Principles of *effective* committee work

"...As the decision making and the work proceed, it is up to each individual, as well as to the group as a whole, to ensure the integrity of the process and the efficiency and effectiveness of the outcome."

– David A. Teutsch
Making a Difference: A Guide to Jewish Leadership and Not-for-profit Management

From this workshop you will gain the tools to:

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1. Better appreciate the need for committees

2. Understand lay/pro roles

3. Gain tips for helping your committee accomplish its agenda

4. Recognize group dynamics

Why do we need committees?
Notes:

_____

_____

_____

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The Roles of Lay Leaders & Jewish Communal Professionals
Notes:

_____

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The Lay Leader-Professional Relationship

A critical component to fulfilling our mission includes a working partnership between professional staff and volunteer leadership. The goal is for volunteers and professional staff to have a strong relationship based on cooperation, trust and mutual respect.

In the lay-pro relationship, **both parties** **need to:**

- Display a strong working knowledge of the Jewish community and the organization
- Demonstrate a commitment to the preservation of Jewish life
- Work as a consensus and community builder
- Affect positive change in the organization
- Act as spokesperson and advocate for the organization at all times
- Display candor in relationships and respect confidentiality of sensitive information
- Be adequately prepared for meetings

In the lay-pro relationship, **volunteers** **will be expected to:**

- Help attract financial and human resources
- Maintain an objective view of organizational systems and operations
- Work as equal partners with professional staff
- Direct policy, strategy and priorities
- Accept fiduciary responsibility
- Provide leadership and support to professional staff

In the lay-pro relationship, the **professional** **will be expected to:**

- Provide expertise in his/her field
- Manage day-to-day operations within his or her responsibilities
- Implement board policy decisions
- Respond with objectivity to all input and suggestions of volunteers in a timely and professional manner
- Work as a problem-solver to address issues that arise
- Provide clear, consistent and timely communications

Source: Jewish Federations of North America

Preparation for Forming a Committee

Notes:

THE ASSOCIATED's Center for Community Engagement and Leadership strives to strengthen and enrich the Baltimore Jewish Community by engaging individuals in meaningful opportunities for involvement and advancement. CCEL accomplishes this mission by engaging, training, educating and placing both volunteers and professionals throughout the community.

Program Name:

Program Chair:

Program Co-Chair:

Lead Professional:

Program Mission

Each program within CCEL has a unique role in engaging, training, educating and placing volunteers throughout the community. Please place an 'x' next to the one category below that describes your program's primary focus.

❑ **Outreach:** Outreach programs provide an entry point for new people to engage in the work of THE ASSOCIATED with their time and/or money.
- Target: New people
- Commitment of Individual's Time and/or Money: Low
- Examples: Shalom Baltimore, Mitzvah Day

❑ **Engagement:** Engagement programs provide an opportunity for people to increase their level of involvement with THE ASSOCIATED.
- Target: People involved with outreach and/or people looking to give, but not ready for or not actively seeking leadership opportunities.
- Commitment of Individual's Time and/or Money: Medium
- Examples: Chapter Two, Missions

❑ **Cultivation:** Cultivation programs provide an opportunity for people to take their involvement with THE ASSOCIATED to a leadership level.
- Target: People who have been involved and are ready for leadership roles.
- Commitment of Individual's Time and/or Money: High
- Examples: YLC, Dor Tikvah, Board Placement

❑ **Stewardship:** Stewardship programs are designed to maintain the relationship with people who have been involved at either an "Engagement" or "Cultivation" level.

Continuum of Involvement

Program Goals and Action Steps

You must now decide how your program will meet its mission of "Outreach," "Engagement," "Cultivation" or "Stewardship" in the year ahead.

The first step to developing a plan for the year is to create goals for:

- **Involvement:** How many people do you plan on attracting? New or existing?
- **Enrichment:** After participation, how will participants feel or think differently?
- **Movement Along the Continuum of Involvement:** After participation, what do you want people to do? How do you want them to be involved? How have we moved them?
- **FRD:** After or during participation, what role will campaign giving play?

Goals in each area should be **S.M.A.R.T** (Specific, Measurable, Achievable, Relevant, and Timely) and include major action steps that will help you to achieve these goals. Before completing goals and action steps, please look at the example below so that you understand the information requested.

Example of S.M.A.R.T Goals with Action Steps

Mitzvah Maker Programs

Area I: Involvement

Responses in this section provide program leadership with an opportunity to articulate the most significant goals and action steps for recruiting new participants and keeping existing participants active in the program.

Goal #1: Involvement

To involve 10 new families who have never been involved in Mitzvah Maker Programs by February 2011.

Major Action Steps for Goal #1

1. Get a list from the JCC preschool of current families in spring of 2010.

2. Create a list of families that have not been involved with THE ASSOCIATED and meet with the president of the JCC preschool PTA in spring of 2010 to identify which might/might not be interested in hands-on volunteer opportunities.

3. Send letters to targeted families inviting them to Mitzvah Maker events in fall and winter of 2010.

4. In early fall, place an ad on THE ASSOCIATED page in the Jewish Times with a list of scheduled Mitzvah Maker events in the fall and winter.

5. In early fall, send letter to synagogue pre-school with a list of scheduled Mitzvah Maker events in the fall and winter to share with their PTA.

Area I: Involvement

Responses in this section provide program leadership with an opportunity to articulate the most significant goals and actions steps for recruiting new participants and keeping existing participants active in the program.

Goal #1: Involvement   Goal Met   Date

Y   N

Major Action Steps for Goal #1   Goal Met   Date

Y   N

-
-
-
-

To what extent were you able/unable to meet your goal? Why?

Area I: Involvement

Goal #2: Involvement   Goal Met   Date

Y   N

Major Action Steps for Goal #2

	Goal Met		Date
	Y	**N**	
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____

To what extent were you able/unable to meet your goal? Why?

Area II: Enrichment

Responses in this section should articulate what program leadership hopes participants will take away from program involvement and how this will be achieved.

Goal #1: Enrichment

	Goal Met		Date
	Y	**N**	
	☐	☐	_____

Major Action Steps for Goal #1

	Goal Met		Date
	Y	**N**	
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____

To what extent were you able/unable to meet your goal? Why?

Area II: Enrichment

Responses in this section should articulate what program leadership hopes participants will take away from program involvement and how this will be achieved.

Goal #2: Enrichment

	Goal Met		Date
	Y	N	
	☐	☐	_____

Major Action Steps for Goal #2

	Goal Met		Date
	Y	N	
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____

To What Extent were you able/unable to meet your goal? Why?

Area III: Movement Along the Continuum of Involvement

Responses in this section should include goals from moving participants along the continuum of involvement (page 1) and how these plans will be achieved.

Goal #1: Movement Along the Continuum

Goal Met		Date
Y	N	
☐	☐	_____

Major Action Steps for Goal #1

Goal Met		Date
Y	N	

-
☐	☐	_____

-
☐	☐	_____

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☐	☐	_____

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☐	☐	_____

To what extent were you able/unable to meet your goal? Why?

Area III: Movement Along the Continuum of Involvement

Responses in this section should include goals for moving participants along the continuum of involvement (page 1) and how these plans will be achieved.

Goal #2: Movement Along the Continuum

Goal Met		Date
Y	N	
☐	☐	_____

Major Action Steps for Goal #2   Goal Met   Date

                                                        Y   N

-

                                                       ☐   ☐   _____

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To what extent were you able/unable to meet your goal? Why?

Area IV: FRD (Financial Resource Development)

Responses in this section should include goals for financial resource development and how these plans will be achieved.

Goal #1: FRD   Goal Met   Date

                                                        Y   N

                                                       ☐   ☐   _____

Major Action Steps for Goal #1   Goal Met   Date

                                                        Y   N

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                                                       ☐   ☐   _____

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                                                       ☐   ☐   _____

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                                                       ☐   ☐   _____

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                                                       ☐   ☐   _____

To what extent were you able/unable to meet your goal? Why?

■ **Area IV: FRD (Financial Resource Development)**

Responses in this section should include goals for financial resource development and how these plans will be achieved.

Goal #2: FRD	**Goal Met**		**Date**
	Y	**N**	
	☐	☐	_____

Major Action Steps for Goal #2	**Goal Met**		**Date**
	Y	**N**	
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____
•	☐	☐	_____

To what extent were you able/unable to meet your goal? Why?

End of year summary

Program leadership should use this section to summarize efforts in the past year and to look ahead to the following year.

Goals: Of the _____ goals established,

_____   _____   _____

were completed fully.   were completed partially.   were not completed at all.

Summary of Feedback from Participants:

Program Strengths/Things to Keep for Next Year:

Opportunities for Improvement:

Perspectives of Program Leadership:

Program leadership's thoughts on strengths, opportunities for improvement and other ideas to consider for next year:

Top Participants:

Please list the names of any participants you believe THE ASSOCIATED should make an extra effort to keep involved with our work.

_____   _____
_____   _____
_____   _____
_____
_____

What to do:

Before the committee meeting
Notes:

_____

_____

_____

_____

_____

_____

_____

_____

_____

During the committee meeting
Notes:

_____

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_____

After the committee meeting
Notes:

Group Dynamics
Notes:

Each of the following questions has three choices. Choose the one in each question which most closely fits your own motivations. Remember, there are no wrong answers.

1) ○ a. When doing a job, I seek feedback.
   ○ b. I prefer to work alone and am eager to be my own boss.
   ○ c. I seem to be uncomfortable when forced to work alone.

2) ○ a. I go out of my way to make friends with new people.
   ○ b. enjoy a good argument.
   ○ c. After starting a task, I am not comfortable until it is complete.

3) ○ a. Status symbols are important to me.
   ○ b. I enjoy a good argument.
   ○ c. I work better when there is a deadline.

4) ○ a. I work best when there is some challenge involved.
   ○ b. I would rather give orders than take them.
   ○ c. I am sensitive to others—especially when they are mad.

5) ○ a. I am eager to be my own boss.
   ○ b. I accept responsibility eagerly.
   ○ c. I try to get personally involved with my superiors.

6) ○ a. I am uncomfortable when forced to work alone.
   ○ b. I prefer being my own boss, even when others feel a joint effort is required.
   ○ c. When given responsibility, I set measurable standards of high performance.

7) ○ a. I am very concerned about my reputation or position.
   ○ b. I have a desire to out-perform others.
   ○ c. I am concerned with being liked and accepted.

8) ○ a. I enjoy and seek warm, friendly relationships.
   ○ b. I attempt complete involvement in a project.
   ○ c. I want my ideas to predominate.

9) ○ a. I desire unique accomplishments.
   ○ b. It concerns me when I am being separated from others.
   ○ c. I have a need and desire to influence others.

10) ○ a. I think about consoling and helping others.
    ○ b. I am verbally fluent.
    ○ c. I am restless and innovative.

11) ○ a. I set goals and think about how to attain them.
    ○ b. I think about ways to change people.
    ○ c. I think a lot about my feelings and the feelings of others.

Understanding your questionnaire:

1) a. Achievement	b. Power	c. Affiliation
2) a. Affiliation	b. Power	c. Achievement
3) a. Power	b. Affiliation	c. Achievement
4) a. Achievement	b. Power	c. Affiliation
5) a. Power	b. Achievement	c. Affiliation
6) a. Affiliation	b. Power	c. Achievement
7) a. Power	b. Achievement	c. Affiliation
8) a. Affiliation	b. Achievement	c. Power
9) a. Achievement	b. Affiliation	c. Power
10) a. Affiliation	b. Power	c. Achievement
11) a. Achievement	b. Power	c. Affiliation

Source: David McClelland

David McClelland's Theory of Motivation

Characteristics of Achievement/Achiever Types:

- Make to-do lists and check-off items
- Like to organize and create systems
- Want clear instructions
- Like pressure and hard work
- Seek specific, tangible achievements
- Can work alone easily

In your organization, what kind of volunteer opportunities would be appropriate for "**achiever**" types?

Characteristics of Affiliation/Affiliator Types:

- Focus on relationships with others
- Enjoy teamwork and collaboration
- Avoid tension and conflict with others
- Measure success by how happy people are
- Need to be accepted and liked
- Want to know co-workers

In your organization, what kind of volunteer opportunities would be appropriate for "**affiliator**" types?

Characteristics of Power Types:

- Want to impact, affect and influence others
- Love to create something new
- Love a challenge
- Success = change and improvement
- Can work alone or form coalitions

In your organization, what kind of volunteer opportunities would be appropriate for the "**power**" type?

Source: David McClelland

Looking Ahead:

How could I address the challenging situation or struggle I have had working with a committee?

▌Commitment to Action

I'd like to Start doing:

_____

_____

_____

_____

I'd like to Stop doing:

_____

_____

_____

_____

I'd like to Continue doing:

_____

_____

_____

_____

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