

Mentor Express Handbook

January 1, 2019



Table of Contents

1.	Welcome	1
2.	How Does Mentor Express Work?	2
3.	I Never Got the Memo.....	3
4.	How Do Mentors Sign Up?.....	3
5.	How Do Mentees Sign Up?	4
6.	The Outer Limits.....	4
7.	Preparing to Meet	5
8.	Responsibilities.....	7
9.	Differing Perspectives.....	7
10.	Code of Conduct.....	8
11.	Qualities of Effective Mentoring.....	9
12.	Action Plan.....	11
13.	FAQs.....	12
14.	Contact Information	12

I. Welcome

Welcome to *Mentor Express*.

The purpose of *Mentor Express* is to improve the professionalism and success of Alberta lawyers by:

- Improving leadership bench strength within law firms, corporate legal departments and the profession generally.
- Improving time to proficiency for newly-admitted lawyers.
- Helping new lawyers manage their professional careers.
- Retaining and transferring knowledge from experienced counsel to those entering the profession.
- Retaining talent in the profession.

In order to be a mentor, and an effective one, one must care. You must care. You don't have to know how many square miles are in Idaho, you don't need to know what is the chemical makeup of chemistry, or of blood or water. Know what you know and care about the person, care about what you know and care about the person you're sharing with.

Maya Angelou

Specifically, our goal is to help lawyers to:

- Develop practical skills.
- Discuss career management issues.
- Contribute to their sense of integrity.
- Increase their knowledge of legal customs.
- Obtain guidance and counsel on professional life as a lawyer.
- Encourage the use of best practices and highest ideals in the practice of law.

This handbook describes how *Mentor Express* works and offers advice to make it work better for you. For questions, comments or concerns, please feel free to contact the Practice Management Department at practice.management@lawsociety.ab.ca or call us at 1.800.661.9003.

2. How Does Mentor Express Work?

In traditional mentoring programs, mentees are introduced to a single mentor. Since they might spend weeks or months getting to know each other, the time commitment can be considerable. For some lawyers, these long-term mentoring relationships simply don't work.

Mentor Express, on the other hand, is like online shopping. Mentees browse an online listing of mentors and book a series of one-hour meetings with those they are interested in meeting. Mentees meet a given mentor only once but meet multiple mentors over the course of the program. Mentors meet multiple mentees as well.

This approach provides mentors and mentees with exposure to a broader range of ideas and experiences. Also, rather than have a program administrator do the matching, the mentees in *Mentor Express* select their own mentors by browsing the online gallery and choosing the mentoring sessions that appeal most to them.

The entire program lasts a year.

If you cannot see where you are going, ask someone who has been there before.

J. Loren Norris

Through all of this, staff from the Law Society's Practice Management Department will play a supporting role by:

- Providing the online platform that hosts *Mentor Express*.
- Maintaining the online gallery of mentors who have offered to participate in the program.
- Receiving confidential feedback from participants.
- Responding to any concerns or requests for accommodation that may arise during the program.
- Administering evaluation forms to mentors and mentees.
- Coordinating training of mentors.

3. I Never Got the Memo

Whether you are a mentee looking for a port in the storm or a mentor offering to assist, think about the following principles to keep the process moving forward.

I Never Got the Memo

Don't Reinvent the Wheel

You each have a wealth of experience to contribute and compare. Share your successes but also reveal mistakes you have made to learn from them.

You Won't Find it in the Law Library

Much of what it means to practice law professionally and competently won't be found in any law book and can't be taught in law school. Think about the unwritten rules, the idiosyncrasies of practicing where you do and the practical effects of general legal concepts.

The Courage to Listen

Courage is what it takes to stand up and speak. Courage is also what it takes to sit down and listen.

There's No Such Thing as a Dumb Question

The practice of law was unfamiliar territory to all of us at some point. No question should be off limits, no matter how inconsequential or obvious. A good mentor will ask and answer questions, lots of them, and will try to create an environment of trust.

4. How Do Mentors Sign Up?

1. Interested mentors fill out an online application on the Law Society of Alberta website.
2. Once approved, Law Society staff send them the link to the *Mentor Express* platform where they fill out a short online profile about themselves with a photo. How they describe their experience, interests and motivation for participating in the program are entirely up to them. The website asks them to list some dates when they are available to meet mentees. We ask that mentors make themselves available for up to ten sessions over the course of the program year.
3. As part of their profile, mentors also choose from a selection of tags to better describe the perspectives they can offer (practice areas, location, interests, experiences). This will help mentees find mentors with the background they are looking for.
4. At that point, the information posted to the mentor gallery becomes visible to mentees registered with the program but mentees aren't able to book meetings just yet. Instead, several times per year, the entire gallery will be opened for bookings on a first-come-first-served basis. When the gallery is 'unlocked' in this fashion, mentees can secure meeting dates by simply clicking on their preferred meeting dates with their preferred mentors.
5. At any time mentors can see who has booked sessions with them by logging in and viewing their "My Sessions" page.
6. There are no assignments, tasks or deadlines. Conversations and topics are driven by the mentees.

We recommend that mentors limit themselves to one mentorship session per month but this is entirely up to them. One of the key features of this program is that mentors can choose the number and timing of meetings to best suit their schedules and other commitments.

We advise against arranging multiple mentorship sessions for a single day or week since this may not provide the best experience for either mentors or mentees.

If a mentor ever needs to re-schedule a session after it has been booked, they should contact their mentee directly to make new arrangements.

5. How Do Mentees Sign Up?

1. Interested mentees complete an online application form on the Law Society of Alberta website.
2. Once approved, Law Society staff sends them the link for the *Mentor Express* platform.
3. From there, they can visit the mentor 'gallery' as often as they want to see who is available and the dates they might meet them. At this point, the gallery is visible but mentees can't book meetings with mentors just yet.
4. Several times per year, the gallery will be opened for bookings on a first-come-first-served basis. To book a meeting, mentees simply click on the desired meeting dates listed on their preferred mentors' profiles. Note: Mentees are limited to one session per mentor but can meet with up to ten different mentors per year.
5. Mentees can log in to their 'My Sessions' page to see which mentor sessions they have booked and to review their mentors' contact information.
6. Mentees are responsible for contacting their chosen mentors to confirm when and where they will meet.

Mentors are asked to commit to up to ten mentorship sessions over a year. If the sessions of a preferred mentor are already taken, we ask mentees to respect their availability and seek other mentors.

If a mentee ever needs to re-schedule a mentoring session, they should contact their mentor directly to make new arrangements.

6. The Outer Limits

While no two mentoring sessions will be the same, keep in mind some common boundaries that will protect both you and your clients.

The Outer Limits

Solicitor-Client Privilege Doesn't Apply

Mentoring doesn't create a privileged relationship between mentor and mentee. You should feel free to confide in each other but must be discreet with the information you share about clients and files.

Beware of Conflicts - Your Clients are Not Their Clients

It is entirely possible that a mentor and mentee represent clients with opposing interests. This is another reason to avoid discussing detailed privileged information and to limit yourselves to hypothetical situations.

You are Not Associates - Mentors are Not Second Counsel

Mentors are not expected to answer specific questions of law. They are not required to conduct research or become actively engaged in a mentee's files. Their role is to coach, advise and act as a role model, not to act as second counsel.

Mentees Must Use Their Own Professional Judgment

Mentees are responsible for exercising their own professional judgment. The guidance they receive from a mentor is not considered legal advice. If a mentee is truly lost on a point, the mentor may be able to provide a referral to another lawyer who could be of assistance.

You are Not a Source of Referrals for Each Other

The goal of the program is to make the mentee a better lawyer, not to troll for new files. There should be no referrals between mentor and mentee.

No Financial Assistance

Mentors must not become financially involved with mentees and should not provide them with loans or any other financial assistance.

Changing Jobs

A mentee may be looking to change jobs or start something new but helping with a job search is not part of the program. A mentor may offer to help with that process but shouldn't feel obligated to do so.

7. Preparing to Meet

To get the most out of *Mentor Express*, we encourage mentees to ask themselves some key questions in advance of their meetings:

- Why did I choose to meet this specific mentor?
- What guidance or insight am I seeking from them?
- What are some questions I'd like to ask them?

Considering these things in advance will give mentees the opportunity to make the best use of their mentors' time and focus.

I have missed more than 9000 shots in my career. I have lost almost 300 games. On 26 occasions I have been entrusted to take the game winning shot . . . and missed. And I have failed over and over and over again in my life. And that is why I succeed.

Michael Jordan

Mentees should also think about developing a mentoring plan to focus their thoughts on what they hope to gain from the experience. A good plan should set goals and provide a road map for things they want to discuss.

It can include a broad or narrow list of topics but should never be regarded as a closed book. Always remain open to discussing other issues as they come up and revisit others if circumstances change.

A Good Mentoring Plan:	
<input type="checkbox"/>	Establishes clear goals.
<input type="checkbox"/>	Identifies topics – professional or personal – that you want to deal with.
<input type="checkbox"/>	Sets boundaries for the meeting.
<input type="checkbox"/>	Determines when and how you will contact each other.

The **Action Plan** section of this handbook includes a full range of topics you can explore. Here are a few to consider:

Topics to Consider	
<input type="checkbox"/>	Long-term career and retirement plans.
<input type="checkbox"/>	Marketing and developing a professional profile in a particular practice area.
<input type="checkbox"/>	How the mentee might acquire the skills needed to practice.
<input type="checkbox"/>	What you do and don't like about your jobs as lawyers.
<input type="checkbox"/>	Obstacles you have each encountered in the practice of law.
<input type="checkbox"/>	Training or education that has proven valuable to you.
<input type="checkbox"/>	Different practice areas the mentee is exploring.
<input type="checkbox"/>	The challenge of integrating personal/family life with a demanding career.
<input type="checkbox"/>	Health, exercise, and the importance of taking vacations.
<input type="checkbox"/>	Recognizing and dealing with stress, tension and burnout.

8. Responsibilities

A good mentoring relationship is a two-way street. You each stand to benefit so you are each responsible for making it a success.

Mentors	Both	Mentees
<input type="checkbox"/> Be willing to share experiences, successes and failures.	<input type="checkbox"/> Discuss the scope of responsibility each of you is assuming.	<input type="checkbox"/> Respect your mentor's time.
<input type="checkbox"/> Provide positive suggestions on issues like time management, managing difficult clients, client development, balancing work and home, stress management.	<input type="checkbox"/> Keep in touch. Arrive on time. Give enough notice before changing a meeting.	<input type="checkbox"/> Be open to feedback and advice. Get a second opinion if you disagree with your mentor's viewpoint.
<input type="checkbox"/> Provide information that will help your mentee adapt to the culture of the professional environment.	<input type="checkbox"/> Show initiative and willingness to listen and learn.	
	<input type="checkbox"/> Be honest and let each other know if the relationship isn't working.	
	<input type="checkbox"/> Give goals a deadline. Analyze where you are and measure how long you will need to complete them. Then set the latest outside date.	
	<input type="checkbox"/> Back your plan with persistence and resolve. Never give up even when you hit setbacks.	

9. Differing Perspectives

Besides differences in legal experience and training, mentors and mentees may be approaching the practice of law from significantly different perspectives due to age, culture and background.

It is important to bear these in mind as you get to know each other.

- **Different Ages & Stages**

The two of you may be from different generations. There may be a significant age gap which may lead to misunderstandings. Talk about your assumptions and try to use your differing perspectives as an asset rather than a liability.

- **Different Ethnicity, Race or Gender**

Your ages may not be the only thing that distinguishes you. Consider each other's backgrounds and values. Discuss these as well to avoid miscommunication.

10. Code of Conduct

A complete copy of the [Code of Conduct](#) is available on the Law Society of Alberta website.

Mentors and mentees should review the following provisions when they first join *Mentor Express*.

Future Harm / Public Safety Exception

- 2.3 (3) A lawyer may disclose confidential information, but must not disclose more information than is required, when the lawyer believes on reasonable grounds that an identifiable person or group is in imminent danger of death or serious bodily harm, and disclosure is necessary to prevent the death or harm.**

Commentary

Confidentiality and loyalty are fundamental to the relationship between a lawyer and a client because legal advice cannot be given and justice cannot be done unless clients have a large measure of freedom to discuss their affairs with their lawyers. In some very exceptional situations identified in this rule, disclosure without the client's permission might be warranted because the lawyer is satisfied that truly serious harm of the types identified is imminent and cannot otherwise be prevented. These situations will be extremely rare.

Serious psychological harm may constitute serious bodily harm if it substantially interferes with the health or well-being of the individual.

In assessing whether disclosure of confidential information is justified to prevent substantial harm, a lawyer should consider a number of factors, including:

- (a) the seriousness of the potential injury to others if the prospective harm occurs;
- (b) the likelihood that it will occur and its imminence;
- (c) the apparent absence of any other feasible way to prevent the potential injury; and
- (d) the circumstances under which the lawyer acquired the information of the client's intent or prospective course of action.

How and when disclosure should be made under this rule will depend upon the circumstances. A lawyer who believes that disclosure may be warranted should contact the Society for ethical advice. When practicable and permitted, a judicial order may be sought for disclosure.

If confidential information is disclosed under Rule 2.03(3), the lawyer should prepare a written note as soon as possible, which should include:

- (a) the date and time of the communication in which the disclosure is made;
- (b) the grounds in support of the lawyer's decision to communicate the information, including the harm intended to be prevented, the identity of the person who prompted communication of the information as well as the identity of the person or group of persons exposed to the harm; and
- (c) the content of the communication, the method of communication used and the identity of the person to whom the communication was made.

Duty to Report Misconduct

- 6.1 (3) Unless to do so would be unlawful or would involve a breach of solicitor-client privilege, a lawyer must report to the Society:**
- (a) the misappropriation or misapplication of trust money;**
 - (b) the abandonment of a law practice;**
 - (c) participation in criminal activity related to a lawyer’s practice;**
 - (d) conduct that raises a substantial question as to another lawyer’s honesty, trustworthiness, or competency as a lawyer; and**
 - (e) any other situation in which a lawyer’s clients are likely to be materially prejudiced.**

Commentary

Unless a lawyer who departs from proper professional conduct is checked at an early stage, loss or damage to clients or others may ensue. Evidence of minor breaches may, on investigation, disclose a more serious situation or may indicate the commencement of a course of conduct that may lead to serious breaches in the future. It is, therefore, proper (unless it is privileged or otherwise unlawful) for a lawyer to report to the Society any instance involving a breach of these rules. If a lawyer is in any doubt whether a report should be made, the lawyer should consider seeking the advice of the Society directly or indirectly (for example, through another lawyer).

Nothing in this paragraph is meant to interfere with the lawyer-client relationship. In all cases, the report must be made without malice or ulterior motive.

Often, instances of improper conduct arise from emotional, mental or family disturbances, substance abuse or other addictions. Lawyers who suffer from such problems should be encouraged to seek assistance as early as possible. The Society supports the ASSIST Program and similar agencies in their commitment to the provision of counselling on a confidential basis. Therefore, a lawyer who is making a bona fide effort to have another lawyer seek help for such problems is not required to report to the Society non-criminal conduct of that lawyer that would otherwise have to be reported under the rule. However, the lawyer must advise the Society if there are reasonable grounds to believe that the other lawyer will engage in conduct that is criminal or is likely to harm any person or of any other conduct under the rule if the lawyer refuses or fails to seek help.

Tell me and I forget, teach me and I may remember, involve me and I learn.

Benjamin Franklin

II. Qualities of Effective Mentoring

Qualities of Effective Mentoring	
<input type="checkbox"/> A sense of humour	<input type="checkbox"/> The ability to accept different points of view and to recognize that reasonable people can disagree.
<input type="checkbox"/> Inventiveness in developing learning opportunities.	<input type="checkbox"/> Willingness to listen.



<input type="checkbox"/> Personal commitment to developing and maintaining the mentoring relationship.	<input type="checkbox"/> Self-knowledge, self-reflection and commitment to ongoing self- development.
<input type="checkbox"/> Professional and personal stability.	<input type="checkbox"/> Strong interpersonal and communication skills.
<input type="checkbox"/> Knowledge about your field and connection to resources.	<input type="checkbox"/> Ability to give and receive constructive feedback.
<input type="checkbox"/> Flexible and open.	<input type="checkbox"/> Honest and genuine.
<input type="checkbox"/> Sensitivity to others' experiences and struggles.	<input type="checkbox"/> Respect toward the lawyer and individual differences.
<input type="checkbox"/> Patience and persistence.	
Listening Skills	
<input type="checkbox"/> Maintain eye contact.	<input type="checkbox"/> Treat listening as a challenging mental task.
<input type="checkbox"/> Focus on content, not delivery.	<input type="checkbox"/> Stay active by asking mental questions.
<input type="checkbox"/> Avoid emotional involvement	<input type="checkbox"/> Avoid distractions
<input type="checkbox"/> Use the gap between rate of speech and rate of thought.	
Questions to Ask to Assess Your Listening Skills	
<input type="checkbox"/> Does the other person's appearance determine how well you listen?	<input type="checkbox"/> Does your mind stray while someone else is talking?
<input type="checkbox"/> Do you listen for the meaning behind the statement?	<input type="checkbox"/> Do you interrupt immediately for clarification?
<input type="checkbox"/> Do your biases affect your listening skills?	<input type="checkbox"/> Do you think about what you are going to say before you say it?
<input type="checkbox"/> Do you always have to have the last word?	<input type="checkbox"/> Have you turned off your cell phone or put your calls on hold?
Evaluating the Relationship	
<input type="checkbox"/> Reduced instances of complaints, claims and trust safety concerns?	<input type="checkbox"/> Are you on track to reach the goals of mentoring relationship?
<input type="checkbox"/> Strengthened involvement in the legal community such as participation in CBA subsections, attendance at LESA seminars.	<input type="checkbox"/> What do you think about your mentors/mentees?
<input type="checkbox"/> Improved confidence?	<input type="checkbox"/> What is working well and why?
<input type="checkbox"/> Improved overall management of the law practice?	<input type="checkbox"/> Is there anything you could do to use your time more effectively?
<input type="checkbox"/> Overall practice plan developed?	<input type="checkbox"/> What changes can you think of to make things work better?
<input type="checkbox"/> Would you enter into such a relationship again?	<input type="checkbox"/> What are you spending too much or too little time on?

<input type="checkbox"/> Are there any other changes you could make to improve the relationship?	<input type="checkbox"/> Is there anything you could do to improve your communications?
<input type="checkbox"/> Are there any other resources you need to access that would help in developing the relationship?	
Giving and Receiving Feedback	
<input type="checkbox"/> Clarity – be clear about what you want to say.	<input type="checkbox"/> Be descriptive rather than evaluative.
<input type="checkbox"/> Emphasize the positive.	<input type="checkbox"/> Own the feedback – Use “I” statements.
<input type="checkbox"/> Be specific – avoid general comments and clarify pronouns such as “it”, “that”, etc.	<input type="checkbox"/> Generalizations – notice “all”, “never”, “always”, etc. and ask for specifics.
<input type="checkbox"/> Focus on the behavior rather than the person.	<input type="checkbox"/> Refer to behavior that can be changed.
<input type="checkbox"/> The best advice will help someone come to a better understanding of their issues, how they developed and how they can identify actions to address them more effectively.	

12. Action Plan

Customize your mentoring sessions so they cover the things that matter the most to you.

What to Do/Discuss
<input type="checkbox"/> Meet at the mentor’s office. Introduce the mentee to other lawyers and support staff there. Tour the office to see how the mentor’s practice is organized.
<input type="checkbox"/> Explore the division of duties between lawyers, paralegals, assistants and other office employees.
<input type="checkbox"/> Time management skills and software.
<input type="checkbox"/> Terms to include in standard retainer agreements.
<input type="checkbox"/> Ways to protect client confidentiality.
<input type="checkbox"/> How to recognize and deal with conflicts of interest.
<input type="checkbox"/> Law office management systems: <ul style="list-style-type: none"> <input type="checkbox"/> Records of client-related expenses <input type="checkbox"/> Billing systems and frequency of billings <input type="checkbox"/> Filing systems <input type="checkbox"/> Document retention plan <input type="checkbox"/> File recall and diary systems
<input type="checkbox"/> Common client management errors, how to recognize them and how to avoid them.
<input type="checkbox"/> How to deal with difficult clients and how maintain good client relationships.

<input type="checkbox"/> How to respond to difficult lawyers or judges, and what to do when you encounter unethical conduct by others; The obligation to report misconduct; What to do if you are asked to do something unethical or unprofessional by a senior partner or a client.
<input type="checkbox"/> Client development techniques that have worked for the mentor.
<input type="checkbox"/> Different forms of dispute resolution (mediation, arbitration, judicial dispute resolution, mini-trials, summary judgment applications, trials) and their relative strengths and weaknesses.
<input type="checkbox"/> Career goals and steps to achieve them.
<input type="checkbox"/> Ways to balance the mentee's career and personal life and how to keep job pressures in perspective.
<input type="checkbox"/> The value of a business plan and what it should include.
<input type="checkbox"/> Substance abuse and mental health issues; What to do if you or a colleague may have a substance abuse or mental health problem; Resources available to get help.
<input type="checkbox"/> Financial pressures the mentee may be facing.
<input type="checkbox"/> Different uses of a law degree and alternate career paths, include big firm v. small firm, private practice v. in-house position, government and not-for-profit sectors.
<input type="checkbox"/> Job search strategies.
<input type="checkbox"/> Ethical ramifications of leaving a firm.
<input type="checkbox"/> Planning for retirement and developing an exit strategy that complies with the mentee's professional obligations.

13. FAQs

View our Frequently Asked Questions about Mentor Express [here](#).

14. Contact Information

Practice Management Department

403.229.4750 or 587.393.2167

Law Society of Alberta

Suite 500, 919 11th Avenue SW, Calgary, AB T2R 1P3

Office hours: Mon – Fri 8 a.m. – 4:30 p.m.

1.800.661.9003 (toll free) or 403.229.4700