Moses spoke to the Israelite tribes saying, "This is what the Lord has commanded: If a man makes a vow to the Lord or takes an oath imposing an obligation on himself he shall not break his pledge, he must carry out all that has crossed his lips." (Numbers 30:1)

c\s the Israelites begin to plan their conquest of the land they are aware of the need for responsible and accountable leadership. Similarly, one of the biggest challenges in synagogue life is not only to find volunteers but to also help them accomplish their goals. Volunteers agreeing to accept their roles and responsibilities is only the first step. They need to be empowered to meet expectations so they can accomplish what they pledged to achieve.

Jewish tradition takes vows and responsibility seriously. We must be clear about expectations for volunteers and provide support so that they can be successful. How do we motivate leaders to step forward and then help them honor their pledges and commitments?

In this unit we will learn how to:

- Delegate wisely

- Develop an accountability plan to track progress on goals

- Practice Covenantal and Caring Conversation (CCC) to help leaders give constructive feedback to volunteers

- Create a culture of gratitude where leaders embrace the habit of acknowledging volunteers' successes

Accountability Starts with Delegation

A scene from synagogue life:

Sarah agreed to be the new membership chair of her congregation. She had worked with the past chair on and off over the last three years. She is a good hands-on worker. She delivered all of the "welcome to the community" baskets to new members and enjoyed helping with the new member Shabbat.

During the budget preparation process in March, the president set a goal of 20 new membership units. Membership had been flat or down over the last five years. In an e-mail to Sarah after the board

meeting, the president outlined the goal of 20 new membership units and explained his desire for the membership committee to do some focus groups with recent new members. He hoped that this research would help the committee develop some new outreach approaches. He emphasized the necessity for keeping the board informed about this important effort. The executive committee was copied on the e-mail.

Sarah originally agreed to be the new chair because she likes people and thought she would be able to connect with more of the community. However, the job seemed to have expanded beyond her capacity. She did not respond to the e-mail highlighting the new expectations for the committee. She did briefly mention focus groups at one of her first committee meetings, but this item was to be discussed at another time. With Sarah's professional job starting to require more of her time, the membership committee did not met with any regularity.

Months later the executive committee was reviewing membership numbers as the High Holidays approached. The officers were again concerned that they saw little membership growth. They remember the e-mail directive to do focus groups and research effective outreach strategies. They asked the president when they could expect the membership report. Some executive committee members had begun to believe that Sarah was doing a poor job as membership chair.

What can we learn from this scenario?

This story illustrates what happens when we don't delegate wisely. The number one way to ensure accountability is to define the task and pick the right person for it. Leaders should seek to prepare the organizational foundation for a reasonable chance of success. It is more effective to spend time defining expectations and recruiting the right person beforehand, than it is to have to fix a problem later on. It appears that Sarah was picked before the new membership goal and additional tasks of the membership committee were defined. The officers paid attention to Sarah's accountability only when their worry about the budget jogged their memory about the goal for 20 new membership units. The president made a pledge of 20 new members, but he did not check to see if it was a pledge Sarah, her committee, or the leadership could actually fulfill.

In an environment of trust, Sarah might have spoken up when she got the e-mail outlining the expectations, but she did not. Sarah probably felt uncomfortable expressing her concerns about her limitations or the

motivation and capacity of the other committee members to meet these new expectations. Perhaps this synagogue, like many, struggled with a culture of criticism and Sarah felt vulnerable to critique.

Dr. Gil Rendle argues that when a system does not know what went wrong, the people in the system look to find out *who* went wrong.

Sometimes we blame people like Sarah, the membership chair, for things that are outside of their control:

• Forces impacting membership are national trends. Many congregations will struggle to keep the current membership level

• The president sets a membership goal from the top without getting buy-in from those directly involved in the membership recruitment process

• The committee chair does not have the skills to facilitate focus groups

• The membership committee is not accustomed to doing research on best practices

• The membership committee may not have many strategic thinkers or people willing to help the chair accomplish new expectations

In this case, the officers looked towards Sarah for what went wrong with the goal of gaining 20 new membership units. The leadership could have avoided blaming Sarah by figuring out how they all could contribute to the solution. In this case, the board might direct the membership committee to focus on ongoing tasks (welcoming, integration) and assign the more strategic data gathering and analysis roles to a new marketing task force.

Accountability Building Blocks

Patrick Lencioni (The Five Dysfunctions of a Team, SF: Jossey Bass, 2002) notes that healthy teams build trust, manage conflict and pay attention to results.

The following are some principles of accountable leadership that allow teams to thrive:

1. **Accountable Leaders Build Trust**
   Leaders take time to develop shared values about how they will work together. They develop shared agreements (board expectations) about how information will be shared and how decisions will be made (operating agreements). They develop job expectations and get to know each other's talents.

2. **Accountable Leaders Manage Change and Conflict**
   Leadership plans disclose where leaders are trying to go, why they want to go there and how they want to get there. Transparency strengthens the team's trust and reduces conflict. Leaders need to take responsibility for the tough issues they encounter on their watch.

   When leaders fail to build buy-in and face resistance they may say in shock, "We had no idea how this happened." It is vital that leaders accept the responsibility to create an intentional campaign of change. (See Sulam for Current Leaders Session 2: The Change Management Plan.)

3. **Accountable Leaders Build Commitment to Results**
   When teams have trust and a capacity to manage conflict, they can better focus on results. When the whole board has embraced written goals everyone is empowered. The president does not have to single out one committee for its lack of goals. The whole board has a commitment to focus on goals and tracking results. It becomes a habit. In their business lives members usually are held accountable. Synagogues are dynamic systems, so commitment in one area can build commitment in others. When leaders start to track goals, their next set of promises carry more weight. Equally important, they are developing a habit of accountability.

   We discussed the importance of **P.A.C.T.** goals in the Leadership Plan. **P.A.C.T.** goals are designed to provide clear direction to leaders. They spell out the **PURPOSE** of the initiative (the Why?), the specific **ACTION** to be taken (the What?) the necessary human and financial resource **CAPACITY** (the Who? How Much?) required and the **TIME FRAME** (the When?) to complete the work.

   When goals are vague, no one is fully accountable.

Accountability Road Blocks

One of the dominant road blocks to accountability is avoidance. Leaders are frequently hesitant to engage others in crucial conversations because they are not sure how and concerned about creating conflict. Here are some examples:

- The synagogue may be ignoring an unmet need because they don't want to confront an unresponsive program chair

- Board members may see their board obligations as nothing more than attending meetings

- The president may be afraid to ask board members to take part more fully in the life of the congregation

- The rabbi may not be connecting with a new generation of members, but leaders don't know how to raise the issue

- The executive director may be over-functioning and not empowering volunteers to do their work

When leaders exhibit avoidance it is harder to ask the community to confront tough issues. The longer issues are avoided, the more tensions can build-up. It is common that no one has taken the time to write out an achievable and relevant set of board expectations to provide the president with a road map for accountability conversations to take place.

Thankfully, these issues can be managed if the right proccesses are in place and they are dealt with on an ongoing basis.

Covenantal and Caring Conversation

When Jewish leaders rise to the top of their organizations, more is expected of them. When board members are not meeting expectations (attendance, giving, role modeling etc.), it is the lay officers' responsibility to hold a conversation with them to find out why. A reference to a leader's job description can be crucial to this converstion as it has a list of tasks as well as directions for overcoming major objectives. The ability to ask leaders to take a self-assessment, disclose their learnings and be open to feedback, is a critical competency of accountability.

A helpful guide to framing our conversations can be learned from the methods of Non-Violent Communications (NVC) developed by Dr. Marshall Rosenberg. (You can learn more at www.CNVC.org). I have renamed this approach "Covenantal and Caring Conversation" (CCC). Covenantal and Caring Conversation is a value-based strategy rooted in the fundamental honor and respect that we owe another human being created in God's image.

The CCC uses non-violent communications tools to help leaders stand up and address real issues based on their observations, feelings and needs while honoring the integrity of the other person. The CCC lets you disclose what you are seeing and feeling. It allows you to give others feedback in a non-judgmental way. Your observations are what you see and hear; they are not judgments, which can cause the listener to turn away. Your feelings are not disputable; they are yours.

There are four essential elements expressed when using CCC:

1. OBSERVATIONS: The concrete actions you are **observing** that impact you and your community.

2. FEELINGS: How you **feel** in relationship to what you are observing.

3. NEEDS: The **needs, values, desires** that are creating these feelings for you.

4. REQUESTS: The **concrete actions you request** to enrich their lives and their communities.

Let's look at how the four elements can be used to provide feedback in the case of Sarah, the membership chair, who did not meet the expectations for conducting focus groups in our example above. Imagine that the president engaged Sarah in a critical conversation using CCC:

CCC ELEMENT	FEEDBACK
OBSERVATIONS	I notice that we have not heard any reports about focus groups or new outreach approaches. I had sent you an e-mail about this important membership committee initiative. Looking through my notes, I realize that I have not followed up with you since that e-mail.
FEELINGS	I am a little concerned about our progress to date.
NEEDS	Outreach is a major element of our vision to expand our community by 100 families in the next five years. I value how you have been committed to reaching out to new members with the welcome baskets you deliver and your personal words of welcome. I was confident that you could organize meetings to better understand why new members joined and whether they were finding what they were looking for here. This research, I hoped, would lead to new outreach approaches to prospects. I believe that our board needs to be knowledgeable about how attitudes to membership have changed since they joined the synagogue.
REQUESTS	I would like to request that we meet next month again so I can get a better understanding of your comittee's plans. I want to know how I can help support your efforts. We can review adding some additional members with marketing experience that might be able to help the committee. After the meeting I will hopefully be better able to inform the board about our outreach plans and determine if you goal of 20 new member units is realistic.

Jewish leaders work to align their goals to the community's values and needs. When they challenge leaders to explore their behavior in the service of these values it is not personal. When leaders can avoid making things their will, versus the will of another, they have a better chance of being heard.

You can use the same framework to ask questions of the other person.

- What have you observed?

- How do you feel about it?

- What do you need?

- What would you like to request me to consider?

In a volunteer culture we will make more progress with a carrot than with a stick. The goal of CCC is to reinforce the behaviors we seek.

In *The One Minute Manager*, Ken Blanchard suggests that we go around our organization and try to catch someone doing something well. CCC is an excellent format to give a compliment. With the right language we can extend a sincere acknowledgment for hard work and effort:

CCC ELEMENT	FEEBACK
OBERVATIONS	I was at the book fair. People seemed to be having a great time. Saw lots of new faces. Watched parents reading children's books with their kids and talking to authors. The buffet looked great. Great mandlebread. It looked like we also attracted quite a few non-members.
FEELINGS	I feel very encouraged by the event.
NEEDS	Your committee was able to get a lot of new people involved. We have talked a lot about finding different ways to engage people. Your book fair really created community.
REQUEST	I would like to request that you come to our next board meeting and share what made this event such a success.

While the CCC seems simple, it achieves a complex task. It is a method to help us reduce avoidance. We take time to give guidance when things are off the mark and, equally important, to provide acknowledgement for work that is right on target.

The Role of the Nominating Committee

The most effective synagogue and non-profit boards provide formative (looking ahead) and summative (looking back) feedback to their board members. By providing feedback on an annual basis, leaders help others create forward-looking plans for continuous improvement.

Nominating committees play an important role in accountability because they are involved in providing summative reviews for members of the board. They look backward to review a leader's contribution to the team to determine who should be granted additional terms of service.

In the best case scenario, a nominating committee already has a board expectations document from its leadership. Written expectations make it easier for the nominating committee to have a Covenantal Caring Conversation with board members.

All leaders can do their own self-assessment of how well they met board expectations. The nominating committee should observe the gap between their expectations and the performance of the leaders. Using CCC, a nominating committee can share its observations, feelings, needs and requests with the board member about his/her performance. This exercise can be a platform to make constructive requests for improvement.

Your Accountability Plan

Accountability needs to be ongoing and routine in your leadership culture. Begin your accountability plan with one or more of the following:
(Ask your KRM for more information about the following resources)

• Conduct a self- assessment of your board processes. (See the Sulam Board Self-Assessment)

• Create a board improvement plan. Identify some ways to improve board meetings. ("Ten Tips for More Effective Meetings")

• Create an intentional campaign of change. (See Sulam for Current Leaders Session 2: The Change Management Plan for the board improvement plan for their kehilla)

• Conduct a process check at least once per quarter to ask what is working well and what could be better. This can gauge whether the improvement plan is working

• Committee chairs and officers can use the board assessment with their committees to evaluate their volunteer year

- Key committee chairs can complete the Committee Chair Personal Review of their year

- The senior staff team can work to align their goals with the board's goals

- The executive committee and the senior staff can have a dedicated meeting or retreat to talk about how they are driving the synagogue's goals together

- Synagogues can be aided by looking at key management metrics. Some call this a list of "vital signs." They feature the most important factors that non-profit leaders track to measure the success of their institutions. These vital signs include dues income, religious school enrollment, fundraising dollars, budget versus revenue and expenses

Conclusion

Creating a culture of accountability takes time. Accountable leaders begin with written goals and expectations and feel empowered to discuss them. When leaders share a "pool of shared meaning" they earn greater trust. Equally important, accountable leaders carefully reach out to provide coaching when goals are off track and are enthusiastic in looking for goals that are going well. They are quick to provide credit and acknowledge results.

Accountability is not just good management, but it is also the cornerstone of a community of sacred relationships. In our case above, the congregation president finally sees that Sarah is having difficulty with her responsibilities, so he takes responsibility to meet with her and help her get back on track. While the president manages the challenges of the membership committee, he is creating an opportunity for growth for both of them through honest and constructive conversation.

The leader of a Conservative congregation is a work in progress. Our tradition talks about leaders as a *dugma*, which means a role model. This applies as much to their spiritual life as to how they conduct crucial conversations.

Accountability is a leadership aspiration. Leaders may enter the synagogue as consumers. Over time they gain commitment for the congregation as members. Gifted leaders remember what they have learned about their evolution in the congregational leadership. As mature leaders they hold themselves accountable to help other leaders step up and grow.