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INSTITUTE FOR
**ACADEMIC
DEVELOPMENT**

Setting up a local researcher mentoring scheme



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Practical suggestions for setting up a mentoring scheme in your School/Centre

‘At the individual level, the added value that mentoring and coaching can bring include enhancing the quality of work planning, broadening or widening perspectives and empathy for other viewpoints and the building of new contacts or networks across the institution.’ Guccione and Hutchison “Coaching and Mentoring for Academic Development, 2021”

Why Mentoring?

Mentoring, as a career development opportunity, supports researchers to learn and develop, through speaking with others, often more experienced academics, who have similar interests or backgrounds. The IAD provides support and information for individual researchers looking to engage in mentoring opportunities. However, we are also aware that Schools/Centres are often interested in setting up and running local level mentoring schemes. This information is designed to support this.

To create this resource, the IAD spoke to colleagues in CMVM (Easter Bush) and CSE (Biology, Physics and Informatics) who were happy to share information around how they run and manage their programme.

Why should you consider setting up a local scheme?

- They allow researchers to receive advice and guidance from someone in a similar discipline, where the career progression and opportunities can be distinct to a subject or area of research
- They can be set up and designed to address local needs and priorities, often having a better understanding of the local values, expectations and behaviours that influence the research culture.
- They can support researchers’ success at receiving a mentor who is a suitable match to their career stage and needs, due to lower numbers and a smaller, locally organised programme
- Although the main benefit to any mentoring partnership is aimed at the mentees and mentors who take part, there is also likely to be a benefit to the School/Centre of a local scheme, through the sharing of local knowledge, expertise, and opportunities to the researcher and research being undertaken.

This guide to setting up local mentoring schemes includes hints, tips and advice from colleagues in different Schools/Centres, who currently run local mentoring schemes.

Before you consider setting up a mentoring scheme, do check there isn’t anything already running in your School/Centre that you could be part of and support.

Local schemes - what to consider:

1. Your Audience: Who do you want to benefit from the mentoring scheme?

Most of the existing local schemes run their programme for a wide research audience, such as: any non-permanent member of research staff, early career PIs, including research fellows, and all academics (including PhD Students, postdocs, fellows and group leaders) with only one scheme aimed purely at postdocs. One centre is also considering expanding to professional services, with the schemes being separate but open to any crossover depending on the needs of the mentee and the core roles within the School/Centre.

Tip: What type of programme you run, will depend on your School/Centre priorities and structure, so make sure you know what they are before setting one up.

- Do you know what your School / Centre priorities are, or know how to find out?
- Do you know who your target audience would be?

2. Frequency: When/how often to run the programme

How you manage a scheme, and how often it runs, can depend on the type of scheme and its focus, the School/Centre's resources available, and the number of mentors available.

Most local schemes confirmed that their programmes are ongoing throughout the academic year and all require a level of structure, organisation and administration. This includes, putting out regular calls/emails about the scheme during the year and matching taking place at various points (usually twice a year, but could be more or less frequent).

SNAPSHOT: The school of Biological Sciences' "SBS ECR Mentoring scheme" is open to staff, throughout the year. This is to support their process/system of all new staff in the school, on appointment, being alerted to the scheme and offered a mentor (This offer to new staff is optional, and any decision can be reviewed again at any point). Therefore, their scheme is constantly running to allow anyone new to be given the opportunity to take part.

One factor, which could determine how often you run your programme, is being able to recruit enough mentors. How you communicate the benefits to being a mentor is fundamental to encouraging engagement. In addition to helping colleagues develop in their career, on a personal level it can also help improve communication and interpersonal skills and allow the opportunity for personal reflection, so being a mentor can also provide some key development opportunities.

Tip: Ensure any promotional materials and messaging that goes out about your mentoring programme, also highlights all the benefits to being a mentor too. The IAD have a resource which can help with this: [Mentoring – Being a Mentor](#)

SNAPSHOT: *The School of Informatics Mentoring Scheme is running Group mentoring to ensure that as many as possible mentees are matched, with 1 mentor to 2-3 mentees per group, and this can also be another way to tackle a possible lack of mentors.*

Tip: there are always going to be people who would be happy to be mentors, but don't put themselves forward, approach them and ask them to take part. There also will be people who are in mentoring partnerships organically, consider asking them to sign up to the scheme with their partnership, so that they can be part of the programme, receive any communication and information related to the scheme and possibly be included in future matching.

- *Are you aware of any colleagues who are, or have been, mentors you could ask to take part in your programme?*
- *Do you know of any informal mentoring partnerships currently happening, that could benefit from being part of your programme?*
- *Who could you ask about existing mentoring partnerships in your School/Centre?*

3. Promotion: How to get researchers engaged and involved

Communication can be tricky, with researchers already receiving large amounts of emails. Most local schemes still used emails to promote their programmes, but also include additional measures to promote the opportunity to researchers, such as:

- Encouraging line managers to speak with their postdocs about this development opportunity
- Promoting at research socials/research staff society events and School events
- Including the opportunity in official procedures, e.g., welcome emails, inductions
- Developing a school/centre webpage with information on mentoring, and the local programme available

SNAPSHOT: *The SBS ECR Mentoring scheme ensures that all post-docs are sent a welcome email when they start asking them to contact and meet with local institute Post-Doc Advisor (PDA) (six institutes in SBS, six advisors). At meeting, the PDA provides information on scheme and asks post-doc to describe what they are looking for in mentor. Based on that, they identify candidate mentors from our spreadsheet of willing mentors across school (all PIs). PDA puts them in contact with preferred mentor and supports initiation of mentoring relationship.*

SNAPSHOT: *The Easter Bush Mentoring Scheme/Programme is planning an event to bring everyone together, celebrate the programme, get people to share experiences and get a speaker, encouraging people to sign up to the scheme.*

4. Systems: how to manage registrations and do matching

All local schemes use excel to manage registrations and do programme matching. All information can be stored, with extra columns added for dates, mentor name, matches made, etc., with easy sorting and allowing quick reporting and balancing of mentoring partnerships.

TIP: Setting up a simple and easy MS Forms can allow researchers to register quickly, with the information being pulled through to an excel to start matching.

SNAPSHOT: *The School of Physics have an excel in their institute for matching, but it also includes upcoming arrival and contract dates, likelihood of funding extensions etc., to allow the postdoc advocate to be aware of potential mentee/mentor numbers, and who to approach with the opportunity.*

Local schemes - Challenges/Successes/Benefits

Organisers of current local schemes at the university have provided some information on what they feel are things to be aware of when running a mentoring programme, but also what can be positive and rewarding.

Challenges of running a local level mentoring programme:

- *Engagement:*
 - It can often be hard to get researchers to understand why a mentoring relationship would be beneficial, and therefore why they should take part in the development opportunity. Many researchers may already feel they receive mentoring from line manager.
 - Reaching researchers is hard, communication about an initiative or development opportunity can be difficult to convey, most do not respond to generic group emails
- *Matching:*
 - As programme organiser, it can be hard to keep on top of mentoring partnerships. Leaving the decision about how often to meet and when should be left up to the mentor and mentee to agree, once matched, but keeping on top of this and checking if happening can often be difficult.
 - It needs someone in a specific role in the programme and School/Centre to oversee the matching, which can be time consuming and challenging.
- *Mentors:*
 - Recruiting mentors, getting enough for effective matching. Establishing and co-ordinating a mentoring pool, may require a lot of support from School / Centre leadership to oversee this.
 - Due to workload, academic staff often don't feel they have time to commit to being a mentor.
 - Academic staff with caring responsibilities, or part-time, may find it hard to engage in this opportunity.
 - Getting colleagues (especially PIs) to understand what mentoring is and to engage can be hard
- *Confusing mentoring with the Annual Review process:*
 - Researchers could consider the annual review process enough, in terms of setting their objectives and workload, not realising that mentoring is something different.
 - University-wide practise is that the immediate line-manager carries out the formal annual review, researchers may not realise that local mentoring scheme provides

access to a different, but still senior member of academic staff and thus a broader perspective.

- *Careers Support and advice:*
 - Ensuring mentors can advise on all career paths; both academic and alternative careers outside academia, can often be challenging
- *Mentoring Groups:*
 - If going down the option of setting up a mentoring group, this is a great way to get groups of researchers together with a mentor, however depending on who registers the mentees could have quite different mentoring needs, so could make the mentoring groups quite challenging.

Suggestions on how to overcome challenges:

- Feeling like researchers are not engaging, may not be such an issue. Even if 50% of researchers are matched to a mentor through your scheme, this is positive, especially if it's presented as an additional/voluntary opportunity.
- Setting up mentoring for new researchers, getting them when they arrive and giving them access to another member of staff, could make engagement higher
- Clarifying to the researcher how mentoring would be beneficial (e.g., having a slightly more external perspective on their work, issues, career development etc.)
- Senior management support is vital, getting the message out that it's not a requirement to act as a mentor, but setting a level of expectation to do it
- Make it clear in communication to researchers that taking up a mentoring opportunity is separate to your annual review, and that the mentor should not be your line manager
- Support academic mentors in the mentoring partnerships deal with career focused questions, by highlighting the careers support from IAD, especially the 1:1 consultations
- Approach institute level PI groups at PI meetings to describe the scheme and recruit mentors is key for building mentoring pools
- Engagement and support from staff to maintain staff lists and emails is critical to promoting the scheme
- Encourage researchers to access IAD mentoring resources and support
- Draft a clear set of guidelines on expectations from mentors and mentees

Successes of running a local level mentoring programme:

- Those who do engage appreciate access to someone at a higher level in the same broad field, in a position they may be aspiring to themselves.
- Avoiding the need to travel across town or to a different campus for a 1:1 meeting, with colleagues likely to be closer together and easier to arrange to meet nearby.
- (informal) very positive feedback from some of our researchers regarding how valuable they have found the scheme, having someone to approach for help when major issues arise.
- People get assigned to mentors (quickly and when they want them) who fit their needs and are committed to mentoring them, something that would prove difficult with a wider university scheme
- People can change mentors effectively when their needs change or if partnership not working.
- Having a colleague who knows the people on the mentor pool responsible for oversight of mentor pairing and support is critical to success of scheme.
- Self-selection of mentors can be problematic - mentors get over-loaded/under-loaded and mentees (especially post-docs) seem to rarely know what they want. Discussions with local

colleagues can help them develop a clearer idea and help identify a person most likely to both have time and be able to support them

- Having cross-institute discussions, when mentors are required from other institutes, has been really powerful - and many of our mentors now come from outside mentee's institute.

Benefits of running a local level mentoring programme (to School/College and researcher)

- External perspective on work/research/career stage etc. for our researchers is extremely valuable, and helps them approach the next stage, develop their own fellowship or faculty applications too.
- It lets the School show a commitment to our researchers, and helps individuals feel more integrated within our community.
- Showing support for career development of researchers is (quite rightly) becoming a requirement of many external funders - this is something specific that can be highlighted in grant applications (and I think is reflected in the high-level of grant success we have)
- Removes the line manager from what can be a single point of contact for researchers. I think this is vital for both the researchers and the line manager themselves
- It is something that can be highlighted in job adverts and/or at interview stage by mentors/mentees?
- Building a more supportive research environment and helping researchers pursue career directions that suit them best will surely end up leading to a better and more productive working environment for all
- You can match people quite nicely and if people are looking for quite specific things, you can work out where that might be and who might fit into it
- Allowing postdocs to build relationships with someone they wouldn't normally come and day to day contact with, getting asked very different questions creating a broad experience

Mentoring Resources

Consider providing resources to your mentors and mentees, to support them in their mentoring partnership, providing further information on mentoring, your scheme specifically, what is expected of them and what they will be required to do. Examples from the current local schemes include providing contracts for mentoring, documents focused on what to chat about in your first meeting, expectations of mentor and mentee, and setting expectations, and general information for both.

The IAD also have mentoring resources, to support individuals to consider mentoring as a career development opportunity. There are 4 resources Schools/Centres can signpost to:

1. What mentoring is, and what it is not
2. Being a Mentee
3. Being a Mentor
4. Further thinking and reading

<https://institute-academic-development.ed.ac.uk/research-roles/research-only-staff/career-management/mentor>

One piece of advice, from colleagues that currently run schemes:

“To make this viable, I think you need colleagues to all agree to take part as mentors. Keeping workload low, well distributed, and with minimal (if any) paperwork is vital for this. If you make that clear then I think people are keen to act as mentors (many do this informally already anyway, so this provides a route for that to be acknowledged)”

“Keep it local, keep it personal. Get a team of people involved who are prepared to invest and work hard. Be patient - especially with post-docs. Response and turn out rates can be appalling but don't be downhearted. If you really help one post-doc, you help them all.”

“It's not as much work as you would think or might feel, if you have everything in a system/database rather than through emails and a notebook.”

The IAD would like to thank everyone who contributed to this guide, with their time and information.

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