



**Technology Affinity Group**  
Promoting technology in philanthropy

# TAG Mentoring Program Handbook

## Table of Contents

<b>Vision, Mission and Goals</b>	<b>1</b>
<b>Guiding Principles</b>	<b>2</b>
<b>How the Program Works</b>	<b>3</b>
<b>Success Factors</b>	<b>4</b>
<b>Mentor/Mentee Roles and Responsibilities</b>	<b>4</b>
<b>Common Responsibilities</b>	<b>4</b>
<b>Mentor Responsibilities</b>	<b>5</b>
<b>Mentee Responsibilities</b>	<b>5</b>
<b>Mentor Guidelines</b>	<b>6</b>
<b>Program Schedule</b>	<b>7</b>

# Vision Statement

TAG envisions having a highly regarded Mentoring program that provides members with opportunities for soft skills growth and professional development. This valuable membership benefit helps participants achieve their potential and strengthens TAG's ability to engage and retain members.

# Mission Statement

The mission of the TAG Mentoring program is to help TAG members further their professional development by providing them with peer expertise.

# Mentoring Program Goals

For the Membership:

- To provide the opportunity to further develop their soft and professional skills.
- To provide a valuable benefit in response to TAG members' request for leadership development.

For TAG:

- To increase membership engagement and participation.
- To increase membership retention.
- To enhance TAG's benefit offerings.

# Guiding Principles

All program participants and administrators acknowledge the following as core tenets and values that are to be upheld in all circumstances:

- **Honesty:** If you expect your mentor to help you, then you must be prepared to build a very open and honest relationship with him or her. The more you give to your mentor, the more you will receive in return.
- **Trust:** This is the cornerstone for establishing and maintaining your mentoring relationship. The Mentor and Mentee should be able to trust each other and prove worthy of being trusted.
- **Integrity:** Good factual information is the foundation of your success. You both must insist on exchanging information openly. If you want your mentor to act with integrity, you must show that you always act with integrity. That means no duplicity, no inconsistency with what you value and believe.
- **Respect:** All interactions will be conducted in a kind and courteous manner.
- **Due Care:** The mentor, as a reasonable person, will always endeavor to provide to the Mentee the best advice possible under the circumstances.
- **Recognition of Access Limitations and Personal Boundaries:** Take the time to talk frankly about what each of you expect to give and take in terms of time, as it will vary from relationship to relationship. Also, make sure that you are on the same page about how you prefer to interact and the boundaries you wish to establish.
- **Genuine Interest:** Both parties express a sincere interest in continuous self-development.
- **Reciprocal Relationship:** - It is expected that Mentor and Mentee should learn from each other.
- **Synergy:** Effective Mentoring requires teamwork and commitment of both parties.
- **Confidentiality:** All information shared between the Mentee and Mentor, or with the Mentoring Program Committee, is confidential with the exception of information regarding: 1) injury or potential injury to one's self or others; 2) child abuse; 3) breach of laws or 4) other situations that pose a danger to the general public, which may obligate a mentor or mentee to act on or relay to appropriate authorities.
- **Heighten Potential:** The Mentoring relationship should inspire new possibilities and seek opportunities to stretch and grow.
- **Patience:** It is recognized that personal growth takes time and that changing behavior is hard work.

Lastly, to ensure that participants have a clear and consistent understanding of the Mentoring program we make explicit what behavior and goals are considered contradictory to the program objectives:

- Program participation is not a means to enhance your professional network or have your network enhanced by using your mentors contacts.
- Mentoring is not about job seeking through your Mentor.
- Mentoring is not about life coaching. The goals of the Mentoring relationship are bounded by the Mentor/Mentee agreement unless explicitly agreed upon by both parties.

# How the Program Works

1. A Mentoring Committee will be established by the TAG Board of Directors, which will be responsible for program oversight and administration.
2. Mentors are to be solicited based on their experience, professional accomplishments, and enthusiasm to participate in the program.
3. Mentees are to be selected by the Mentoring Committee through an application process, primarily on the ability to match them with a Mentor and successfully achieve their goals.
4. Mentors and Mentees are to be matched by the Mentoring Committee. Mentors are recruited to match Mentees' goals and requirements.
5. Participation is voluntary and driven by the Mentee. The program operates on the philosophy of personal motivation and discipline.
6. The Mentoring runs the program year or portions agreed upon. It is extended only at the agreement of both Mentor and Mentee.
7. Mutual expectations and benefits are defined and agreed to by the Mentee and Mentor at the beginning of the relationship.
8. The Mentee and Mentor set the content of their ongoing agenda.
9. Mentee and Mentor provide quarterly feedback to the Mentoring Program Committee.
10. Feedback and self-reflection are important components of the learning and development process of the program for both Mentee and Mentors.
11. A time commitment to the relationship is critical. It is suggested that Mentors and Mentee will meet at least once a month, on average.
12. It is encouraged for both parties to meet in person; however, understanding geographical limitations, video conferencing is acceptable.

# Success Factors

Success will be indicated by:

- Positive feedback by participants with respect to soft skills growth and professional development.
- Positive feedback by participants with regard to program structure.
- The willingness of Mentees to recommend the program to others.
- The growth in number of Mentoring Program applications.

## Mentor/Mentee Roles and Responsibilities

The following are the Mentoring Committee's expectations regarding the relationship between Mentors and Mentees.

### *Common Responsibilities*

- Conformance with the Mentoring Program Handbook.
- Frequent communication between the Mentor and Mentee (recommended at least once a month).
- All information shared between the Mentee and Mentor is confidential (see "Guiding Principles").
- If there are issues on the part of the Mentor or Mentee that are not able to be resolved, these are to be immediately brought to the attention of the TAG Mentoring Committee.
- The Mentee or Mentor may terminate the Mentoring relationship by notifying in writing the TAG Mentoring Committee and explaining the reason for early termination.

### *At the First Meeting*

- Establish relationship.
- Establish common expectations regarding communications.
- Determine Mentee's agreed-upon goals and submit the "Mentee's Agree-Upon Goals Form".
- Sign the "Mentor-Mentee Agreement".
- Determine a meeting schedule.

### *At Each Meeting*

- The Mentee comes prepared to discuss his/her situational challenges.
- The Mentor provides guidance and advice based upon his/her experience.
- Be prepared for each session. Respect one another's time and commitment to the effort.
- Communicate any concerns with respect to the relationship and progress to the Mentoring Committee as soon as possible.
- Every 3 months, submit the "Mentee Progress Report Form."

### ***At the Final Meeting***

- The Mentor and Mentee should each submit an individual “Mentee Progress Report Form”.

### ***Mentor Responsibilities***

In addition to the Common Responsibilities, Mentors are expected to:

- Review Mentee CV and Application prior to the first meeting
- Jointly develop a strategy that will lead to goal attainment
- Listen carefully to Mentee’s goals, issues, obstacles, and feedback
- Your Mentee knows he/she can count on you to be honest yet safe and to follow through on your promises.
- Offer ongoing practical advice relevant to Mentee goals
- Suggest exercises, reading, and general advice relevant to Mentee goals
- Monitor and discuss Mentee’s follow-through on the specific advice and counsel provided

### ***Mentee Responsibilities***

In addition to the Common Responsibilities, Mentees are expected to fulfill the following expectations:

#### ***At Each Meeting***

- Be prepared to discuss your challenges and issues relevant to stated goals.
- Be frank and forthright in your interactions with your Mentor.
- Your Mentor knows he/she can count on you to be honest and to follow through on your promises.
- Be responsible for scheduling future sessions.
- Take steps to apply constructive criticism and corrective feedback as soon as possible.
- Be prepared to provide your Mentor with positive feedback about his/her Mentoring and other things he/she has shared.
- Make every attempt to embrace and internalize the advice and feedback you receive.
- Discuss relevant successes in your meetings.
- Communicate any difficulties you are having in implementing the changes you seek, and discuss challenges and potential alternative tactics.

#### ***Every 3 Months***

- Mentees submit a Mentee Progress Report to the Mentoring Program Committee.

## **Mentor Guidelines**

Your commitment and dedication to your Mentee may be the most profound opportunity that you may experience. The quality of the relationship you build directly influences the life and future of the

participant. Please exert every effort to maintain professional standards, improve your Mentoring skills, and exercise good judgment when engaged in any activity involving your Mentee. Your role in the relationship is complex and includes that of:

- Positive Role Model
- Coach
- Trusted Advisor
- Self-esteem Builder
- Career Counselor
- Advocate

The following is provided as basic guidance for new Mentors. It should be read carefully and reviewed periodically to ensure its lessons remain fresh:

- At the initial stages of the engagement, it is possible your Mentee may appear to be hesitant, unresponsive, and perhaps even unappreciative of the relationship. This “guarded” attitude is often simply a manifestation of his/her insecurity about the relationship. The Mentee’s attitude will gradually take a positive turn as he/she realizes your sincerity about your role. **BE PATIENT!** Attempting to speed up the process by going out of your way to accommodate your Mentee, or seeing your Mentee more often than agreed, sets poor precedent and can be a mistake.
- Remember the Mentor/Mentee relationship has a “startup” phase during which the Mentee is more interested in getting to know how “real you are” and building trust. Early activities should include establishing communication preferences and meeting locations. Ground rules regarding contact should also be re-affirmed.
- Experience demonstrates it is counterproductive to assume roles other than a dependable, consistent advisor. Present information carefully without distortion and give all points of view a fair hearing. Listen carefully and offer possible solutions without passing judgment. Don’t criticize or preach. Think of ways to problem solve together rather than lecturing or telling the Mentee what to do. Maintain the focus on productive future actions rather than past mistakes.
- Respect your Mentee’s individuality and influence them through constructive feedback. The Mentor empowers the Mentee to make “right” decisions indirectly --without actually deciding for the Mentee. Identify the Mentee’s interests and take them seriously. Be alert for opportunities and “teachable moments.” Explore both the positive and negative potential consequences of decisions.

# Mentoring Program Schedule

Year	Date	Activity / Milestone	Description
2017	August	Program Announcement	Announce via newsletter, blog & webinar
	Aug 1	Enrollment Opens	Mentor/Mentee Applications Accepted
	Sept 30	Enrollment Closes	
	Nov 1	Matches Announced	Mentor/Mentee Pairings
2018	Jan 1	Program Begins	Monthly Mentor/Mentee Meetings
	Mar 31	Mentee Status Report due	Email Mentee Progress Report to Mentoring Committee
	June 30	Mentee Status Report due	Email Mentee Progress Report to Mentoring Committee
	Sept 30	Mentee Status Report due	Email Mentee Progress Report to Mentoring Committee
	Dec 30	Program Concludes/Mentee Status Report due	Email Mentee Progress Report to Mentoring Committee