

MENTOR GUIDE

The Legal Centre for Business and Technology is a not for profit charitable society affiliated with the University of Calgary Faculty of Law. It operates the Business and Technology Law Clinic in association with the Faculty of Law. Its website is www.ucalgary.ca/biztechlaw.

Business Clinical:

The Clinic is operating as a component of the Business Clinical Seminar course and the evaluation is defined in the Business Clinic Seminar Outline. The Clinic is intended to provide students with an opportunity to gain hands-on practical experience in relation to some of the more common business and technology related legal transactions.

The student will be placed in group of 2-3 students and required to jointly take on one client file and follow it through to completion. Each student will be assigned a mentor who will be available throughout the duration of the file to assist the student with all questions pertaining to that file.

Clients:

The practical experience gained through the Clinic will occur by working on client files.

Typical clients include:

- Entrepreneurs with creative ideas for ventures;
- Small business owners seeking assistance with legal planning;
- New businesses; and
- Creators of technology interested in commercialization

Generally, clients submit their legal issue for consideration and the Centre's coordinator determines if it is a file that the Clinic can take on depending on its nature and on the capacity of the Clinic at that time.

Mentor's Role

Your role is to act as a legal mentor to law students working on a client file. The level of assistance required will vary depending on the students and the nature of the file; however, there are certain expectations of the mentor. These include:

- Acting as a mentor for one file;
- Being present during the initial interview of the client; (Note: the student will be responsible for running the interview; however, mentors may participate in the interview process as needed)
- Determining the nature and extent of legal assistance that the Clinic can provide to the client;
- Being available (via telephone, email or in person) to discuss the file with the student;
- Reviewing the student's work;
- Approving or disapproving the work done on the client file;
- Completing the student Evaluation Form.

Student's Role

Students will be expected to:

- Attend regularly scheduled Business Clinical lectures;
- Attend and be prepared for the initial meeting with the client and mentor and any subsequent meetings with client and/or mentor;
- Conduct interviews with the client; (see "The Interview Process")
- Complete the Client Tracking Form; and Client Agreement;
- Take the lead in the interviewing and counselling process;
- Be responsible for assigned client files, seeing them through from commencement to completion; (see "LCBT Client File Checklist")
- Develop creative legal solutions specific to the client's needs;

- Keep mentors and clients updated as to the progress of the file;
- Report to the client upon completion of file;
- Schedule additional meetings with the client and/or mentor as needed; and
- Complete other tasks as needed.
- **REMEMBER: ALL CLIENT FILE INFORMATION IS CONFIDENTIAL!!**

The Process

Client files typically progress as follows:

1. The Clinic accepts the client file and schedules an interview for one of the meeting dates.
2. A mentor is assigned to that file.
3. The client is interviewed by a group of students.
4. At the end of the interview or shortly thereafter, the mentor will outline the nature and extent of the assistance that the Centre can provide for the client
5. Following the interview, students and mentors will discuss what work will be done and tentative dates for completion.
6. The student group will work on the client's issue under the supervision of the mentor.
7. The students will submit final work to their mentor for approval and evaluation.
8. The Mentors will review student work and approve/ disapprove of the work.
9. The reporting letter and any necessary documents will be given to the client. In-person explanations may be appropriate in some circumstances.
10. The Mentor evaluates the student's performance and provides to the Student.

The types of legal issues clients present will naturally vary depending on which clients approach the Clinic for assistance. The expected time to complete a client file is a two-weeks.

Meetings

- The Centre will hold scheduled meetings after the Business Clinical lecture. The main purpose of these meetings is to conduct new client interviews. The however, Clinic coordinator will be present to answer any general questions students may have.
- **Client meetings will be scheduled throughout the semester. Best efforts will be used to determine the meeting date near the beginning of the semester, but the unpredictability of client needs and timing may necessitate changes during the term.**
- Meetings will be held in seminar rooms within the Law School to be determined. Students who are not conducting an interview or meeting with their mentor on a particular date are **not** required to attend a meeting on that date.
- Subsequent contact and meetings with the client and/or mentor shall be arranged by the student as needed to complete the file. Seminar rooms will be made available to students to book for such meetings. Please contact the Centre Coordinator for such purposes.