



EMERGING LEADERS ACADEMY

ADVOCATE

Overview

As the Emerging Leaders Academy advocate for your firm, you are responsible for working with both participants and their guides throughout the three-year program. Your primary role is to act as the “go to” person for everyone involved in the program, keeping track of important upcoming events, deadlines, and responsibilities and ensuring that everyone is on track.

Part of our job at Upstream Academy is to keep your role as an advocate from becoming burdensome by providing you with the necessary tools, advice, and support. Advocates, guides, and ELA participants all have access to an Internet-based tool (On-line Progress Tracking program or OPT) that allows them to track progress on goals and projects throughout the year. As an advocate, you also receive periodic mail updates and are encouraged to contact Upstream any time you have questions or concerns.

Typical Advocate Duties

Although Upstream Academy requires each firm to have an advocate (one only) and tell us the name of that individual, we do not assign specific duties. Firm leaders need to determine their advocate’s specific responsibilities and level of involvement in the ELA program. Below are some of the responsibilities typically given to advocates.

1. Assist in the assignment of guides.
2. Act as an alternate firm contact for the participant and assist in choosing a replacement guide when necessary.
3. Provide assistance and support for guides.
4. Ensure all participants attend the live presentation or listen to the CD of the first Leadership Training Forum each year, and encourage guides to attend Guide Conference Calls, especially the first call of the year. Getting everyone off to a solid start is critical, and making sure people know where to get answers to questions that may arise is essential to the long term success of the program.
5. Assist in coordinating registration and travel arrangements for the Upstream Academy event included with each participant’s enrollment. Depending on your firm’s needs, you may want to consider:

- a. having all participants attend one event (so they all have the same experience);
- b. having them attend the event that is most relevant and convenient to them and their departments; or
- c. having each participant attend a different event (to give a variety of experiences to participants and avoid short staffing problems).

If participants attend different events, you may want to consider having them share their experiences and knowledge gained with the group (preferably in an oral presentation).

6. Organize the Leadership Training Forums. Each year, Upstream presents ten one-hour conference calls, which participants are strongly encouraged to attend together as a group. The PowerPoint and other relevant materials are sent prior to each presentation and an audio CD of the presentation is sent out afterwards. As an advocate, you may want to set up an Outlook group, issue meeting requests, and schedule a conference room (with data projector) for all ELA forums. You may also wish to be the one who coordinates the collection of CPE credit requests for the forums (CPE credit is available only for ELA participants and guides who participate in the live presentation). Some firms have found it useful to add a discussion period for guides and participants following the forums.
7. Organize the Guide Conference Calls. To assist guides in their important responsibilities, Upstream presents three conference calls each year. The PowerPoint and other relevant materials are sent prior to each presentation and an audio CD of the presentation is sent out afterwards. If your firm has more than one guide, you may want to set up an Outlook group, issue meeting requests, and schedule a conference room (with data projector) for the conference calls. CPE credit is not available for participation in Guide Conference Calls.
8. Use the Internet-based tool to ensure that participants are staying current with their goals and projects. You may want to send reminders to those who do not seem to be making progress.
9. Coordinate the purchase of items necessary to complete the selected goals and projects (books, LeaderSkills lessons, etc.).
10. Recognize the accomplishments of participants and/or guides through the firm newsletter, staff meetings, etc.