

Mentor Connect Handbook

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I. Program Overview

Welcome to Mentor Connect.

The purpose of Mentor Connect is to improve the professionalism and success of Alberta lawyers. It engages experienced counsel to guide those with less experience to realize their career goals and achieve greater personal and professional balance in their lives.

Specifically, a successful mentoring relationship will 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.
- Improve leadership bench strength within their law firms, corporate legal departments, institutions (such as universities), Not-For-Profit organizations and 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 are sharing with.

Maya Angelou

Mentees drive the conversations. They identify, and make known to their mentor, the professional skills, knowledge, attributes, or capabilities they want to address to improve their success and effectiveness as a lawyer.

Mentors ask questions. They listen. They may review material to better appreciate the mentee's strengths and weaknesses. They use their own experiences to identify and help the mentee overcome challenges and guide them in their decision-making.

This handbook describes how Mentor Connect works and offers advice to make it work better for you.

2. How the Program Works

The idea behind Mentor Connect is simple but powerful.

At the outset, the program matches individual lawyers and mentors based on areas of law, geographical proximity, and similar interests.

Matching is done by staff of the Mentorship Team.

In all cases, the mentee's identity and the existence of the mentoring relationship must be held in confidence and not disclosed without the mentee's clear consent.

The initial match lasts three months, giving you the opportunity to determine whether the relationship is working and what benefits you are gaining from it. If it is working, it can be extended to six months. If there is a problem or the chemistry is wrong, a new pairing may be the answer.

Through all of this, the Mentorship Team will play a supporting role by:

- Maintaining a list of mentors who want to participate in the program.
- Matching mentors and mentees.
- Receiving confidential feedback from participants.
- Responding to any concerns or requests for accommodation that may arise during the program. All participants are encouraged to indicate any special needs or requirements on their registration form.
- Administering evaluation forms to mentors and mentees.
- Coordinating training of mentors.

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

J. Loren Norris

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 in order 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 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. Mentees feel free to ask questions too. That is why your mentor signed up for the program after all.

- **Contacts and Introductions**

As experienced counsel, mentors can help mentees develop better ties with the legal community. This might include attending bar association events together, sharing lunch or a coffee with colleagues, or attending court proceedings in a shared area of interest.

4. First Meeting and Mentoring Plan

Because it is important that you are comfortable with each other, the mentee and proposed mentor will be given each other's names in advance of your first meeting. This gives you the opportunity to discreetly decline the proposed match. New names are proposed if there are significant concerns.

Once the pairing has been confirmed, you will meet with a member of the Mentorship Team at the Law Society offices to develop a mentoring plan.

That first meeting will give you an opportunity to talk about what makes a successful mentoring relationship and what is, and is not, expected of you.

A good plan should set short term and long-term goals – what you hope to learn from the relationship – and should provide a road map of things you will discuss over time.

It will consist of a list of activities from which you will choose but should not be regarded as a closed book. You can always discuss other issues as they come up and revisit others if circumstances change.

As you get to know each other, the range of topics you might discuss is entirely up to you.

A Good Mentoring Plan

- Establishes clear goals.
- Helps you understand each other's needs and evaluate whether you are the right person to meet them.
- Confirms time commitments -- the where, when, and how of meetings and communications.
- Identifies topics – professional or personal – that you want to deal with.
- Sets boundaries for the relationship.
- Decides on a “dispute” resolution process. Talk about what to do if your personalities and mentoring styles don't match. Be prepared to walk away and look for a more suitable match.
- Determines how you will contact each other.
- Establishes timing of future meetings.

In the **Resources** section of this handbook is a month-to-month **Mentoring Checklist** with other topics you can explore as you get to know each other and develop a greater comfort level with each other.

Other Topics to Consider as the Relationship Develops

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

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

5. 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.

Responsibilities		
Mentors	Both	Mentees
<ul style="list-style-type: none"> Be willing to share experiences, successes, and failures. 	<ul style="list-style-type: none"> Discuss the scope of responsibility each of you is assuming. 	<ul style="list-style-type: none"> Respect your mentor's time.
<ul style="list-style-type: none"> Provide positive suggestions on issues like time management, managing difficult clients, client development, balancing work and home, stress management. 	<ul style="list-style-type: none"> Meet on a regular basis and keep in contact by telephone or email. Arrive on time to meetings. Give sufficient notice before changing a meeting. 	<ul style="list-style-type: none"> Be open to feedback and advice. Get a second opinion if you disagree with your mentor's viewpoint.
<ul style="list-style-type: none"> Provide information that will help your mentee adapt to the culture of the professional environment. 	<ul style="list-style-type: none"> Show initiative and willingness to listen and learn. 	
<ul style="list-style-type: none"> Provide referrals to resources if further assistance is needed. 	<ul style="list-style-type: none"> Respect the confidentiality of the program. 	
	<ul style="list-style-type: none"> Discuss problem-solving strategies before trying them. 	
	<ul style="list-style-type: none"> Be honest. Let each other know if the relationship isn't working. 	
	<ul style="list-style-type: none"> Give goals a deadline. Analyze where you are and measure how long you will need to complete them. Then set the latest outside date. 	
	<ul style="list-style-type: none"> Back your plan with persistence and resolve. Never give up even when you hit setbacks. 	

6. Action Plan

Customize your Mentoring Plan to include the things that matter most to you. What follows are some suggestions. It is up to you to decide what topics to include and when to address them.

Month One	
Elected	Activity
	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.
	Explore the responsibilities and division of duties between lawyers, paralegals, assistants and other office employees.
	Discuss office politics and boundaries for acceptable behavior between lawyers and staff.
	Attend a bar association meeting together. Discuss opportunities and benefits of greater bar association involvement.
	Introduce the mentee to other lawyers in the community.
	Visit the courthouse and sit in on proceedings in the division in which the mentee will practice. Introduce the mentee to court personnel and members of the judiciary.
	Discuss the unwritten rules of civility between lawyers and when dealing with members of the judiciary.
	For criminal law practitioners, visit the local jail or remand centre. Explain the protocol governing meetings with clients in custody.
	Familiarize the mentee with Legal Aid, Pro Bono Law Alberta, and opportunities for charitable work as a lawyer. Discuss how to fit volunteer work into a busy practice.

Month Two	
Elected	Activity
	Discuss time management skills and software.
	Discuss terms to include in standard retainer agreements.
	Discuss ways to protect client confidentiality.



	Discuss how to recognize and deal with conflicts of interest.
	Review law office management systems: <ul style="list-style-type: none"> • Records of client-related expenses • Billing systems and frequency of billings • Document retention plan • File recall and diary systems • Online research
	Identify common client management errors and malpractice complaints, how to recognize them and how to avoid them.
	Discuss obligations to report potential insurance claims to ALIA.
	Discuss how to deal with difficult clients and how maintain good client relationships.
	Discuss how to respond to difficult lawyers or judges, and what to do when the mentee encounters unethical conduct by others; the obligation to report misconduct; and what to do if the mentee is asked to do something unethical or unprofessional by a senior partner or a client.
	Consider client development techniques that have worked for the mentor.
	Examine different forms of dispute resolution (mediation, arbitration, judicial dispute resolution, mini-trials, summary judgment applications, trials) and their relative strengths and weaknesses.
	Discuss techniques for conducting successful mediations and negotiations.

Month Three	
Elected	Activity
	Discuss the mentee's career goals and steps to achieve them.
	Look at ways to balance the mentee's career and personal life and how to keep job pressures in perspective.
	Discuss the value of a business plan and what it should include.
	Talk about substance abuse and mental health issues, what to do if the mentee or a colleague may have a substance abuse or mental health problem, and the resources available to get help.
	Review any financial pressures the mentee may be facing, including ways to manage law school

	debt.
	Discuss 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.
	Explore possible job search strategies and introduce mentee to contacts at job search agencies.
	Discuss ethical ramifications of leaving a firm.
	Discuss planning for retirement and developing an exit strategy that complies with the mentee's professional obligations.

7. The Outer Limits

Your relationship will evolve over time but there are limits that will protect you and your clients.

The Outer Limits

- **Solicitor-Client Privilege Does not Apply**

Mentoring does not 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.

- **If not substantive law, then what?**

The purpose of Mentor Connect is to gain insight about career management, work-life balance, how to deal with difficult clients, judges and counsel, and steps to become the lawyer you would like to be. It is not to discuss substantive law questions or develop plans for your files. For that, mentees are urged to contact the Law Society's [AdvisorLink](#) service.

- **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 should not feel obligated to do so.

8. 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.

9. Code of Conduct

A complete copy of the Code of Conduct is available on the Law Society of Alberta web site at: [Act, Code & Rules – Law Society of Alberta](#)

Mentors and mentees should review the following provisions in particular at the start of their mentoring relationship.

Future Harm / Public Safety Exception

(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:

the date and time of the communication in which the disclosure is made;

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

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

(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.

10. Qualities of Effective Mentoring

Qualities of Effective Mentoring	
<ul style="list-style-type: none"> • A sense of humor. 	<ul style="list-style-type: none"> • The ability to accept different points of view and to recognize that reasonable people can disagree.
<ul style="list-style-type: none"> • Inventiveness in developing learning opportunities. 	<ul style="list-style-type: none"> • Strong interpersonal and communication skills.
<ul style="list-style-type: none"> • Personal commitment to developing and maintaining the mentoring relationship. 	<ul style="list-style-type: none"> • Self-knowledge, self-reflection, and commitment to ongoing self-development.
<ul style="list-style-type: none"> • Professional and personal stability. 	<ul style="list-style-type: none"> • Willingness to listen.
<ul style="list-style-type: none"> • Knowledge about your field and connection to resources. 	<ul style="list-style-type: none"> • Ability to give and receive constructive feedback.
<ul style="list-style-type: none"> • Flexibility and openness. 	<ul style="list-style-type: none"> • Honesty and genuine-ness.
<ul style="list-style-type: none"> • Sensitivity to others' experiences and struggles. 	<ul style="list-style-type: none"> • Respect toward the lawyer and individual differences.
<ul style="list-style-type: none"> • Patience and persistence. 	

Listening Skills	
<ul style="list-style-type: none"> • Maintain eye contact. 	<ul style="list-style-type: none"> • Focus on content, not delivery.
<ul style="list-style-type: none"> • Treat listening as a challenging mental task. 	<ul style="list-style-type: none"> • Stay active by asking mental questions.
<ul style="list-style-type: none"> • Avoid emotional involvement. 	<ul style="list-style-type: none"> • Avoid distractions.
<ul style="list-style-type: none"> • Use the gap between the rate of speech and your rate of thought. 	



Barriers to Effective Listening

<ul style="list-style-type: none">• Becoming impatient.	<ul style="list-style-type: none">• Thinking of another topic.
<ul style="list-style-type: none">• Daydreaming or becoming preoccupied with something else.	<ul style="list-style-type: none">• Lack of interest.
<ul style="list-style-type: none">• Becoming distracted by outside noises, conversations, or environmental concerns.	<ul style="list-style-type: none">• Acting as if you are listening when you are not.
<ul style="list-style-type: none">• Checking email or surfing the net instead of listening.	

Questions to Ask to Assess Your Listening Skills

<ul style="list-style-type: none">• Does the other person's appearance determine how well you listen?	<ul style="list-style-type: none">• Does your mind stray while someone else is talking?
<ul style="list-style-type: none">• Do you listen for the meaning behind the statement?	<ul style="list-style-type: none">• Do you interrupt immediately for clarification?
<ul style="list-style-type: none">• Do your biases affect your listening skills?	<ul style="list-style-type: none">• Do you think about what you are going to say before you say it?
<ul style="list-style-type: none">• Do you always have to have the last word?	<ul style="list-style-type: none">• Have you turned off your cell phone or put your calls on hold?

Giving and Receiving Feedback

<ul style="list-style-type: none">• Clarity – be clear about what you want to say.	<ul style="list-style-type: none">• Be descriptive rather than evaluative.
<ul style="list-style-type: none">• Emphasize the positive.	<ul style="list-style-type: none">• Own the feedback – Use “I” statements.
<ul style="list-style-type: none">• Be specific – avoid general comments and clarify pronouns such as “it”, “that” etc.	<ul style="list-style-type: none">• Generalizations – Notice “all”, “never”, “always”, etc. and ask for specifics.
<ul style="list-style-type: none">• Focus on behavior rather than the person.	<ul style="list-style-type: none">• Refer to behavior that can be changed.



- 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.

Evaluating the Relationship

<ul style="list-style-type: none">• Reduced instances of complaints, claims and trust safety concerns?	<ul style="list-style-type: none">• Are you on track to reach the goals of your mentoring relationship?
<ul style="list-style-type: none">• Improved confidence?	<ul style="list-style-type: none">• What do you think about your mentor/mentee?
<ul style="list-style-type: none">• Improved overall management of the law practice?	<ul style="list-style-type: none">• What is working well and why?
<ul style="list-style-type: none">• Overall practice plan developed?	<ul style="list-style-type: none">• Is there anything you could do to use your time more effectively?
<ul style="list-style-type: none">• Would you enter into such a relationship again?	<ul style="list-style-type: none">• What changes can you think of to make things work better?
<ul style="list-style-type: none">• Are there any other changes you could make to improve the relationship?	<ul style="list-style-type: none">• What are you spending too much or too little time on?
<ul style="list-style-type: none">• Are there any other resources you need to access that would help in developing the relationship?	<ul style="list-style-type: none">• Is there anything you could do to improve your communications?

11. Use and Collection of Personal Information

The Law Society can use any personal information it receives in connection with its mentorship programs and that it receives through any mentor eligibility checks:

- To confirm that participants are eligible to participate and remain in its mentorship programs,
- To help match mentors with mentees,
- To administer the Mentor Connect program and to carry out evaluation and research,
- To inform and assist with the administration of the Mentor Connect program and,
- For any other purposes contemplated by the *Legal Profession Act*, the Rules of the Law Society, the Code of Conduct, Guidelines and Protocols of the Law Society, or a resolution of the Benchers.

All of the Law Society's departments will have access to this information. They may use or disclose it for any of the Law Society's regulatory purposes, including investigations and proceedings. The Law Society may contact participants for more information, or to obtain clarification on any information it has already received.

Should you have any question about the collection, use or disclosure of this information, please review the Law Society's [Privacy Policy](#) or contact the [Privacy Officer](#) at 403.229.4700.

12. FAQs

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

13. Contact Information

[Mentorship Team](#)

403.229.2195

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