



**ISBA MentorCenter**  
**@www.isba.org**



# **ISBA MentorCenter Handbook:**

**Practical information for a  
successful mentoring relationship**

Prepared by  
ISBA Mentoring Committee  
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[www.isba.org/mentorcenter](http://www.isba.org/mentorcenter)

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### **Mission Statement**

To provide a resource to lawyers with questions regarding substantive law, office economics and management, and professional conduct.

# **I. The ISBA MentorCenter**

Welcome to the ISBA's MentorCenter. The purpose of this program is to provide a resource for ISBA members to seek and receive advice and to discuss topics including: (1) practice and law office management-related issues; (2) issues involving such matters as personnel, escrow or other accounts; (3) substantive areas of law and related procedural issues; (4) appropriate and professional conduct and how to deal with inappropriate conduct; and (5) the importance and means of being involved in Bar and community activities and in developing a support network for a lawyer's practice.

Lawyers utilizing the MentorCenter are not establishing a lawyer/client relationship. Rather, the purpose of the mentoring relationship is to provide counseling, guidance and an open atmosphere for learning. They should not reveal any client confidences to the mentor but rather seek guidance in general areas. Nor should the mentor relationship be used as an employment recruitment tool or a means to establish "of counsel" relationships.

The MentorCenter is an Internet-based program, housed on the Illinois State Bar Association Web site. It's designed to connect experienced ISBA lawyers with any member lawyer – but especially new or young lawyers – who are seeking assistance with substantive law or the personal and professional demands of practice.

Qualified mentors sign up and may be accessed by practice area or location, with preferred contact information included. ISBA members seeking assistance may go to the MentorCenter Web page, select a mentor, and make the contact.

This individual-initiated contact from mentees to potential mentors might involve a single issue or an ongoing, formal mentoring relationship. Relationship parameters are determined by the preferences of both mentor and mentee.

Some basic information about the program is provided below:

*Q. How do I access the MentorCenter?*

A. Just visit the ISBA Web site and select Practice Tool>MentorCenter from the menu or visit directly at [www.isba.org/mentorcenter](http://www.isba.org/mentorcenter). You will need to be logged in to do a search for a mentor. If you don't know your login, you can reset it via email address we have on file for you.

*Q. Who are the mentors?*

A. Mentors are ISBA members who have volunteered to share their experiences with mentees. All mentors have agreed to program requirements that include good standing with the ARDC, proof of professional liability insurance, a one-year commitment to serve, and agreement to the terms of the mentor disclaimer and release.

*Q. Are there any special requirements for mentees?*

A. Mentees must be ISBA members and must agree to the terms of the mentoring program as put forth in the mentee disclaimer and release, which is available at the MentorCenter Web site.

*Q. How do the mentees and mentors make contact?*

A. Mentees can search for potential mentors by area of practice, county or ZIP code. Mentors will indicate on their profiles whether they prefer to be contacted by phone or e-mail, and mentees are responsible for initiating the contacts.

*Q. What is the duration of the mentor-mentee relationship?*

A. It is up to the individual mentor and mentee. This program can be used for a single question, or a mentor and mentee may choose to have a more formal relationship.

*Q. Is access to the MentorCenter as mentees restricted to new or young lawyers?*

A. No. All ISBA members who need assistance or consultation from colleagues are welcome to utilize the program.

*Q. Will there be support for mentors?*

A. Yes. ISBA staff and members of the implementation committee will provide help and information to mentors. In addition, resources will be available to help mentors answer questions about such topics as trust accounts, law office management, conflicts and other issues.

## **II. The Benefits of a Mentoring Relationship**

Mentoring is a mutual relationship between individuals and benefits both parties. The mentee may receive benefits such as:

- Encouragement, support and affirmation
- The opportunity to explore new ideas and alternatives
- Contacts with new individuals and groups that can aid her/him in their job career
- Information about the informal relationship or politics within the professional community
- Stimulus to challenge her/him to achieve new goals and confidence to try

The mentor can equally benefit in the relationship. A mentor receives the satisfaction of helping someone grow and succeed. There is an exchange of information and knowledge, which can cause the mentor to re-affirm hers/his own standards and philosophy. The mentor gains by seeing the results of his/her own knowledge, expertise, and influence. Self-esteem can be bolstered as the mentor is appreciated and respected.

The benefits of a mentoring program extend beyond the more experienced lawyer mentoring a newly admitted lawyer. Lawyers who completed their education before technology was commonly used could greatly benefit from a younger lawyer mentoring them in the use of computers and other technology to improve the efficiency of their practices, allow them to remain competitive, and serve their clients better. Small firm practitioners, especially those practicing solo, could benefit from a mentor to aid with practice management assistance or simply someone to help explore ideas on a particular case. Given today's competitive market, lawyers in large firms, or who work as in-house counsel are often unsure whether they should ask questions of their supervising lawyer for fear that it may compromise their future. A mentor could be the answer. Lawyers with disciplinary grievances due to their inexperience could benefit from a mentor. Malpractice claims could potentially be avoided or reduced because of the assistance of a mentor to a less experienced lawyer. Lawyers doing *pro bono* work outside of their practice area could benefit from a mentor with more experience in that area.

Mentoring can help improve relationships among lawyers and promote camaraderie among the profession. The public could benefit from improved professional services through the assistance of their lawyer's more experienced mentor.

### **III. The Mentoring Relationship**

Mentoring normally develops between individuals as a natural extension of their professional or personal relationship. The goal of this program is to create and enhance that relationship.

#### **Mentor's Role:**

- Work collaboratively with the mentee to develop an action plan.
- Provide support, counseling, network system and knowledge of community resources.
- Periodically evaluate the mentee's progress.

#### **Mentee's Role:**

- Identify barriers to advancement and collaborate with a mentor to develop a plan to overcome the barriers.
- Be willing to candidly discuss issues and consider advice.
- Periodically evaluate progress with the mentor.

#### **Guidelines for Mentors**

- Listen and try to address mentee's concerns on a level that allows them to participate in a thoughtful discussion.
- If mentors find that mentees are unable to focus their questions or concerns, mentors should guide mentees to a topic.
- Whenever possible, mentors should exchange ideas with mentees rather than lecturing.
- Whenever possible, mentors should share their "war stories" with mentees to help them both feel more comfortable and learn from the mentor's good and bad experiences.
- If mentors are unsure about any aspect of their advice, they should consult with their colleagues about how they might handle the issue.
- Mentees have been advised that when they are discussing a particular case, they should pose their questions in the form of "hypothetical fact patterns," not only to avoid disclosing their clients' identities and confidences but also to avoid any potential conflicts of interest. If a client's identity must be disclosed, the mentor shall ascertain that no conflict of interest exists before responding.
- Mentors shall not be required to perform any research as a result of inquiry.
- Mentors should not accept employment as co-counsel, and mentors should not refer their clients to mentors to handle cases. Mentors are cautioned that they should take appropriate steps to avoid even the appearance of existence of a lawyer/client relationship with the mentee's clients. Mentors are, however, encouraged to provide mentees with names of other lawyers who could act as co-counsel or to whom cases may be referred. Mentors may wish to modify their conflicts system to retrieve all matters on which the mentor is adverse to the mentee.

- Mentors should remind mentees that any detailed conversation about the specifics of the problem and situation of a client may require prior written consent from the client before making such disclosure.

## **Guidelines for Mentees**

Below are some points to keep in mind when working with mentors.

- The Mentor Program does not contemplate mentors rendering professional services to mentee's clients, and mentees must ultimately exercise their own independent professional judgment on behalf of their clients.
- When discussing a particular case, mentees should pose their questions in the form of "hypothetical fact matters," to avoid disclosing their clients' identities and confidences. If a client's identity must be disclosed, the mentor shall ascertain that no conflict of interest exists before responding.
- Mentees should not: (a) ask mentors to perform any legal research as a result of inquiry; (b) ask mentors to accept employment as co-counsel; or (c) refer clients to mentors to handle their cases. Mentors are cautioned that they should take appropriate steps to avoid even the appearance of the existence of a lawyer/client relationship between mentor's and mentee's clients. Mentees may wish to modify their conflicts system to retrieve all matters on which their mentors are adverse to the mentees.
- Mentees are reminded that any detailed conversation about the specifics of the problem and situation of a client may require prior written consent from the client before making such disclosure.
- Mentees are encouraged to ask questions regarding substantive, practical or ethical issues they may encounter. Mentees should not be afraid to ask even the most basic questions. Remember that mentors probably had similar experiences when they began the practice of law and that mentors will be more than happy to answer questions.

## IV. Basic Mentoring Concepts

- **Teaching** – The mentor should share with the mentee some of the specific skills and knowledge necessary for successful job performance or otherwise assist in the mentee’s career development. The method of instruction can be formal or informal, direct or subtle.
- **Guiding** – Every profession has its “unwritten rules,” and the more experienced mentor should orient the mentee in these.
- **Advising** – Teaching and guiding are mentoring behaviors usually initiated by the mentor while advising often occurs in response to a request by the mentee. The difference between the advice of mentors and the advice of others should be the quality of the advice. The mentor should be imparting wisdom based on a high degree of competence and extensive experience. In a relatively short time span, the mentee may benefit from experience that often has taken a lifetime to accumulate.
- **Counseling** – The mentor should provide emotional support in stressful times. The mentor should listen to the mentee’s concerns and communicate an empathic understanding of those concerns. In addition, the mentor often helps the mentee clarify career goals and develop plans of action to achieve those goals.
- **Role Modeling** – The mentor serves as a person whom the mentee can emulate. Role modeling usually occurs subtly as an outcome of the relationship rather than by conscious design by either mentor or mentee. The mentor’s traits and behaviors become a blueprint that the mentee unconsciously uses to pattern his or her own manner.
- **Validating** – The mentor should evaluate, possibly modify, and finally endorse the mentee’s goals and aspirations. If a mentor cannot at least accept the possibility of the mentee achieving his or her aspirations, it is doubtful whether the mentor relationship can be maintained.
- **Motivating** – Validating involves helping mentees believe in their goals. In motivating, the mentor should provide the encouragement and impetus for the mentee to act toward achievement of those goals. Whether done through a “kick in the pants” or a “pat on the back,” the end result is action. Some mentors are drill sergeants; others are cheerleaders.
- **Communicating** – The mentor should establish open lines of communication through which concerns can be discussed clearly and effectively. Expertise means little if it cannot be communicated.

## **V. Tips for Successful Mentoring**

### **A. For the Mentor**

- Do engage in the mentoring relationship prepared to exert energy, and from time to time to experience frustration.
- Don't expect the mentored to adopt your precise style or comport themselves in the very shadow of your image.
- Do make yourself available at identifiable times and for briefer, impromptu questions.
- Don't frustrate by being unavailable or inaccessible, impatient or amnesiac about how hard the practice of law was for you in the earlier years.
- Do work consciously on your listening skills and create an atmosphere in which inquiries can freely ask questions.
- Don't avoid the harder questions requiring judgment, but avoid being judgmental.
- Don't give up. Even if your efforts don't show tangible or consistent results, remember that mentoring is a long-term process and an important act, in and of itself.

### **B. For the Mentee**

- Do be mindful of your mentor's schedule.
- Don't schedule a mentoring meeting and fail to show up on time.
- Do take initiative. Your mentor is likely to be busier than you are.
- Don't take offense if your mentor has to cancel a session or is a bit difficult to reach from time to time.
- Do express gratitude for your mentor's involvement and energies on your behalf.
- Don't take for granted how demanding it can be for most lawyers to mentor others.
- Do your part to develop the relationship, so that your mentor will trust you and embrace his or her role in your career.
- Don't quarrel with the advice your mentor provides--listen well, reach across your differences to accept the guidance you sought and need.

### **C. Things a Mentor Can Do**

- Tell a career story. Share the highs and the lows of your career path.
- Spend one visit with the mentee discussing his/her needs and aspirations, a second visit with the mentee studying the legal system and a third visit developing action for the next year.
- Help establish an action plan for the mentee.
- Mentor may want to arrange for mentee to attend high-level meetings or other activities.
- Mentor may want to use his/her personal influence to help the mentee gain exposure to special training.
- Ask mentee to select a book or article on something relating to his/her career field and report on the reading to you.
- Help mentee write short-range and long-range career development plans.

- Talk about what you do:
  - General description of your job
  - Major tasks, subtasks, specific responsibilities
  - How your job fits into the total organization
  - How you spend a typical day
  - Personal qualities needed for this type of work
  - General opportunities for advancement
  - Effects of economics on your specific job and on your occupation in general
  - Other jobs you could do with your skills
  - How you got started in your job
  - Other jobs you have held, skills you developed from them, their relationship to your present job
  - Skills you had to learn specifically for this job; how you acquired them
  - Your recommendations to others for acquiring these skills; suggestions you would give someone applying for your job
  - What you like most and least about your job
  - What you would change if you could
  - Interpersonal skills you find most important in your work and why
  - Attitudes and values that are important to you and how they are reflected in your work
  - Obstacles or barriers you had to overcome to get where you are now

#### **D. Things a Mentee Can Do**

- Identify goals for the mentoring relationship and discuss them with your mentor.
- Share successes with your mentor; a case you recently won, or a strategy that worked well.
- Do some thinking and planning about career direction and goals. Identify how the mentor can help you meet these goals, and ask specifically for the help.
- Interview mentor about career path. What were the barriers to overcome, the pit-falls along the way, about learning from failures as well as successes, etc.
- Be clear about what you want from your mentor at any given time; do you want advice right now, a sympathetic ear to listen, or help with problem solving? Don't be afraid to ask for the specific type of support you want in different situations.
- Discuss a legal issue you are exploring.
- Discuss the issue of integrating personal/family life with career objectives. Share your own experiences.

#### **E. Things That Both Can Discuss**

##### **Talk About How Your Career Goals Affect Your Personal Life**

- Family time
- Leisure time
- General health/diet/exercise
- Stress factors: tension, fatigue, burn-out
- Stimulation factors: excitement, challenge, opportunity

- Where your present activities fit into your life: lifetime career or stepping stone to something else

A successful relationship of any kind requires both parties to want the relationship to work. This is especially true in a mentoring situation where mentor and mentee can develop a satisfactory association where both are committed to meeting their responsibilities. By allowing each other the freedom to openly discuss and work on professional issues, without censure, on a regular basis, the mentee and mentor are well on their way to an enjoyable, stimulating and rewarding experience.

## **VI. Resources**

***ISBA Ethics Inquiry Program*** – call the ISBA Ethics InfoLine for personal guidance from an ISBA ethics advisory lawyer at 800-252-8908 (Springfield office) or 800-678-4009 (Chicago office). ISBA's Advisory Opinions on Professional Conduct are also available on line for ISBA members at <http://www.isba.org/EthicsOpinions/>

***ARDC Ethics Inquiry Program*** – a telephone inquiry line that provides general information on where to find sources to help resolve hypothetical questions arising under the Rules. Call the ARDC at (312) 565-2600 or (800) 826-8625.

***ARDC Client Trust Account Handbook*** – available by calling the ARDC at (312) 565-2600 or (800) 826-8625 or on the ARDC website at [www.iardc.org](http://www.iardc.org) under “Publications.”

***Lawyers Assistance Program (LAP)*** – if you need help with matters related to drug dependence, alcohol abuse, or mental health problems, please contact LAP at 312-726-6607 or 800-LAP-1233 or visit its web site at [www.illinoislap.org](http://www.illinoislap.org).

***Lawyers Trust Fund of Illinois (IOLTA)*** – Information regarding the IOLTA program, the Honor Roll list of financial institutions and downloadable IOLTA signup forms on the Lawyers Trust Fund website at [www.ltf.org](http://www.ltf.org) or contact the Lawyers Trust Fund of Illinois, 111 North Wabash Avenue, Suite 2018, Chicago, Illinois 60603; (312) 372-5906 or call (800) 624-8962; Fax (312) 372-1962.

***ABA ETHICSearch*** – a research service for those needing information on the ABA Model Rules, Standards and ethics opinions. Call (312) 988-5323; Fax (312) 988-5491, e-mail [ethicsearch@staff.abanet.org](mailto:ethicsearch@staff.abanet.org) or write to ETHICSearch, Center for Professional Responsibility, ABA, 541 North Fairbanks Court, Chicago, IL 60611-3314.

***Bar Association Ethics Advisory Opinions*** – ISBA Committee on Professional Responsibility or CBA Committee on Professional Responsibility advisory committees receive inquiries and render opinions either addressed to the inquiring lawyer or published in the *Illinois Bar Journal* or *CBA Record*. The published ISBA ethics advisory opinions (1984-present) may be obtained from the ISBA website at <http://www.isba.org/EthicsOpinions/> (members only). Inquiries to the ISBA may be made to the ISBA Legal Department at (217) 525-1760. Summaries of published CBA advisory opinions (1971-1997) may be obtained from the CBA website at [www.chicagobar.org](http://www.chicagobar.org) (members only). CBA members may make inquiries to the CBA to the CBA Committee on Professional Responsibility at [www.chicagobar.org/member/committee](http://www.chicagobar.org/member/committee).

**Using Quick Books for Lawyers' Trust Accounting** – a guide to using QuickBooks for trust accounting published by and available on the website for the Minnesota Bar at [www.mnbar.org](http://www.mnbar.org).