

VISTA ... Celebrating 50 Years of Service



LEADER ORIENTATION

September 2016



AmeriCorps VISTA Leader Orientation Workbook

September 2016

ACKNOWLEDGMENTS

This workbook is sponsored wholly, or in part, by the Corporation for National and Community Service, under Contract #CNSHQ14F0057. Contents do not necessarily reflect the views of the Corporation for National and Community Service or any agency of the United States government. Permission to reproduce these binder contents in whole or part for use by educational, national service, or other not-for-profit agencies is granted with the inclusion on all pages of the footer contained herein.

The AmeriCorps VISTA National Integrated Training Program is staffed by Education Northwest in partnership with JBS International. We would like to acknowledge Jean Carroccio, Ben Nowell, Kapila Wewegama, and Elaine Williams for the development of this curriculum.

We also wish to acknowledge our colleagues at the Corporation for National and Community Service, particularly Andy King and Patrick Triano.

Contents

Leadership Framework

| | |
|---|---|
| VISTA Leader’s Learning Focus and Approach | 1 |
| What is a VISTA Leader? | 2 |
| Comparison of VISTA Leader and Supervisor Roles | 3 |
| Sample VISTA Leader Assignment Description (VLAD) | 6 |
| VISTA Leaders and eGrants Accounts..... | 9 |

Transformational Leadership Model & VISTA Leader Roles

| | |
|---|----|
| Five Practices of a Transformational Leader | 10 |
| VISTA Leader Roles | 11 |
| The Role of an AmeriCorps VISTA Leader..... | 12 |
| Ambassador Role | 13 |
| Facilitator/Educator Role | 17 |
| Liaison Role..... | 23 |
| Mentor Role | 30 |
| Recruiter Role..... | 37 |
| Resource Generator Role | 48 |

Communication

| | |
|---|----|
| Communication: The Core of Leading Effectively | 55 |
| The Knowledge & Skills of Effective Communication | 56 |
| Managing Up | 61 |

Conflict Management

| | |
|---|----|
| Introduction to Conflict Management | 64 |
| Approaches to Conflict..... | 67 |

Open Space

| | |
|----------------------------|----|
| Open Space Technology..... | 69 |
|----------------------------|----|

Competency Based Workshops

| | |
|--|----|
| Leading from a Distance: Skills for Success | 70 |
| Five Categories of Effective Leadership from a Distance | 71 |
| Change Your Life: Stop Hiding From Difficult Conversations | 75 |
| Why Is the Ability to Have Difficult Conversations Vital to Leaders and Their Ability to Lead?..... | 79 |

Contents

Additional Resources

| | |
|---|----|
| Writing a Leadership Definition..... | 81 |
| VISTA Leader Self-Efficacy | 84 |
| Group Functioning Self-Efficacy II..... | 85 |
| Project Management..... | 86 |
| VISTA Leader Living Allowance Rates | 87 |
| Notes, Reminders & Deep Thoughts | 88 |

VISTA Leader's Learning Focus and Approach

- Provide opportunities for leaders to meet and make connections with VISTA leaders attending this conference.
- Learn the Transformational Leadership Model's Five Exemplary Practices and explore their application within the VISTA leader context.
- Learn, explore, and teach yourself and other leaders about the role of the VISTA leader
- Provide an atmosphere and opportunity for leaders to acquire knowledge, ideas, and methods that will increase their effectiveness as a leader in the VISTA context.

What is a VISTA Leader?

What You Should Know as an AmeriCorps VISTA Leader

AmeriCorps VISTA leaders support and help coordinate larger VISTA projects and/ or regions, involving at least six VISTA members, in their efforts to address the needs of low-income communities. Leaders serve as recruiters, coordinators, trainers, mentors and resource providers who strengthen the capacity of VISTA members, VISTA projects, and community members. Just as VISTA members work to expand and build the capacity of community projects, leaders work to expand and build the capacity of individual VISTA members and their respective project sites. AmeriCorps VISTA leaders serve different functions depending on the needs of the local projects. These include recruiting and coordinating VISTA members, preparing VISTAs' in-service training, mentoring and identifying new funding sources.

Goals of the AmeriCorps VISTA Leaders' Program

- Increase VISTA project effectiveness;
- Increase VISTA project sustainability;
- Increase VISTA member effectiveness;
- Increase VISTA member recruitment;
- Decrease VISTA member attrition;
- Foster greater communications between VISTA members and their sponsoring organizations;
- Facilitate a learning community among VISTA members within a state and region;
- Enhance training for VISTA members;
- Provide an extended service opportunity for VISTA members who demonstrate outstanding leadership skills and abilities; and
- Promote leadership development within the national service field.

Regional vs. Project-Based Leaders

Several states, because of the size and geographic nature of the state, have assigned leaders regionally. Regional leaders serve on a VISTA project and not only support their own project's VISTAs, but also VISTAs on other projects, usually working in a similar issue area. A regional VISTA leader can have a maximum of three projects with up to 15 VISTAs total. Project-based leaders have a minimum of six and maximum of 12 members and their sites are within a 20 mile radius. If there is more than a 20 mile radius, a project could have up to 20 VISTAs. Some additional criteria for regional leaders are:

- they are being supervised by a single AmeriCorps VISTA supervisor/sponsoring organization;
- all project sponsors involved are in agreement with the proposal; and
- the leader is not operating in a Corporation state staff role.

Comparison of VISTA Leader and Supervisor Roles

Because of their inherent skills and abilities, VISTA leaders often take on more responsibility or receive more authority than is reasonable or appropriate. Keeping focused and within the limits of the leader’s roles are crucial to the leader’s success. To this end, regular communication between the supervisor and the leader is highly effective. It is imperative that VISTAs understand the distinctions between a supervisor and leader, and know to whom to turn for what they need. Co-facilitating a discussion with the VISTAs, and perhaps providing a reference sheet about procedures and points of contact are effective methods for supervisors and leaders to keep VISTAs informed.

Table 1. Examples of Appropriate Leader and Supervisor Roles

| Task/Activity | Leader Support | Supervisor Contribution |
|---|---|---|
| <p>Conducting an On-Site Orientation and Training (OSOT)</p> | <ul style="list-style-type: none"> • Collate orientation materials • Draft agenda • Help to secure guests, speakers and facilitators • Participate in implementation of OSOT • Utilize facilitator / educator skills to achieve OSOT activities | <ul style="list-style-type: none"> • Develop OSOT plan • Finalize agenda • Ensure the OSOT plan is submitted to the CSO • Help to secure guests, speakers and facilitators • Coordinate with leader re: OSOT • Implement OSOT |
| <p>Recruiting and selecting new VISTAs</p> | <ul style="list-style-type: none"> • Promote position announcement through local venues • Assist in screening applications • Assist in setting up and participate in interviews of top applicants • Provide feedback to supervisor • Utilize VAD in interview process • Utilize recruiting and interview skills to achieve recruiting tasks | <ul style="list-style-type: none"> • Interview top candidates • Nominate candidates for selection and approval by the CSO • Notify candidates of their selection and approval • Ensure paperwork is completed • Accept/select candidates in eGrants/Portal • Utilize VAD in interview / selection process |

Comparison of VISTA Leader and Supervisor Roles (cont.)

| Task/Activity | Leader Support | Supervisor Contribution |
|--|--|---|
| <p>Facilitating a successful year of service for VISTAs</p> | <ul style="list-style-type: none"> • Make self available to VISTAs as a resource • Listen when VISTAs approach with problems and barriers • Assist VISTAs in identifying their options and creating their own solutions • Assist VISTAs in outlining their options for mediation, including informing supervisor • Involve the supervisor if the VISTAs cannot resolve the issue themselves • Utilize skills as resource generator, mentor, ambassador and liaison, as appropriate, to ensure a successful year for VISTAs | <ul style="list-style-type: none"> • Provide ongoing and scheduled supervision to VISTAs • Utilize problem-solving and coaching techniques to help VISTAs resolve problems and barriers • Assist VISTAs in identifying options and solutions • Develop protocol for addressing conflict within group (including the leader's role) • Schedule appropriate conference time with leader for updates and feedback |
| <p>Responding when a VISTA is habitually late</p> | <ul style="list-style-type: none"> • Ensure the VISTAs know and understand the policy and procedures for punctuality and project schedule(s) • If pattern persists and the supervisor is unaware, communicate problem to supervisor and inform VISTAs of same • Let supervisor know if tardiness of the VISTAs is a potential or real divisive issue for the team. • Utilize educator and liaison skills for achieving this task | <ul style="list-style-type: none"> • Discuss with the VISTA the reasons for the recent tardiness and explore how to improve punctuality • Set /re-set timeliness expectations • Determine any organizational measures to be taken to address the situation • Notify the CSO, if the situation merits • Follow-up with VISTA regarding effectiveness of corrective action • Coordinate with leader as needed regarding VISTA |

Comparison of VISTA Leader and Supervisor Roles (cont.)

| Task/Activity | Leader Support | Supervisor Contribution |
|---|---|---|
| <p>Reporting on project performance to CSO</p> | <ul style="list-style-type: none"> • Coordinate collection of data from VISTAs • Clarify points in reports with VISTAs if required • Collate or categorize information • Assist in interpretation of data • Coordinate feedback with supervisor | <ul style="list-style-type: none"> • Obtain data from leader • Interpret data • Write report in eGrants • Ensure timeliness of reporting to CSO • Follow-up with leader and/or VISTAs as necessary |
| <p>Developing or refining Volunteer Assignment Description (VAD)</p> | <ul style="list-style-type: none"> • Review VADs for clarity and accuracy • Suggest improvements or changes to supervisor • Clarify action steps for VISTAs when required • Offer feedback to VISTAs and supervisor to determine if tasks appropriately help achieve objectives • Utilize facilitator, educator, mentor skills on an ongoing basis to ensure successful implementations of VAD | <ul style="list-style-type: none"> • Establish tasks to achieve goal(s) • Write VAD and submit to CSO for approval • Review VAD with VISTA on a consistent basis • Monitor achievement of objectives by setting appropriate expectations for progress and completion • Refine VAD as necessary on an ongoing basis • Identify needed feedback from leader related to VAD progress |

Sample VISTA Leader Assignment Description (VLAD)

VISTA Project: Project CONNECT

VISTA Leader: Asif Khouri

Site Name: Project CONNECT

Assignment Area: Volunteer Management

Date: May 15, 20XX

| VISTA Leader Activities and Steps Checklist | Planned Period of Work |
|--|---------------------------------|
| <p>Goal: Enhance VISTA project success and sustainability by facilitating the VISTA team, supporting team members in their work, and working in partnership with the VISTA project supervisor on project management tasks.</p> | |
| <p>Activity #1: Support recruitment of high quality VISTAs</p> <ul style="list-style-type: none"> Step 1: Review VADs for clarity, accuracy and consistency and suggest improvements Step 2: Research recruitment opportunities and promote position announcement through local venues Step 3: Suggest process for candidate assessment and evaluation that incorporates the VAD in the process Step 4: Assist in screening applicants Step 5: Assist in setting up interviews and participate in interviews | May – Aug 20XX |
| <p>Activity #1 Comments/Summary of Accomplishments:</p> | <p>Completed (date):</p> |
| <p>Activity #2: Conduct VISTA member training and coordinate ongoing professional development</p> <ul style="list-style-type: none"> Step 1: Form a plan with supervisor for the on-site orientation and training (OSOT); gather orientation materials, draft agenda, secure presenters/facilitators, etc. Step 2: Participate in the implementation of OSOT, utilizing facilitator/educator skills, to ensure that VISTAs understand all policies/procedures and project schedule Step 3: Evaluate and report on the OSOT to the supervisor, defining changes to be made for the next OSOT | May – Aug 20XX |

Sample VISTA Leader Assignment Description (cont.)

| VISTA Leader Activities and Steps Checklist | Planned Period of Work |
|---|---------------------------------|
| <p>Step 4: Identify learning needs of VISTAs and develop calendar of trainings on topics such as cultural diversity, conflict resolution, poverty, and volunteer management</p> <p>Step 5: Secure local instructors to present trainings or prepare to deliver training</p> <p>Step 6: Facilitate and encourage peer learning among VISTAs</p> <p>Step 7: Maintain professional development log for all VISTA Members, distribute completion certificates</p> | <p>Aug 20XX – Feb 20XX</p> |
| <p>Activity #2 Comments/Summary of Accomplishments:</p> | <p>Completed (date):</p> |
| <p>Activity #3: Facilitate a successful year of service for VISTAs</p> <p>Step 1: Conduct one-on-one monthly meetings with each VISTA member to review VAD goals, assess progress, address member needs, etc., to ensure a successful year for VISTAs</p> <p>Step 2: Assist VISTAs in clarifying problems and creating their own solutions, involving the supervisor if the VISTA cannot resolve the issue otherwise</p> <p>Step 3: Coordinate four projects for National Days of Service (September 11th National Day of Remembrance, Rev. Martin Luther King, Jr. National Day of Service, Cesar E. Chavez Day and AmeriCorps Week)</p> <p>Step 4: Guide VISTA members in creating their own sustainability manuals to assist subsequent VISTAs with continuing project implementation</p> | <p>Aug 20XX – Apr 20XX</p> |
| <p>Activity #3 Comments/Summary of Accomplishments:</p> | <p>Completed (date):</p> |
| <p>Activity #4: Increase project and member effectiveness by monitoring member monthly reports</p> <p>Step 1: Train VISTA members on the organization’s reporting requirements</p> <p>Step 2: Assist VISTA members with reporting needs, escalating issues to appropriate supervisor</p> <p>Step 3: Collect monthly reports from each VISTA member, review data and summarize for project coordinator</p> | <p>Aug 20XX – Apr 20XX</p> |

Sample VISTA Leader Assignment Description (cont.)

| VISTA Leader Activities and Steps Checklist | Planned Period of Work |
|--|--------------------------|
| Activity #4 Comments/Summary of Accomplishments: | Completed (date): |
| <p>Activity #5: Work with supervisor to ensure overall project stability and sustainability</p> <p>Step 1: Archive all significant materials created and document all procedures for implementing the project, for convenient future retrieval by organization staff, future VISTAs and VISTA leaders</p> <p>Step 2: Suggest changes to the program based on challenges and successes VISTAs have experienced</p> <p>Step 3: In collaboration with staff members, create and implement a written plan for project sustainability</p> | Jan – Apr 20XX |
| Activity #5 Comments/Summary of Accomplishments: | Completed (date): |

VISTA Leaders and eGrants Accounts

VISTA leaders may be given the role of Grantee Recruiter in My AmeriCorps, through eGrants, to support a project sponsor's recruitment activities. For a list of user roles, please visit <http://nationalserviceresources.org/files/Whats-My-Role-eGrants-My-AmeriCorps-User-Roles-for-VISTA-Programs.pdf>.

In the role of Grantee Recruiter, a VISTA leader is able to edit service opportunity listings, search for and contact VISTA member candidates, and review applications.

Although the role of Grantee Recruiter allows the user to approve or reject applications, a leader may not do so. Only a project manager or supervisor may approve or reject applications.

In addition, VISTA leaders may not access eGrants to work on project-management tasks--progress reports, V-81 approvals, etc--as this is a project staff function. Under no circumstance can a leader have "grantee," "grantee administrator," or any other eGrants roles assigned to them. Failure to comply with these provisions by a project sponsor or leader can lead to project closure.

To hold the role of Grantee Recruiter, the leader must apply for a separate eGrants account and the Grantee Administrator for the project may then approve the request by assigning the role of Grantee Recruiter to the leader.

VISTA leaders may not use their supervisors' accounts and passwords.

Steps to create an eGrants account can be found on pgs. 6-11 in the My AmeriCorps User Guide located here: http://nationalserviceresources.org/files/MyAmeriCorps-User-Guide_VISTA-Sponsors-R3_7-24-09_.pdf.

If there are any questions or concerns regarding VISTA leaders, please contact your state office.

Five Practices of a Transformational Leader

Inspiring a Shared Vision

- Envision an exciting and believable future for the group/organization
- Enlist others in a common vision by appealing to their core values, hopes, and dreams

Enabling Others to Act

- Foster collaboration by promoting cooperative goals and building trust
- Strengthen constituents by giving choices, developing competence, assigning critical tasks, and giving support

Challenging the Process

- Search out challenging opportunities to change, grow, innovate, and improve services, processes, or programs
- Experiment, take important risks, and learn from the inevitable mistakes and help your team do it, too

Modeling the Way

- Set the example by behaving in ways that are consistent with your shared values and vision
- Achieve small wins that promote consistent progress and build commitment among constituents

Encouraging the Heart

- Recognize individual contributions to the success of every project
- Celebrate team achievements regularly and genuinely

Kouzes and Posner, 1987

VISTA Leader Roles



AMBASSADOR

You are VISTA! Be able to tell people about your experience and what VISTA is.



FACILITATOR / EDUCATOR

Help your VISTAs achieve their goals through effective training.



MENTOR

Share your experiences to help your VISTAs aim high and achieve their goals.



LIAISON

Be the bridge. Help people come together.



RESOURCE GENERATOR

Know what your VISTAs need and help them get it.



RECRUITER

Help find new VISTAs to serve at your project and build even more capacity

The Role of an AmeriCorps VISTA Leader

What is my role as a VISTA leader?

These six role monographs are intended to provide you with an explanation of each of the possible roles you may play as a VISTA leader. Each monograph includes a definition, role objectives and the knowledge, skills and attitudes that are helpful to fulfill role objectives. Practical ideas to carry out the role are also highlighted as well as the relationship with other VISTA leader roles and the Transformational Leadership model. At the end of each explanation, sample resources are listed for further follow-up. Thus, each of the six role monographs include the following:

- ❖ A Definition
- ❖ Role Objectives
- ❖ Knowledge, Skills & Attitudes
- ❖ Practical Strategies
- ❖ Transformational Leadership & the Role
- ❖ Relationship with Other VISTA Leader Roles
- ❖ Other Resources

Ambassador Role

Ambassador: A Definition

Ambassadors serve as representatives or messengers for certain institutions or interests. As a VISTA leader, you represent national and community service in your town or city and region. In a nutshell, you are a spokesperson and advocate for VISTA, your sponsoring organization and their respective missions. When acting in the Ambassador role, you also represent an ethic of service demonstrated by your individual commitment to serve.

Ambassador: Role Objectives

The Ambassador's goal is to promote the national and community service movement and raise awareness about AmeriCorps VISTA. This means letting people know about successful VISTA projects, encouraging community volunteers to get involved in VISTA projects and raising visibility for AmeriCorps VISTA. For example, something as simple as wearing VISTA buttons and t-shirts can help raise visibility.

The Ambassador role also aims to create mutually beneficial relationships that strengthen VISTA members and their projects. These relationships may range from simple commitments to well-defined partnerships or strategic alliances among communities, sponsoring organizations, VISTA members and Corporation for National and Community Service (CNCS) State/Commission offices.

Ambassador: Knowledge, Skills & Attitudes

To be successful as an Ambassador, a VISTA leader will need to develop specific knowledge, skills and attitudes such as those listed below.

Knowledge:

- A thorough understanding of the VISTA legacy, vision and mission
- Awareness of specific VISTA members' projects, assignments and roles
- Familiarity with the state office's VISTA project-related priorities and goals
- Some understanding of members' sponsoring organizations and communities
- Familiarity with key organizations and service partners operating in the leaders' town/city or region
- Information about the main service-related activities, events and celebrations carried out in the region/area

Ambassador Role (cont.)

Skills:

- Ability to articulate the VISTA vision and mission
- Capacity to foster excitement in others about the VISTA mission and service ethic
- Effective public speaking and presenting
- Leadership skills in promoting, communicating, and persuading
- Networking and relationship-building skills
- Diplomacy skills such as empathetic and attentive listening, tactful communication, and effective negotiation

Attitudes:

- Passionate about and committed to the VISTA mission and leader role
- Positive
- Enthusiastic
- Outgoing
- Resilient
- Persistent
- Humble
- Professional

Practical Strategies for Effective Ambassadorship

The leader should consciously identify, create, and engage in opportunities to represent AmeriCorps VISTA. Listed below are some practical strategies for effective Ambassadorship.

- ✓ Re-orient yourself with the VISTA legacy, vision, and mission (from PSO materials), then create and memorize “talking points” about VISTA that includes anecdotes from your personal experience and your community
- ✓ Commit to wearing the AmeriCorps VISTA pin or logo every day; encourage other VISTA members and supervisors to do likewise
- ✓ Complete a self-assessment of the necessary skills and attitudes for effective ambassadorship; develop a plan and strategies to enhance your abilities
- ✓ Learn about your members’ projects, assignments, and roles by reading about them, having one-on-one conversations with members, and making site visits
- ✓ Discuss and clarify your supervisor’s expectations about your ambassadorship activities, including communicating and working with organizations where VISTA members are placed

Ambassador Role (cont.)

- ✓ Discuss, clarify, and identify your members' expectations about your role as a VISTA Ambassador, including communicating and working with organizations where VISTA members are placed
- ✓ Introduce yourself to and establish contact with your members' organizations; ask how you can help them raise the visibility of VISTA members and projects in the community
- ✓ Visit other key organizations and service partners in your region/area where VISTA members are not present; introduce the VISTA mission and establish work contacts
- ✓ Identify key service activities and events scheduled in your region and identify appropriate potential opportunities for VISTA representation and engagement; work with your state office and sponsoring organizations in order to plan and strategize to get VISTA members and their communities involved in these activities and events
- ✓ Create effective presentations to introduce and promote the VISTA mission and member activities (your members might be a good audience for you to test and practice your presentations)
- ✓ Use every opportunity to represent/promote VISTA and the ethic of service; encourage others to engage in partnerships and commitments; Web sites, local newspapers, bulletin boards, and community forums are potential venues

Transformational Leadership & the Ambassador Role

- **“Inspiring a Shared Vision”**
Inspiring a Shared Vision of a community without poverty and of a community engaged in service to others is the essence of the Ambassador role. Your Ambassador role gives you the opportunity to represent and share the VISTA mission and service ethic with passion and enthusiasm.
- **“Modeling the Way”**
As a representative of the VISTA mission and service ethic, you are expected to be a role model. Role modeling means always acting in such a way that it serves the VISTA members, the project, and the VISTA mission. Lead the way by being the first to wear your VISTA button at all times, by succinctly describing the VISTA mission, and by sharing information about successful VISTA endeavors.

Ambassador Role (cont.)

The Relationship Between the Ambassador & Other VISTA Leader Roles

- **Facilitator/Educator**

Skills required and tasks carried out in your Facilitator/Educator role contribute greatly to your role as an Ambassador. Initiating, creating, and fostering relationships to promote the VISTA mission relates to the Facilitator role of the VISTA leader that brings people together for a common purpose. The Educator role supports the training of members and other project partners in the VISTA mission and member projects.

- **Liaison**

This role involves fostering communication between the VISTA leader and other project partners, and therefore goes hand in hand with ambassadorship. Both roles emphasize creating and fostering mutually beneficial relationships.

- **Mentor**

As an Ambassador, you are a role model and coach to your members in promoting the VISTA mission and service ethic. The role of Mentor complements this aspect of ambassadorship.

- **Recruiter**

The Ambassador role is complementary to the Recruiter role since each requires an understanding of and commitment to the VISTA mission. Promoting VISTA in the community requires similar knowledge, skills, and attitudes necessary for effective recruiting.

Other Resources

As outlined above, there is a range of skills that contribute to becoming an effective Ambassador. Good verbal and written communication skills, however, are crucial. Many books and Internet resources offer insights and techniques to improve communication skills. One such resource is Larry King's *How to Talk to Anyone, Anytime, Anywhere – The Secrets of Good Communication*.

In carrying out the ambassador role, it is important to become familiar and fluent with the VISTA legacy, vision, and mission. A good reference resource is the publication *VISTA ... In Service to America – Fighting Poverty for 40 Years*. Produced by CNCS to celebrate the 40th anniversary of the VISTA mission, this publication is available at: http://www.nationalservice.gov/sites/default/files/documents/06_0523_americorps_vista_legacybook_0.pdf

Facilitator/Educator Role

Facilitator/Educator: A Definition

Facilitators foster and maintain mutually respectful, safe, and meaningful learning environments. As a VISTA leader, this means you will help VISTA members identify learning and development goals and work with them to achieve those goals.

Educators are responsible for imparting knowledge, skills, and attitudes to group members. This transfer of knowledge, skills, and attitudes occurs both formally and informally in serving as a teacher, instructor and/or role model.

Therefore, your VISTA leader role as Facilitator/Educator requires you to facilitate the transfer of knowledge, skills, and attitudes to VISTA members to help contribute to a meaningful service experience and successful project outcome. In some cases, VISTA leaders act as educators to directly impart knowledge. More often, however, VISTA leaders facilitate learning and reflection by identifying and creating learning and growth opportunities for members to engage in.

Facilitator/Educator: Role Objectives

The first goal of the Facilitator/Educator is to create opportunities for VISTA members to reflect on and learn from their service experience. For example, as a VISTA leader, you might encourage the use of journal reflection and ask members to share some of their thoughts and feelings, successes and struggles with you and each other.

The second goal is to facilitate opportunities for the transfer of knowledge, skills, and attitudes that contribute to meaningful and productive projects and personal growth among VISTA members. For example, you might plan and implement trainings for members and/or keep members informed of training events.

Facilitator/Educator: Knowledge, Skills & Attitudes

To accomplish the above role objectives, the successful Educator/Facilitator will need to develop knowledge, skills, and attitudes such as those listed below.

Knowledge:

- An understanding of facilitation
- Familiarity with VISTA members' education/development needs to successfully complete their project workplan; awareness of members' learning styles/preferences
 - Awareness of VISTA members' personal growth goals and needs
 - An understanding of VISTA members' assignments and projects and the necessary skills and knowledge to complete them

Facilitator/Educator Role (cont.)

- An understanding of the members’ sponsoring organizations’ member training plans and other training opportunities
- Knowledge and information about potential training opportunities in the region, including those sponsored by AmeriCorps/VISTA and those offered by local schools, colleges/universities, nonprofit resource centers, etc.
- An understanding of the experiential learning cycle, adult learning principles, and different training/teaching techniques
- Information about team building and ice breaker/energizer activities.

Skills:

- Needs assessments skills
- Facilitation skills
- Effective presentation skills
- Training/teaching skills
- Team building skills
- Training design, facilitation and evaluation skills
- Mentoring and coaching skills

Attitudes:

- Enthusiastic about the growth of each VISTA member
- Positive
- Friendly
- Outgoing
- Willing and able to be both an educator and a learner
- Open minded
- Humble
- Professional

Practical Strategies for Effective Facilitation/Education

In this role, the VISTA leader works to identify, create, and facilitate learning and sharing opportunities for VISTA members to gain new knowledge and skills. Remember that the VISTA experience offers two important opportunities for each VISTA member: (1) The opportunity to serve a community project that aims to eliminate poverty and (2) The opportunity to grow as a person. In this regard, the Facilitator/Educator role is crucial in improving individuals and communities.

Facilitator/Educator Role (cont.)

Listed here are some steps, strategies, and ideas that could be helpful in this endeavor:

- ✓ Learn about members' current skills, talents, and strengths
- ✓ Determine members' learning needs (conduct a needs assessment)
- ✓ Learn about knowledge and skill requirements for your members' projects and assignments
- ✓ Discuss, clarify, and identify your supervisor's expectations about your role in relation to communicating and working with member organizations and member training needs
- ✓ Discuss, clarify, and identify your members' expectations about your role in relation to facilitating their learning and training needs
- ✓ Learn about your members' personal goals
- ✓ Learn about your members' learning styles
- ✓ Work with your members to develop individual training plans for them
- ✓ Visit key organizations and service partners in your region/area to identify potential training/learning opportunities available to your members
- ✓ Coordinate with training providers to seek and secure potential training opportunities for your members
- ✓ Design and conduct training sessions/events and team-building activities for your members
- ✓ Promote knowledge-sharing and skill-building opportunities for members to learn from each other
- ✓ Identify and participate in skill-building opportunities to enhance your own training and facilitation skills

Transformational Leadership & the Facilitator/Educator Role

- **“Enable Others to Act”**

Enhancing members' knowledge and skills enables individuals to act and perform confidently and competently. This aspect of transformational leadership is therefore the crux of the facilitator/educator role.

- **“Modeling the Way”**

As a VISTA leader Facilitator/Educator, one way to facilitate and educate is by acting as a role model. To do this, you can be open about your own learning needs and development and what you are doing to improve your own effectiveness in your role. For example, you might explain that you are working on becoming a better public speaker and have started attending Toastmasters meetings in your free time.

Facilitator/Educator Role (cont.)

The Relationship Between the Facilitator/Educator & Other VISTA Leader Roles

- **Ambassador**
This role focuses on raising the visibility of AmeriCorps VISTA and promoting cooperation and collaboration among project partners, including members. In both roles, the VISTA leader identifies opportunities to bring groups of people or organizations together. Leaders will likely be working with other partners and training providers to secure training opportunities for their members.
- **Liaison**
In carrying out your Facilitator/Educator responsibilities, you will use Liaison skills. Training needs of members will vary. Therefore, the leader will need to identify a range of resources and opportunities and then work to find common ground where the most learning needs can be met for the largest number of people.
- **Mentor**
The role of mentor complements the leaders' facilitation/education efforts. Mentoring is another method of helping VISTA members get their learning needs met.
- **Recruiter**
Recruitment skills will help you as a Facilitator/Educator in persuading other organizations and individuals to provide training and skill-development opportunities for members.

Other Resources

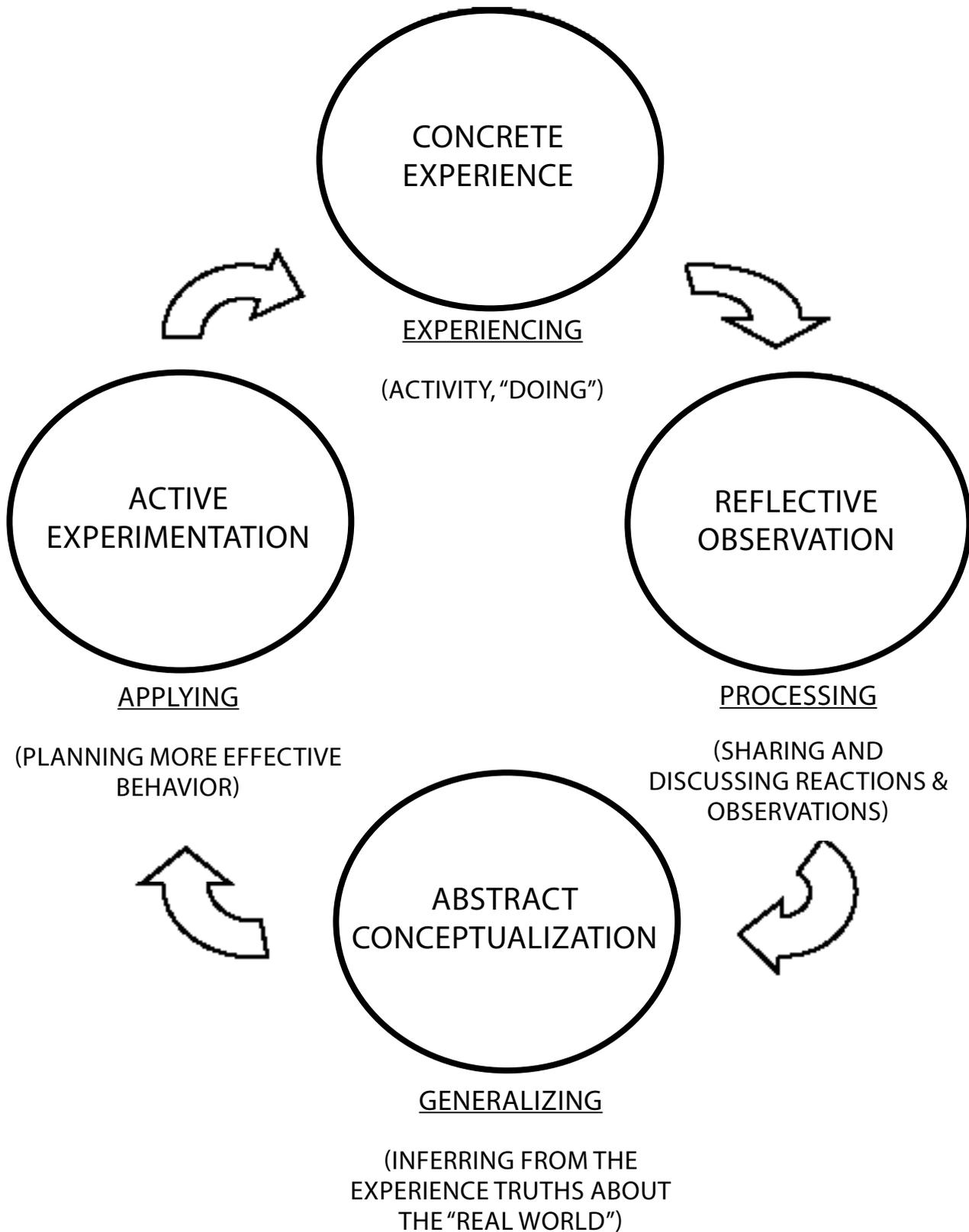
On the next two pages, you will find two models to assist with your role as Facilitator/Educator. The Experiential Learning Cycle outlines a method by which we learn new things. Principles of Adult Learning are outlined on the following page.

Many training ideas, techniques, and strategies for planning, designing, and conducting trainings are available at MOSAICA—The Center for Nonprofit Development and Pluralism. Its training briefs can be found at the following Web site: <https://www.nationalserviceresources.gov/training-tips-and-resources#.U0RzB1dAWgQ>

- **Designing Effective Training**
<https://www.nationalserviceresources.gov/designing-effective-training#.U0Rz5VdAWgQ>
- **Using a Personal Style Inventory for Volunteer and Member Development**
<https://www.nationalserviceresources.gov/buffaloes-beavers-eagles-miceoh-my#.U0RyNVdAWgR>

The Experiential Learning Cycle

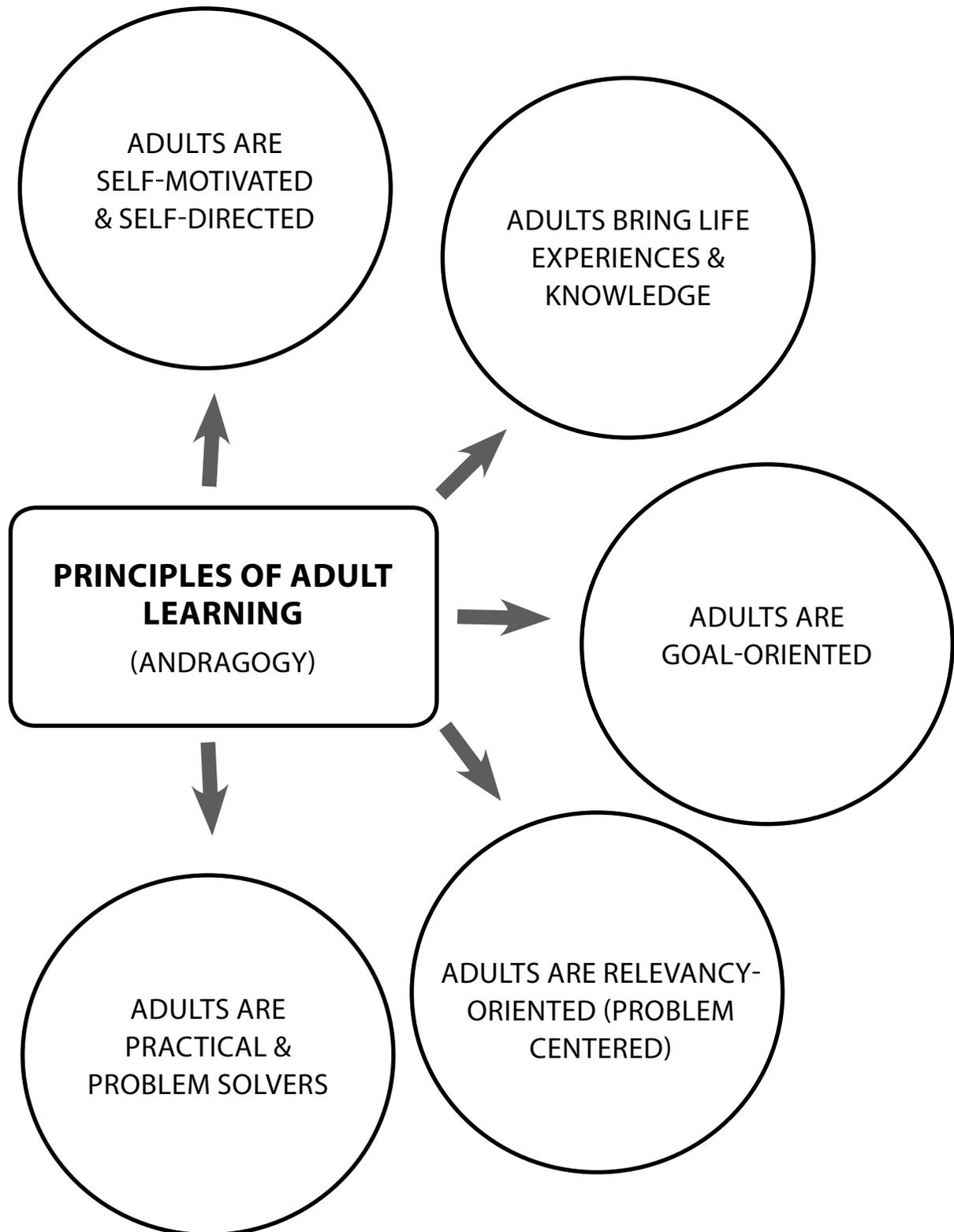
by David Kolb



Principles of Adult Learning

by Malcolm Knowles

Transformational Leadership Model & VISTA Leader Roles



Liaison Role

Liaison: A Definition

A Liaison is someone who connects two or more individuals or groups. The role of the Liaison requires the VISTA leader to be constantly aware of the relationships between key players (self, members, supervisor, sponsor, state office, community) and to identify the needs of these players. These needs may be as complex as resolving conflicts between a VISTA member and the sponsor site, or as simple as connecting a VISTA member with someone who can help her to meet her project goals. In a nutshell, the Liaison role involves acting as a communication link and a conflict resolver/mediator.

Liaison: Role Objectives

The ultimate goal of the Liaison is to bring people together. Part of your responsibility as a VISTA leader is to ensure relationships between team members are on track and that members have what they need in order to accomplish the goals set out in their workplan. Therefore, as a Liaison you may be the person who members come to when they have a conflict or an unmet need.

Liaison: Knowledge, Skills & Attitudes

On the surface, this role may appear simple. However, acting as a Liaison is one of the most crucial and complex roles of the VISTA leader. To be successful as a Liaison, a VISTA leader will need to develop specific knowledge, skills, and attitudes such as those listed below.

Knowledge:

- Thorough understanding of the goals of the VISTA project(s)
- Awareness of the team's progress in order to forecast current and future needs
- Familiarity with an extensive network of people and organizations at the community, municipal, state, and federal levels so that you can help meet VISTA members' needs by connecting them with others
- Awareness of the relationships between project members (remember that conflict is a normal part of the team process and can develop even in the most friendly and productive teams)
- Familiarity with some methods of improving communication among key players, so that each is aware of others' responsibility and progress

Liaison Role (cont.)

Skills:

- Ability to network
- Good listening skills
- Ability to develop trust quickly with all partners and team members involved in a project
- Ability to hear, understand, and explain multiple perspectives in a conflict
- Intuition (to hear what is said and notice what is not being said)
- Ability to foresee or predict future needs

Attitudes:

- Open and non-judgmental (so that people are comfortable approaching you with questions)
- Assume that questions/issues arise from lack of communication
- Passionate about and committed to the VISTA mission and leader role
- Positive
- Enthusiastic
- Outgoing
- Humble enough to admit that you do not have all the answers, but will try to help VISTA members get what they need
- Professional

Practical Strategies for an Effective Liaison

As stated in the working definition, the Liaison role encompasses at least two different functions: (1) communication link between key players and (2) conflict resolver/mediator. Further explanation of each function and key questions to ask are provided below.

(1.) Communication link is an important liaison function because, if done well, it can prevent conflict and miscommunication among key players. In this function, you may be questioned about how the project interfaces with the sponsor agency's mission, and goals, or about the VISTA member's tasks and progress. Therefore, you must keep track of who is doing what, how, and why. Consider yourself on a year-long fact-finding mission. If you are the VISTA leader for multiple sites, acquiring all this knowledge may be difficult. Do as much as you can. At the very least, develop relationships with people at each site who can get you the information when you need it so you can answer any question that may arise. Here are some steps and key questions to assist you in tracking who is doing what and help people make connections.

Liaison Role (cont.)

- Familiarize yourself with all aspects of the sponsor site(s).
 - What is the site’s mission? What are the ultimate goals of the project?
 - Who are the key players in the sponsoring organization? Who holds decision-making power? Who holds veto power?
 - Which people in the sponsoring organization do the VISTA members go to with questions on a regular basis? What are their roles and responsibilities within the organization?
 - What are the sponsoring sites’ expectations of the VISTA members? What is their understanding of the project?
 - What other organizations or individuals does the sponsoring organization collaborate with in the community?
 - What other organizations does the sponsoring organization “compete with” for funding, volunteers, and other resources?
- Familiarize yourself with the individual VISTA project goals (workplan for each member) and how they fit within the sponsor organization. Capture this information on a one- or two-page document so that you can clearly communicate it to others.
 - What are VISTA members expected to do in their role? What are VISTA members not expected to do in their role?
 - What is each VISTA member working on? What progress have they made? What remains to be done before the end of the VISTA term of service?
 - What specific questions or needs do VISTA members have at this time? Are there places in the workplan where VISTA members seem stuck?
- Brainstorm ways you can connect VISTA members with other individuals, organizations, learning opportunities, or other resources to assist them in completing their project. Ask the VISTA member(s) what ideas they have and then share your own ideas with the member(s). You might also refer to the Resource Generator role for further suggestions on linking VISTA members with people and resources.

(2.) Conflict resolver/mediator is a function requiring a great deal of time and patience. Conflicting perspectives and personalities are a normal part of teamwork. However, it is how these conflicts are managed that determines whether or not they detract from project goals. Resolving or managing conflicts can be one of the most important and difficult roles as a Liaison. The first step is to assess your own comfort with conflict. If you are not comfortable with conflict and tend to avoid situations where conflict arises, it is essential that you get

Liaison Role (cont.)

additional training or do extra reading to learn to manage conflict effectively. You may also want to find someone on your team who is skilled in this area and can coach you. If conflict is not managed appropriately, it can have a negative impact on key players and may impede progress toward project goals. The following list is a summary of suggestions about conflict from the book, *Building Community—The Human Side of Work*:

- Recognize that conflict is normal and can be an important catalyst for change where change is needed or desired.
- Everyone has experiences of conflict. It is how we handle conflict that is important.
- We can view conflict as negative or positive. A positive approach involves focusing on how best to use this conflict to achieve the project goals. In other words, ask, “How can we use this divergence in purpose or personality to give us a broader perspective or more fully shape our project?”
- Conflict is typically about what people need or want and rarely about who is right or wrong. If people’s needs are satisfied and their wishes are heard and dealt with fairly, everyone benefits.
- At times it may be important to ask if all parties want to resolve the conflict and try to settle their differences. Otherwise, it may be appropriate to agree to disagree after attempts at understanding have failed.
- If the parties agree to work on a resolution, it is best to assume that each party means well. If you assume the parties are trying to create conflict, your chances of resolution are already diminished. If you help to identify a party’s positive intentions, there is greater likelihood differences will be resolved.
- You must then “listen for understanding” (Carl Rogers). This means reframing the issue at hand. Each person must seek to understand the other person’s point of view and see the issue from his or her perspective before restating it. Such an approach often paves the way for a breakthrough in dialogue that will result in positive negotiation or resolution.

Adapted from *Building Community—The Human Side of Work*, by George Manning, Kent Curtis and Steve McMillen, Whole Person Associates, 1996

Liaison Role (cont.)

Transformational Leadership and the Liaison Role

While each of the Transformational Leadership practices plays an important part in the role of Liaison, the following three are key.

- **“Inspiring a Shared Vision”**
As a Liaison, help define a common vision of the project successfully completed. Become adept at being able to quickly and succinctly communicate the purpose, goals, and value of your project. You will need to do this in order to bring new members up to speed, as a reminder to key players, when seeking out requested resources, and to help motivate key players.
- **“Enabling Others To Act”**
The Liaison will enable others to act by functioning as the communication link and, most importantly, by stopping conflict from preventing the team from meeting project goals.
- **“Modeling the Way”**
In order to be sought out as someone who can help in a time of need, the liaison must be competent at resolving his or her own conflicts and be skilled at bringing people together to achieve common goals.

The Relationship Between the Liaison & Other VISTA Leader Roles

- **Ambassador**
This role focuses on representing and promoting the VISTA mission among project partners in the community and, therefore, is closely tied to the Liaison role. Both roles emphasize connecting people and fostering relationships.
- **Facilitator/Educator**
Skills required and tasks carried out in your Facilitator/Educator role contribute to your role as Liaison. Facilitation skills will assist you in making communication links and helping to resolve conflict. Furthermore, awareness of members’ projects and needs will help you to connect members with people/resources and also to support training opportunities for members.
- **Mentor**
As a Liaison, you are a role model and coach to your members in promoting the VISTA mission and service ethic and in helping them to achieve their project goals for the year.

Liaison Role (cont.)

- **Recruiter**

The Liaison role is complementary to the Recruiter role. An understanding of sponsoring organizations' needs and VISTA projects will help you recruit new members for the next service year.

- **Resource Generator**

As a Liaison, you act as a connection to networks and resources for your VISTA members to help them meet their project goals.

Other Resources

There are many resources available on the Internet, at your local library, and through the National Service Knowledge Network. The National Association for Community Mediation has a Web site with links and information on conflict mediation: www.nafcm.org.

The National Service Knowledge Network is a library for people in national and community service. Go to www.nationalserviceresources.gov to browse and/or borrow resources. The following are some resources on conflict management available from the National Service Knowledge Network.

Conflict Management, various authors, The GilDeane Group, Seattle, WA, 1995, 21 pages. This collection of 10 articles reprinted from recent issues of the journal *Cultural Diversity at Work* highlights the interdependence of managing conflict and creating a diverse work force. Attaining one is dependent on the other. Each of these readings either gives step-by-step keys to conflict management or presents case studies with model solutions. The editor's viewpoint is that mediation by third parties within a context of a social grouping—rather than isolated to individuals—is the more typical and accepted method in cultures outside the Anglo/North American experience. This focus on multi-cultural differences adds significantly to the standard body of information on conflict management.

Getting Past No: Negotiating with Difficult People, William Ury, Bantam Books, New York, 1993, 189 pages. The goal of this book is to help you learn how to stay in control under pressure, find out what the other side really wants, counter dirty tricks, use power to bring the other side back to the table, diffuse anger, and reach agreements that satisfy both sides' needs. There are three sections in this book. The first is "Getting Ready" which is an overview of the process of breaking through barriers to cooperation. The second section outlines five breakthrough strategies. Section three discusses how to turn adversaries into partners.

Liaison Role (cont.)

Getting to Yes: Negotiating Agreement Without Giving in, Roger Fisher and William Ury, Houghton Mifflin, Boston, 1991, 187 pages. What is the best way for people to deal with their differences? This question applies not only to business negotiations, but also to personal relationships or any compromising interaction. The first chapter describes problems that arise using standard bargaining strategies. The next four chapters lay out four principles of the bargaining method. The last three chapters answer the questions most commonly asked: What if the other side is more powerful? What if they will not play along? What if they use dirty tricks? Every negotiation is different but the basic elements do not change. This book uses clear language and examples.

Managing Conflict at Work, Jim Murphy, American Media Publishing, Des Moines, IA, 1994, 80 pages. Conflict often goes hand in hand with change. This step-by-step workbook is designed to help the individual understand, manage, and effectively deal with real life conflict in the workplace. The book highlights the personal and organizational advantages and benefits of viewing conflict positively rather than negatively.

Successful Negotiation, Robert B. Maddux, Crisp Publications, Inc., Menlo Park, CA, 1988, 72 pages. This book, which is written in a workbook format and can be completed in approximately one hour, focuses on successful negotiation in daily life. There are exercises the reader can complete to test his/her ability in applying the concepts that have been presented. Subjects covered include: "what is negotiation?", disagreement and conflict, the win-win philosophy, tactics, and developing a personal action plan.

Mentor Role

Mentor: A Definition

A Mentor is a trusted counselor or guide, a tutor, or coach. As a VISTA leader, you have a role in influencing and guiding VISTA members toward achieving their workplan goals. In a nutshell, a Mentor guides more than directs.

Mentoring can be a peer-to-peer relationship or it can be a relationship between an individual with more experience who shares information and skills with one who is less experienced. Mentoring can also be a combination of the two in which varying levels of experience in different areas can be shared within the partnership.

Mentoring can be formal or casual/informal. Formal mentoring happens when there is a clear structure to the relationship. The Mentor/mentee agree to meet regularly over a period of time to address a specific objective. Together, they participate in training development or community-related activities. In a formal mentoring relationship, the intention is that the mentee learn and develop by following the mentor's example and by making use of the Mentor's help and support.

Informal mentoring relationships often happen on their own, instead of being actively structured with explicit objectives. There may be no formal expectations or regularly scheduled meeting times. In this case, the Mentor simply acts as a role model for the mentee, and may not even be aware that the mentee is using his or her behaviors as an example to follow.

The Mentor's goal is to foster a purposeful relationship between him- or herself and the VISTA member(s) interested in developing skills and finding opportunities for personal and professional growth. The assumption underlying the mentoring relationship is that the mentee is trustworthy, competent, dedicated, and motivated to grow and develop with support from the Mentor.

At times, the informal Mentor will be called on to guide the mentee through a challenging situation. In this way, the VISTA leader's goal is to act as an ally or coach to VISTA members when they are struggling.

To be successful as a Mentor, a VISTA leader will need to develop specific knowledge, skills and attitudes such as those listed below.

Mentor: Knowledge, Skills, and Attitudes

Knowledge:

- Self-awareness
- An understanding of the personal and professional goals of members
- A thorough understanding of the VISTA legacy, vision, and mission

Mentor Role (cont.)

- Awareness of VISTA members' projects, priorities, and timelines
- Insight into how the VISTA members' strengths match the needs of the project
- An understanding of the workplan goals and the activities intended to achieve them
- Familiarity with the state office's VISTA project-related priorities and goals

Skills:

- Active listening
- Ability to ask "coaching" questions
- Ability to ask questions — without always giving an answer — to help VISTA members solve problems
- Ability to support without rescuing
- Ability to set clear boundaries to avoid dependency-producing behaviors
- Ability to articulate the VISTA vision and mission
- Relationship building skills

Attitudes:

- Committed to honesty (a core value of respect)
- Comfortable letting go of the need to feel competent (give yourself and the mentee permission to say, "I don't know," thereby creating an opportunity to learn)
- Open and non-judgmental
- Warm and sincere
- Supportive of independent thinking and problem-solving
- Passionate about and committed to the VISTA mission and leader role
- Positive
- Enthusiastic
- Friendly
- Professional

Mentor Role (cont.)

Practical Strategies for Effective Mentoring

The first decision you have to make in the Mentor role as a VISTA leader is whether you want to pursue formal mentoring relationships with VISTA members. If you decide not to, then you can let members know that you are available to offer casual or informal mentoring to them as appropriate.

If you decide to create more formal mentoring relationships with members, this entails two important steps: (1) assessment and (2) intervention. Some questions, strategies, and ideas for each step are listed below.

(1.) Mentoring assessment means learning what the VISTA member/mentee's needs and objectives are and determining how you might help them meet those objectives.

- ✓ In what way(s) does the mentee want to grow and develop?
- ✓ Research on mentoring recommends "starting where the mentee is" by building on the strengths, interests, and talents of the mentee or VISTA member
- ✓ What is the VISTA member already good at? How can this interest or talent help them with their development objective?
- ✓ Meet with the VISTA member to define and write out the desired objectives of the mentoring relationship; what activities or methods will be used to meet the objectives?
- ✓ Discuss with the mentee who would be the appropriate person to mentor the VISTA member? If it is not you, the VISTA leader, who else would be appropriate? What can you do to monitor and support the mentoring relationship?
- ✓ Work with the site supervisor to clarify each of your roles and to coordinate support and guidance for the VISTA member
- ✓ It will be important for you to review the workplan and strategic vision with the supervisor so that you share a common understanding of the priority goals and activities, the resources needed to achieve them, and how both of you will work with and support the VISTA member.
- ✓ Consider the VISTA member's site supervisor and sponsoring organization. What information and resources does the sponsoring organization possess that would support your mentoring role with the VISTA member? Who in the organization already has information, or has access to information and resources that may be helpful in mentoring the VISTA? What does the organization know about you and your role as leader? What does the organization need to know and how will you ensure they know it? How will you partner with the sponsoring organization on behalf of your VISTA as a mentor who is role modeling relationships?

Mentor Role (cont.)

- ✓ Contact the State Office for information about events or opportunities that may benefit the mentee; the State Office may also have access to other VISTA members who previously served on the project, or other personnel who may be able to offer relevant expertise and guidance.

(2.) Mentoring intervention means implementing the activities plan, which in turn will help the mentee meet his or her objectives.

- ✓ Enter into a contract with the mentee about the expectations and structure of the relationship; establish mutually clear activities and timelines that will help the mentee meet his or her developmental objectives.
- ✓ Determine your mentoring communication process: What information do you need to share with each other, how often and using what method? If you will meet on a regular basis, when and where?
- ✓ Encourage VISTA members to regularly select the activities that will help them meet their objectives themselves.
- ✓ Look for ways to expose the VISTA members/mentee to activities, experiences, and opportunities that they would not otherwise have .
- ✓ Allow the VISTA member to take smaller risks within a supportive environment.
- ✓ Set the VISTA member up to succeed at the activity by offering achievable challenges; for example, if the mentee's goal is to become an effective public speaker, you might provide them an opportunity to give a brief introduction of another speaker at a community event (help them practice beforehand).
- ✓ Schedule a time to "de-brief" or talk about how the risk or activity went and what they learned from the experience.
- ✓ Remember that the power of mentoring is in the relationship; build the relationship through experiences that not only encourage growth, but also foster trust, respect, and communication.

During a mentoring session, coaching questions can be used to gain a better understanding of VISTA members/mentees, what is important to them, and how they see the world and make decisions.

Mentor Role (cont.)

Transformational Leadership and the Mentor Role

- **“Modeling the Way”**

The Mentor sets an example by behaving in ways consistent with the shared values and vision of the sponsoring organization, VISTA mission and the project’s goals and values. The Mentor recognizes small progress and achievements and promotes VISTA members’ continuing growth.

- **“Enabling Others to Act”**

A Mentor helps people develop the skills, internal resources, and freedom they need to meet the workplan objectives.

- **“Encouraging From the Heart”**

The Mentor encourages from the heart by recognizing and appreciating the VISTA members’ contributions to the project’s success at whatever phase the project is in. The Mentor also celebrates individual and team achievements both genuinely and regularly in big and small ways. In working from the heart, deep relationships and trust are fostered en route to the desired change.

Coaching Questions

- How do you know?
- How can you tell?
- On what basis do you decide “x”?
- On what basis have you decided “x” in the past?
- What did you intend to accomplish?
- How well did it work?
- What happens next?
- What is missing?

The Relationship Between the Mentor & Other VISTA Leader Roles

- **Facilitator/Educator**

Skills required and tasks carried out in your Facilitator/Educator role contribute to your role as Mentor. Facilitation skills will assist you in asking good coaching questions and helping you to identify learning/development needs. Furthermore, awareness of members’ projects and personal and professional goals will help you to connect members with appropriate activities, people, and resources and also support relevant training opportunities for members.

Mentor Role (cont.)

- **Liaison**

This role focuses on being a communication link, resolving conflict, and responding to challenging situations faced by VISTA members. It is closely tied, therefore, to the Mentor role. Both roles emphasize connecting people and nurturing growth and development.

- **Resource Generator**

As a Mentor, you may be connecting VISTA members to networks and resources to help them meet their personal objectives and project goals.

Other Resources

Many resources are available on the Internet, at your local library, and through the National Service Knowledge Network. However, the best resource when it comes to mentoring is to think about the person(s) in your life who encouraged you to be all you could be, to take risks, and who guided you in the process of realizing your full potential.

The National Service Knowledge Network is a library for people in national and community service. Go to www.nationalserviceresources.gov to browse and/or borrow resources. Most of the listings for mentoring are geared toward designing and running youth mentoring programs in schools and the community. However, the following resource provides insights for the establishment of a mentoring structure that may prove helpful to VISTA leaders:

- ***Mentor handbook***, Career Academy Support Network, University of California, Berkeley (2000). Organized in two sections: one for coordinators and one for mentors. Topics for coordinators include policies and procedures, mentor orientation and training, and program evaluation. Topics for mentors include effective mentoring relationships, suggested activities, and troubleshooting. The handbook contains sample forms such as a student survey form and mentoring contract.

The following books recommended by the National Center for Atmospheric Research (NCAR) may also prove useful in your role as Mentor:

- ***The Mentoring pocketbook*** (Alred, Geof et al.) . A pocketful of proven tips, tools, and techniques for mentors and the mentored to maximize the benefits of this powerful development process. Long on learning impact, short on words, this book gets you to the heart of the subject, fast. For the expert or beginner, this is a self-learning aid, an instant checklist, and an ongoing source of ideas and practical help.
- ***Managers as mentors: building partnerships for learning*** (Bell, Chip R.). According to consultant and trainer Chip R. Bell, mentoring is a highly synergistic, two-way performance that, when properly engaged, takes on the synchronized qualities of a well-executed dance. In this book, he explains what mentoring is (and is not) and provides a way for readers to assess their own attributes for the practice. Subsequent informa-

Mentor Role (cont.)

tion—designed to be personalized and read in any order—deals with such specifics as giving advice properly, gaining protégé acceptance, lessening the fear factor and finding time to commit to the process.

- ***Mentoring: the Tao of giving and receiving wisdom*** (Huang, Chungliang Ai et al). The new model for business and personal relationships based on the simple yet profound principle of mentoring—both giving and receiving knowledge in a creative mutual exchange.
- ***The manager's pocket guide to effective mentoring*** (Cohen, Norman H.). This practical reference to effective mentoring is in a format that provides quick access to the important concepts and techniques of this unique, powerful, one-to-one learning model. *The Manager's Pocket Guide to Mentoring* is convenient and comprehensive reference, offering valuable, pragmatic guidance that mentors can use in assisting the mentored.
- ***Beyond the myths and magic of mentoring: how to facilitate an effective mentoring process*** (Murray, Margo). Many managers believe that effective mentoring is most often the lucky result of personal chemistry between two people. But in this book, author Margo Murray lays that myth to rest. Her guide gives you all the expert advice, tools, and case studies you'll need to harness the power of mentoring. Building on the solid principles outlined in the first book, this revised edition adds examples of mentoring from recent publications and the author's client experience. It also includes international examples. It reveals how mentoring can maximize employee productivity and provides information on how to assess organizational needs and link them to the mentoring process. Includes all the information needed to evaluate the effectiveness of a mentoring program.
- ***The everything coaching and mentoring book: how to increase productivity, foster talent and encourage success*** (Nigro, Nicholas). *The Everything® Coaching and Mentoring Book* features information on:
 - Inspiring self-motivation
 - Coaching versus mentoring
 - Overcoming common workplace problems
 - Managing diversity issues
 - Handling crises and morale issues
 - Coaching and mentoring for not-for-profit organizations
 - Debunking common myths and misconceptions
- ***Mentoring: a practical guide*** (Shea, Gordon F.). This book explains what it means to be a mentor and examines the methods and styles of mentoring.

Recruiter Role

Recruiter: A Working Definition

Recruiters persuade others to unite their abilities and expertise to achieve common goals. In a nutshell, a recruiter is responsible for finding the right VISTA(s) for the next year's open VISTA position(s). The recruiter role is an exciting one. It combines elements of the sales representative, the matchmaker, the manager, the public relations specialist, and the artist. As a recruiter, the VISTA leader is responsible for "selling" the position, the site, the agency, VISTA, national service, and a city, town or region of the country. It also means being a matchmaker connecting someone's skills and desires with the requirements and vision of the position and shared VISTA goal of eliminating poverty.

Recruiter: Role Objectives

The goal of the Recruiter is to advertise open VISTA placements and attract as many qualified applicants as possible. VISTA leaders in the Recruiter role often jump too quickly into attending university career fairs. Standing behind a table, smiling, and handing AmeriCorps stickers to college students, the VISTA leader usually has limited success at finding the right VISTAs for their program. In order to be truly effective as a VISTA Recruiter, it helps to view the role as a series of smaller steps: (1) gather information about the anticipated VISTA workplans/positions, (2) develop a recruitment plan, (3) implement the plan and (4) evaluate the plan.

It is not enough to simply recruit VISTA members. You must also retain the ones you have. Good VISTA member retention is related to other VISTA leader roles, such as Mentor and Liaison, but keeping members starts with recruiting the right members in the first place.

Recruiter: Knowledge, Skills & Attitudes

To be successful as a Recruiter, a VISTA leader will need to develop specific knowledge, skills, and attitudes such as those listed below.

Knowledge:

- Thorough understanding of the goals of the VISTA project
- An understanding of the benefits of VISTA service
- Familiarity with the VISTA workplans for which members are being recruited
- Familiarity with the community in order to know where to go to recruit people and who to talk to
- An understanding of the sponsoring organization and its key players
- Basic information about marketing and public relations

Recruiter Role (cont.)

Skills:

- Communication skills, written and verbal
- Public speaking/presentation skills
- Good active listening skills and a willingness to ask questions in order to learn more about someone
- Project planning and event organizing skills
- Creativity

Attitudes:

- Outgoing
- Positive
- Enthusiastic
- Tenacious, flexible, and patient
- Caring
- Dedicated to seeing VISTA positions filled with the best possible people
- Professional

Practical Strategies for Effective Recruitment

Above all, the Recruiter role requires listening and talking to people. Though the listening part might seem easier than the talking part, it can be surprisingly difficult. Listening means preparing two or three questions that, when answered, will give you information about the person you are talking to. Responses to your questions will allow you to tailor your recruitment message.

In *Crossroads*, a popular teen movie in 2001, Dan Aykroyd plays father to college-bound Britney Spears. As she is about to leave home, he says to her, "Remember: interested is interesting." Of course, in the context of the film the father was not giving Britney advice about recruiting VISTA members. He was trying to help her make new friends. But whether your goal is new friends or new VISTA members, the point is the same. Express your interest in the other person first and that person will be far more likely to listen to what you have to say. Furthermore, responses to your questions will help you identify ways that VISTA is a good fit with the interests and desires of a potential recruit.

There is so much you could say about VISTA, the organization, and the role, but you don't want to overwhelm a potential recruit, so be selective about what you tell them. Try picking three key things you want a person to remember about VISTA. Here are some examples of ways of tailoring your message based on what you know about the person, their needs and

Recruiter Role (cont.)

interests. Let's say you're speaking to someone who is just graduating from university, is considering a career in teaching, and is hoping to eventually get a graduate degree. You might say VISTA is (1) an opportunity to work with kids, (2) a one-year program commitment and (3) an opportunity to earn an education award to pay for graduate school. If the person is a mother of two who wants to re-enter the workforce for the long term, you might say VISTA means (1) getting experience in nonprofit, community development work, (2) subsidized child care, and (3) non-competitive eligibility status for Federal government positions following a one-year term as a VISTA. If it's a retired professional, VISTA might mean (1) a chance to get involved in community volunteering or "give back," (2) an opportunity to take on a project with flexibility and independence and (3) an opportunity to work with young people.

"Interested is interesting"

What to ask a potential recruit before launching into your AmeriCorps VISTA spiel ...

- What type of work are you interested in doing?
- What are your plans in the coming year? (looking to move, go back to school, get a job, etc.)
- What have been some of your favorite courses at school or university?
- What have you heard about AmeriCorps or VISTA?

The recruiter role also requires that you ask for help from other VISTA members in at least three ways. First, encourage other VISTAs to use their connections with friends and family to get the word out about open VISTA positions for the upcoming year. Second, ask current VISTA members to document their year through photographs, stories, videos, poems, songs, drawings, and journal entries. Ask them to record the experience through their own eyes, but also ask them to highlight successes of communities, groups, and individuals they are working with. Ask permission to share some of what you have gathered in newsletters and recruitment materials. Third, work with current members to keep them for a full term of service. Recruitment is also about retention. As a VISTA leader, how can you support other VISTA members to help them get the most out of their year? What can you do to help current VISTA members successfully fulfill their workplan mandate? Sometimes it means simply listening when VISTA members encounter an obstacle or challenging situation.

As with all of your VISTA leader roles, work with your supervisor on recruitment tasks. Depending on the relationship you have with your VISTA supervisor, this may range from giving monthly updates on your progress to working side-by-side at recruitment fairs. Ask your supervisor to share the workplan and strategic vision for the future VISTA you are seeking. Who are they looking for? What are the criteria for recruiting the best possible member? What have they done already to recruit someone for the upcoming year(s)?

Recruiter Role (cont.)

As you know, when people in VISTA talk about the “sponsor,” they usually mean the sponsoring organization (a community nonprofit organization) that wrote the grant to get a VISTA. In your recruiter role, work with your sponsoring organization to learn what recruitment efforts are already under way. Is there a Web site or other place where they post job listings? What do you need to do to post a VISTA position with the sponsor? Does the sponsoring organization already have recruitment materials you can use? These might include brochures, documents, stories, and photos that say something about the sponsoring organization’s mission and culture.

Ask your state office what is happening in regional and/or national recruitment efforts. Can you tap into these efforts? The state office might have useful recruitment supplies such as AmeriCorps posters, sign-in sheets (for recruitment fairs), banners, display boards, pins, buttons, stickers, business cards, folders, brochures, etc. Your state office may also be able to get in touch with previous VISTA members who have served locally and would be willing to help with recruitment efforts or speak with potential recruits about their VISTA experience.

Here are other suggested steps for the Recruiter role with ideas and key questions to ask during each phase.

(1.) Gather information about the anticipated VISTA workplans and positions.

- ✓ Plan for what the VISTA will do. Find out from your supervisor what their workplan will look like. What will be the VISTA’s key responsibilities?
- ✓ Do not start recruiting VISTAs until there is workplan written for the position you are recruiting for! It is like being an architect of a house. You need to have a blueprint and some sketches of what the final product will look like before you can ask someone whether they want to build it and live in it. Similar to a blueprint, the VISTA needs a workplan from which to start. Think of your own workplan for your VISTA year. How would you re-write it based on what you know now? What was helpful in your workplan? What do you wish had been there that was missing? The workplan does not need to be entirely fleshed out, but it should show a potential VISTA what opportunities await them. A VISTA needs enough direction to get started, but not so much direction that they feel they are just following a recipe.
- ✓ Part of your matchmaking role is getting to know the organization and the community. Get to know your organization. Identify key organizations, people, and resources in the community. Gather information about what it takes to be successful in a particular community.
- ✓ Identify skills and interests required to carry out the key responsibilities. What specialized knowledge will this person need? What motivations and interests will this person need? What other qualities does the person need to be successful in this organization and community?

Recruiter Role (cont.)

- ✓ Brainstorm possible places you might find someone with the skills, motivation, and other qualities required to carry out the workplan.

(2.) Develop a recruitment plan.

- ✓ Develop a tentative calendar for the year listing your recruitment efforts and events in order to help stay on track. Remember that you will need to plan for some events several months in advance. Job fairs often require registering in advance. Return to your calendar or recruitment plan often to make updates and adjust your time and tasks as needed.
- ✓ Use a multi-faceted approach to recruiting. This means you recruit for the same position in more than one way. See the Where to Post list below for ideas.
 - What online resources are available to post the VISTA position (AmeriCorps recruitment system, Peace Corps Web site, nonprofit job listings online, etc.)?
 - What activities or events should you go to in person (city job fairs, college career fairs, church socials, etc.)? Who do you need to call to find out about these events and activities?
 - What “paper-based” recruitment should you do (write a job posting for local newspapers, neighborhood papers, community newsletters, flyers at the laundromat, etc.)?
- ✓ Find out what others are doing and create a list of the contact names, phone numbers, and e-mail addresses of key contacts and resources.
- ✓ Create a strong AmeriCorps VISTA message or “spiel” that you could deliver to anyone you meet, then tailor it to person’s particular circumstances.
- ✓ Know what you need to do with interested applicants’ contact information. Does your program or sponsor have a database where you can record potential VISTA members’ names and contact details? What is the next step? When does the program review applications and schedule interviews? When will the program make a final decision about VISTA members for the following year? You need to know this so you can communicate it to potential applicants.

(3.) Implement the plan.

- ✓ This is the fun part. Follow through on the recruitment plan/calendar that you created in the previous step.
- ✓ As you get people interested in the VISTA position, send them a quick note to let them know you received their application. See the example below the “Where to Post” ideas.

Recruiter Role (cont.)

(4.) Evaluate the plan.

- ✓ Return to the information you gathered in the first two steps. How well did you do at creating a recruitment plan that was multi-faceted? How successful were you in your role as sales representative and matchmaker? Were you able to complete the recruitment plan in a timely manner or were you scrambling to recruit someone at the end of the year?
- ✓ The true test of your recruitment efforts will be whether the VISTA successfully completes his or her term of service and fulfills the workplan's mandate. What are you doing this year with your current VISTA members to make sure they stay? You can send supportive e-mails and make encouraging phone calls, set conference calls to help members connect with you and other members, have parties or potlucks in the VISTA members' honor, and/or send random notes and messages of appreciation.

Where to Post

- AmeriCorps Web site. Make sure the position has its own entry on www.americorps.gov
- Use your VISTA Assignment Description to write up your posting
- Always clearly state that there is no upper age limit so that older folks know AmeriCorps VISTA is not just a program for youth.
- Keep in mind what is in it for them. How will this position benefit them while also helping the community? People who are looking for opportunities to do something good are also strategizing about how to schedule and accomplish longer-term personal goals. How does this year of national service meet their needs?
- Organizations' Community Newsletters – Make sure that the organizations' own clients or former clients know about the opportunity. Talk about the job opening in the program newsletter. People who already take an interest in organization's mission will read the newsletter and may know someone who is perfect for the position.
- College and university career services – Career center directors and counselors may be familiar with AmeriCorps, but may not be very clear about how to get students information about AmeriCorps and VISTA programs. You must do more than just give an AmeriCorps poster to the career center along with flyers and information on specific positions. Make sure they stay stocked and updated. To start, make a list of schools and contact information (name, phone, address, e-mail) for Career Center directors, service learning coordinators and student services staff.
- Career Fairs — Go to career or service learning fairs, and panel discussions on college campuses. Try partnering with other AmeriCorps programs or Peace Corps to maximize your efforts and audience.

Recruiter Role (cont.)

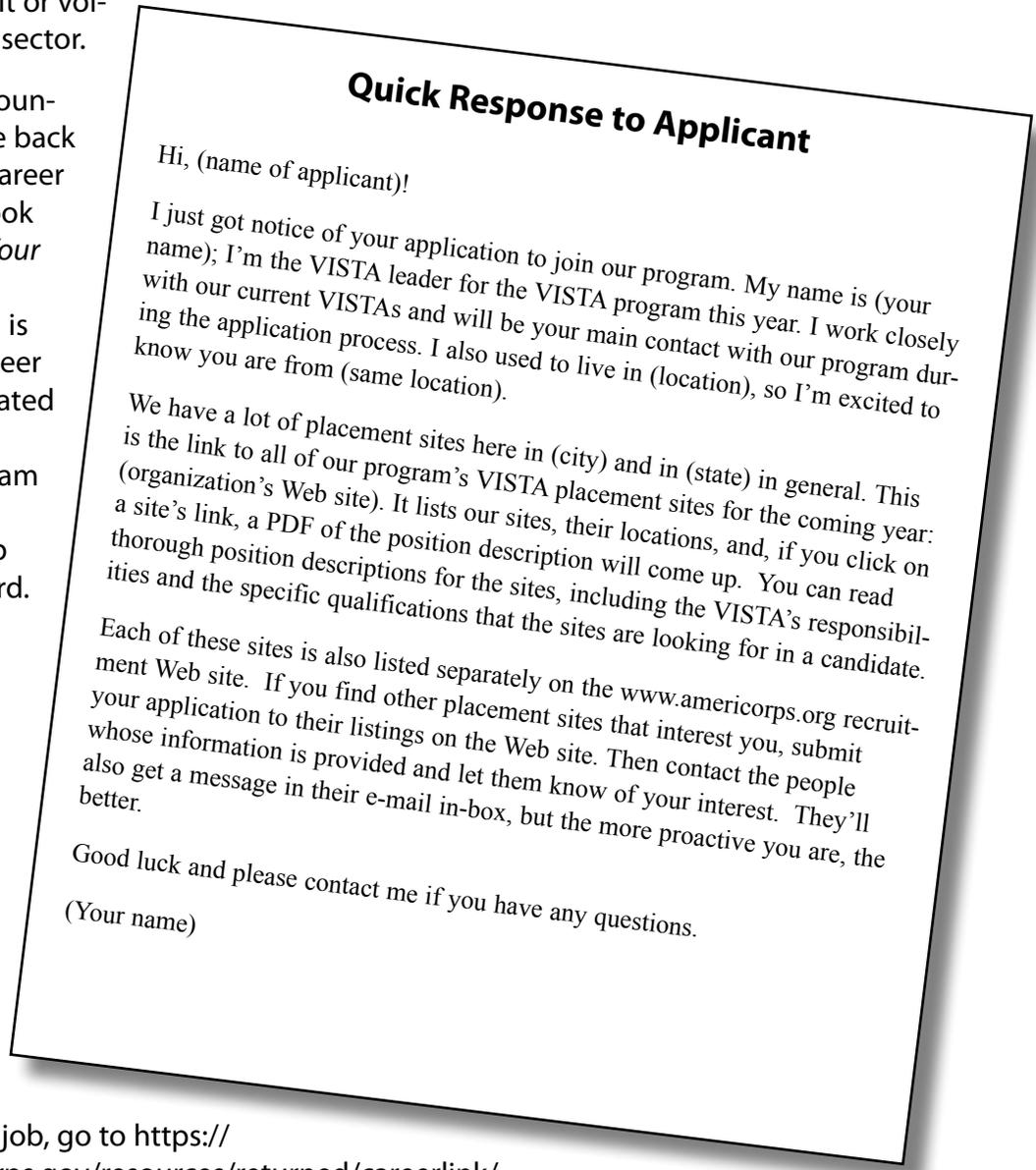
- ❑ College and university service learning coordinators — If the university has a service-learning program, these coordinators will know the students who are already interested in the nonprofit or volunteer service sector.

- ❑ Other career counselors — In the back of the classic career exploration book *What Color Is Your Parachute?* (by Richard Bolles) is a list of the career counselors located in each state. Sending program information to them may help spread the word.

- ❑ Peace Corps Web site — Peace Corps offers several resources to newly Returned Peace Corps Volunteers (RCPVs) and that includes job postings. To post a job, go to <https://www.peacecorps.gov/resources/returned/careerlink/postjob/>

- ❑ Other Web sites for job seekers — For example, post on The Liberal Arts Career NetWORK. It is a place where employers can post positions for free for a readership of up to 60,000 students from top liberal arts schools. Go to <https://lacn-csm.symplicity.com/students/?s=home>

- ❑ Other ideas that work for you and your program — Tap into the creative artist in you and come up with recruitment and posting ideas that no one else has thought of. The possibilities are endless.



Recruiter Role (cont.)

Transformational Leadership & the Recruiter Role

All five behaviors of a transformational leader are relevant to the recruitment role of a VISTA leader, but two are key: inspiring a shared vision to recruit new VISTA members and encouraging from the heart to retain members once they are on board.

Transformational Leadership Model & VISTA Leader Roles

- “Inspiring a Shared Vision”**
 Recruiting requires transmitting a shared vision. In order to do your best work as a matchmaker, you must appeal to the dreams, values, and goals of others and draw parallels with what the position has to offer. Everything about recruitment requires planning and thinking. Something as basic as what you say to a potential recruit, and the questions you ask to strike up a conversation, require thinking ahead and writing something down.

Benefits of Serving as a VISTA

- Education award (\$5,550 education voucher which may be used at the college or university of your choice) or stipend (up to \$1,500)
- Non-competitive status for Federal positions in the year following your term of service as a VISTA
- Living allowance
- Maintain eligibility for other benefits while serving as a VISTA
- Health insurance
- Move to a new community in a place you want to live OR work within your own community

- “Encouraging From the Heart”**
 Retaining VISTA members is all about encouraging from the heart. It is about random appreciative remarks to let people know that you notice their achievements and efforts. Asking questions, listening to responses, and putting yourself in other people’s shoes is critical to retaining VISTA members. Think of ways to celebrate a job well done. Remember to also celebrate the risk-taking, effort, and learning opportunities associated with failures and mistakes. As you know, being a VISTA is about planning and trying things based on the best information available. When something doesn’t work, it is important to learn from the experience and do better next time. Encourage VISTA members to document their learning experiences so that others (the next VISTA member, sponsoring organization, community) can benefit.

The Relationship Between the Recruiter & Other VISTA Leader Roles

- Ambassador**
 This role includes representing and promoting the VISTA mission among project partners in the community and is, therefore, closely tied to the Recruiter role. Both roles emphasize communicating the VISTA mission and generating excitement about past, present, and future VISTA projects.

Recruiter Role (cont.)

- **Facilitator/Educator**

The question-asking and public speaking/presentation skills required in your Facilitator/Educator role complement your role as Recruiter. Facilitation skills will assist you in making links with important recruitment partners and in helping to resolve conflict. Furthermore, awareness of members' projects and needs will help you explain typical VISTA projects to potential recruits.

- **Resource Generator**

As a Recruiter, you are making connections with individuals and organizations that will also help you and other VISTA members connect to networks and resources and, in turn, meet specific project goals.

Other Resources

The National Service Knowledge Network is a library for people in national and community service. Go to www.nationalserviceresources.gov to browse and/or borrow resources. However, the following resources offer some guidance in recruitment that may prove helpful to VISTA leaders.

- AmeriCorps Recruitment and Placement System Web site. Post your open VISTA position so people across the county can see it at www.americorps.org. Contact your state office for assistance.
- The following resources, and others, are available from the National Service Knowledge Network. Go to <http://www.nationalserviceresources.gov>
 - *The Resource Connection*, Volume 3, Number 3 ("Recruiting and Retaining Members with Disabilities")
 - *The Resource Connection*, Volume 4, Number 1 ("Recruitment and Retention")
 - *Art of Recruiting and Retaining Volunteers* (Bradner 1995)
 - *Becoming a Better Supervisor: A Resource Guide for Community Service Supervisors* (NCPC 1996)
 - *Recruiting New Members* (ACTA videotape, 1996)
 - *Secrets of Motivation: How to Get & Keep Volunteers & Paid Staff!* (Sue Vineyard)

Effective Interviewing

Conducting a good interview requires several skills, the most important being good listening skills. The interviewer's ability to listen well is tantamount to learning what you need to know about your candidate and his or her qualifications for the available position. Learning to be a good listener also ensures that the interviewer is not dominating the interview, which too frequently occurs.

A good interview requires the interviewer to possess thorough knowledge of the position and what experience and skills will be required to meet the expectations of that position. This allows the interviewer to scan for pertinent information in a variety of ways during the interview and also ensures that the interviewer will be able to communicate information about the position in clear, meaningful ways to the interviewee. This helps focus the interview and keeps it "on topic."

The next important skill is to learn about the candidate's strengths and determine if there is a match between strengths and needs; and between attitude and challenge; interest/passion and the intangibles of the position.

Also, critical to being a good interviewer is the ability to read body language, which includes facial expressions, tone of voice, eye contact, body position, physical presentation, etc. Being able to observe the consonance or dissonance between words and body language helps the interviewer determine the authenticity of the information gathered and is critical to making the best selection of a candidate.

Asking open-ended questions insists the interviewee reveal considerable information about him- or herself, including the ability to hear and respond to the question with clarity; the ability to integrate his or her knowledge-base, abilities, and experience in a focused way; it reveals the attitudes and values behind the candidate's words and experiences; it allows an opportunity to reveal his or her work and educational history and the relevance of both to the available position and its requirements; it suggests what the candidate's goals and passion might be in the future; and, finally, it provides the interviewer sufficient information about the candidate's knowledge, skills, and attitudes to determine the fit between what the candidate could bring to the position and what the position demands.

As VISTA leaders, please discuss and find consensus regarding the following questions related to interviewing:

1. Five skills were identified above for interviewers to master to become good interviewers; identify three additional important skills interviewers should possess.
2. Identity five open-ended, questions (for each of the following three categories) that would provide the interviewer with information about the candidate's Knowledge-base, Skills and Abilities, Attitudes and Motivation.

Effective Interviewing (cont.)

3. One of the most difficult aspects of an interview is to get a clear picture of the candidate's weaknesses or limitations. Suggest at least three ways skilled interviewers can approach this challenge.
4. Prepare an 8–10 minute role play that illustrates the skills identified in the narrative above and in question 1. The role play should illustrate a VISTA leader interviewing a potential VISTA for a particular project.

Before you begin the role play, set the stage by addressing the following:

- Is this for an urban or rural VISTA position?
- What year in the three-year project plan is the candidate applying for?
- What roles, responsibilities, and abilities are required for this position?

Resource Generator Role

Resource Generator: A Definition

Resource Generators identify and build relationships that lead to the acquisition of needed resources. These resources generally include, but are not limited to, money, materials, supplies, people, knowledge, information, partnerships, and alliances.

This role requires the VISTA leader to actively identify, link, educate, and connect themselves and other VISTA members with those who have power and influence when it comes to getting the resources you need.

In addition, the VISTA leader Resource Generator role requires the leader to mentor the VISTA member as s/he develops resource generation skills. In keeping with the Mentor role, in addition to directly securing resources, leaders also help VISTA members develop their individual resource generation skills.

At the most basic level, this role is heavily dependent on the VISTA leader's ability to build and constantly expand a network of relationships. The quantity and, to a certain extent, the quality of relationships will ultimately determine a VISTA leader's and member's success in securing a variety of project resources from multiple sources.

Resource Generator: Role Objectives

The Resource Generator's primary objective is to facilitate VISTA members' successful completion of project tasks by helping them access the resources they need.

The leader's role is to be conscious of how members can pool their skills and resources to improve both the leader's and members' chance of success. This can be accomplished through a variety of approaches:

- Do your homework. Learn about successful resource generation practices used by other VISTA leaders and members and then share the information. Share your success stories with other leaders and members.
- Think creatively. What do you really need? Can you substitute something else? Can you adapt or modify your need or the resource? Can one resource be put to multiple uses?
- Know your resources. Discover the resources you already have. The four major categories of resources include: people, money, goods, and services.
- Know your needs. Determine what you need now and what you'll need next.
- Continually scan the external environment for possible resources.
- Plan ahead and consider the amount of time others will need to make decisions.

Resource Generator Role (cont.)

- Foster and maintain mutually satisfying resource exchange relationships.
- Manage and maintain key relationships with other VISTA leaders, other members, their supervisors, sponsoring organizations, the state office, and the Corporation for National and Community Service.
- Remember, success often depends on persistence and building relationships.
- Build a resource exchange team with the VISTA members you support.
- Bring potential donors on site visits. Make the project come alive and touch the heart of the potential resource donor.

Resource Generator: Knowledge, Skills & Attitudes

To be successful as a Resource Generator, a VISTA leader will need to develop specific knowledge, skills, and attitudes as outline below.

Knowledge:

- A thorough initial understanding of specific VISTA members' projects and project needs (to do this, conduct an assessment as described below).
- Continued awareness of changing VISTA member resource needs throughout the year (remind VISTA members that it is their responsibility to get this information to you).
- Awareness of potential community resources.

Skill:

- The key resource-generator skill is networking. The rule of successful networking is reciprocity. Keith Ferrazzi, author of *Never Eat Alone*, describes it this way: "A network functions precisely because there's recognition of mutual need. The more people you help, the more help you'll have and the more help you'll have helping others." Successful networkers first and foremost are interested in and curious about other people and organizations' endeavors. They seek out unfamiliar groups and organizations with a view to making unlikely connections and reaching common goals. Research has demonstrated that the quantity of your connections is more important than their quality. You don't have to be best friends with everyone you meet; simply make and periodically check in with your network. When someone in your network helps you, remember to do the following:
 1. Thank the person and be specific about what you are thanking them for.

Resource Generator Role (cont.)

2. Acknowledge the effort they made on your behalf.
3. Tell them what it means to you.

Attitude:

- Resource Generators must adopt and project a positive and open attitude about opportunities. Jacki Coyle, executive director of Shepherd's Table in Silver Spring, Maryland, demonstrated such an attitude when an 11 year-old child made a \$25 donation to the organization. Shepherd's Table serves meals to 1000 people a day. What difference could this small donation really make? With some creative thinking, the \$25 was used to purchase 100 casserole pans. These pans were distributed to churches, civic groups, cooking clubs, and businesses with community service programs. Each casserole pan was returned to the Shepherd's Table and ultimately 1000 people received meals. It all started with \$25, an optimistic attitude, and openness to opportunities.

Practical Strategies for Effective Resource Generation

Here are some steps you may wish to follow in your role as a Resource Generator.

(1.) Find a resource generation guide that interests you.

- ✓ For example, secure a free copy of *Discover Total Resources: A Guide for Nonprofits*. This resource contains more detailed information on resource generation. The complete guide is available online at <https://www.nationalserviceresources.gov/online-library/items/r0035#.U0R5gVdAWgQ>

(2.) Identify possible resources required for VISTA projects.

- ✓ According to *Discover Total Resources: A Guide for Nonprofits*, total resources include: people, money, goods and services. All four of these resource categories work together and independently to meet community needs. Excerpts of the resource category definitions are as follows:
 - **People**
People are the key to all resources (money, more people, goods, and services). People are everywhere. The challenge is to discover how to utilize the most people, in the best combination, to your organization's greatest advantage.
 - **Money**
Money isn't everything, but you can't run a nonprofit without it. According to the American Association of Fundraising Council, individual donations account for 85% of

Resource Generator Role (cont.)

charitable giving in America. Donations are the only source of money for nonprofits. There is also investment income; membership dues; earned income from businesses, goods and services; government grants and contracts.

- **Goods**

Any personal property value, excluding money and securities, is a good. Often called money substitutes, a good is a vital non-cash resource for any organization. Goods are available everywhere there are people ... homes, businesses, governments, civic groups. To obtain goods, determine your needs, match them with the most probable sources, and develop an action plan.

- **Services**

Services are the most underrated of all community resources. Corporations, small businesses, vendors, colleges, other nonprofits, individual professionals and tradespeople ... everyone providing a service for a fee is almost certainly also providing it for free or at a discount for some worthy cause.

(3.) Conduct a self-assessment with each VISTA member.

✓ The following questions provide you with a basic format for the assessment.

- What is your project goal?
- What tasks are associated with achieving the goal?
- What resources will you need to your complete these tasks and meet this project goal?
- What resources do you already have?
- What alliances and/or partnerships are critical to your success?
- Who are the key stakeholders? Who might contribute to or detract from your success?
- What relationship do you need to develop with these key stakeholders?
- What are the specific unmet financial or material needs?
- Are you confident you have the skills required to get the project done?
- What do you need from me to help you generate resources?

✓ These questions are designed to guide you through a self-assessment process. Consultant Mark Goulston suggests that you reframe or rephrase questions into a "fill in the blanks" format. How different does it feel to be asked, "What are your goals?" compared to, "We are meeting together now, because you want to accomplish _____? In order to accomplish _____, you are likely to need _____. This method encourages VISTA member(s) to work collaboratively with you instead of feeling challenged, or

Resource Generator Role (cont.)

put on the spot with “What are your goals?” Direct questioning can sometimes lead to defensiveness or a feeling of having to give the “right answer.” Try this out and see if you find a difference in the quality of the assessment results.

- ✓ Note: Consider approaching each member individually before conducting a group assessment. This will be an opportunity to support the development of a resource network between members. It is highly likely that some members of the group already have or are able to secure resources that others need. Often, they are able to share those resources. Ideally, members should reach out to one another in addition to seeking support from you, the VISTA leader.

(4.) Support VISTA members throughout the year with their resource generation goals

Transformational Leadership and the Resource Generator Role

Each of the Transformational Leadership practices play a role in generating resources.

- **“Inspiring a Shared Vision”**
Create a shared vision of a skilled resource generation team. Determine what this means in terms of project success and improving people’s lives.
- **“Enabling Others to Act”**
Resource generation will enable others to act. Members, clients, sponsors and, ultimately, AmeriCorps VISTA all benefit from resources that assist in meeting the VISTA workplan and project goals.
- **“Challenging the Process”**
Use tried and true methods and then stretch yourself to be creative. Try new approaches to generating resources. Question the inclusion of certain items on your resource list. Do you really need a particular resource? Or are you simply doing things the way they are usually done? Can something be eliminated?
- **“Modeling the Way”**
You must walk the talk. Build your own network and introduce VISTA members into that network. Treat VISTA members as part of your network with all the respect that you give to others who help you.
- **“Encouraging From the Heart”**
Help VISTAs see that seeking resources provides an opportunity for others to add meaning to their lives by making meaningful contributions of time, talent, money, or material goods. Ultimately, well-used resources change people’s lives for the better.

Resource Generator Role (cont.)

The Relationship Between the Resource Generator & Other VISTA Leader Roles

- **Ambassador**
This role provides opportunities to gain access to resources. The astute leader will learn about existing and potential community resources.
- **Liaison**
This role ties in with the need to connect members with the people whose resources they need. This role is about empowering members to generate resources on their own.
- **Facilitator/Educator**
This role also complements the Resource Generator role. Facilitating relationships and creating opportunities for members to learn and generate resources is a big part of being successful in the Resource Generator role.
- **Recruiter**
The skills used in successfully recruiting new VISTAs or community volunteers are powerful when it comes to finding and recruiting other human resources. The leader must broaden his or her understanding of recruitment beyond member recruitment to include resource recruitment. Ask yourself what talents, skills, knowledge, and connections volunteers can bring to project tasks and goals.
- **Mentor**
As a Mentor, the VISTA leader has an opportunity to guide and support VISTA members in improving their ability to generate resources.

Other Resources

Discover Total Resources: A Guide for Nonprofits.

For more detailed information on resource generation, get your own free copy of Discover Total Resources: A Guide for Nonprofits at <https://www.nationalserviceresources.gov/online-library/items/r0035#.U0R5gVdAWgQ>.

Grassroots Fundraising, Inc. (www.grassrootsfundraising.org)

This site is a gold mine for VISTA leaders and members. Grassroots Fundraising claims that fundraising is a critical part of progressive social change and that anyone can do it. Check out this Web site. It is full of useful information and ideas.

Resource Generator Role (cont.)

The Foundation Center (www.foundationcenter.org)

The Foundation Center's mission is to strengthen the nonprofit sector by promoting knowledge about U.S. philanthropy. Founded in 1956, the Center is the nation's leading authority on philanthropy and is dedicated to serving grantseekers, grantmakers, researchers, policy-makers, the media, and the general public. The Center does the following:

- Collects, organizes, and communicates information on U.S. philanthropy
- Provides education and training on the grantseeking process
- Provides public access to information and services through its Web site, print and electronic publications, five library centers, and its national network of Cooperating Collections.

Good360 (formerly Gifts In Kind) (www.giftsinkind.org)

The world's leading charity in product philanthropy. Linking resources to enhance, empower, and restore communities and people in need. Ranked as one of the most cost-efficient charities in the world, Gifts In Kind International operates at less than 0.5 percent of its annual donations. In 2004 alone, Gifts In Kind International and its global affiliates distributed nearly \$820 million in quality products to a network of more than 200,000 charitable nonprofits around the world.

The Grantsmanship Center (www.tgci.com)

This center is a fundraising and training organization offering courses and publications on grantsmanship and fundraising.

Giving Circles (<https://www.givingforum.org/topic/giving-circles>)

Learn about Giving Circles, in which donors pool their money, energy, and ideas, and find out how to connect with them.

Communication: The Core of Leading Effectively

Communication is the foundation for relationship building or breakdowns. We are in a constant state of communication whether we are aware of it or not. As human beings, we frequently are thoughtless or unconscious about what we are communicating and the impact of our communication on others. It is an ability we too often take for granted or to which we assign little import.

The reality is that communicating is a difficult and complex activity. The mere desire to send information out from ourselves to another requires that:

Sender

1. I intend to send a particular message.
2. I communicate the message.
3. I believe I sent the particular message I intended and the particular message was heard as intended.
4. I may or may not ask for feedback to assure the particular message was heard as intended.

Receiver

5. I heard a message.
6. I assign meaning to the message from my own frame of reference.
7. I think I understand the particular message as intended.
8. I may or may not provide feedback that I did or did not understand the particular message as intended.

This is the first level of communication and at any point along the eight aspects of communication there could be a failure to send or hear the particular message as it was intended. There are many barriers that challenge good communication and the ability to manage these barriers raises communication to an art.

Good communication is the ability to align your message in a way that resonates to your real thoughts, emotions, and beliefs. So, what I am communicating reflects what I am really thinking, how I feel, what I believe, and how I am behaving. The other half of effective communication is listening. Listening is wanting to hear. Take a moment to rate yourself on a scale of 1–10, with 1 representing an ineffective communicator and 10 representing an effective communicator. Also, rate yourself as a listener using the same scale (1 being distracted listener and 10 being an active listener).

The Knowledge & Skills of Effective Communication

1. What are the core ingredients that make communication effective? Be specific.
2. What are five significant barriers to effective communication?
3. What is the influence of your “family of origin” on your communication style? Be specific.
4. What is the difference between verbal and non-verbal communication? Which is more likely to be authentic? Why?
5. What does self-awareness have to do with being an effective communicator? Be specific.
6. Name some of the best communicators you know or know of. What made them so effective? Be specific?
7. Please describe the relationship between being an effective communicator and an effective leader? Think broadly.

What are the core ingredients that make communication effective?

1. Seek first to understand, and then to be understood.
2. Develop exquisite listening skills. This requires focused listening, not mentally preparing a response, while the other person is communicating.
3. Discipline yourself on a daily basis to increase your self-awareness.
4. Get comfortable with being told ‘no;’ being disagreed with and criticized; and with strong emotional responses.
5. Allow other people to own their own reactions, mental and emotional, to your messages.
6. Find out what other people require to feel respected when involved in a communication transaction.
7. Become flexible and open to individual and cultural diversity aspects of communication.
8. Be willing to challenge your own assumptions, judgments, and biases.
9. Give yourself permission to err and to apologize if necessary.
10. Find the existing common ground with the person or people you are communicating with and begin the communication by stating it clearly.

The Knowledge & Skills of Effective Communication (cont.)

What are common barriers to effective communication?

Fear is a critical barrier to effective communication. Many of us devise elaborate communication patterns to protect ourselves from disapproval, rejection, criticism, being seen as wrong, being told “no,” of being discounted, etc. Most of these patterns began with our family of origin and our relationship to authority figures.

In order to feel safe we try to hide our fear and take on indirect communication patterns. The two most dominant patterns are placater and blamer. As a placater, I am seen as a “yes” person and am prone to burnout because I allow myself to be taken advantage of. Some of my placating patterns include: saying yes when I really want to say no; avoiding difficult conversations, withdrawing, and masking.

As a blamer, I possess the same or similar fear as the placater, but instead, I keep people at a distance by dominating communication and blaming others when things go wrong or mistakes are made. I may engage in labeling behaviors, criticism of others, controlling behaviors or when feeling high fear, attacking or aggressive behaviors, such as shouting, name calling, put-downs ... in general, making other feel small and wrong, and as if they don't matter.

For both placaters and blamers conflict is difficult and they exhibit their unique pattern as a way to hide their fear and prevent the conflict from occurring, thus preventing them from losing face! Fear also contributes to poor listening skills which is another primary barrier to effective communication. Poor listening leads to misinformation, confusion, contradictions, unnecessary disagreements, misinterpretation, and poor problem-solving and decision-making processes.

Another barrier to effective communication is a weak or non-existent feedback system. Feedback provides an opportunity to communicate my understanding of the information shared and provides an opportunity for clarification, the appropriateness of the communication, and whether the message/information needs to be clarified, etc.

A lack of organization around how the information will be communicated (verbal/written, announcements, meetings, e-mail, etc.), to whom the information will be provided, how often, and what the feedback process will be, significantly contribute to poor communication processes.

There are many other barriers to communication; however, those identified above are those that need to be addressed and prevented for effective communication to occur.

The Knowledge & Skills of Effective Communication (cont.)

What is the influence of one's "family of origin" on their communication styles?

Our family of origin has a significant influence on our communication patterns. Parents, siblings, and grandparents all have influenced us as children both verbally and through body language. As children we learn quickly what is safe to say, whether it is safe to communicate openly or if we have to camouflage what we say. Our parents frame our relationship with authority figures when we are children, and teachers, along with religious institutions, either support or counteract that relationship.

Not much has been written about our family of origin's influence on our communication styles as we grow into adults; but more and more research is illustrating the relationship between our role as communicators in the workplace to what we learned as children in our family of origin.

What is the difference between verbal communication and non-verbal communication? Which is more authentic?

Verbal communication is "spoken" communication. Non-verbal communication is body language which accompanies verbal communication. Non-verbal communication includes facial expressions, voice tone and inflection, hand/leg movements, eye contact, body tension, etc. When there is dissonance between the verbal and non-verbal communication of an individual, experts rely on the non-verbal messages because they are more difficult to control and self-monitor, and therefore are more apt to be the more authentic message.

What does self-awareness have to do with being an effective communicator?

Self-awareness is the foundation of personal growth. The more aware we are of our physical, psychological, emotional, social, and spiritual tendencies, including our fears, passions, and knowledge, as well as knowledge gaps, strengths/weaknesses, motivations, communication style and patterns, the more choices we are able to offer ourselves to change and to grow past our weaknesses and vulnerabilities.

The Knowledge & Skills of Effective Communication (cont.)

The more self-aware we are, the more we know what our needs are and how to ensure those needs are met, which is a genuine way to engage in self-care. Becoming an effective communicator is a growth process, based in self-awareness which includes affirming our self-esteem and self-worth by engaging in daily self-care.

When we are comfortable being direct in our communication, while communicating in a way that respects your own authenticity as well other people in general, then our values, beliefs, thoughts, emotions and behaviors are aligned, and we present to others our truest, most authentic self; and we do so from a place of confidence, not self-doubt; face-forward and not placating or blaming; from a place of strength and not fear.

Who are the best communicators you have ever known? What characteristics make them such effective communicators?

Some of the finest, well known communicators were able to move through conflict or issues which polarized communities, if not nations. Abraham Lincoln and Martin Luther King, Jr., are two American historical figures who addressed the issue of civil rights almost 100 years apart. Both men spoke to mankind's higher nature, raising our spirits, not pulling them down. Both men lived their values and beliefs, and communicated them with clarity and focus. Their own authenticity allowed us to find that place within ourselves; their commanding presence spoke to the need for basic human unity. They also both approached both the heart and mind of the individuals they led, allowing them to grow taller through empathy and acceptance. Their method was one of gentle but obvious and persistent persuasion; while their communication styles were distinctly different, their message, nonetheless, was unwaveringly clear.

What is the relationship between being a strong communicator and an effective leader?

Community is a face to face group in which the liability of each for the other and all for one is unlimited, or as close to it as it is possible to get. Trust, respect, and ethical behavior prevail and the leader constantly communicates that by his or her behavior and words. The leader is in internal alignment with his or her beliefs, values, emotions, and thoughts, and is externally aligned because his behaviors resonate to the leader's internal core. The leader enriches by his presence, and realizes it is terribly important to know both about him- or herself and about others, making it safe for others to become self-aware.

The Knowledge & Skills of Effective Communication (cont.)

Simply stated, one cannot be an effective leader and not be an effective communicator; and, an effective communicator may be assigned leadership by others because of their ability to build relationships through their strong communication style. When we are effective communicators, we automatically build trust and respect through our authenticity. The message this sends, both verbal and non-verbal, is permission for the other to also be their authentic selves, which keeps the communication environment open, honest, direct with minimal or no fear distorting the information communicated.

Managing Up

Effective leaders and members make and take time and energy to manage their relationships with supervisors. In addition to managing the relationship with the leader's direct supervisor, the VISTA leader is responsible for supporting members as they establish healthy relationships with their own supervisor. This effort can simplify both the leader's and member's service year by eliminating potential problems.

The supervisor-member relationship is one of mutual dependence between two fallible human beings. Leaders and members must have a good understanding of themselves and their supervisors. Effective leaders and members will use this understanding to develop a healthy relationship, compatible with both persons' work styles and expectations.

This can only happen if they must seek out information about the supervisor's goals and pressures, by tactfully questioning the supervisor, and being an astute observer of his or her behavior.

Adapting to a new supervisor is an opportunity to develop new skills and to demonstrate your abilities to establish strong and cooperative working relationships.

In the beginning it may be important to adapt your work style to that of the supervisor. Her preferred way of doing things isn't meant as a judgment on another way: it's just what works for her.

Pay attention to the supervisor's statements about her likes and dislikes, then fine-tune your actions appropriately. Of course, there's bound to be some give-and-take between his preferences and yours, but showing a willingness to adapt, say, to his level of formality in dress is a good early signal to send.

In "Managing Your Boss" (*Harvard Business Review*, 1980), John Gabarro and John Kotler suggest you pay particular attention to:

Communication Style

Determine the format, frequency, and depth of information the new boss wants. Consider how she expresses herself and what style of messages she's most receptive to. Does she prefer a formal memo, or a casual chat?

Getting this issue straight from the start will minimize misunderstandings and help you and your supervisor feel more comfortable with the new relationship.

Managing Up (cont.)

Decision-Making Style

How does the supervisor make up her mind? Is she methodical? Intuitive? Or somewhere in between? In justifying a purchase, for example, will she respond better to a line-by-line cost/benefit analysis or to an eloquent argument that it will increase client and community satisfaction?

Other clues to what she values include her pet projects and proudest achievements, as well as anything said after “What I really like about that is ...”

Clarifying Mutual Expectations

Ask the new leader what she wants you to achieve. If she hasn’t had time to learn exactly how you contribute, offer an overview of your recent work and current projects. Listen carefully to the supervisor’s responses, from “That’s nice” to “We need to do more of that!”

In addition to establishing common goals, make sure the supervisor knows what support you need. What kind of guidance, resources, and connections to other staff do you hope her to provide? Most supervisors will be relieved to hear how they can help you, because doing so will help them be more productive from the start.

Put Yourself in the Supervisor’s Position

If you’re having trouble understanding a supervisor’s actions, style, or goals, consider her point of view. What are her organizational and personal objectives? What pressures is she facing? What are her special strengths—and in what areas is she not so strong?

You can get many of the answers to these questions by asking the supervisor directly. Fill in the background by asking reliable people who’ve worked with her before.

The transitions and changes that come with a new supervisor can be unsettling, but they’re also an opportunity to shape your future to the benefit of your VISTA service—and to your own benefit. *The more energy and consideration you devote to getting off to a good start with your supervisor, the stronger the foundation you’ll establish for long-term success.*

Managing Up (cont.)

Managing Your Supervisory Relationships

Make sure you understand your supervisor and his (or her) context, including:

- His goals and objectives
- The pressures on him
- Her strengths, weaknesses, and blind spots
- Her preferred working style

Assess yourself and your needs including:

- Your own strengths and weaknesses
- Your personal style
- Your predisposition toward dependence on or independence from authority figures

Develop and maintain a relationship that:

- Fits both your needs and styles
- Is characterized by mutual expectations
- Keeps your supervisor informed
- Is based on dependability and honesty
- Selectively uses your supervisor's time and resources

Some VISTAs will resent that in addition to all their other responsibilities, they will also need to take time and energy to manage their relationships with their supervisors. Leaders can help members see that managing the relationship with supervisors can simplify their service responsibilities by minimizing problems.

As VISTA leaders, please discuss and make recommendations regarding the following questions:

1. What does Managing Up have to do with Transformational Leadership?
2. How can leaders and members begin immediately to build a healthy relationship with supervisors in the spirit of Managing Up?
3. How can leaders support their members in maintaining strong relationships and Managing Up?
4. How can leaders support their members when problems develop with supervisors?

Adapted from: John J. Gabarro & John P. Kotter. *Harvard Business Review*

Introduction to Conflict Management

The following information addresses effective and practical ways to manage conflict. To manage conflict effectively one needs a significant level of self-knowledge and self-awareness.

Any approach or practice related to managing conflict requires that each individual clearly and respectfully represent his or her point of view, and be willing to hear the other person's point of view. When those in conflict can achieve this level of understanding, then the potential for solution finding is most likely to occur. The key component is to hear and respect your own, and the other individuals *boundaries*. In the absence of this condition, conflict will not get resolved.

Leadership and Conflict Management: Emotional Intelligence

For leaders, emotional intelligence is almost 90% of what set stars apart from the mediocre. As Goleman documents, it's the essential ingredient for reaching and staying at the top in any field. Emotional Intelligence describes abilities distinct from, but complementary to, academic intelligence, the purely cognitive capacities measured by IQ.

"Emotional Intelligence" refers to the capacity for recognizing our own feelings and those of others, for motivating ourselves, and for managing emotions well in ourselves and in our relationships.

- **Self-Awareness:** Knowing what we are feeling in the moment, and using those preferences to guide our decision making; having a realistic assessment of our own abilities and a well-grounded sense of self-confidence.
- **Self-Regulation:** Handling our emotions so that they facilitate rather than interfere with the task at hand; being conscientious and delaying gratification to pursue goals; recovering well from emotional distress.
- **Motivation:** Using our deepest preferences to move and guide us toward our goals, to help us take initiative and strive to improve, and to persevere in the face of setbacks and frustrations.
- **Empathy:** Sensing what people are feeling, being able to take their perspective, and cultivating rapport and attunement with a broad diversity of people.
- **Social Skills:** Handling emotions in relationships well and accurately reading social situations and networks; interacting smoothly; using these skills to persuade and lead, negotiate and settle disputes, for cooperation and teamwork.

Adapted from the work of Howard Gardner & Daniel Goleman & Peter Solovey, "Multiple Intelligence" and "Working with Emotional Intelligence."

Introduction to Conflict Management (cont.)

Conflict Management

Non-violent collaborative conflict management is about standing up for yourself and getting your needs met, while being respectful of others and making sure they get their needs met too. It's not about avoiding real problems and pretending they are not there. It's not about being a doormat and letting people walk on you. It's a challenging process and it's one that develops long-term solutions to conflicts while maintaining relationships. Below are a few strategies to help:

Check anger levels

- Are you too angry to have a rational conversation?
- Are other people involved too angry to have a rational conversation?
- Is this a good time to deal with the issue?
- Would another time be better?

Check yourself

- Why am I angry/upset? What *triggers* have occurred?
- What do I really want out of this situation?
- Who would be able to help me get that?
- What can I do to get that?

Check out the participants

- Who needs to be here to resolve this?
- Is everyone here?
- How can those people be contacted?

Create a safe space

- What guidelines do you and others need to be honest with each other?
- What guidelines do you and others need to be able to listen to each other?

Check out what the other people want

- Listen. Listen. Listen.
- Often if you listen first, other people will let you speak.
- Say back what you heard. Give others a chance to clarify.
- What do other people really want out of the situation?

Introduction to Conflict Management (cont.)

Say what is going on for you

- Be clear about what you need from the situation.
- Explain how you feel.
- Be respectful to yourself and others, and say what you need.

Make sure you understand what the conflict is really about

- Be clear about what issues you are discussing, e.g., communication, tasks, work quality, deadlines, expectations.
- Take time to discover what everyone wants out of the solutions, e.g., a project progress update, help meeting a deadline, more respect, etc.

Look for solutions together

- Work on one issue at a time.
- Make a list of *all* possible solutions. Be creative.
- Choose ones that work for everyone.

Check in later

- Within a reasonable amount of time agree to check in to see how it's going.
- Make adjustments as necessary.
- Acknowledge improvement.

Approaches to Conflict

The difference in outcomes to a conflict depends on the approach participants use. No one of these approaches is better than the other. Each has a time and a place. The key to effective conflict management is using the right approach at the right time. The five most basic approaches to conflict and how/when they may be useful include: Competing, Accommodating, Avoiding, Collaborating, and Compromising.

| Competing | |
|--|--|
| <p>Strengths</p> <ul style="list-style-type: none"> • Emergency situations when someone needs to act. • When you know you are right; the other person's judgment is inadequate. • When you need to show that you are not a pushover. | <p>Limitations</p> <ul style="list-style-type: none"> • You win and the other loses; potential for resentment. • You may not get all the information you need because others feel intimidated. • You may lose. |

| Accommodating | |
|--|--|
| <p>Strengths</p> <ul style="list-style-type: none"> • When you realize you are wrong. • When the issue is more important to the other person. • Building up social credits. • Cutting your losses; the time and energy spent trying to resolve the conflict to your benefit will only damage your long-term interests. • Letting other people learn from their mistakes. | <p>Limitations</p> <ul style="list-style-type: none"> • You lose and the other wins; potential for resentment. • Important issues go unaddressed. |

Approaches to Conflict (cont.)

Avoiding/Postponing

Strengths

- When the issue is trivial.
- When you haven't got a chance of getting satisfaction.
- Letting things cool off.
- Taking time to collect information.
- When others can resolve the conflict more effectively.

Limitations

- A conflict can go unmanaged and get out of hand.
- Everyone may end up losing and no one's interests are served.

Collaborating

Strengths

- Learning all you can about the problem.
- Gaining a commitment from the other person.
- Maintaining relationships.

Limitations

- You may take more time than the issue warrants.
- You may cause an issue to become more serious by belaboring it.

Compromising

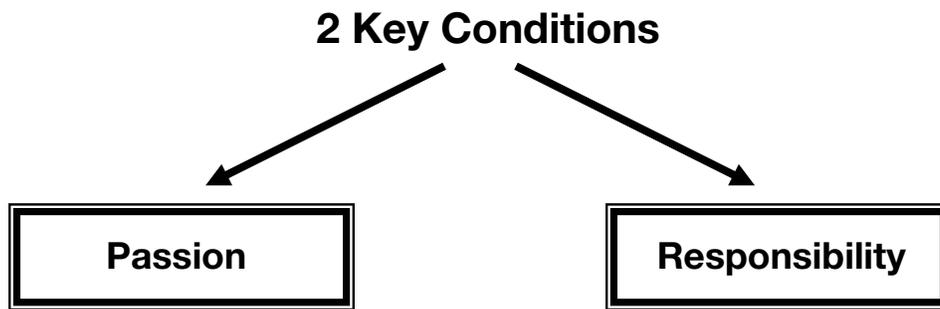
Strengths

- Reaching temporary solutions.
- Reaching fast solutions.
- Reaching solutions when your goals are in direct conflict.
- Cutting losses; you won't get all you want, but you will accept some.

Limitations

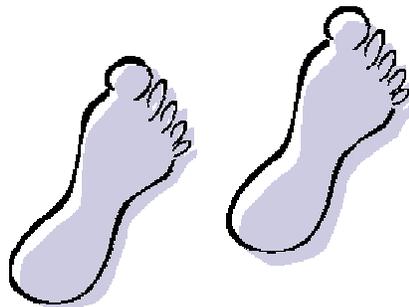
- You may be seen as being a "politician."
- You may pay more attention to reaching solutions than to preserving agreed upon principles or values.

Open Space Technology



Four Principles:

- ✓ *The right people are the people who come.*
- ✓ *Whatever happens is all that could have.*
- ✓ *Whenever it starts is the right time.*
- ✓ *Whenever it is over, it is over.*



Law of Two Feet



Bumblebee



Butterfly

Leading from a Distance: Skills for Success

Research Findings from achieveglobal*

Research in this area reveals that effective leadership from a distance includes the typical fundamentals of leading people and managing resources in a traditional same-site environment.

Difficulties in the traditional environment, however, can be magnified in remote locations. Difficulty in communicating, working together, and producing high-quality, on-time results is typically heightened by the distance.

Effective leaders need to quickly, confidently, and competently diagnose such issues and take deliberate actions to keep project team relationships, productivity and outcomes on track.

There is even more emphasis on the use of appropriate communication skills to fit the needs of both the people and the situation

Research also reveals the profile of employees who operate well in virtual team project situations. When possible, it is advisable to select team members who already demonstrate these characteristics or who are willing and able to quickly develop them.

- Able to perform the core task for their roles
- Self-disciplined
- Goal directed
- Flexible
- Collaborative
- Willing to share and exchange information
- Open to feedback, change, differences in people and culture, ways of thinking, and alternative approaches to processes.
- Committed and connected to the work
- Competent in using technology required for the role and distance communication

*<http://www.achieveglobal.com>

Five Categories of Effective Leadership from a Distance

1. Communicating Effectively

Communicating effectively requires careful attention to listening and to how we present our thoughts and ideas. It requires a clear focus on positive, constructive intent, on choosing the right technology to quickly and sensitively communicate a clear message, and on taking extra steps to respectfully ensure understanding and expectations for action. It includes important feedback loops and networking and often requires daily contact during fast changing times.

- Formulate specific objectives and an organized delivery plan for communication
- Model values and members' ground rules in all communication
- Communicate in a way that meets the needs of members as well as the situation
- Apply communications technology that best fits the situation
- Link messages to members' shared purpose and goals, and link recognition of performance contributions to results
- Listen proactively: verify understanding of the message
- Guide communications to achieve positive and constructive outcomes
- Coach and offer feedback with respect and support

2. Building Community

Research shows that a sense of community is based on mutual trust, respect, fairness, and affiliation among members. It includes sensitivity to differences and how the team will work together.

- Model the behaviors expected of all members
- Maintain the self-confidence and self-esteem of others
- Demonstrate respect for all members and their opinions
- Encourage all members to participate fully
- Focus on the situation, issue, or behavior, not on the person
- Confront issues with others directly
- Take initiative to make things better
- Keep confidence
- Maintain constructive relationships

Five Categories of Effective Leadership from a Distance (cont.)

- Keep commitments
- Admit mistakes

3. Establishing a Shared Purpose

The importance of establishing a clear, inspiring, shared purpose, a common vision, and accompanying goals and expectations for performance has received much attention in recent years. This is a category of leadership skills that requires deliberate attention in effectively leading from a distance.

The full involvement in creating a shared purpose or common vision serves as a foundation for unified commitment. When coupled with clear expectations and measurable performance, this combination of elements can be an effective driving force for self-discipline and motivation. This category can become one of the most effective secrets for shifting from control to member self-management. Day-to-day, moment-to-moment, the members can self-coach on the project vision and sense of purpose.

- Share information
- Clarify the rationale and intent of strategies and goals
- Provide clear expectations for contributions and measurable results
- Ensure members are involved in decisions that affect their work
- Seek ideas and opinions from all members
- Ensure consideration of client/community/project/project supervisor and site needs when planning work or solving problems (consider all constituents)
- Promote creativity and innovation in undertaking new goals or opportunities
- Help members develop positive approaches to the needs of their constituents (see above list)
- Challenge assumptions that may inhibit progress
- Demonstrate flexibility in adapting to changes in goals and expectations

Five Categories of Effective Leadership from a Distance (cont.)

4. Leading by example with a focus on visible, measurable results

Leading by example with a focus on visible, measurable results is a natural extension of the previous category. The clear and inspiring shared purpose, vision, and resulting project team's goals and expectations become targets for establishing individual and team contributions. The important distinction for off-site teams is the need to make "out of sight" contributions as visible as possible. Individual members need to know how their roles and tasks directly contribute to achieving organizational goals. On a day-to-day basis, they need to self-direct and self-discipline their work on clear priorities.

- Emphasize the need for goal-directed self-discipline in completing daily work
- Inspire members to reach or exceed expectations for performance and results
- Ensure that all members know how their contributions affect all constituents
- Help members understand their roles and responsibilities
- Track contributions and measurable results on goals
- Ensure members plan appropriately to achieve results
- Seek opportunities to recognize members' contributions and results

5. Contributions and collaborating across boundaries

The fifth category involves coordinating and collaborating across boundaries. This includes extending the same level of trust, respect, teamwork, collaboration, and focus on visible contributions that appears within your own project team to other individuals or groups within your organization as well as with all other constituents.

- Link the need for coordination and collaboration to the needs of those you are serving
- Help members identify opportunities for improvement in projects and processes that cross organizational boundaries
- Help members diagnose and solve problems

Five Categories of Effective Leadership from a Distance (cont.)

- Promote information sharing in situations of mutual interest
- Ask for the specific support you need, and communicate what you will do in return
- Challenge unnecessary barriers to collaboration across boundaries
- Help members move constructively from conflict to collaboration

In summary, research and best practices reveal that all five categories of effective leadership skills for leading from a distance serve as a sound basis for achieving results while meeting member needs.

Leading from a Distance: Skills for Success from AchieveGlobal. Downloaded from <http://www.achieveglobal.com/Research/Default.aspx>.

Change Your Life: Stop Hiding From Difficult Conversations

Difficult Conversation: feelings of intimidation or fear particularly when there is strong disagreement, emotions are running high, and the issue is important to all individuals involved.

The number one cause of stress today, both at home and at work, is the inability to communicate what we are really thinking and feeling on deeper levels of knowing. We devise elaborate ways to avoid, dramatize, sabotage, and confuse our truth. The primary reason is: **FEAR**.

Fear of what? Fear of rejection, fear of hurting someone or making him or her angry, fear of being hurt, fear of disapproval, fear of looking stupid, incompetent, fragile, weak, vulnerable, ignorant, unimportant shall I go on?

Where does this fear come from? As much as you don't want to hear this, it comes from a time when you were very young, and authority figures communicated in ways that laid this foundational pattern; or, perhaps you modeled your communication style after your mom, dad, grandparent, teacher, religious leader, baby sitter, sibling(s), etc.

How do I know I have this fear? If your communication of intimate or difficult conversations are anything but direct and spoken in a way that you can be heard, and understood in the way you intend, then you, in all likelihood, have this fear!

Examples of indirect communication include placating and blaming. Placating looks like this: I say yes, when I really mean no! I am so indirect I lose the real message. I am silent about my "own" needs. Patterns of placating include: avoidance, masking, or withdrawal. Placating usually leads to physical and emotional fatigue, even though I get a lot of kudos for being so helpful and flexible. Blaming looks like this: I am right and you are wrong! I am hostile and refuse to listen to your point of view. Patterns of blaming include: labeling, controlling (dominating the conversation/interrupting), or attacking. Blaming usually leads to a false sense of dominance, but underneath I feel detached and excluded. Under stress, most of us have learned to use silence or aggression. Neither one actually works!

Two other patterns I might develop to avoid intimacy or difficult conversations include: becoming very mental or computer-like, becoming totally detached from my emotions; and/or becoming very humorous and distracting myself and everyone from the heart of the real conversation. When I engage in the latter, lots of people exhale a sigh of relief, even though the real issues remain unaddressed, underneath, and unresolved. When I engage in the former, I may feel safe, but I usually am very lonely.

Change Your Life: Stop Hiding From Difficult Conversations (cont.)

| <u>PLACATING</u> | <u>BLAMING</u> | <u>RESCUING</u> |
|------------------|----------------|-----------------|
| Silence | Dominance | Co-dependence |
| Avoidance | Labeling | |
| Masking | Controlling | |
| Withdrawal | Attacking | |
| Computing | | |
| Distracting | | |

What purpose does this fear serve? It helps me to desperately avoid the pain of the personal “conclusion” or “angst” that happened somewhere in my earlier life. Unfortunately I keep repeating the personal pattern as a behavioral strategy to avoid the fear of this pain, but then I end up feeling disconnected from myself and other people.

Over a lifetime, the body, like everything else in life, is a mirror of our inner thoughts and beliefs. The body is always talking to us, if we will only take the time to listen. Louise Hay, in her book *You Can Heal Your Life*, states that every cell in your body responds to every single thought you think and every word you speak.

Where in your body do you carry the fear or pain?

What words, verbal or non-verbal exchanges, situations, or experiences trigger your fear? List as many as you can identify.

Gaining Clarity: A clarity is a gentle process which assists you in clearing core issues tied to your tissues or mental wiring. Getting to the source behind the trigger allows you to “let go” of the unwanted core issue(s) and provides you with the healthy energy to experience your trust in yourself and the freedom to be yourself.

Change Your Life: Stop Hiding From Difficult Conversations (cont.)

Antidotes to Triggers:

1. Self-awareness
2. Keep the conversation safe through shared purpose, mutual respect, and shared meaning. Don't be afraid to ask for a time out.
3. Clean out your own life filters ... especially when they involve triangulation:
Victims, blamer, rescuers = Helplessness
 - Move from victim to being an actor: What am I pretending not to know about my role? What part did I play in escalating the situation?
 - Move from blamer who makes others the villains accountability ... Why do I need to pretend to be so right and so strong? What part did I play in escalating the situation?
 - Move from being a rescuer to a person with strong boundaries: Why do I need to protect others when they can take care of themselves? What is my secondary gain from rescuing others? Why don't I care for myself like I do other people? What part did I play in escalating the situation?
4. Eliminate judgment and assumptions from your thought processes and perceptions of yourself and others.
5. Discover your old conclusions you made about yourself as a young person; create new conclusions and affirm them daily.
6. Let go of your drama/story and live your life with choice.
7. Center your self daily though meditation, prayer, silence, imagery, etc.
8. Take responsibility for yourself, and let others do the same.
9. Live from the heart.
10. Self-care/self-love.

Change Your Life: Stop Hiding From Difficult Conversations (cont.)

Process for Achieving Clarity

1. What was the behavior(s) that triggered you?
2. What feelings did you experience? Sadness, anger, fear, guilt, shame, loneliness, etc.
3. Go back to a time, a core moment, when you experienced very similar feelings?
4. Describe.
5. What conclusion did you come to about yourself in that core moment?
6. What decisions did you make about how you would behave as a result?
7. Can you see the impact of your conclusion/behavioral theme on your life since that core moment?
8. What new conclusion/behavioral decisions would you like to make now to replace the old conclusion/decisions?
9. What do you need from yourself to make this happen?
10. What do you need from _____?
11. How do you want to bring closure to this process right now?

Why Is the Ability to Have Difficult Conversations Vital to Leaders and Their Ability to Lead?

During the past two decades both transactional and transformational leadership have become a focus of research and controversy. Transactional leadership is easy to define, because it is the basic, daily stuff of politics, the pursuit of change in measured and often reluctant doses. The transactional leader functions as a broker, and, especially when the stakes are low, his or her role could be relatively minor, even automatic.

But what does it mean to transform? Is there a decisive difference between transactional and transforming leadership or are they variations on a spectrum? Let's begin by distinguishing between the verbs "change" and "transform."

To **change** is to substitute one thing for another, to give and take, to exchange places, to pass from one place to another. These are kinds of changes attributed to transactional leadership.

To **transform** something cuts much more profoundly. It is to cause a metamorphosis in form or structure, a change in the very condition or nature of a thing, a change into another substance, a radical change in outward form or inner character. It is the change of the breadth and depth that is fostered by transforming leadership.

In order to change processes, systems, people, the **essence** of the being must change. Insight, self-awareness, vision, values, beliefs, risk-taking, flexibility, boldness and the **ability to communicate the difficult information, messages, fears, concerns, problems, goals, the unknown and the unpredictable in ways they can be heard and understood are required for the core to re-shape itself.**

Because we cannot expect any single heroic individual to possess all these traits, leadership, ultimately, must involve people and systems. It is the responsibility of the leader to see that leading occurs.

Finally, leadership is the presence and spirit of the individual who leads and the relationship created with those who are led. The foundation of all relationships is **communication ... not just any communication ... but the kind in which each of us can communicate that which is pleasing to hear and understand, as well as difficult and tough to hear and understand.**

Why Is the Ability to Have Difficult Conversations Vital to Leaders and Their Ability to Lead? (cont.)

The ability to have difficult conversations is life-changing and therefore transforming to the individual, family, the group, the organizations, and the community.

The final caveat ... the ability to communicate authentically what is in our mind and hearts is by far the number one reducer of personal and organizational stress. So that vulnerability becomes an accepted part of each us, as much as our strengths.

© Elaine K. Williams, MSW, 248-396-5735 or ElaineKWilliams@aol.com

Writing a Leadership Definition (cont.)



DAY 2: REFLECTIONS ABOUT LEADERSHIP



DAY 3: REFLECTIONS ABOUT LEADERSHIP

Writing a Leadership Definition (cont.)



MY RENEWED PERSONAL DEFINITION IN RELATION TO LEADING:

A large rectangular area enclosed by a dotted border, containing ten horizontal lines for writing a personal definition.

VISTA Leader Self-Efficacy

Name: _____

Please use the same 5-point scale to indicate how competent and comfortable you feel in handling each situation.

- ① = "I'm not good at this. I'd feel very uncomfortable about handling this situation well, and would avoid it if possible."
- ② = "I'm only fair at this. I'd feel pretty uncomfortable and would find it quite difficult to handle this situation well."
- ③ = "I'm okay at this. I might feel uncomfortable and find it a little tough to handle this effectively."
- ④ = "I'm good at this. I'd feel pretty comfortable and able to handle this situation well."
- ⑤ = "I'm really good at this. I'd feel pretty comfortable and able to handle this situation extremely well."

- | | | | | | |
|---|---|---|---|---|---|
| 1. <u>Accomplishing the tasks</u> that I'll need to do as a VISTA leader. | ① | ② | ③ | ④ | ⑤ |
| 2. Letting others know <u>what I'm capable of doing</u> as a VISTA leader | ① | ② | ③ | ④ | ⑤ |
| 3. Influencing <u>what my responsibilities include</u> as a VISTA leader. | ① | ② | ③ | ④ | ⑤ |
| 4. <u>Suggesting new ways</u> things could be done as a VISTA leader. | ① | ② | ③ | ④ | ⑤ |
| 5. <u>Identifying and prioritizing activities</u> for self and members as a VISTA leader. | ① | ② | ③ | ④ | ⑤ |
| 6. <u>Building informal, cooperative relationships</u> as a VISTA leader. | ① | ② | ③ | ④ | ⑤ |
| 7. <u>Communicating ideas</u> to supervisors and members as a VISTA leader. | ① | ② | ③ | ④ | ⑤ |
| 8. <u>Applying my service and/or work experiences</u> as a VISTA leader. | ① | ② | ③ | ④ | ⑤ |

Group Functioning Self-Efficacy II

Name: _____

Please use the same 5-point scale to indicate how competent and comfortable you feel in handling each situation.

- ① = "I'm not good at this. I'd feel very uncomfortable about handling this situation well, and would avoid it if possible."
- ② = "I'm only fair at this. I'd feel pretty uncomfortable and would find it quite difficult to handle this situation well."
- ③ = "I'm okay at this. I might feel uncomfortable and find it a little tough to handle this effectively."
- ④ = "I'm good at this. I'd feel pretty comfortable and able to handle this situation well."
- ⑤ = "I'm really good at this. I'd feel pretty comfortable and able to handle this situation extremely well."

| | | | | | |
|--|---|---|---|---|---|
| 1. Getting a group to work together productively. | ① | ② | ③ | ④ | ⑤ |
| 2. Motivating project partners with different interests towards a common goal. | ① | ② | ③ | ④ | ⑤ |
| 3. Helping a group work through conflicts or problems. | ① | ② | ③ | ④ | ⑤ |
| 4. Motivating individual members to achieve their project goals and activities. | ① | ② | ③ | ④ | ⑤ |
| 5. Delegating responsibilities to others in the group. | ① | ② | ③ | ④ | ⑤ |
| 6. Building informal alliances or relationships to get things accomplished. | ① | ② | ③ | ④ | ⑤ |
| 7. Taking on leadership responsibilities that are unfamiliar to you. | ① | ② | ③ | ④ | ⑤ |
| 8. Identifying untapped potential or ability in others. | ① | ② | ③ | ④ | ⑤ |
| 9. Giving constructive feedback about performance or attitude problems to another. | ① | ② | ③ | ④ | ⑤ |
| 10. Identifying creative strategies to help a group reach its goals. | ① | ② | ③ | ④ | ⑤ |
| 11. Working collaboratively with others towards a common goal. | ① | ② | ③ | ④ | ⑤ |
| 12. Listening to and appreciating others' perspectives. | ① | ② | ③ | ④ | ⑤ |
| 13. Helping a group stay focused or on track. | ① | ② | ③ | ④ | ⑤ |

Project Management

One of the most difficult challenges in managing a project is to avoid the “activity trap.” People too frequently want to dive head on into activities related to a project with very little planning, prioritizing, determining goals, or developing milestones or measurements of goal achievement. This can be dangerous because it can lead to chaos, failure to achieve goals, and an inability to coordinate appropriate activities.

The VISTA leader needs to have a clear definition of their project management role so they effectively use themselves to guide their VISTA members to successful goal attainment of the VISTA project. Project management is a carefully planned and organized effort to accomplish goals that lead to desired outcomes. It includes developing a project plan, which includes project goals and objectives, specifying tasks or how goals will be achieved, what resources are needed, and working within a prescribed budget and timeline.

Project management also includes implementing the project plan, along with periodic benchmarks for checkpoints. Plans are not prisons, checkpoints provide an opportunity to make course corrections when new information comes in or situations change requiring a change in plans. If no changes are required then these checkpoints ensure that the plan is being guided according to prescribed agreements. There are several phases to project management, but the important phases include: planning, implementation, evaluation, refinement of the plan, and re-evaluation.

Within each phase of a project plan, the VISTA leader will need to offer guidance and support for management of timelines, tasks to be accomplished, setting priorities, identifying methods to monitor and influence the project’s progress, planning for barriers and interruptions, and evaluation and course correction. Finally, and most importantly, lines of communication need to be established during every phase of a project that identify who needs to be communicated to/from; how often; through what method(s); topics and information to be communicated, feedback, and follow-up.

Most importantly, determination needs to be made regarding who will be responsible for organizing and disseminating needed communication and ensuring the lines of communication are open and flowing as prescribed in the project plan.

VISTA Leader Living Allowance Rates

| Monthly Amount (\$) | Months in a Year | Yearly Amount (\$) | Days in a Year | Daily Rate (\$) | Days in Bi-weekly Allowance | Amount per Pay Period (\$) |
|---------------------|------------------|--------------------|----------------|-----------------|-----------------------------|----------------------------|
| 1,190 | 12 | 14,280 | 365 | 39.12 | 14 | 547.68 |
| 1,226 | 12 | 14,712 | 365 | 40.31 | 14 | 564.34 |
| 1,269 | 12 | 15,228 | 365 | 41.72 | 14 | 584.08 |
| 1,308 | 12 | 15,696 | 365 | 43.00 | 14 | 602.00 |
| 1,378 | 12 | 16,536 | 365 | 45.30 | 14 | 634.20 |
| 1,422 | 12 | 17,064 | 365 | 46.75 | 14 | 654.50 |
| 1,476 | 12 | 17,712 | 365 | 48.53 | 14 | 679.42 |
| 1,533 | 12 | 18,396 | 365 | 50.40 | 14 | 705.60 |
| 1,593 | 12 | 19,116 | 365 | 52.37 | 14 | 733.18 |
| 1,666 | 12 | 19,992 | 365 | 54.77 | 14 | 766.78 |
| 1,715 | 12 | 20,580 | 365 | 56.38 | 14 | 789.32 |
| 1,920 | 12 | 23,040 | 365 | 63.12 | 14 | 883.68 |

**Gross is amount prior to deductions for taxes and/or life insurance.*

