

The Royal Statistical Society

Guidance Notes for the Royal Statistical Society Mentoring Scheme

1. Aims and objectives of the RSS Mentoring Scheme

Our new mentoring platform provided by PushFar is set up to allow all RSS paying members (fellows and professionally qualified fellows) to take part in our mentoring scheme. All fellows can sign up as either mentors or mentees, or both.

Members can register to mentor or be mentored in a number of different areas and specialisms, including, but not limited to: CPD; data science; academia; marketing; consulting; pharmaceuticals and more.

We encourage members to sign up to grow their network, enhance their professional development and offer any support they can to future generations as mentors of the RSS.

For those members wanting advice on how to reach Chartered Statistician status (CStat), it is recommended that you only seek mentors that already hold the CStat award. Only active CStat holders are eligible to mentor members specifically with regards to working towards CStat and it is usually expected that the mentees have already gained either Data Analyst or Graduate Statistician (GradStat) status. The aim of this particular RSS scheme is very specific: to help and advise those Data Analysts and Graduate Statisticians in respect of the CPD they need to undertake in order to prepare themselves should they want to apply for Chartered status. It does not cover career development advice outside the statistical profession – though of course CPD for a statistician will not be purely statistical – and it does not include advice on statistical problems they may encounter in their work. For more information about all professional awards offered, their requirements and standards please see [our website](#).

2. Expectations of RSS mentors and mentees

The RSS mentor role is a voluntary one. The mentee is not expected to pay for the service and the Society cannot offer any remuneration or payment of expenses to mentors. However, the Society hopes that mentors will see this as an opportunity to contribute to the overall health of the profession. It should also enable mentors to

develop a range of inter-personal skills such as listening, problem analysis and problem solving, therefore contributing to their own CPD.

The time commitment varies depending on the mentorship and should be agreed upon between the individuals. Mentoring relationships can last for as long as you wish for them to – however, agreeing a time commitment at the beginning (eg six months) is an important part of setting up the mentoring relationship. (See section 3 below.)

It is advised that mentors and mentees within this scheme will be working in broadly the same area of statistical application. The Society would expect that, normally, they would not be working within the same organisation – such an arrangement would be expected to be managed by that organisation. The Society recognises that there may be exceptions to this in the case of very large organisations where it could be satisfactory for a mentee to have a mentor in a separate department.

Whilst all members are eligible to become RSS mentors, the Society expects that they will already have experience of mentoring career-young statisticians within their current or previous employing organisations and that they will have up-to-date knowledge of the range of CPD opportunities available for statisticians and data professionals. In other words, the scheme should draw on the existing experience and expertise of each mentor – it should not require extensive additional training or learning by mentors.

Mentees must accept that all advice is given in good faith. Mentees must also respect the voluntary nature of the commitment given by mentors and not place undue pressure on them to devote more time than they are able. The importance of agreeing a time commitment applies just as much to mentees as to mentors. If mentees believe that insufficient attention is being paid to their needs, they must first try to resolve this by discussion with their mentors. Only as a last resort should they consider withdrawing from a relationship and possibly seek an alternative mentor.

It is important that all communications between mentors and mentees are confidential between them, and that any such communications can only be shared with third parties with the agreement of both. It is further advised that the PushFar platform is used as the regular means of communication between all parties.

It may be advisable for mentors to check with their employing organisations that they are content for them to take part in the RSS scheme.

3. Conducting a mentoring relationship

Whether over a phone call, video call or in-person meeting, an introductory meeting is an essential first step for mentoring. The introductory meeting should cover off the following points and it is important to discuss these openly and honestly, straight away:

- How often should you both meet or call?
- How long should the mentoring relationship last?
- What can the mentor offer?
- What is the mentee looking for?

Although mentoring within a normal organisational context would be carried out through face-to-face meetings, this is not expected to be the norm for the RSS scheme because of the logistical difficulties it would pose. To try to match mentors and mentees geographically as well as by sector within the profession, when both mentor and mentee populations are likely to be relatively small, could make the scheme inoperable. Instead, the Society envisages contact through e-mail, phone call, video call, with in-person meetings taking place only if both parties are willing to commit the time and effort to doing so.

There are generally considered to be four stages within the mentoring life cycle:

- Establishing rapport
- Direction setting
- Progress making
- Moving on

Establishing rapport will involve the mentor and mentee working out together how they can get on with and respect each other. They will need to exchange views on what the relationship is and is not, bearing in mind the aims and objectives set out above. They should agree a way of working together that is mutually satisfactory – for example whether the mentor is prepared to accept *ad hoc* calls/e-mails, or whether all contacts should be scheduled in advance. They will also need to set up a way of calling meetings that covers frequency, duration, and method of contact (ie e-mail, telephone, other methods). The Society suggests that all these decisions should be recorded, and the record agreed between mentor and mentee to avoid misunderstanding at a later stage. This record can then be regarded as an informal agreement between the two parties, though of course it can be subject to change at any later stage provided both parties agree such changes.

Part of the process of establishing rapport will be for the mentor to gain an understanding of various characteristics of the mentee's employing organisation, and thus the environment in which the mentee is working; for example, its size, the nature of its business, and its overall policy on training and [Continuing Professional Development](#).

This is an additional step compared with the normal mentoring situation where both parties are employed by the same organisation and the mentor would already be aware of these characteristics. It is possible that during these discussions a mentor and mentee will find that they are working for organisations that are in direct competition. If the mentor or mentee feels that this is likely to result in conflicts of interest or the possibility of breaches of commercial confidentiality, it may be felt necessary to withdraw from the relationship. If they decide to continue, scrupulous care will be needed in avoiding any possible situations where such conflicts or breaches might occur.

The mentor and mentee will also need to discuss the interface between the RSS scheme and the mentee's employing organisation. In a sense this is not so far from the normal mentoring situation, where the mentor would be outside the mentee's line management chain, but the fact that they are not even in the same organisation could produce additional tensions and steps should be taken to avoid these. Mentees should tell their employers at an early stage that they are taking advantage of the RSS mentoring scheme and explain its objectives and way of working. Mentors will need to check with mentees that they have discussed their participation in the scheme with their employers. A good employer should be pleased that an employee is taking CPD seriously.

It is possible that at this first stage in the proceedings either a mentor or a mentee may feel that they are not well matched. In this circumstance, either party should have no hesitation in withdrawing from the arrangement, informing the other party.

Direction setting is likely to be the stage in the life cycle during which there is the most intensive contact between mentors and mentees. It will involve the two parties in a relationship working together to diagnose the mentee's CPD needs and goals, and then setting some priorities and targets. During these discussions, mentors will need to be very sensitive to the fact that they do not have responsibility for resourcing the CPD that they consider would benefit the mentees, in either time or money terms. Mentees should be encouraged to discuss at an early stage with their line managers the suggested CPD objectives that emerge from discussions with their mentors, so that the line managers also have some ownership of the process.

The main result of this stage should be a personal development plan with target dates and agreed outcomes, drawn up and agreed between mentors and mentees. The

mentees should be encouraged to share these with their line managers and gain their agreement.

The types of CPD that may form part of the mentee's development plan may be many and varied. The list below is not intended to be prescriptive, nor should it be interpreted as an order of importance. The mix will differ from person to person.

- Formal training courses, internal or external
- Attendance at conferences, lectures, seminars, etc
- Personal study, guided reading
- Authorship of publications, refereed or otherwise
- Authorship of internal reports
- Internal or external presentations
- Participation in extramural statistical work, for example appropriate service on committees

In advising mentees on their personal development plans, mentors should bear in mind the Society's overall CPD policy. This defines CPD in four broad categories:

1. Learning
2. Doing
3. Managing
4. Other

The Society's view is that practising statisticians should aim at an annual CPD portfolio of at least 60 hours "notional hours" of CPD, where

$$\text{Notional hours} = (\text{Actual hours}) \times (\text{"CPD value", in range } 0 - 1)$$

"CPD value" is a personal assessment of the value of the activity to the individual. Different individuals are likely to gain different benefits from the same activity, let alone from different ones. A mentee is likely to look to the mentor for advice on how to assess these values. As an illustration, a 2-day (say 15 hours) course might actually score 15 "notional hours" for an individual for whom the subject matter is new and relevant, while a 5-day conference where only 2 days could honestly be regarded as new and developmental would also score 15.

More information on the Society's CPD policy may be found [on the website](#) , and mentees should be encouraged to consult this and discuss with their mentors what the implications are for their particular situations.

Once objectives and priorities have been set and a personal development plan agreed, the next stage in the life cycle is **progress making**, during which mentor and mentee review progress against the agreed plan, adapting it as necessary. They may wish to

agree the frequency with which reviews should be carried out, but if at all possible, it will be helpful if the mentee is able to raise concerns or new issues outside any set review times, so that any problems can be dealt with expeditiously.

Mentors should encourage mentees to keep records of their CPD using the CPD recording tool within MyRSS. This will especially be of benefit for those applying for future professional titles such as CStat and Advanced Data Science Professional. For some mentees it will be convenient, or they may be required, to follow the standard procedures of their employers. However, it is likely to be convenient for them to keep some form of "CPD diary", updated perhaps on a monthly basis, and records of this type are likely to form a good basis for periodic review of progress between mentor and mentee. Mentors should help mentees to assess the value to them of each CPD activity engaged in as soon as possible after its completion.

We have an online CPD recording system that is freely available to all members – just visit [MyRSS](#) and select CPD under the 'Other information' section.

Alternatively, a Word document, '[CPD Activity Summary](#)' can be downloaded and used to record your CPD.

The final stage of the life cycle is **moving on**. Knowing when to end a mentoring relationship can often be tricky. If you feel that either your mentee is not engaged or that you are beginning to feel unable to give further support, it is best to have an upfront conversation and decide either to end the relationship or to have a set end time. If you had a successful introductory mentoring meeting, then you should have already discussed the length of time you are looking to mentor anyway, so do use this as a guide. At the end, discuss the things you have covered off during the relationship and use it as a time to reflect on where the mentee and mentor were at in the beginning and where they have got to now.

For some mentees, the natural point for beginning to make plans for moving on comes at the point where the mentor feels that the mentee is ready to apply for a professional title they have been working towards, such as CStat status. This will normally be after five years of post-qualification experience – the criteria are available from the Society's [website](#). Normally the mentoring relationship itself will end at the point of attainment of Chartered status. However, if both parties are willing to continue the relationship it will be necessary to discuss how they see it evolving, and to renegotiate the informal agreement outside the Society's Scheme.

4. Applying for the mentoring scheme

To apply for the scheme, you must be a paying member of the RSS (fellow or professionally qualified fellow).

You can register your profile on the [RSS mentoring platform](#)

Frequently asked questions

Are there any legal implications?

The short answer is that we intend and hope that there are not. A mentoring arrangement is a purely voluntary partnership between a mentor and a mentee, both parties recognising that advice and guidance are offered and accepted in good faith.

However, for the sake of formality and to ensure protection of all concerned, the Society has taken legal advice. As a result, the following statement will appear on the form filled in by members seeking to enter the scheme.

The Royal Statistical Society's mentoring scheme is available to members of the Society, and it is confined to advice on professional and career development within the statistical profession. It does not cover technical statistical advice on problems that may arise in mentees' work.

Mentoring is offered on a volunteer basis by members of the Society. All members agree to abide by a Code of Conduct which requires that they only undertake work within their own areas of competence and experience.

Although mentors will always strive to provide mentoring advice to the highest professional and ethical standards and in good faith, the mentee accepts and agrees that neither the Society nor the individual mentor will have any liability whatsoever in respect of any advice offered.

We hope this will be sufficient to clarify the situation and allay any concerns that may arise.

My mentee has asked me for advice on methodology to apply to a specific problem, as though I was a consultant.

Provision of technical advice is not covered by the RSS scheme. You may if you wish suggest sources of such advice to your mentees, but you should advise mentees to talk to their employers about how consultancy advice of this sort might be obtained – for example by using the [RSS Consultants Directory](#).

My mentee seems to have lost interest – contact is never initiated and the CPD plan doesn't seem to be kept to.

It may be that the mentee has other priorities at the moment, either in the workplace or personal. Try, without being intrusive, to explore why so little interest is being exhibited; it may be a passing phase. However, if you feel that the relationship has reached the end of the road, then you should inform the mentee that you are withdrawing.

My mentee gets in touch with me far more frequently than I imagined, and I just don't have the time to respond.

Your mentee has to accept that mentors cannot enter into any binding agreement to provide any particular level of support. Tell the mentee how much support you are willing to provide. If the mentee feels that more is needed, suggest that another mentor can be found who could meet those expectations. Otherwise, tell the mentee that you will ignore any contacts that are initiated outside the agreement that you have made.

My mentee complains about an employer's unreasonableness in not allowing the mentee to undertake the CPD that I think is needed. Should I intervene?

Try to help your mentee to develop negotiating skills to persuade the employer to provide the opportunities you think are needed. However, you may also need to help the mentee to prioritise CPD activities to "cut the coat according to the employer's cloth". Bear in mind that different employers are likely to place varying degrees of importance on CPD. On no account should you criticise the employer to the mentee.

My mentor doesn't give me as much attention as I feel I need: what should I do?

You and your mentor should have agreed a time commitment at the outset of your mentoring arrangement. If either the amount of time your mentor is devoting to the arrangement falls short of the agreement, or you feel you need more time than the original agreement envisaged, talk to your mentor to see whether adjustments can be made. If you are not able to come to a mutually acceptable agreement, you may need to see whether another mentor can be found who can better meet your needs.

The advice I am getting from my mentor is completely at odds with what I am getting from my line manager, in terms of what CPD I should be undertaking. Whose advice should I take?

You need to bear in mind that your mentor and your line manager are providing advice from different standpoints. Your mentor will be advising on what you need to do to attain, for example Chartered Statistician status; your line manager will be advising on

what you need to do to make progress within your specific job and within your organisation. Their advice is more likely to diverge if you are working in an organisation that employs few statisticians and, therefore, where career progression may be likely to take you out of a purely statistical role. You need to analyse whether this is the case, discussing with both your line manager and your mentor. In the end, the decision has to be yours as to what direction to take.

I would like to reply to a job advertisement, but the post is in my mentor's organisation. Can I do so?

Yes, no reason why not. There is no reason to think that you will be in a privileged position – although you may have learnt useful background information about the organisation, this will be no different from what you might have learnt from a friend working there.