# STEP

## Society of Trust and Estate Practitioners

### THE STEP/CLT MENTOR SCHEME

**(for students on the Diploma in International Trust Management or the Diploma for England & Wales)**

**What is a mentor?**

- *"an experienced and trusted advisor" (Oxford English Dictionary)*

The essential purpose of mentoring is to provide guidance, encouragement, help and support, thus enabling a more experienced person to help a less experienced person achieve their goals.

**The STEP/CLT mentor scheme**

The STEP/CLT mentor scheme has been designed to provide support for persons studying for the STEP Diploma in International Trust Management or the STEP Diploma for England and Wales.

Not all students want or desire the assistance of a mentor and the involvement of a mentor is not a requirement of completing the course. However, if you would like informal support from someone who has more experience in the relevant area of study, then you might consider approaching that person to act as a mentor.

Some STEP branches have made arrangements to form a panel of volunteers who are willing to act as mentors for student members of their branch. This facility is available for students who do not otherwise have access to a suitable person to fulfil the mentor role. If you require further details of this, please contact your branch education officer or branch secretary.

**The mentor-student relationship**

The nature of the relationship between a student and their mentor will vary according to their respective experience, the availability of the mentor, the amount of time the student can spend on the programme and the respective personalities of the student and mentor. Consequently, there is no "standard" approach to mentoring. Rather, what is central to the scheme is that the mentor and student agree in advance the level of encouragement, support and understanding that the student requires whilst on the programme, and the mentor follows through to provide that.

**Mentor assistance**

A mentor might, for example, assist with the following:

- reviewing with the student the course structure, as outlined in the course documentation; and/or

- discussing with the student the format, style and requirements of the examination; and/or

- reading over the student's assignments, and answering any technical queries the student may have, arising out of the course materials; and/or

- preparing a study timetable, to include study sessions and revision sessions, and assisting with examination preparation.

If the mentor happens to be in the same organisation as the student and is in a line management position, it may be possible for the mentor to:

- assist with time management, permitting the student some flexibility to facilitate study periods, e.g. allowing the student to work through the lunchtime and finish early so that a visit to the library can be arranged; and/or

- allow flexibility in terms of booking leave to fit in with study and examination arrangements; and/or

- allow access to terminals with website facilities, where this is not already available.

**What a mentor will require from the student**

Any mentor will need to agree in advance the areas on which the student would welcome assistance. The student should therefore:

- Show the mentor the course pack, syllabus, examination regulations and specimen papers.

- Provide an outline of his/her study plan; for example: the duration of the course, the amount of work to be done and the proposed division of the work over the suggested time period.

- Discuss with the mentor the format and the date of the examination.

- Identify how he or she would like the mentor to help. For example, can the mentor explain complex terms, read assignments, test the student on his/her knowledge? The mentor and the student should pencil in a series of meetings, in advance.

**Mentor pack**

If, once a student has discussed matters with the potential mentor, they are prepared to act as mentor, the "mentor form" (obtained from CLT) should be completed and returned to CLT, who will then arrange to provide the mentor with the relevant "Mentor Pack", containing:

- Course Manual. This is the principal learning text used by the students in the distance-learning component of the course. It is broken down into modules that correspond to the syllabus headings.

- Syllabus and guidance notes. This provides a full and detailed breakdown of the course syllabus, content and emphasis.

- Examination handbook. This provides an outline of examination requirements and gives guidance on examination preparation.

- Course brochure. This outlines the course requirements and background information.

- World trust survey. This provides a comparison of recent developments in the principal offshore trust jurisdictions.

**Further mentor tasks**

A mentor might also assist the student with some of the following:

- Ensuring that the student has access to the CLT website and an access code.

- Working through the glossary at the back of the course manual and explaining any terms the student does not understand.

- Working through the modules with the student:

  - explaining any passages the student does not understand;

  - checking that the student understands the self-assessment questions at the end of the module; and

  - working through the solutions with the student. These may be found at the end of the manual.

- Where the student has questions that are not solved by the course materials, helping him/her to frame a question to be inserted in the FAQ section of the CLT (course) website, to be sent to the course tutor, and assisting the student in analysing any replies.

- At the end of module four, supervising the student's attempt at assignment one. On completion of the assignment, analysing the reply from the website or from the tutor. If a student has a particular problem with any area of work,

reviewing the course content with them. At the end of module eight, repeating the process with assignment two.

- Providing the student with practical examples from within the mentor's own organisation:

  - documents;
  - case illustrations;
  - procedures; and
  - standard forms.

- Linking the academic work of the student to their workplace practice.

- Suggesting further reading of any articles, books journals or websites that may be of assistance.

- Reviewing the format of the examination with the student. Examining the specimen questions and solutions. Working through them with the student.

- Asking the student if he/she would like to submit written answers to the mentor, on any of the course questions. This is certainly not compulsory, but if the student feels it would be of value, the mentor might offer to review the student's answers.