



# Welcome Guide for Mentors

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# Section 1: Welcome!

As CAs and members of ICAS we are very fortunate to belong to a professional community with strong values. We are proud of our heritage, the quality of our education and our professional responsibilities.

The ICAS Foundation mentoring programme gives you, the local and global community of CAs, the opportunity to share your experience and success with those who aspire to follow in your footsteps, but who may struggle even to get on the first rung of the ladder. We very much appreciate you volunteering your time to support a young person through their university journey, helping them to navigate academic, personal and professional challenges and make the most of the opportunities they are offered through our programme.

This resource has been designed to help you and your mentee make the most of your mentoring relationship, supplementing your existing knowledge and skills. It is provided to all ICAS Foundation mentors, and should be read and considered alongside any other role-relevant policies, procedures and guidance.

**Norman Murray CBE CA, ICAS Past President & Chair of ICAS Foundation Board of Trustees**

# Section 2: Mentoring with the ICAS Foundation

All students on the ICAS Foundation programme are enrolled on our mentoring programme, which matches them with a CA or similarly qualified individual, who can help guide and support them through their first steps into a career in accountancy and finance.

In the ICAS Foundation, we see the mentoring process as:

- A mutually beneficial relationship, which allows both the mentor and student to develop from the process.
- A structured system used to assist individuals at specific times of development and lasting for a defined period of time – in this case, the duration of our student's undergraduate degree.
- An opportunity for a mentor to use their experience to support the career exploration of their student.

Our mentoring programme is not designed to be a formal relationship where defined skills are taught to all students, or a management relationship where the mentor provides ongoing direction of studies or activities. The emphasis is on enabling and empowering the student to take charge of their own development.

As a key part of the support we provide to our students, the ICAS Foundation Director has overall responsibility for the mentoring programme. The implementation, monitoring and review of the mentoring programme and its associated procedures and guidance is managed by the ICAS Foundation Operations and Engagement Manager.

# Section 2: Mentoring with the ICAS Foundation

The main principles that underpin the ICAS Foundation Mentoring Scheme are:

- Both student and mentor understand and agree with the mentoring scheme's purposes and processes, as set out by the ICAS Foundation.
  - Mentoring must be constructive and developmental, of mutual benefit to both student and mentor.
  - The mentoring relationship depends on both student and mentor engaging with the process and maintaining an open, respectful and engaged approach to meetings.
- Both student and mentor clearly understand and agree the level of confidentiality in the mentoring relationship, and the requirement for the ICAS Foundation team to be kept informed of mentoring progress.

The mentoring process should be a positive experience, enabling and developing a greater sense of confidence and enhancing the professional and personal skills of both parties. Mentoring should empower our students, and it is therefore vital that their mentor guides them to take ownership of their personal development.

Participation in the mentoring scheme is a mandatory requirement of your student's participation in the Foundation programme, therefore it is very important that as a mentor, you engage with the student and support them in meeting the programme requirements.

# Section 2: Mentoring with the ICAS Foundation

Most ICAS Foundation students have limited knowledge of, and no personal contacts within, the accountancy profession. Our mentoring programme allows students to learn more about the profession, develop a professional network and an understanding of the benefits the CA qualification can bring.

Your involvement as a mentor supports the personal and professional development of an undergraduate student by:

- Giving them an insight into your work and career.
- Offering advice and guidance with their transition from school / college to undergraduate to young professional.
- Support students in their thinking and understanding of various educational opportunities.
- Assisting potential graduates with their career thinking and practical tips for successful job search strategies.

The programme should also benefit you as the mentor, by helping you to:

- Gain personal and professional satisfaction in helping a university student.
- Gain recognition from your peers and have the opportunity to connect with other mentors.
- Develop your interpersonal and coaching skills.

# Section 3: Mentoring responsibilities

The **responsibilities** of an ICAS Foundation mentor are set out in two documents:-

- The Mentor Volunteer Role Description:
  - Our role description highlights the key information mentors need to understand their volunteer role and its responsibilities.
- The Mentor Volunteer Agreement:
  - When an applicant is accepted as a mentor, they are asked to sign a volunteer agreement to confirm they are happy to meet the responsibilities of mentoring and understand the role of the ICAS Foundation.

Most importantly, our mentors are expected to:

- Stay in contact with their student on at least a monthly basis, generally meeting in person or by video call.
- Record all monthly contact in their mentoring log and make this log available to their student.
- Return the log to the ICAS Foundation on a minimum quarterly basis (usually March, June, Sept & Dec).
- Respond to communication from their student or the ICAS Foundation in a timely manner.
- Let the ICAS Foundation know as soon as possible if they have any concerns about their student.
- Keep the ICAS Foundation up to date with new contact details or changes which may impact on mentoring.

# Section 3: Mentoring responsibilities

## **Regular mentoring meetings and contact**

As a mentor, your main responsibility is to regularly keep in touch with your student. Our expectation is that you will meet once per month (wherever possible) to discuss their academic progress and university experience. This may include being proactive about communicating with your student and arranging meetings, particularly early in the mentoring relationship, while encouraging them to take ownership of the meeting process. Outwith your meetings, you should also be reasonably available to your mentee by alternative methods of communication.

## **Responding to communication from your student or the ICAS Foundation**

It is very important to our students that their mentor is reliable and consistent in responding to their messages, so that they feel supported and valued. It is also important that mentors reply promptly to ICAS Foundation communications and proactively return their mentoring log, so that we can focus our time on providing additional support where needed and developing the Foundation to help more students in the future.

## **Changes to your personal details**

If your contact or employment details change, you must update the ICAS Foundation with your new information as soon as possible so that you can be contacted with regards to the mentoring programme.



# Section 3: Mentoring responsibilities

## Quarterly mentoring log

Your log should maintain a record of all mentor / mentee meetings and important communications. After a meeting, the log should be forwarded to your mentee within 10 business days, with the opportunity for them to make changes as appropriate. If you are unable to arrange a monthly face-to-face meeting with your student on occasion, you should record your other communications during the month to show that you've maintained a dialogue with your student during that time.

Your log should be forwarded to the ICAS Foundation quarterly at minimum (we recommend March, June, September, and end December / early January to coincide with important points on the academic calendar). For data protection purposes, the log should be maintained in the password protected document we provide.

It is **very important** that your mentoring log is returned on a regular basis as requested. Mentoring logs are carefully considered by the ICAS Foundation team when they are returned, and provide a useful source of information about your student's experience. If your log does not contain sufficient information, the ICAS Foundation may contact you to request additional details. **Mentoring logs which are not returned on a quarterly basis or at the direct request of the ICAS Foundation will be followed up, and regular failure to return logs on time will be recorded.**

# Section 3: Mentoring responsibilities

## **Confidentiality, Record Keeping and Intellectual Property**

All mentoring activity under the ICAS Foundation programme, and all information obtained through the mentoring programme, must be treated as confidential between you, your mentee and the ICAS Foundation. No information should be shared outwith this group without the express permission of the relevant individual(s). As a mentor, you must take steps to ensure that the information you hold about your students is shared only with the ICAS Foundation and kept securely in line with our guidance.

All written records produced should be appropriate to the needs of you and your mentee. Records must be accessible to you, the mentee and the ICAS Foundation in line with the timescales in the volunteer mentor agreement, or as soon as possible at the specific request of the ICAS Foundation. All documentation created during the formal ICAS Foundation mentoring process remains the property of the ICAS Foundation.

If you leave your employer, it is your responsibility to ensure that all ICAS Foundation material has been removed from the company records. In particular, you must ensure that no documentation is retained in the company records which includes the mentee's personal information.

Please note that participation in the programme does not authorise you to use the ICAS Foundation or ICAS logo in any material, or imply endorsement by the ICAS Foundation or ICAS.

# Section 3: Mentoring responsibilities

Student participation in the mentoring programme

Every student joining the ICAS Foundation programme signs a Letter of Conditions, where we set out our expectations of all students on our programme. This includes:

- Meeting our academic expectations, by achieving an average above 60% across their modules each academic year.
- Meeting our communication requirements, by returning a report and their results each January and June.
- Actively participating in the mentoring programme, fully engaging with their assigned mentor and meeting or communicating with them on a regular (generally monthly) basis. We also explain to students that this condition is reviewed through the quarterly log that their mentor is required to return to us.

**Participation in the mentoring scheme is a mandatory requirement of your student's participation in the Foundation programme (and by extension, their bursary funding), therefore it is very important that as a mentor, you engage with the student and support them in meeting the programme requirements.**

If a student does not respond to your communications and you are not aware of any reason for their lack of reply (for example, if they are focused on revision during an exam period), please let us know as soon as possible so that we can make contact with the student. If your log does not demonstrate that contact is taking place on a monthly basis, the ICAS Foundation may contact you for further details.

# Section 4: Mentoring support

As one of our volunteers, we are dedicated to providing you with the support necessary to carry out your role effectively. This includes:

- Ensuring that we make the best matching choice possible for the student and the mentor.
- Providing you with relevant documentation and any additional resources required for your role.
- Advising you of a named person you can contact to discuss your mentoring and anything arising (generally the Operations and Engagement Manager).
- Communicating with you quarterly (at minimum) to track the progress of your mentoring relationship and make you aware of any changes or activities planned for the ICAS Foundation.
- Offering you assistance with your role through peer support opportunities, training opportunities and individual or group manager support.
- Following up with your student where you have raised a concern or we have identified an issue.
- Giving you the opportunity to provide feedback on the mentoring programme and following up on any feedback or questions you may have regarding your involvement as a volunteer or the programme more widely.
- Ensuring your personal information is kept confidential and that the information provided to us is processed lawfully and fairly, in accordance with the ICAS Foundation Privacy Policy on our website.

Training, support and supervision of mentors is carried out in line with the ICAS Foundation Mentoring Policy.

# Section 4: Mentoring support

## Events

The ICAS Foundation arranges events and training sessions, where students and mentors have the opportunity to meet and share their experiences. Details are issued to mentors as events are arranged.

## Expenses

Any expenses you incur will be handled as per the ICAS Foundation Mentoring Policy. Any expenses incurred by your mentee in respect of the mentoring programme shall be the student's responsibility; in exceptional circumstances, and where prior approval has been given, the ICAS Foundation will consider meeting mentee expenses.

## Mentoring Feedback

The ICAS Foundation is happy to hear from mentors who have constructive suggestions and comments on their mentoring experience. On occasion, we also use more formal feedback procedures such as surveys to collate information.

We also ask students for feedback on their mentoring experience during their half-year and year-end student reports, including the frequency of meetings and how helpful they have found the assistance.

# Section 4: Mentoring support

The ICAS Foundation sends regular email updates to current students, including information from partner organisations, details of internships and graduate roles, or information about events and other opportunities. We may also distribute new or updated resources by email, such as our Student Development Toolkit (available on our website under Community > Current Students). Mentors are included in these emails where applicable.

We encourage engagement with our social media channels, as we often post quick updates on these channels for events, news and opportunities which may become available.

- Facebook [www.facebook.com/ICASFoundation](https://www.facebook.com/ICASFoundation)
- Twitter [twitter.com/ICASFoundation](https://twitter.com/ICASFoundation)
- LinkedIn [www.linkedin.com/company/icasfoundation](https://www.linkedin.com/company/icasfoundation)

# Section 5: Matching mentor and student

Our matching process is carefully considered to take account of the student and mentor's:

- Geographical location
- Background and interests
- Personal circumstances

Where possible, we assign all students a mentor at the start of their university degree. If insufficient mentors are available at time of matriculation, we assign mentors throughout the academic year as and when they become available. In general, students are supported by the same mentor throughout their university degree. Re-matching usually only takes place under exceptional circumstances.

We introduce mentors and students by email, and provide the mentor with the student's email address to make first contact. If a mentor has difficulties in making contact with their student, we ask them to let us know after a couple of weeks, in case it has taken some time for the student to settle into university. You may like to include a short introduction to yourself in your initial email, so that the student knows something about you when you first meet.

Before meeting your new student, you may also wish to review the Welcome Guide for New Students (available on our website) to understand the requirements and responsibilities for ICAS Foundation students.

# Section 5: Matching mentor and student

Your **first meeting** is an opportunity to introduce yourself and learn a bit about your new mentee. It is very important, as it sets the stage for the relationship and establishes the parameters essential for its success.

When setting up the meeting:

- If you are meeting in person, arrange a neutral and public venue such as a café.
- If you are meeting virtually, make sure your student has access to a quiet space and suitable technology.
- Ensure you are prepared with questions to prompt the conversation if required.

You may want to consider some of the following questions for yourself, or to discuss with your mentee:

- What experience has helped you prepare for your mentoring role, and what did you learn?
- What do you feel makes a successful mentoring relationship?
- What do you think the mentee will gain from the relationship?
- What do you think you will learn from the relationship?
- What potential challenges could occur in the mentoring relationship? How can these be resolved?
- What is the anticipated time commitment for the mentoring relationship? How will this time be found?
- How do you think the mentee will be feeling? Consider their potential preconceptions about mentoring and Chartered Accountants.



# Section 5: Matching mentor and student

**Ongoing meetings** provide a space for discussing experiences and issues, giving and receiving feedback, and talking through options for future action and development. It is important that you use skilful questioning and a non-directive, non-judgemental approach. Topics for discussion may include:

- Reviewing experience and identifying achievements or areas for development with timescales.
- Giving feedback e.g. reviewing (not marking) coursework where students are experiencing challenges.
- Exploring options e.g. choosing academic modules, exploring work experience opportunities.
- Coaching specific skills and techniques e.g. presentations, academic concepts, interview preparation.
- Discussing professional issues e.g. expectations of the workplace, advancing technology in accounting.
- Setting targets for future action e.g. writing a CV, developing knowledge on potential career paths.

While students are in the first year of their degree, conversations will generally centre on personal development and academic support, with this progressing to include career exploration and planning.

Over time and as the mentoring relationship develops, your mentee may find it useful to consider additional processes such as learning logs, self-review journals and feedback. Feedback is essential to the development of the mentee, so it is important that you have a trusting and respectful relationship with your mentee, focused on ensuring constructive outcomes. It is also important to build in review meetings, to keep track of the mentoring programme's aims and objectives and consider how your relationship is developing.

# Section 6: If you're having difficulties

If your student is having any difficulties, we encourage you to let us know as soon as possible. Our aim is to help all of our students achieve the best academic results possible, however we are unable to help if we are unaware that a student is facing challenges.

## Student Academic Challenges

If a student is having difficulties with their studies, we encourage them to inform their university tutor or adviser as soon as possible for support and guidance. Academic staff are there to help students, for example if a student has queries about their coursework, or is unsure how their results have been calculated. If your student achieves grades lower than anticipated, it's particularly important to understand at an early stage if they need to improve coursework research or exam technique.

Most universities have academic and study skills support facilities, which can assist with academic writing workshops, study skills and planning, exam technique preparation or one-to-one coursework review. Mentors should encourage mentees to consider utilising this support to improve their academic performance or feel more confident about their study skills.

# Section 6: If you're having difficulties

## Student Academic Challenges

As students are required to submit their exam results to the Foundation after each semester, we are probably aware of any issues but please get in touch if you are concerned about your student's academic progress.

Where a student is achieving multiple or ongoing grades below the Foundation's expectations (60% or above), we may arrange to speak directly with your student to assess their current academic standing and if they require any additional assistance.

In some situations, ongoing failure to meet our conditions, including not meeting our grade requirements, may mean that we withhold payment of an instalment of the student's bursary, or that students are unable to continue as part of the ICAS Foundation programme.

Removing a student from the ICAS Foundation programme is a decision which is not taken lightly, and we will not take this step without having made every effort to understand the student's situation and, where possible, support them to resolve any challenges.

# Section 6: If you're having difficulties

## Student Academic Challenges

If a student is having personal difficulties, then please let us know as soon as possible. Students face many pressures while studying, especially if living away from home, and some of our students come from difficult circumstances which may continue to have an impact after they start attending university. As the mentor, your role is to support the student to the best of your ability. If you are unsure how to support your mentee in a particular situation, please contact the Foundation for assistance.

If a student has been ill or a severe personal difficulty is likely to impact on their academic results, please encourage your student to inform their Adviser of Studies or utilise the university's facility for reporting Good Cause / Exceptional Circumstances, which allows personal circumstances to be taken into account when marking coursework or exam results. Please also encourage your student to let the ICAS Foundation team know as soon as possible, or get in touch with us directly so we can offer appropriate support to the student.

Since the pandemic, many university students have reported additional challenges around their mental or emotional wellbeing. If your student describes similar challenges, please encourage them to take up any counselling facilities available at their university or to speak to their GP, as your student may need additional support beyond the mentoring relationship.

# Section 6: If you're having difficulties

## Other Mentoring Concerns

All mentors can have concerns, whether they are working with their first mentee or if they have mentored before but encountered a new situation. You may be worried about whether you and your mentee will get on, whether you will have enough topics to discuss or what could go wrong in the relationship. Your mentee probably has the same concerns!

If your student stops communicating with you, once you've tried all reasonable forms of communication then please let us know. As participating in the mentoring scheme is a requirement for students, it's important for us to know if they have stopped engaging. Failure to respond to mentor communications can also be the first indication of wider challenges being experienced by the student.

The ICAS Foundation is committed to ensuring an enjoyable and rewarding experience for mentors and mentees. Although it is rare in a mentoring relationship, there will be occasions where the mentor and the mentee struggle to work together to such an extent that there may be complaints or a grievance. Please discuss any concerns regarding the mentoring programme with your ICAS Foundation named contact; where more serious or formally raised, mentor concerns, complaints or problems are handled in line with ICAS Foundation policy.

# Section 6: If you're having difficulties

## Mentor Personal Challenges

If you are having difficulties which may impact on your mentoring role, then we would encourage you to let us know as soon as possible.

Over the course of the mentoring relationship, we know a mentor's circumstances can change significantly and unexpectedly, whether at work or in their personal lives. We are here to support you in your volunteer role, so if you need to step away from volunteering for a short period or if you are unable to continue mentoring at the present time, please get in touch so that we can discuss the best option for you.

It is helpful to remember that many companies offer employer supported volunteering as part of their employee benefits package. Depending upon your employer, you could choose to use these days to support your mentee or to attend ICAS Foundation events.

# Section 7: Additional information and resources

Along with our mentoring programme, the ICAS Foundation provides additional support to its students:

- Bursary funding of between £1000 and £2500 per year (depending on the student's household income).
- Help in finding internships and graduate opportunities through promoting vacancies.

We also make other opportunities and resources available to students on an ad-hoc basis.

- Our Student Development Toolkit, first published in 2020, includes a wide range of information on personal development tools and career resources. The most up to date version of this toolkit is available on our website at [Community > Current Students](#).
- Access to ICAS events such as in-person career fairs, virtual career events and webinars

You may also want to consider:

- What resources are offered by your student's university careers service, including mock interviews, CV writing sessions and practice psychometric testing.

# Section 7: Additional information and resources

## Work Experience, Internships and Graduate Roles

We actively encourage students to be proactive in searching for relevant work experience, internships and graduate role, and mentors should encourage their mentee to make the most of these opportunities. During and after undertaking a work experience or internship role, mentors can help their student reflect on the experience, evaluate any constructive feedback received in the workplace and use this to help plan future areas of development or interest.

There is more information about applying for internships and graduate roles in our Student Development Toolkit. In general, students will apply for different opportunities at different times during their studies:

- Work experience placement or spring insight opportunities are open to students in the second year of a four year degree, or first year of a three year degree.
- During the penultimate year at university, students can apply for an internship to take place in the summer prior to their final year.
- During their final year, students apply for a graduate job to start after they finish their studies.



# Section 7: Additional information and resources

## Internships and Graduate Roles

For most students, applying for work experience opportunities, internships and graduate jobs will be their first experience of competitive application processes. The earlier students can begin this experience, the more opportunity they have to learn from the process. Mentors can help in a variety of ways:

- As early as possible, help your student plan a structured approach to applications, e.g. a spreadsheet listing preferred companies and roles, opening dates, application dates and follow-up / outcome notes.
- Review their sample CV and cover letter, and discuss the importance of tailoring these for each application
- Review potential application questions for standard application forms and how these could be answered
- Review interview questions and hold a sample interview, potentially involving colleagues for impartial feedback

The ICAS Foundation generally collates lists of available opportunities and distributes these to students and mentors when applications are open for relevant roles. We also post opportunities on our social media feeds.

# Section 7: Additional information and resources

## Internships and Graduate Roles

If your student is struggling to find an internship or graduate job:

- Firstly, establish what steps students have taken to find and apply for opportunities, including [becomeaca.org.uk](https://becomeaca.org.uk) and any vacancies highlighted by the ICAS Foundation.
- Check if they are unsuccessful with application forms, CVs or both, or if they struggle at the interview stage.
- Find out if they have looked into available support from their university's career support services.

We work with partners to offer exclusive opportunities for ICAS Foundation students, or sometimes receive direct communications from companies or requests to provide CVs for consideration. When we have such opportunities, we will look for students who have been unsuccessful so far but have a good academic record, so it is important that students keep us updated with their applications progress.

If students choose to delay their application to a graduate job, and instead apply for a January start or as part of the next Autumn's intake, it's important to remember that students will be competing against students who graduate the following year – they may find it more difficult to obtain a role unless there has been a specific reason for the delay, or they plan to work / gain alternative experience during the gap year.

# Section 8: Ending the mentoring relationship

## Mentors with graduating students

Normally, the ICAS Foundation facilitated mentoring relationship will end at the student's graduation. We offer ongoing support to all of our Foundation graduates through our Alumni programme, and more information on this is sent to students after their graduation.

It is important that the relationship finishes on a positive note and celebrates success in the final review. We are aware that many of our students and mentors do stay in touch following the student's graduation, but this is a decision for the mentor and student and is not part of our mentoring programme.

Mentors with graduating students are asked to:

- Schedule a final meeting to tie up any outstanding actions and celebrate the mentoring relationship.
- Send their final mentoring log covering all meetings and communication up to graduation.
- Let the Foundation know if they would like to be considered for supporting a student starting university in the next academic year.
- Provide any feedback they may have on the mentoring experience.

# Section 8: Ending the mentoring relationship

## Early Termination of the Mentoring Relationship

We ask all ICAS Foundation Mentors to commit to mentoring for a minimum of 2 years at time of matching. While most mentors are in a position to mentor their mentee for the full term of their degree (up to 4 years), we understand that this is not always possible. In line with the ICAS Foundation Mentoring Policy, you may end your volunteer role at any time, however we do request that you provide reasonable advance notice of your resignation where possible, to ensure a limited impact on your mentee. If you are unable to continue mentoring, we will rematch your mentee with a new mentor for the remaining period of their studies – please contact us as soon as possible if this may be required.

In line with our Mentoring Policy, we reserve the right to end a mentor's volunteer role given due cause. The ICAS Foundation takes its responsibilities to our students very seriously, therefore we also reserve the right not to rematch a mentor given due cause. This may include repeated failure to return mentoring logs on time, or to regularly meet with their previous student.

We also reserve the right to terminate the mentee status of a student at any time, given due cause. We do not take this step lightly, and mentors will be informed if this step is under consideration, as ending the mentoring relationship may also result in the student's removal from the ICAS Foundation programme.

# Section 9: The ICAS Foundation staff team

Name	Job title
Sanjay Singh	Director
Amy Drysdale	Operations and Engagement Manager

For all initial enquiries, please contact [enquiries@icasfoundation.org.uk](mailto:enquiries@icasfoundation.org.uk).

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