

Mentor Express Handbook

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I. Program Overview

Welcome to Mentor Express.

The purpose of Mentor Express 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're 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 Express works and offers advice to make it work better for you.

For questions, comments, or concerns, please feel free to contact Customer Service by [email](#) or at 403.229.4700.

2. How the Program Works

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 do not 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.

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

J. Loren Norris

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.

This program is six months and runs from October to March annually.

Through all of this, staff from the Law Society's Mentorship Team 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

- **Do not 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 Will not Find it in the Law Library**

Much of what it means to practice law professionally and competently will not be found in any law book and cannot 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.

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 is 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.

3. As part of their profile, mentors also choose from a selection of tags to better describe the perspectives they can offer (Personal Attributes, Discussion Topics, Geographical Area). 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. The entire gallery is open for bookings on a first come, first served basis. Mentees 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 spread out their mentorship sessions, 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. If time is tight in a given week or month due to a big closing, a trial or vacation, simply don't offer up any dates then.

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, 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.
4. The gallery is open 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.

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 session, they should contact their mentor directly to make new arrangements.

6. Choosing Mentors/Preparing to Meet

To get the most out of Mentor Express, we encourage mentees to ask themselves some key questions before they book their meetings:

- What am I hoping to get out of this program?
- How will choosing a particular mentor get me closer to that goal?
- What guidance or insight am I seeking from them?
- What are some questions I would 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.

Let your mentors know in advance of your meetings what you hope to cover with them.

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 you 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

- Establishes clear goals.
- Helps you understand each other's needs and evaluate whether you are the right person to meet them.
- Identifies topics – professional or personal – that you want to deal with.
- Sets boundaries for the relationship.
- Determines how you will contact each other.
- Establishes timing of future meetings.

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

- Long-term career and retirement plans.
- Marketing and developing a professional profile in a particular practice area.
- How a mentee might acquire the skills needed to practice.
- What you do and do not 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

7. 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"> 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. 	

8. Action Plan

Customize your Action 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 which mentors you want to discuss them with.

Activity



Meet by video conference or at the mentor's office. If meeting in person, the mentor can 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.

Discuss the unwritten rules of civility between lawyers and when dealing with members of the judiciary.

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.

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:

- 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 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.

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.

9. 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

- **Career Management, Not File Advice**

Mentees should not raise substantive law questions or seek guidance from their mentors about particular client matters.

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

The purpose of Mentor Express 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.

- **Solicitor-Client Privilege Does not Apply/No Duty of Confidentiality**

Mentoring does not create a privileged relationship between mentor and mentee. Communications with mentors are not protected by solicitor-client privilege. **Neither person owes a duty of confidentiality to the other, but as personal information and experiences are shared during the relationship, you should each take care to respect each other's privacy.** By participating in this program, you are agreeing to not disclose your discussions without the other person's clear permission. For more information about privilege and the duty of confidentiality, see [Canadian Bar Association - FAQ - Privilege and Confidentiality for Lawyers in Private Practice \(cba.org\)](#)

- **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 confidential 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 should not feel obligated to do so.

10. 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.

II. 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 when they first join Mentor Express.

Duty to Report

7.1-3 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;**
- (e) conduct that raises a substantial question about a lawyer’s capacity to provide professional services; and**
- (f) any situation in which a lawyer’s clients are likely to be materially prejudiced.**

Commentary

[1] 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). In all cases, the report must be made without malice or ulterior motive.

[2] Nothing in this rule is meant to interfere with the lawyer-client relationship.

[3] Instances of conduct described in this rule can arise from a variety of causes, including addictions or physical, mental or emotional conditions or disorders. Lawyers who face such challenges should be encouraged by other lawyers to seek assistance as early as possible.

[4] The Society supports the ASSIST Program in Alberta 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 is encouraging or 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.

12. Qualities of Effective Mentoring

Qualities of Effective Mentoring	
<ul style="list-style-type: none"> • A sense of humour. 	<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 genuineness.
<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.



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">• Checking email or surfing the net instead of listening.
<ul style="list-style-type: none">• Acting as if you are listening when you are not.	

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">• Must you always 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.



<ul style="list-style-type: none"> 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. 	
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What's Next?	
<ul style="list-style-type: none"> Do you have fewer complaints, claims and trust safety concerns? 	<ul style="list-style-type: none"> Are you on track to reach the goals of your participation in this program?
<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 a mentorship program like this 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 mentorship you receive from others? 	<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 better mentorship? 	<ul style="list-style-type: none"> Is there anything you could do to improve your communications?

13. 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 Express program and to carry out evaluation and research,
- To inform and assist with the administration of the Mentor Express 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.

14. FAQs

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

15. Contact Information

[Customer Service](#)

403.229.4700

Law Society of Alberta

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