

# Mentoring Policy



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The ICAS Foundation is a registered Scottish charity: No SC034836

## **Background**

The ICAS Foundation was launched in 2012 to meet an obligation to those who cannot gain access into the accountancy profession or follow a career in accountancy or finance without a helping hand.

Our objectives are to:

- Identify and support academically talented young people in need to realise their true potential.
- Mobilise the ICAS membership as donors, mentors and facilitators.
- Secure sufficient funding that makes it possible for us to award bursaries of up to £2,500 per annum to individuals whose parents or guardians earn under a defined threshold.
- Support students in securing a suitable internship during summer breaks to build skills and experience needed to enter the workplace.
- Provide mentor support through the ICAS Foundation mentoring programme.

The mentor will use their experience in a facilitative manner to support the career exploration and determination of the mentee. Mentoring is used to assist individuals at specific times of development or transition and lasts for a defined period of time. The relationship provides an opportunity for both the mentor and mentee to develop and benefit from the process.

## **Principles of Mentoring**

The following principles underpin the ICAS Foundation Mentoring Scheme:

- There must be shared understanding of, and agreement with, the purposes of the mentoring scheme and the process has to be understood by all those taking part.
- Mentoring is a constructive, developmental form of support and of mutual benefit to those taking part.
- A clear understanding of, and agreement on, the level of confidentiality will be required within the mentoring relationship.
- The mentoring scheme will reflect and promote a commitment to equal opportunities.
- Open communication and consultation will occur throughout the implementation and management of the scheme.

## **Recruitment**

1.1 Mentors must be a member of ICAS and be willing to adhere to all ICAS Foundation mentoring programme policies and procedures. Participants must:

- Complete a mentor application form.
- Agree to a minimum of two years commitment to the programme.
- Agree to offer one hour support per month.
- Attend mentor training sessions as required.
- Be willing to share email and telephone contact details with the mentee.
- Complete the screening procedure.
- Have a clean criminal history.

- 1.2 Participation in the Programme is on a voluntary basis for mentors. Mentees are automatically enrolled onto the programme when a bursary is awarded.
- 1.3 All bursary recipients must participate in the Programme.
- 1.4 The ICAS Foundation will respond to enquiries from potential new mentors within five business days.
- 1.5 Excellent service must be provided to mentors at all times, from first contact throughout the screening process and beyond.
- 1.6 Confidentiality for all potential participants will be upheld from the initial point of contact.
- 1.7 The ICAS Foundation reserves the right to refuse an application and shall not be obliged to provide reasons where an application is refused.

### **Screening**

- 2.1 As a minimum, two references will be taken. References should not be from close family members. At least one reference should be from current or most recent employer.
- 2.2 A face to face interview will be held where appropriate.
- 2.3 Protection of Vulnerable Groups (PVG) checks will be undertaken for mentors supporting students under the age of 18.

### **Training**

- 3.1 All mentors must read through the mentor guidance notes provided before initial contact with the mentee.
- 3.2 The mentor shall require to undertake such training as the ICAS Foundation may direct.
- 3.3 It is the responsibility of the ICAS Foundation to identify and co-ordinate appropriate training sessions.

### **Support and Supervision**

- 4.1 All mentors and mentees will have a point of contact in the ICAS Foundation.
- 4.2 Any issues should be brought to the attention of the ICAS Foundation immediately.
- 4.3 A mentor shall avoid any conflicts of interest which may arise through participation in the programme. If unsure whether a conflict of interest exists, refer to the ICAS Foundation for guidance.
- 4.4 A mentor shall act in accordance with the ICAS Code of Ethics at all times whilst participating in the programme.

### **Record Keeping**

- 5.1 All records must be kept confidential.
- 5.2 All written records produced should be appropriate to the needs of the mentor and mentee and should be accessible to the mentee and the ICAS Foundation.

- 5.3 A record of all mentor/mentee meetings must be completed with a copy being sent to the mentee within 10 business days of the meeting.
- 5.4 A copy of the updated record log to be sent to the Head of the ICAS Foundation on a quarterly basis as a minimum.
- 5.5 Data Protection Act 2018 to be followed, and in particular, for retention and destruction of records.
- 5.6 As an additional security measure, each Mentor Log is password protected by the ICAS Foundation. The password will be communicated to the mentor and student via email and this will be required to access and edit the document.

### **Confidentiality**

- 6.1 A mentor shall treat all of their dealings under the Programme, and all information obtained through the Programme as confidential.

### **Expenses**

- 7.1 All and any expenses incurred by the Mentor in respect of the programme shall be the responsibility of the Mentor.
- 7.2 Any expenses incurred by the mentee in respect of the mentoring programme shall be the responsibility of the mentee. In exceptional circumstances the ICAS Foundation may give consideration to meeting mentee expenses if prior approval given.

### **Termination**

- 8.1 The ICAS Foundation reserves the right to terminate Mentor status at any time.
- 8.2 The ICAS Foundation reserves the right to terminate Mentee status at any time.
- 8.3 A mentor may resign from participation in the Mentoring Programme by giving one months' notice.

### **Intellectual Property**

- 9.1 All copyrights, trademarks and other intellectual property rights relating to any support materials which may be provided by the ICAS Foundation will be and remain the property of the ICAS Foundation.
- 9.2 Participation in the programme does not authorise mentor or mentee to use the ICAS Foundation or ICAS logo in any material or imply endorsement by the ICAS Foundation or ICAS.

### **How we use your information**

- 10 The ICAS Foundation is fully committed to handling student and mentor personal information in accordance with data protection legislation and best data protection practices. The information provided to the ICAS Foundation will be processed lawfully and fairly, in accordance with the privacy notice on the ICAS Foundation's website (<http://www.icasfoundation.org.uk/>)

All mentors should take steps to ensure that information they hold regarding students is shared only with the ICAS Foundation and is kept securely and processed in accordance with the Data Protection Act 2018.