



# The Royal Statistical Society

## Guidance Notes for the Royal Statistical Society Mentoring Scheme for its Graduate Statistician members

### 1. Aims and objectives of the RSS Mentoring Scheme

The Royal Statistical Society has set up a mentoring service for its Graduate Statistician members. Graduate Statisticians satisfy the academic requirements for award of the Society's full professional status of Chartered Statistician but do not yet have the necessary practical professional training and experience. General information about Graduate Statistician and Chartered Statistician membership of the Society is available in the professional membership section of the website, <http://www.rss.org.uk/professionalmembership>, and by email or post from the Society. Contact details are given near the end of this document, immediately before the "Frequently Asked Questions" section.

Most Graduate Statisticians are therefore career-young statisticians, who normally expect to be eligible to become Chartered Statisticians after about five years from their qualifying degrees, provided that they have undergone appropriate continuous professional development (CPD) over that period.

The aim of the RSS scheme is very specific: to help and advise Graduate Statisticians in respect of the CPD they need to undertake in order to prepare themselves 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.

The scheme has been set up in response to a need identified in a survey of Graduate Statisticians conducted in 2005. It is envisaged that it will be particularly valuable to Graduate Statisticians working either as singleton statisticians or in organisations employing very small numbers of statisticians, who therefore have very limited access to career advice that is specific to the statistical profession.

The aim is that mentors and mentees 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 totally separate department.

## 2. Expectations of RSS mentors and mentees

Because the focus of the RSS scheme is on advising Graduate Statisticians who aspire to Chartered Statistician status, the Society envisages that mentors will themselves already be Chartered Statisticians, probably with upwards of five years experience in a supervisory role after the conferment of Chartered status. Further, 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. 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. However, a one-day course on Effective Mentoring and Coaching is offered from time to time by the RSS Professional Development Centre (see <http://www.rss.org.uk/courses>) and this would be available to the Society's mentors with the Society paying the course fee. It is emphasised that it is not compulsory for the Society's mentors to attend this course.

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, thus contributing to their own CPD.

The time commitment that a mentor can offer is entirely for each individual to decide. This applies both to the number of mentees that a mentor is prepared to accept and to the time that can be devoted to advising any individual. It is difficult to provide guidance on the sort of time commitment that each mentoring relationship might involve because this is likely to vary considerably both between mentees and for any particular mentee over a period of time. For example, it may require several hours input during the "Direction setting" phase of the relationship (see section 3 below) but only periodic contact thereafter. Agreeing a time commitment is an important part of the setting up of a mentoring relationship. A mentor need feel no compulsion to continue an arrangement if it is felt that it has become too burdensome – see section 4 below.

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 approaching the Society to 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 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

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

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

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 and by telephone, with face to face meetings taking place only if both parties are willing to commit the time and effort to doing so.

**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 in section 1 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 they the mentee is working; for example its size, the nature of its business, and its overall policy on training and CPD. 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 both the other party and the RSS Office.

**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 (see <http://www.rss.org.uk/cpd>), 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 in the form of a portfolio that will facilitate their eventual application for Chartered Statistician status. 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.

The Society keeps a note of when Graduate Statisticians might be ready, in terms of "time served", to apply for Chartered status. About two to three years before that time, they will be contacted by the Society and invited to undergo a mid-term assessment. This is voluntary, but intended to be helpful so that the Society can advise whether the person's career appears to be going well, whether any further development seems to be required, and when Chartered status might be reasonably be applied for. The assessment is normally carried out by two members of the Society's Professional Affairs Committee. Confidentiality is of course respected.

A mentee is likely to be contacted in this way during the progress making stage of the mentoring relationship. In many respects, the mentoring relationship is itself a means of continuous assessment against the same criteria as the mid-term assessment, and so a mentee may regard a mid-term assessment as unnecessary. That is entirely a matter for the mentee's individual judgement. However, a mid-term assessment does give the opportunity for an opinion to be expressed by the body that will eventually be assessing the Graduate Statistician for Chartered Statistician status, and so the mentee may decide to go ahead with it. In such a case, the mentee may wish to ask the mentor to provide comments on the mid-term assessment form. Comments are in any case invited from the line manager but, if this person is not a statistician, it may be found difficult to put the mentee's professional development activities into context.

The final stage of the life cycle is **moving on**. With the RSS scheme, 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 to the Society for Chartered Statistician status. This will normally be after five years of post-qualification experience – the criteria are available from the Society's website (see <http://www.rss.org.uk/professionalmembership>) and by email or post from the Society.

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. Practical arrangements

Each mentee will fill in a form providing basic information about career to date and current work (including size of organisation etc) and a statement about what is expected from the mentoring relationship. This should facilitate the matching process (see below). It may perhaps also enable the RSS Office to identify at an early stage any mentees with unrealistic expectations, and take appropriate action.

The RSS Office will maintain a register of volunteer mentors. When a mentee submits details as above, these will be circulated in an anonymised form by e-mail to the register, and volunteers sought. (The anonymisation involves removal of names and addresses and details of the mentee's employer, other than the generic field of work.)

If a mentor might be willing to enter into an arrangement with a particular mentee, the mentor should reply accordingly to the Office. The Office will allocate a mentor on a first come, first served basis and provide e-mail addresses to each party. In other words, the mentors are self-selecting: the Office will make no attempt to match-make. An exception to this is that the Office will endeavour to avoid situations where mentors may inadvertently take on mentees within their own organisations. However, there may be situations where the Office is unaware of this possibility, and in such cases the mentor and mentee will need to decide carefully whether they wish to proceed.

It is the responsibility of the mentor to make the first approach to the mentee.

Some mentors may only be willing to take on one mentee, others may be able to take on more (and this may also depend on how demanding their existing mentees are). By circulating details of new would-be mentees to the whole of the register, the onus is on the mentors to decide each time whether they are prepared to take on another commitment, and thus self-manage their commitment to the scheme.

The Office will maintain a register of all mentoring relationships in operation at any one time to monitor take-up of the scheme. The Office may also contact mentors and/or mentees periodically to collect feedback on the success or otherwise of the scheme.

Mentors and mentees may withdraw from a mentoring arrangement at any time. If they do so, they must inform each other and also inform the RSS Office. No reason need be given, and any withdrawals will be without prejudice, but the RSS Office will endeavour to collect feedback on the reasons for withdrawal so that the overall mentoring scheme may be well managed. If either mentor or mentee withdraws and the mentee would still like to take advantage of the mentoring service, it may be possible to recruit a replacement mentor; this, however, would need the party who has withdrawn to give some reason (in confidence) for withdrawing, and it would be at the discretion of the Society.

## Contact details

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The Society's website is <http://www.rss.org.uk>. General information about all aspects of Graduate Statistician and Chartered Statistician membership and the Society's continuing professional development policy is available from the professional membership section: <http://www.rss.org.uk/professionalmembership>.

## 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 Graduate Statisticians seeking to enter the scheme.

The Royal Statistical Society's mentoring scheme is available to members of the Society who hold the status of Graduate Statistician (GradStat). 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 professionally qualified members of the Society. These are members who hold the status of Chartered Statistician (CStat) or, equivalently, may be Members or Fellows of the Institute of Statisticians (MIS or FIS). This status is only awarded to members who have gone through a rigorous application procedure designed to ensure that they satisfy specified criteria. Professionally qualified 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 Directory of Statistical Consultants (see <http://www.rss.org.uk/consultants>).

### **I feel that my mentee's career path is moving away from statistics.**

You should point out that this is what you perceive is happening, and, if appropriate, that the mentee's career path is likely not to lead to Chartered Statistician status. However, you should avoid dissuading a mentee from the chosen direction if that is how the mentee wishes to proceed. It may be appropriate at this stage to withdraw from the mentoring relationship.

### **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 and the RSS Office 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 contact is made with the RSS Office to see whether 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 contact the RSS Office 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 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.