



The National Self-Represented Litigants Project

# McKenzie Friend Worksheet



Work through the following to **decide if you need** a McKenzie Friend, **define their role**, and then **choose the right person** for the job.

## 1. Deciding

To decide if you need a McKenzie Friend, **ask yourself** the following:

- Q How good at *speaking* are you? How about *listening, thinking, processing, and responding* in the moment?  
.....
- Q Do you expect that you'll be calm under this type of pressure?  
.....
- Q How important is it for you to handle your own documents in the hearing?  
.....
- Q How confident are you about handling your matter, and being the only one in charge?  
.....
- Q Would it be useful to have someone else take notes? Or perhaps quietly listen to the court proceeding so that they can debrief with you afterwards?  
.....
- Q Do you prefer to remain in charge of documents yourself?  
.....
- Q Would it be helpful to have someone who can organize and pass you documents while you listen and respond to what's being said?  
.....
- Q If you had someone sitting beside you, even quietly, would that help you feel calmer? Or would that just distract you?  
.....

## 2. Defining their role

What do you need your McKenzie Friend **to do**?

- Take notes to review with you later
- Observe the courtroom discussion
- Organize your legal documents
- Hand you documents in the course of your presentation to the court
- Observe and give you feedback on how they thought you sounded or how things went in court
- Do most or all of these tasks
- Just be there to help you feel calm, so you can handle all or most of it yourself



### 3. Choosing the right person

List as many **friends, family members,** and **professionals** as possible. Print more than one page if needed. Narrow things down by using the tips below.

|   | PERSON 1  | PERSON 2  | PERSON 3  | PERSON 4  | PERSON 5  |
|---|---|---|---|---|---|
| <b>Occupation</b>                               | _____   | _____   | _____   | _____   | _____   |
|   | <input type="checkbox"/> Legal professional?  | <input type="checkbox"/> Legal professional?  | <input type="checkbox"/> Legal professional?  | <input type="checkbox"/> Legal professional?  | <input type="checkbox"/> Legal professional?  |
| <b>Relationship to me</b>                       | <input type="checkbox"/> Friend / family<br><input type="checkbox"/> Professional   | <input type="checkbox"/> Friend / family<br><input type="checkbox"/> Professional   | <input type="checkbox"/> Friend / family<br><input type="checkbox"/> Professional   | <input type="checkbox"/> Friend / family<br><input type="checkbox"/> Professional   | <input type="checkbox"/> Friend / family<br><input type="checkbox"/> Professional   |
| <b>How long I've known them</b>                 | _____   | _____   | _____   | _____   | _____   |
| <b>Relationship to the other side</b>           | <input type="checkbox"/> Neutral<br><input type="checkbox"/> Good<br><input type="checkbox"/> Tense   | <input type="checkbox"/> Neutral<br><input type="checkbox"/> Good<br><input type="checkbox"/> Tense   | <input type="checkbox"/> Neutral<br><input type="checkbox"/> Good<br><input type="checkbox"/> Tense   | <input type="checkbox"/> Neutral<br><input type="checkbox"/> Good<br><input type="checkbox"/> Tense   | <input type="checkbox"/> Neutral<br><input type="checkbox"/> Good<br><input type="checkbox"/> Tense   |
| <b>Skills/ type of support they could offer</b> | <input type="checkbox"/> Thinking / responding<br><input type="checkbox"/> Handling documents<br><input type="checkbox"/> Taking notes<br><input type="checkbox"/> Stress<br><input type="checkbox"/> Other<br>_____<br>_____ | <input type="checkbox"/> Thinking / responding<br><input type="checkbox"/> Handling documents<br><input type="checkbox"/> Taking notes<br><input type="checkbox"/> Stress<br><input type="checkbox"/> Other<br>_____<br>_____ | <input type="checkbox"/> Thinking / responding<br><input type="checkbox"/> Handling documents<br><input type="checkbox"/> Taking notes<br><input type="checkbox"/> Stress<br><input type="checkbox"/> Other<br>_____<br>_____ | <input type="checkbox"/> Thinking / responding<br><input type="checkbox"/> Handling documents<br><input type="checkbox"/> Taking notes<br><input type="checkbox"/> Stress<br><input type="checkbox"/> Other<br>_____<br>_____ | <input type="checkbox"/> Thinking / responding<br><input type="checkbox"/> Handling documents<br><input type="checkbox"/> Taking notes<br><input type="checkbox"/> Stress<br><input type="checkbox"/> Other<br>_____<br>_____ |
| <b>Level of trust?</b>                          | <input type="checkbox"/> High<br><input type="checkbox"/> OK<br><input type="checkbox"/> Low  | <input type="checkbox"/> High<br><input type="checkbox"/> OK<br><input type="checkbox"/> Low  | <input type="checkbox"/> High<br><input type="checkbox"/> OK<br><input type="checkbox"/> Low  | <input type="checkbox"/> High<br><input type="checkbox"/> OK<br><input type="checkbox"/> Low  | <input type="checkbox"/> High<br><input type="checkbox"/> OK<br><input type="checkbox"/> Low  |
| <b>Any personal agendas?</b>                    | <input type="checkbox"/> Yes<br><input type="checkbox"/> No<br><input type="checkbox"/> Maybe   | <input type="checkbox"/> Yes<br><input type="checkbox"/> No<br><input type="checkbox"/> Maybe   | <input type="checkbox"/> Yes<br><input type="checkbox"/> No<br><input type="checkbox"/> Maybe   | <input type="checkbox"/> Yes<br><input type="checkbox"/> No<br><input type="checkbox"/> Maybe   | <input type="checkbox"/> Yes<br><input type="checkbox"/> No<br><input type="checkbox"/> Maybe   |



#### Tips to narrow down your choice

- Is the person you're considering a child of the marriage breaking up, or a grandparent? They may run into objections, or they may still be the best choice.
- Is the person you're considering a lawyer or paralegal by profession? Judges sometimes object to lawyers or paralegals acting as "support persons".
- Is the person you're considering someone the other side may object to? How would you deal with those objections? Are they reasonable?
- How do you think this person will be seen by the judge and other court officials – are they calm, reasonable, and dignified?
- Will you be worried about how they are managing the stress of the courtroom?
- Is the person you're considering likely to be upset by anything they hear in court? Might they hear information that you would prefer them not to know about?
- How much time does this person have to give to supporting you as a McKenzie Friend? If they are working, how flexible are their hours?
- Is this person a community justice worker who is familiar with your case and situations like your own?
- Do you trust this person's observations? Do you need their feedback?
- Overall, who do you feel has the most skills to offer?
- Overall, who would you feel the most comfortable with in court?