



## Strengthening Success Team Lead Capacity

# Upward Management Plan Checklist

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A checklist that guides Team Leads to develop an upward management plan focused on communication protocols and scheduled encounters.

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### Communication Protocols

- Preferred method of communication for principal or administrator liaison:  
\_\_\_\_\_
- Does principal get CC'd on communications with liaison? \_\_\_\_\_
- I make sure the meeting agenda is sent to my principal or administrator liaison for approval at least 48 hours prior to the team meeting
- I make sure items requiring approval are brought before the principal or administrator liaison in a timely manner

### Scheduled Encounters

- I am scheduled to meet with my principal or administrator liaison weekly/semi-monthly on matters related to freshman success
- Our agreed-upon standing agenda items include:
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
- I make sure my principal or administrator liaison receives the meeting minutes within 48 hours, including:
  - Summary of discussion
  - Action items, including owner and due date
- I keep an electronic/hard copy archive of the meeting minutes