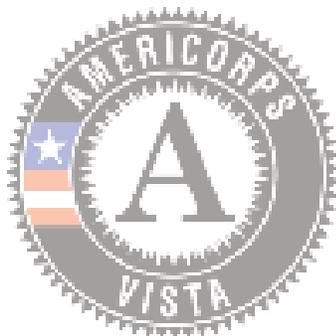


# Managing **UP**



## Action Learning Challenge



Created by:

Jessica Rothenberg, Kaitlin Dorn,  
Leif Olandese, and Natasha Mills

**FANTASTIC FOUR**

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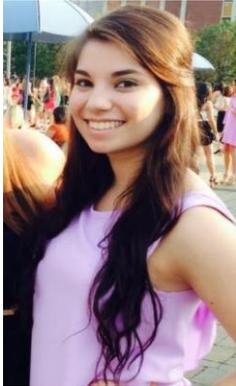
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## Meet the Team!

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**Jessica Rothenberg** was born and raised in Mechanicsville, VA and holds a Bachelor Degree in Psychology with a Minor in Criminal Justice from Old Dominion University. In college, she was a mentor at an alternative school for children. She chose to serve as an AmeriCorps VISTA to continue volunteer work, serve her country, and apply some of the skills she learned in college. During her first VISTA term, Jessica served as the Program Outreach Coordinator for Mental Fitness through United Way of the Piedmont's VISTA program in Spartanburg, SC. Jessica is currently serving as a VISTA Leader with the Virginia Department of Social Services in Richmond, VA.



**Leif Olandese** was born and raised in and around Chicago. Since moving to Florida 15 years ago, he focused on disaster management and community awareness training. He also focused his life on helping others, so VISTA was a natural choice. As a VISTA, he set up a vocational program for single parents and in early summer, offered some hurricane preparedness workshops at each of his sites. Now as a Leader, he returned home to Fort Myers to help coordinate the VISTAs in Florida's first and only Promise Zone.



**Natasha Mills** was born and raised in Kansas City, MO. She received her Bachelor's of Science in Health Sciences. She's always wanted to work within the public sector and work to build her community, which led to her decision to serve as VISTA. She served as a VISTA in New York City under the Community Schools Corps Program for the Office of Community Schools at the DOE. Her VISTA year was so rewarding she decided to serve a second year, in which she is currently serving as a NYC VISTA Leader for NYC Service, Office of the Mayor.



**Kaitlin Dorn** was born and raised in the Chicago suburbs in Illinois. She received a Bachelor of Science in Architectural Studies and Bachelor of Arts in History from Southern Illinois University. She earned a Master of Historic Preservation from the University of Florida. She was inspired to serve in AmeriCorps VISTA after a study abroad program. Kaitlin served her first term with Hawaiian Community Assets in Honolulu, Hawaii. She is currently serving at United Way of Weld County in Greeley, Colorado.

## Acknowledgements

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The completion of this Resource Guide on Effectively Managing Up would not have been made possible without the support of: our fabulous coach, Kapila Wewegama; AmeriCorps VISTA Training Specialist, Andy King; The Corporation for National and Community Service; our Sponsoring Organizations: Virginia Department of Social Services - Community Services Block Grant, NYC Service-Office of the Mayor, United Way of Weld County, and Southwest Florida Regional Planning Council (SWFRPC); the Virginia, New York, Colorado, and Florida State Offices; and most importantly, each other.

## Welcome

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Welcome to the “VISTA Leaders Guide on Effectively Managing Up”. This toolkit was created to provide resources and best practices for VISTA Members and Leaders on how to effectively manage up to bring out the best value to their supervisors, organizations, and projects. Our team of four VISTA Leaders worked over the course of four months to create this resource on Effectively Managing up and we are excited to share this resource with VISTA Members, Leaders, and Supervisors in the hopes of helping to create a more positive impact.

## Purpose

In order to have successful AmeriCorps VISTA projects, it is vital that VISTA Members and Leaders know how to work effectively with their supervisors to bring out the best value to their supervisors, organizations and projects to have a positive impact in their service year.

Managing up helps VISTA Members and Leaders voice their concerns and ideas, while maintaining a respectful and professional working relationship with others. It is a skill needed to manage projects/programs so VISTA Members and Leaders can identify gaps and assess the needs in their projects, so they can create sustainable solutions for the communities in which they’re working.

## Focus Areas

Three major components of managing up for VISTA members consist of:

- **Relationship Building** - Their ability to establish and maintain effective work relationships with their supervisors.
- **Communication** - Their ability to communicate effectively with their supervisor and the team.
- **Project Management** - Their ability to carry out their VAD responsibilities and achieve project goals.

## Vision, Mission, & Goal

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### Vision

Our Action Learning Challenge team vision is for VISTA Members and Leaders to effectively communicate and manage up to ensure a more positive, impactful, and successful experience that will be more efficient and effective for VISTAs and Supervisors.

### Mission

Our Action Learning Challenge team mission is to create and develop a self-directed learning toolkit on how to effectively manage up for VISTA Members and Leaders to establish an environment of open communication and effective working relationships to increase the quality of VISTA Project interactions.

### Goal

By the end of June 2018, the Action Learning Challenge team will create a toolkit focused on promoting effective communication, relationship building, and project management which will guide VISTA Members and Leaders to effectively manage up.

## What is Managing Up?

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**Managing up** is the process of working with your supervisor to have the most effective outcome for projects and create value for your supervisor and organization. Creating value can include working to develop effective work relationships, communication, and project management skills.

### 8 Common Myths to Managing Up:

**Myth 1:** Managing up is managing your supervisor.

**Myth 2:** Your supervisor doesn't have time for you.

**Myth 3:** Since supervisors are put in a higher position, they don't need guidance.

**Myth 4:** Supervisors always know their leadership impact on members.

**Myth 5:** Supervisors have all the information they need.

**Myth 6:** The sole role of the supervisor consists of giving constant supervision.

**Myth 7:** Supervisors leading styles are set in stone. Therefore they may not want to change their approach.

**Myth 8:** Managing up is overstepping.

# Managing



# UP

## What Managing Up Actually Looks Like:

1. Understanding and embracing the organizations mission.
2. Working to develop positive working relationships.
3. Understanding your supervisor's ideal outcome.
4. Being able to anticipate your supervisor's needs.
5. Keeping your supervisor well informed.
6. Taking initiative with your projects.
7. Communicating your strengths and talents to your supervisor.
8. Respecting your supervisor's time.

The following sections will give you a deeper dive on key focus areas to effectively managing up.

## Relationship Building

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### Personal Stories

#### Staff Transitions

When I began my year as a VISTA leader, I was part of a project which had just lost its supervisor. The Executive Director, who had by default become the Program Supervisor, was much too busy to focus on it. She and I discussed some things I could do to ease her burdens (keeping in contact with sub-sites, and working to fill other open VISTA slots.). Through demonstrating this commitment to the project and willingness to learn on my own, I displayed respect for her time constraints. This was rewarded with more trust and responsibility as the project grew. Now that there is an assigned VISTA supervisor, through managing up, by simply learning about and helping her meet her needs, we have built a working relationship built on trust, and can rely on each other in the future.

#### Out-of-Town Supervisor

I met with my supervisor my first day of service and she informed me her and her husband would be out of town the rest of the week. She gave me a list of tasks to complete with no direction, only the vision of the final product. In order to gain her trust, I looked through the resources that were left from the previous VISTA and did research online. My supervisor saw I was a self-starter and could use my own resources when needed. Due to being a self-starter, my supervisor would explain what she envisioned for our site and though some of the projects were not realistic at the time due to many factors, I was able to create a list of possible future projects and even start on a few. Through demonstrating my skills right off the bat, I was able to gain my supervisors trust quickly and jump right into my service year. I managed up by taking information my supervisor mentioned and created lists, did research, and developed information in order to build trust and have an effective working relationship to have a great VISTA term.



### How does managing up improve the VISTA-Supervisor relationship?

- Demonstrates a willingness to understand and adapt to supervisor's workstyles.
- Allows for a mutual trusting work relationship between supervisors and VISTA members.
- Shows a willingness to exchange open and honest communication.
- Creates opportunity for supervisors to become a coach/mentor to VISTA members.
- Leads to opportunities for VISTA members to expand their skill set.
- Adapting to the supervisor's work style allows VISTA members to anticipate their supervisor's workload and offer support.



## Best Practices

- ***Take Initiative during one on ones*** - Come prepared with an agenda and specific questions. List out the items you want to cover in order of priority. Ask questions when needed during the conversation with your supervisor.
- ***Demonstrate Your Innovation/Show value*** - Show progress on the projects you've been assigned and on your VAD. Be a self-starter and try to tackle a project you've been given. Be creative on projects and use your own connections and networks.
- ***Put yourself in your supervisor's shoes*** - Think about all the different hats your supervisor wears and their responsibilities. If you were a site supervisor, consider how you would like your VISTA to complete their projects and ask questions when needed.
- ***Communicating with your supervisor is an important skill to foster*** - It involves elements of learning to follow instructions and ask for guidance when you need assistance. It also includes the ability to discuss honestly how you feel you are doing in your job and how the supervisor can help you perform better.
- ***Utilize active listening skills at all times*** - Listen for the message within the message. Be attentive to both languages being spoken (verbal and body). Do this and you may soon find yourselves with a better understanding of those with whom you work.
- ***Speak clearly, and concisely*** - Plan before you speak: It will be appreciated when your message is easily understood and communicated in as few words as necessary. It will demonstrate that you understand the time demands of other people.
- ***Keep your supervisor informed*** - It is imperative that VISTA members keep supervisors informed so they can continuously provide input and insight. Keeping your supervisor informed also maintains the proper hierarchy of decision making in order to obtain the best results. It creates a scenario where risk management is an intuitive part of the project. Finally, it keeps the supervisor aware of your hard work.
- ***Provide positive feedback to your supervisor*** - Providing positive feedback provides motivation, shows appreciation, and allows for more open dialogue. As this may be a supervisor's first time supervising a VISTA/VISTA Leader, positive feedback also lets the supervisor know the areas in which they are doing well, while supporting VISTA members.
- ***Ask for feedback/help*** - When you ask for help or information, be clear about what you need, why, and by when. When you ask your supervisor for feedback, do you need constructive criticism, or do you need recognition for your work?
- ***Play off each other's strengths*** - If you notice that you have certain strengths and your supervisor has other strengths, you can highlight both of your strengths by being aware of and offering to help in areas your supervisor would appreciate.
- ***Complete assigned tasks on time*** - The first step with getting tasks completed on time is to know when they need to be completed. Make sure you prioritize your tasks according to deadline and value. You should try to get tasks done early, so that you can ask for feedback and implement the suggestions for your deadline.

## Communication

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### Personal Stories

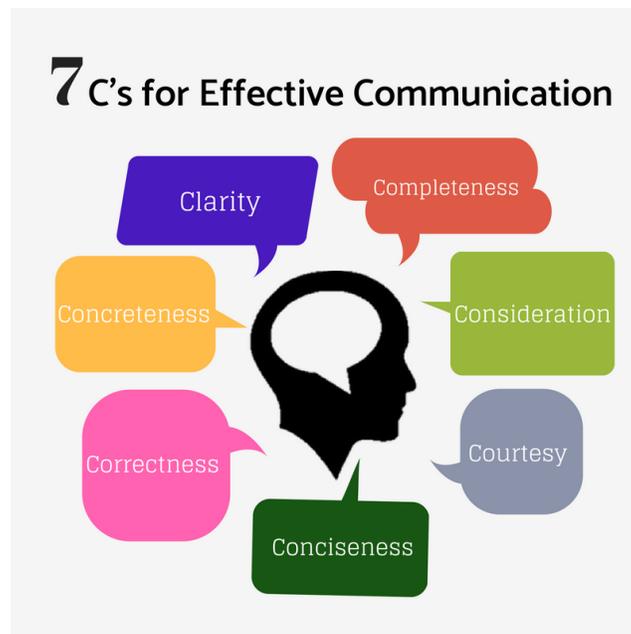
#### Setting up Weekly Meetings

My supervisor is a new supervisor. My co-Leader and I are the first employees that she has ever had to supervise. She is also an extrovert and my co-Leader and I are introverts. She started her position one-month into my term (6-months into my co-Leader's term). When we first started working together, she would assign tasks ad hoc throughout the day, randomly, to anyone that would listen. Then, because my co-Leader and I weren't sure who she was talking to or whether she would change her mind, some of the things she blurted out didn't get done. This delegation style, made me feel micromanaged and I needed to find a way to communicate this to my supervisor without offending her. One day, I explained to her that I wasn't used to this amount of support (e.g., meeting daily and throughout the day) and I suggested that we set up regular office meetings every Monday morning to get started with our week and weekly one-on-ones with each of the VISTAs on Wednesdays to get progress updates. Now, we are all happier and getting things done.

#### Onboarding your Supervisor

Communication will surely get more results if one uses the foundations of managing up when doing so. My VISTA project is unusual in as much as I was hired before the Program Coordinator. When he came on board, he had no prior experience with VISTA, but because we could discuss issues openly, we discovered the areas where we were both strong and weak, and found informal flexible solutions. I have come to understand him as a man who is very comfortable with IT and how to harness it for the program's benefit while he has developed a respect for me as detail oriented, especially in writing VADs. Through discussing and resolving program issues together, we have forged strong bonds of mutual trust and respect as we value and complement the unique skill sets each of us brings to the VISTA program.

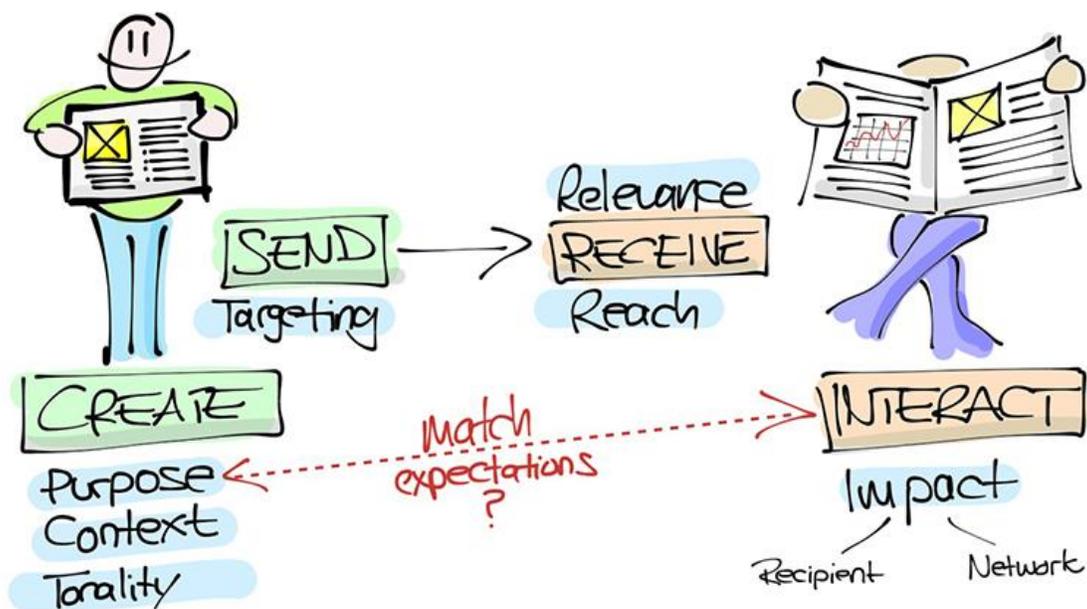
# 7 C's for Effective Communication



1. **Clarity** - Make sure that it's easy for the other person to understand your meaning. People shouldn't have to "read between the lines" and make assumptions on their own to understand the message.
2. **Consideration** - Consideration implies "stepping into the shoes of others". Keeping in mind and understanding that your supervisor is busy and has other priorities will be helpful when it comes to managing up and managing priorities.
3. **Conciseness** - It is both time-saving and underlines and highlights the main message as it avoids using excessive and needless words.
4. **Completeness** - Make sure you're relaying all known information and that you're not withholding information. When communicating with your supervisor/team, complete communication helps in better decision-making.
5. **Concreteness** - When you're speaking with your supervisor about what you're working on, make sure you can show progress like data, facts, etc. Your information should not be too general.
6. **Correctness** - Verify information before presenting your findings.
7. **Courtesy** - Be kind when you communicate. Make sure your supervisor understands your message and feels like you have been listening to them.

## Why is the skill to communicate effectively important during your VISTA year?

Due to the one-year VISTA term, it's important to communicate effectively to make sure VISTAs and Supervisors have what is needed to complete the VAD as efficiently and successfully as possible. Effective communication is needed to ensure all expectations are clear, goals are being met, and allows VISTA members to share their impact and progress. This leads to less mistakes being made and a more positive work environment. Communicating effectively builds and sustains trust with new supervisors and team members. Using effective communication methods to give/receive feedback promotes growth and more opportunity. It leads to clear insight for both the VISTA member and supervisor, which decreases the chance of assumptions being made. Overall, improving communication skills are not only beneficial for the VISTA project, it is a transferable skill that can be utilized throughout the VISTA member's career.



Source: <https://digital-sherpa.me/2015/09/30/from-relevance-to-the-kpis-that-measure-communication-quality-impact/>

## Barriers to Communication



### Linguistic

If English is a second language for the VISTA Member, Leader, or supervisor, there might be a language barrier. Another linguistic barrier could be having an accent or different dialect in which words might have multiple meanings (e.g., pop, soda, v. coke or buggy v. cart). A great way to work through this barrier is to ask clarifying question and to not make assumptions.

### Cultural

Barriers may result from the concepts held around the meaning of eye contact. In western culture, it denotes interest in the conversation, but in some Asian cultures it may be perceived as aggressive or threatening.

### Interpersonal

Interpersonal barriers are usually interpreted as a lack of communication and a lack of open mindedness. However there are many causes responsible for this barrier. They include limited vocabulary, low self-esteem, emotional outburst, communication selectivity and poor listening skills. Ways to overcome this barrier is to practice using simple language, active listening, staying calm, and providing feedback.

### Physical

Physical barriers to communication include acting unfocused, looking around, not showing expression, playing on your phone or computer. To avoid some of these, turn your phone on silent and shut your computer. If you must be on your phone/computer, let your supervisor know beforehand.

### Organizational

Organizational barriers result from poor operational practices. Some examples of organizational barriers are being allowed to collaborate with peers and speak with your supervisor, but not being allowed to speak with your supervisors peers or your supervisor's supervisor; being told to ask someone else because certain coworkers have specific job titles and job descriptions; and being told to ask someone else because what you asked help for is "above their pay grade."

## Best Practices

- ***Think before you speak*** - Listen and really try to understand what your supervisor is saying before you decide what you're going to say.
- ***Active listening/be present*** - Active listening involves making eye contact, staying engaged during the conversation, taking notes, nodding your head, and asking questions.
- ***Be open minded*** - Listen to your supervisor's ideas and try to understand where they are coming from. Ask questions if you don't understand something and put yourself in their shoes.
- ***Use your voice*** - Feel confident in yourself and the progress you have made in your projects and VAD.
- ***Utilize conflict management skills when approaching difficult conversations*** - Come into a conversation with an open mind and listen to what the other person has to say.
- ***Respond in a timely manner*** - Timing is key. Communicate if you need an extension or if you need to change a meeting, in advance.
- ***Write everything down*** - It is important to document information at all stages of a conversation so you can go back and read through your notes.
- ***Ask Clarifying Questions*** - Always ask clarifying questions to fully understand the conversation in every capacity.
- ***Respect Cultural Differences*** - Understand that people may have different backgrounds than yourself and the way you communicate may be different for them.
- ***Give Constructive Feedback*** - Ask if you can provide feedback and be encouraging when you do. Search for a solution together rather than separately.
- ***Receive constructive feedback*** - Take notes and be open-minded to the feedback being given. Ask clarifying questions about your feedback so you can improve.
- ***Understand your own and other people's communication styles*** - See Appendix A for communication style assessments.

## Project Management

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### Personal Stories

#### Getting Organized with Flip Charts and Post Its

We adapted a year-long mentoring program to a one-week summer camp for teens in foster care. My supervisor and I are very visual, so we filled up a wall with flip chart paper. We laid out one day on one piece of flip chart paper; using colors to make the day, time, and location stand out. While we planned, we used different colored sticky notes to include presenter names, locations, and titles of workshops and stuck them on the flip chart paper. With so much information, we had to move around a lot of our workshops. Once we confirmed the day, time, workshop title, etc., we would write down the information using sharpies on the flip chart paper. This method was great so we could see what we have accomplished and what we needed to finish. It was an effective way for two visual and tactile people to move items around and most importantly, keep track of each other's progress throughout the planning period. By building a relationship and learning each other's strengths, I was able to manage up by creating a tracking system that would be most helpful to both my supervisor and me.

#### Balancing Multiple Projects and Priorities

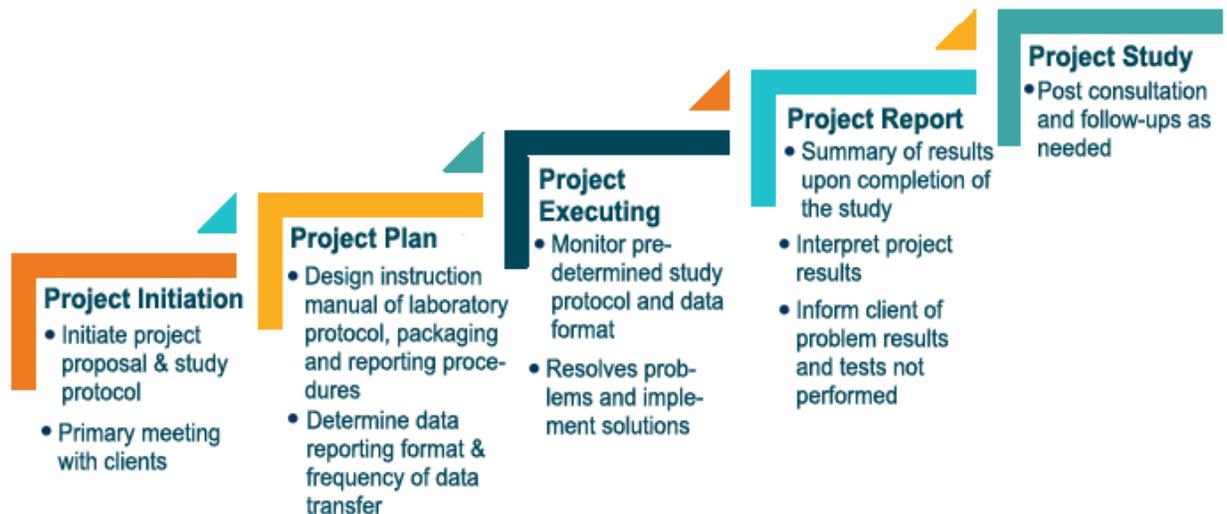
As a VISTA member, I was tasked with two separate projects under two different supervisors. One of those projects was to provide support to 13 schools and the other project was to create an online interactive asset map for NYC. According to my VAD, my main priority was around supporting the 13 schools. Eventually, the supervisor for the interactive map started asking me to dedicate more time to that project, and 80% of my work time was working on this map. I started to miss meetings and paying less attention to my 13 schools because I simply did not know how to manage both projects. I spoke with my VISTA Coordinator and we spoke with both supervisors and went over my VAD to determine how I could manage both projects successfully. I started with sharing my calendar with each supervisor so that they were both aware of my schedule. I created realistic expectations for the interactive map and set official dates next to each benchmark. Last, I divided the important school meetings to attend with my other supervisor so that I was still able to provide support to the schools. In the end both projects turned out successfully through managing up.

## What is project management?

Project management is planning, organizing, and managing the effort to address a community need which includes processes, methods, knowledge, skills, and experience to achieve the project objectives. Project management includes creating and prioritizing tasks to meet project requirements.

## Why are effective project management skills important during your VISTA year?

Project management is an important skill because VISTA Members and Leaders are involved with many tasks and it is important to keep track of everything and be able to communicate with their supervisor. Effective project management skills will allow the supervisor to understand what the VISTA member is working on, follow their progress, and provide guidance through the process. Being able to track projects in a way that is helpful to both the VISTA and the Supervisor is important due to VISTAs being heavily involved with planning, executing, and monitoring projects. Project management is a transferable skill that can be utilized throughout the VISTA Member and Leader's career.



Source: <http://www.accordiontec.com/accordiontec/project-management.html>

# Stages of Project Management

## Initiating

This stage is usually completed by the Site Supervisor. The overall project direction and project objectives are outlined in a VISTAs VAD.

## Planning

VISTAs/Leaders will start to develop their projects and how they will complete their VAD. It's important to make sure the project follows SMART goals: Specific, Measurable, Achievable, Realistic, and Timely (See graphic below). A work plan can act as an extension of the VISTAs VAD. Work plans can be very detailed and have dates for when each small or large piece of the project needs to be completed (assessments in Appendix A). SMART goals and work plans are a great way to keep organized and keep site supervisors involved.

## Executing

This stage is the bulk of the VISTA term. The VISTA will carry out what is outlined in their VAD. During the execution stage, it's important to use the work plan to keep site supervisors involved in the process.

## Monitoring

Keeping a detailed work plan is an important part of making sure you are on track to completing your VAD objectives. VISTAs must be able to adapt in case the project doesn't go the way as planned.

## Closing

Every time a project is completed, it is best practice to write a report that describes what happened during the entire project and how it compares to the original plan. For most VISTA projects, this information should be included in the sustainability binder.



Source: <http://www.shibaram.com/blog/how-to-set-smart-goals-zero-to-success-1-day-at-a-time/>

## Best Practices

- **Research** - Similar projects to ensure your project will produce sufficient benefits. Researching both the successes and challenges of other similar projects gives more insight and provides guidance and direction for the project.
- **Create a detailed work plan** - Breakdown your VAD into sections. Explain every step of a project and give a timeline on when each part will be completed
- **Progress Report** - Communicates your progress from the work plan. Giving your supervisor updates on your project can keep them in the loop and help them give proper feedback.
- **Document everything** - The more evidence you have, the better the decisions you can make in the future. What seems small today may be helpful in planning a future project or explaining why certain elements of the current project did not finish on schedule.
- **Be able to adapt** - Be able to adapt in case a project isn't going the way as a planned. Don't be afraid to get creative and have back up plans. VISTA Members should be able to work through changes. VISTA Members need be able to provide potential solutions to their supervisors, rather than always asking for their supervisors to problem-solve for them.

## Resources

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## Appendix A: Understand Your Communication Style

### Sample Communications Styles Team Chart

<p style="text-align: center;"><b>Style 1</b></p> <p><b>WHAT</b></p> <p>Results Objectives Achieving Doing</p>  <p style="text-align: center;"><b>ACTION (A)</b></p>	<p style="text-align: center;"><b>Style 2</b></p> <p><b>HOW</b></p> <p>Strategies Organization Facts</p>    <p style="text-align: center;"><b>PROCESS (PR)</b></p>
<p style="text-align: center;"><b>IDEA (I)</b></p> <p><b>WHY</b></p> <p>Concepts Theories Innovation</p>   <p style="text-align: center;"><b>Style 4</b></p>	<p style="text-align: center;"><b>PEOPLE (PE)</b></p> <p><b>WHO</b></p> <p>Communication Relationships Teamwork</p> <p style="text-align: center;"><b>Style 3</b></p>

Resource:

[Communication Styles: A Self-Assessment Exercise](#)

# Appendix B: Project Management Tools

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## Sample Work Plan

AmeriCorps VISTA Work plan

<b>Site Information</b> Site: Address: Site Supervisor: Telephone: Email:										
<b>Project Objective 1</b>										
<b>VISTA Responsibilities for Project Objective 1 with timeline</b>										
<table border="1"><thead><tr><th>Responsibility</th><th>Timeline</th></tr></thead><tbody><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr></tbody></table>	Responsibility	Timeline								
Responsibility	Timeline									
Skills needed in VISTA to achieve this objective •										
<b>Project Objective 2 (If Applicable)</b>										

Additional Resource:

[10 Best Project Management Software Tools](#)

## Sample Project Management Template on Excel

Projects						Deliverable(s)	
Status	Priority	Deadline	Task	Assignee	Description	Deliverable	% Done
			<b>Project Name</b>				
<input checked="" type="checkbox"/>	High	8/27/2015	Task		details of task here		100%
<input checked="" type="checkbox"/>	High	8/27/2015	Task				50%
<input type="checkbox"/>	Low	7/29/2018	Task				0%
			<b>Project Name</b>				
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
			<b>Project Name</b>				
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			<b>Project Name</b>				
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Source:

<https://www.smartsheet.com/top-project-management-excel-templates>