NOSSCR Mentorship Program Outline

GOALS AND ACTIVITIES:

The mentorship program will establish and maintain an organizational structure within which experienced NOSSCR members can provide general professional and specific subject matter guidance to junior NOSSCR members.

Participants enter into a voluntary relationship facilitated through NOSSCR. In monthly individual mentor/mentee video/teleconference sessions, the mentor will provide educational information on a specific substantive matter, answer specific subject matter questions, and also will address general career development related questions from the mentee.

NOSSCR will recognize the program participants on an annual basis. Program directors may set a cap on participation, and program participants must sign a confidentiality/conduct agreement. The NOSSCR board may terminate the mentorship program at any time at its discretion.

The estimated time commitment for participants is approximately 60-120 minutes a month (including review / preparation of subject matter material/questions, the monthly session, and completion of the quarterly check-in / brief report).

Benefits to Mentees:

- ❖ Receive support for professional/career growth
- ❖ Receive subject matter education
- ❖ Enable engagement in NOSSCR and professional community

Benefits to Mentors:

- ❖ Provide professional support to the next generation of attorney/ non-attorney representatives
- ❖ Provide subject matter education on critical issues
- ❖ Provide engagement in NOSSCR and professional community

Benefits to NOSSCR:

- ❖ Increase established member engagement
- ❖ Recruit and retain junior members
- ❖ Promote professional development
- ❖ Promote continuing education, particularly for members with financial limitations (legal aid and junior attorneys)

Participants

Mentors:

- **Attorneys** practicing Social Security law as at least 50% of their caseload for more than 10 years, who are NOSSCR members in good standing.

- **Non-attorney** representatives with more than 10 years of full-time experience representing Social Security disability claimants, who are eligible for direct payment and are NOSSCR members in good standing.

Mentees:

- **Attorneys** who are NOSSCR members in good standing and have been either (1) practicing law less than 5 years OR (2) who are new to the practice of Social Security law.

- **Non-attorney** representatives who are NOSSCR members in good standing, are eligible for direct payment, and are currently representing Social Security disability claimants on a full-time basis, but have less than 5 years experience in such representation.

Directors: There will be a minimum of two volunteer Directors (Chair and Co-Chair) appointed by the President of the mentorship program, one of whom must be a NOSSCR board member. Additional Committee members to assist the Directors will be appointed by the President.

All participants in the mentorship program must remain NOSSCR members throughout the entire mentorship period. Failure to remain a NOSSCR member will result in termination from the program.

Timeline

Each mentorship match is one calendar year in duration, starting January 1. Participants will be informed of their matches by December 1 for the following program year. Matches will be chosen by the Chair and Co-Chair, or alternatively, by two Committee members designated by the Chair, one of whom must be a NOSSCR board member.

The Directors will provide a report to NOSSCR by March 15 for the prior year's program.

Matching Process

The matches will be selected in accordance with the following limitations:

➢ Attorneys must be matched with attorneys, and non-attorneys with non-attorneys.
  o This provision is included to address the different ethical and professional issues that each membership category encounters in their practices, so that the mentor/mentee relationship can be most beneficial and relevant.

➢ Mentors and mentees cannot maintain offices within the same circuit, or from adjoining states across circuit lines.
  o For example, Illinois/Iowa or Illinois/Wisconsin will not be matched; however, Maine/Vermont or Mississippi/Nevada matches are acceptable.
  o This provision is included to foster cooperation without concern about competition, and will encourage a focus on wider subject matter and professional issues, rather than specific questions about a particular locality.

➢ The mentor/mentee will state why they are interested in the program and provide basic information about themselves and their practice (e.g. a solo practitioner/larger firm in rural/urban area; alternate career; minority; LGBTQ; working parent; etc.). This information will be shared with their matches.

➢ Requests for a specific mentor/mentee match will not be considered. Furthermore, participants may not necessarily be matched with similarly situated individuals:

  • When attempting to pair mentor and mentee, be careful not to assume that similar is better. Instead, consider putting together two lawyers who may *not* seem to have that much in common. Two like-minded individuals are far more likely to find one another without a formal mentoring relationship. It's the people who *don't* seem to share common ground who may, to your surprise, find their differences to benefit them the most. [1]

➢ Not everyone is guaranteed a match, as there many not be sufficient mentors/mentees enrolled to complete all match requests in compliance with the matching limitations.

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[1] Molly DiBianca, "Engaging Lawyers with Reverse Mentoring", *Law Practice Today* (ABA Law Practice Division, October 2011), *available at*: https://www.americanbar.org/publications/law_practice_today_home/law_practice_today_archive/october11/engaging_lawyers_with_reverse_mentoring.html

➢ An individual cannot be both a mentor and mentee.

➢ Any mentor/mentee match who have been in, are in, or are planning on being in a co-counsel arrangement on a claim/case, or work together for compensation or potential future compensation in any manner, cannot be matched.

Technology Requirement

Mentors and mentees must be willing and able to participate in the program through electronic means to reduce the administrative burden on NOSSCR and the program's volunteer directors. Specifically, participants must complete the registration for the online discussion board.

The online discussion board will be the only method through which all documents and communication will be processed. The program participants must be able to communicate with each other by video (Zoom, Skype, FaceTime, etc.) or telephone conference.

Session Format

The sessions should conform to the same basic structure:

➢ Held once each calendar month at a mutually convenient time
➢ Occur by video or telephone conference
➢ Last 25-60 minutes
➢ Result in the quarterly submission of a brief report to the Directors listing general subject matters discussed (e.g., SGA, reasoning level, accounting, career goals, etc.)

Session Content

The mentor and mentee should determine the subject matters to be addressed in the following manner:

➢ The Committee will provide a list of at least 12 proposed subject areas for discussion, which can be used for guidance purposes
➢ It is recommended that the mentor choose 6 of the 12 subject matter issues to be addressed, and the mentee choose the remaining 6 subject matter issues, pending consent of the mentor based on their subject matter knowledge
➢ It is recommended that the subject matter portion be on issues of significant importance, although case specific issues can be incorporated

- Illustrative sessions: calculating SGA; regulations regarding medical sources; composite jobs
➢ The mentor <u>cannot</u> delegate the sessions to a substitute
  - If the mentor has a question regarding a subject matter issue, it is strongly recommended that the mentor contact the Mentorship Committee for further information and relevant resources.
  - If the mentor enlists the assistance of a colleague on a specific subject matter issue, the mentor must ensure the confidentiality/conduct agreement is not violated.
➢ The mentee may request assistance/guidance with case-specific issues <u>at the discretion of the mentor.</u> It is recommended that case-specific issues result in additional guidance on the subject matter at issue in general terms.
  - Illustrative session: The ALJ said my client is earning above SGA, what can I do? The mentor would address the case-specific question, but also incorporate guidance on averaging earnings, IRWE, the regulatory definition of SGA, accommodations, etc., as needed
➢ The mentee may present career-related questions on general matters only, which are not job- or firm-specific questions
  - Appropriate issues: schedule management, life-work balance, practice management as solo practitioner, challenges for minority/ LGBTQ+/working parent attorneys, difficult courtroom situations
  - Inappropriate issues: characteristics of a specific firm/job/attorney, complaints about supervisors/coworkers/staff/judges, or any request for assistance from the mentor
➢ If the mentor and mentee become co-counsel on a claim/case or work together for compensation or potential future compensation in any manner, the mentorship program must be notified, and the mentor/mentee assignment will be terminated.

End of Term Evaluation

At the end of the mentorship term, the mentor and mentee will complete final evaluations addressing the following questions (answers available of yes/sometimes/no):

➢ Mentor
  - Did your mentee treat you respectfully?
  - Was your mentee prepared with questions?
  - Did your mentee ask inappropriate question or request favors?
  - Do you recommend this mentee for further participation in the program? If not, please explain:
  - What elements of the program would you change?
➢ Mentee
  - Did your mentor make themselves available to you each month?
  - Did your mentor treat you respectfully?

- o Was your mentor prepared for the substantive portions of the discussion?
- o Did your mentor provide a positive learning experience?
- o Have you incorporated the new knowledge into your practice/life?
- o Do you recommend this mentor for further participation in the program? If not, please explain:
- o What elements of the program would you change?