



Technology Affinity Group
Promoting technology in philanthropy

TAG Emerging Leaders Initiative

Handbook Table of Contents

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Vision Statement

TAG envisions facilitating a highly-regarded leadership 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 offerings for its members.

Mission Statement

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

Emerging Leaders Initiative Goals

For TAG members:

- 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.

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 parties express a sincere interest in continuous self-development.
- **Reciprocal Relationship:** - It is expected that Mentor and Emerging Leader will learn from each other.
- **Synergy:** Effective mentoring requires teamwork and commitment of both parties.
- **Trust:** This is the cornerstone for establishing and maintaining your mentoring relationship. The Mentor and Emerging Leader should be able to trust each other and prove worthy of being trusted.
- **Openness:** To cultivate a successful mentoring relationship, be prepared to build an open and honest relationship with each other. The more you give, the more you will receive from the relationship.
- **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 Emerging Leader 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.
- **Confidentiality:** All information shared between the Emerging Leader and Mentor, or with the Emerging Leaders initiative 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 Emerging Leader 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 Emerging Leaders Initiative, 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/Emerging Leader agreement unless explicitly agreed upon by both parties.

How the Program Works

1. The TAG Board of Directors has established an Emerging Leaders Initiative Committee responsible for program oversight and administration.
2. Emerging Leaders are to be selected by the Emerging Leaders Initiative Committee through an application process, 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 by the Emerging Leaders Initiative Committee. Mentors are recruited to match Emerging Leaders' goals and requirements.
5. Participation is voluntary and 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 quarterly feedback to the Emerging Leaders Initiative Committee.
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.
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 Emerging Leaders to recommend the program to others.
- The growth in number of Emerging Leaders Initiative applications.

Mentor/Emerging Leader Roles and Responsibilities

The following are the Emerging Leaders Initiative Committee'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 of the TAG Emerging Leaders Initiative Committee.
- The Emerging Leader or Mentor may terminate the Mentoring relationship by notifying in writing the TAG Emerging Leaders Initiative Committee and explaining the reason for early termination.

At the First Meeting

- Establish relationship.
- Establish common expectations regarding communications.
- Determine Emerging Leader's agreed-upon goals and submit the "Emerging Leader's Agree-Upon Goals Form".
- Sign the "Mentor-Emerging Leader Agreement".
- 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 Emerging Leaders Initiative Committee as soon as possible.
- Every 3 months, submit the “Emerging Leader Progress Report Form

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.

Every 3 Months

- Emerging Leaders submit a Emerging Leader Progress Report to the Emerging Leaders Initiative Committee.

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 even 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 2019 Emerging Leaders Initiative.

2018	
Aug 7	Enrollment Opens
Sep 28	Enrollment Closes
Oct 8	Mentoring Pairs Made
Nov 5-8	Meet cohort and mentors at TAG2018 Conference
2019	
Jan 1	Program Formally Begins
Mar 31	Q1 Report Due
Jun 30	Q2 Report Due
Sep 30	Q3 Report Due
Dec 30	Program Concludes. Final Report Due