TAG Emerging Leaders Initiative (ELI)

Handbook Table of Contents

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About TAG’s Emerging Leaders Initiative

The TAG Emerging Leaders Initiative (ELI) is designed to help cultivate the next generation of technology leaders in philanthropy. Through a series of coaching, mentoring pairing, and educational opportunities, Emerging Leaders are provided with the expertise and skills needed to advance in their careers.

TAG facilitates the highly regarded ELI leadership program to provide members with opportunities for soft skills growth and professional development. This valuable membership benefit helps participants achieve their potential and strengthens its members’ connections to each other.
Guiding Principles

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

- Genuine Interest: Both mentors and emerging leaders must express a sincere interest in personal and professional development.
- Reciprocal Relationship: Mentors and emerging leaders are expected to learn from each other.
- Synergy: Effective mentoring requires the commitment and collaboration of both parties.
- Trust: Trust is a cornerstone of the mentoring relationship and both mentor and emerging leader must be trustworthy.
- Openness: Mentors and emerging leaders must be open and honest with each other to cultivate a successful relationship.
- Respect: All interactions must be conducted in a courteous and respectful manner.
- Due Care: Mentors must provide the best advice possible to emerging leaders.
- Recognition of Access Limitations and Personal Boundaries: Mentors and emerging leaders must discuss their time commitments and establish clear boundaries.
- Confidentiality: Information shared between mentor and emerging leader must be kept confidential, with some exceptions.
- Heightening Potential: The mentoring relationship should inspire new possibilities and opportunities for growth.
- Patience: Personal growth takes time and changing behavior is hard work.
How the Program Works

1. The Emerging Leaders Program is overseen the ELI Program Director and TAG Leadership.

2. Through an application process, Emerging Leaders are selected primarily on the ability to match them with a Mentor and successfully achieve their goals.

3. Mentors are to be solicited based on their experience, professional accomplishments, and enthusiasm to participate in the program.

4. Mentors and Emerging Leaders are matched based on multiple criteria, such as interest area, organization type, locale, and experiences.

5. Participation is voluntary and the learning agenda is driven by the Emerging Leader. 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 Emerging Leader.

7. Mutual expectations and benefits are defined and agreed to by the Emerging Leader and Mentor at the beginning of the relationship.

8. The Emerging Leader and Mentor set the content of their ongoing agenda.

9. Emerging Leader and Mentor provide regular feedback to the ELI Program Director via a 1st quarter status report, a mid-year check-in call and a final report.

10. Feedback and self-reflection are important components of the learning and development process of the program for both Emerging Leader and Mentors.

11. A time commitment to the relationship is critical. It is suggested that Mentors and Emerging Leader will meet at least once a month, on average and agree on other touchpoints (Slack, email, etc.) as needed.

12. The Emerging Leaders will meet monthly as a cohort for peer discussion and learning, facilitated by the ELI Program Director.
Mentor/Emerging Leader Roles and Responsibilities

The following are TAG’s expectations regarding the relationship between Mentors and Emerging Leaders.

**Responsibilities for Both Parties**

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

**At the First Meeting (or three)**

- Establish relationship, build chemistry.
- Establish common expectations regarding communications.
- Determine Emerging Leader’s agreed-upon goals and direction.
- Determine a meeting schedule.

**At Each Meeting**

- The Emerging Leader 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 TAG Membership Committee as soon as possible.

**At the Final Meeting**

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

**Mentor Responsibilities**

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

- Review Emerging Leader CV and Application prior to the first meeting
- Jointly develop a strategy that will lead to goal attainment
● Listen carefully to Emerging Leader’s goals, issues, obstacles, and feedback
● Your Emerging Leader 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 Emerging Leader goals
● Suggest exercises, reading, and general advice relevant to Emerging Leader goals
● Monitor and discuss Emerging Leader’s follow-through on the specific advice and counsel provided

**Emerging Leader Responsibilities**

In addition to the Common Responsibilities, Emerging Leaders 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.

**Reporting Back**

● Emerging Leaders submit an Emerging Leader Progress Report to the ELI Program Director for the first and last quarters of the year.
Mentor Guidelines

Your commitment and dedication to your Emerging Leader 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 Emerging Leader. 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.

• At the initial stages of the engagement, it is possible your Emerging Leader may appear to be hesitant, unresponsive, and perhaps event unappreciative of the relationship. This “guarded” attitude is often simply a manifestation of his/her insecurity about the relationship. The Emerging Leader’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 Emerging Leader, or seeing your Emerging Leader more often than agreed, sets poor precedent and can be a mistake.

• Remember the Mentor/Emerging Leader relationship has a “startup” phase during which the Emerging Leader 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 Emerging Leader what to do. Maintain the focus on productive future actions rather than past mistakes.

• Respect your Emerging Leader’s individuality and influence them through constructive feedback. The Mentor empowers the Emerging Leader to make “right” decisions indirectly—without actually deciding for the Emerging Leader. Identify the Emerging Leader’s interests and take them seriously. Be alert for opportunities and “teachable moments.” Explore both the positive and negative potential consequences of decisions.
Emerging Leaders Initiative Schedule

Please find a proposed schedule below for the 2022 Emerging Leaders Initiative.

<table>
<thead>
<tr>
<th>2023</th>
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<tbody>
<tr>
<td>Jan ()</td>
<td>Program Formally Begins</td>
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<tr>
<td></td>
<td>Kick-off Call</td>
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<td></td>
<td>Q1 Monthly Group and Peer Networking Calls &amp; Learning Experiences</td>
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<tr>
<td>Mar 30</td>
<td>Emerging Leader Progress Report due</td>
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<tr>
<td>Apr ()</td>
<td>Q2 Monthly Group and Peer Networking Calls &amp; Learning Experiences</td>
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<tr>
<td>Jun-Jul</td>
<td>Mid-year one-on-one check-ins (ELs and Program Director)</td>
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<tr>
<td>Sep ()</td>
<td>Q3 Monthly Group and Peer Networking Calls &amp; Learning Experiences</td>
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<tr>
<td>Oct ()</td>
<td>Q4 Monthly Group and Peer Networking Calls &amp; Learning Experiences</td>
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<tr>
<td>Nov 14-17</td>
<td>TAG Conference – ELI Sessions</td>
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<tr>
<td>Dec 31</td>
<td>Final progress report due from both emerging leader and mentor</td>
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For 2024 Cohort

| June, 2023            | Enrollment Opens                                      |
| July, 2023            | Enrollment Closes                                     |
| August, 2023          | Emerging Leaders Acceptance Notification              |
| Oct 15, 2023          | Mentoring Pairs Announced                             |
| Nov 6-9, 2023         | Meet cohort and mentors at TAG2023 Conference (Nashville, TN) |