

Navigating the
*Lay/Professional
Partnership*

“It is a custom of the world, that when one takes a bunch of reeds tied together, can one possibly break them all at once? But when one takes one by one, even an infant can break them. And so you find, that the people of Israel are not complete until they become ‘one bunch.’”

– Midrash Yalkut Shimoni

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What Is Jewish About Lay Leaders and Professionals Working Together?

Consider the text below (from Exodus 18:13-27)

The next day, Moses sat as magistrate among the people while the people stood about Moses from morning to evening. But when Moses' father-in-law {Yitro} saw how much he had to do for the people he said "What is this thing that you are doing to the people?...Moses replied to his father-in-law, "It is because the people come to me to inquire of God. When they have a dispute, it comes before me and I decide between one person and another and I make known the laws and teachings."

But Moses' father-in-law said to him, "The thing you are doing is not right... Now listen to me...You shall seek out from among all the people capable men (*anshei emet*) who fear God, trustworthy men who spurn ill-gotten gain. Set these over them as chiefs of thousands, hundreds, fifties and tens and let them judge the people at all times..." Moses heeded his father-in-law...Moses chose capable men out of all Israel, and appointed them heads over the people-chiefs of thousands, hundreds fifties, and tens and they judged the people at all times; the difficult matters they would bring to Moses and all minor matters they would decide themselves.

Moses was burned out and exhausted from serving as a judge from dawn to dusk. Yitro's suggestion – to create various levels of trusted judges who would deal with smaller matters, while saving the more difficult matters to Moses –had several positive outcomes. First, Moses' energy and commitment could be renewed. Second, this system empowered other volunteers to be a part of the governing process, making them more vested in the success of the system.

Questions to consider (on your own or with your fellow lay leaders or professional partners):

- › What precedent does Yitro's question set in terms of leadership styles?
- › Should people volunteer of their own volition, or should they be asked, or appointed, to volunteer? What are the pros and cons of each approach?
- › What are the benefits of spreading out the decision making process over a large group of people (rather than just one person)? What are the potential pitfalls?
- › How would you define *anshei emet* today?

The Lay/Professional Relationship

Exercise

› Describe one volunteer leader and one professional who impressed you and why.

› Why do we need lay leaders? Why do we need professionals?

The Ideal Relationship

“An optimum profile for lay-staff relations would look something like the following: professional staff and lay leaders and volunteers commit themselves to a shared vision, partnership and an effective working relationship. Both parties regard the other with respect and understanding of their respective roles in the organization and the community. Work gets done without irritating concerns about who is in charge or who gets credit because the common good requires and enlists everyone’s participation and contribution. Communications are clear and unambiguous, and sufficiently frequent so that board and staff alike feel informed and involved. There are opportunities to recalibrate the partnership from time to time (such as meeting in a relaxed retreat setting) to address any tensions or other issues in the relationship.”

Stephen Dobbs, Gary Tobin, Zev Hymowitz, “The Development of Professional Leadership in the Jewish Community” (Institute for Jewish & Community Research, San Francisco: 2004), p.30

Question:

› What prevents us from reaching this ideal? What are some of the challenges in working with lay leaders/professionals?

Lay Professional Relations – Who Does What?

Listed below are various functions which are ascribed primary to either the lay leader or the professional. Next to each function, please designate whether it should be primarily a lay role, staff role or shared:

FUNCTION	Lay	Staff	Shared
Decides on which members of the community to appoint to committees and boards			
Recruits potential volunteers to serve on committees			
Explains to potential committee members what is expected of them			
Orients new committee member to the organization, committees functions and programs			
Replaces volunteer leader or committee member who is not fulfilling his or her responsibilities			
Sets the agenda for board meetings			
Accountable for agency operating budget			
Hires and fires staff (except executive director)			
Create speaking points to lead meetings			
Institutes change in policy or direction of agency			
Responsible for spreading good word around the community			
Generates new ideas for the planning of ongoing or new programming			
Deals with angry board members			
Develops leadership programs in order to build leadership base			
Solicits prospective annual donor gifts			
Settles conflicts that arise between volunteers			
Writes thank you notes to appropriate people			

What is common here? What themes do you see?

Motivational Analysis

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

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 the “**affiliator**” type?

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
- › Want to get things done

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

Creating a Brit Kodesh – A Sacred Partnership

What is a *brit/covenant*?

“ A brit represents a commitment to join together on a deeper level in the task of helping to improve the world. To do so, **the partners in this endeavor not only have to work together, but they also must create space around each other, making room for an exchange of ideas and dreams.** Each partner comes to the relationship with visions and aspirations. Both partners must be open to the other, but each also needs to make space for the other to flourish in the relationship. ”

[Singer, Rabbi Jonathan L., “Tzimtzum: Creating a Space for One Another,” *Brit Kodesh - Sacred Partnerships*, Synagogue 2000 and the Union of American Hebrew Congregations, 2001., page 15.]

While a covenant and a contract are certainly similar, understanding their differences can help us highlight the unique aspects of a covenantal relationship and how it can be manifested in Jewish communal organizations. We sign contracts all the time. We sign contracts with strangers - mortgage lenders, human resource managers, cell phone service providers. Most contracts are signed for a fixed term, whereas a covenant is eternal. Under the right conditions, one party can nullify a contract. A covenant has no such “out clause.” In a contractual relationship, if one party does something wrong, the other party can be expected to take recourse and seek compensation. **By contrast, two parties enter a covenant not to protect themselves, but to better themselves and each other.**

When we are in a covenantal relationship, our destinies are joined; our successes and disappointments are not ours alone, **but are shared with a partner.** A contract protects the individual’s rights and privileges. A covenant sets the stage for a partnership, where each person needs to create space for the other person, and the relationship itself, to grow.

What covenants must we make with each other in order to create an attractive, nurturing, and productive environment for professionals and lay leaders? Consider the following five step approach:

1. **Develop shared, mutually-agreed upon expectations**
2. **Acknowledge realistic and unrealistic expectations**
3. **Recognize the various roles of each party**
4. **Re-divide the pie**
5. **Address these issues through a brit or covenant**

Phases of The Lay-Professional Relationship

Contracting

- › Creating an agreement between the lay leader and the professional that defines the work to be done, the goals and objectives to be achieved, and the ways in which the two parties will work together.
- › Defining how long, where, and when the parties will work together, and when the lay-professional relationship will come to a close.

Mid-Year

(or mid-term, if the lay-professional relationship will last for more or less than a year)

- › Taking an honest look at what has been achieved and how the lay-professional relationship is, or is not, working. You can use the “STOP. START. CONTINUE. “technique,” outlined below, as a “check-in” tool.
- › Determining what course of action should be taken if the relationship has gone off track; seeking out resources (advice, coaching, etc.) if help is needed to strengthen the relationship.
- › Creating a succession plan – what needs to happen next in order to maintain Federation’s work, and who will be next to take on the mantle of leadership.

Closing

- › Evaluating what has, or has not, been achieved over the course of the lay-professional relationships.
- › Making an honest assessment of each partner’s contributions to the shared work.
- › Appreciating each other’s contributions.

Checking in with Your Partner

You can use the **STOP. START. CONTINUE.** technique during your work with your partner to observe activities, strategies, and processes that you have been employing and evaluate how they are (or are not) moving you towards your goals. This simple and powerful technique compels people to identify their concerns, their expectations of change, and the solutions they can create to support their work.

With your partner, ask yourselves the following questions:

- At this time next year (or in 6 months):**
 - › **What will be in place?**
 - › **What will we be experiencing?**
 - › **What will we have accomplished?**
 - › **What will have shifted?**

STEP 1

State one of your development goals for the upcoming year.

STEP 2

STOP – Things that are getting in the way. What do you need to stop doing right now in order to move towards your goals? What are you doing that has nothing to do with your goals, or is working against your goals? How are you getting in your own way? What is not serving your interests? What negative things have you been tolerating (e.g. other people's behaviors, your own behaviors, low standards) and how can you stop tolerating those things as you move forward?

START – Things you want to put into place in order to improve the situation and achieve your goals. What can you start doing in order to achieve your goals? What new activities, attitudes, or behaviors can you initiate in order to move in the right direction? What do you want to bring forth in yourself in this new chapter? What can you start doing right now that will make a difference?

CONTINUE – Things that are working that you should keep doing. What do you want to continue that will help you to achieve your goals? What has been working well up until now, and how can you continue doing that? What are you currently doing that is consistent and aligned with the stated goals?

STOP	<p>Things you are doing that you would benefit from stopping.</p> <p>Things that are getting in the way.</p>	Actions:
START	<p>Things you aren't doing that you would benefit from starting.</p> <p>Things you want to put in place to improve the situation in order to attain your goals.</p>	Actions:
CONTINUE	<p>Things that are working that you should keep doing.</p>	Actions:

Agreement/Covenant

Agreements set forth mutual expectations that will provide a foundation for a positive working relationship based upon trust and accountability. Consider the following questions as you work on this “covenant”:

Purpose:

- › What are our shared goals in this relationship?
- › What outcomes are we looking to achieve vis-a-vis the organization’s goals?
How will we measure our success?
- › What expertise and capabilities do we each bring to the table that will help us in achieving our shared purpose?

Roles:

- › What are the roles and responsibilities of the professional?
Where will the professional take the lead?
- › What are the roles and responsibilities of the lay leader?
Where will the lay leader take the lead?
- › What can we expect from one another in working together?
- › How will we continue to grow in our roles?
- › What commitments will we make to each other to ensure success in our respective roles?

Communication and Process:

- › How often will we meet (frequency and duration)?
- › How should our communication be structured (telephone, face to face or e-mail) to identify agendas and prepare for our meetings together?
- › How far in advance should we discuss the agenda for our upcoming meetings?
Our committee meetings?
- › How will we give and receive feedback when the relationship is, and is not working?
- › How will we hold each other accountable for following the process we establish?
- › When we are in meetings, what our respective roles and responsibilities to the committee?

Contact:

- › How do we each like to be contacted (phone, email, fax)?
- › Where do we like to be contacted (office, home, cell)?
- › What is the best time of day for us to connect?
- › How often would you like to speak? Should we set up weekly calls? On an as needed basis? Both?
- › How quickly do you respond to email? If I send an email and do not receive a response within 48 hours, what should I do?

Other Important Questions:

- › What are the most important things you need to know about me?
- › What do you need to know about my working style that would be helpful?
- › What issues are particularly important to you? How would you like to be involved to make a difference on these issues?
- › How does this assignment fit within the context of your other lay or professional responsibilities?
- › Where else are you involved within the community? Which federation agencies? Which Jewish agencies beyond the federation system? Which non-Jewish agencies?
- › Are there particular positions or committees that you would like to be involved in either now or at the conclusion of this assignment?

Reflective Questions

- › When the lay/professional relationship is working well, what does it look like?
- › When it is not working well, what should we start or stop doing?
- › What supports are in place to assist those cases when the lay-professional partnership is not working well?
- › What are some of the basic rules of the relationship that we can all agree upon?



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