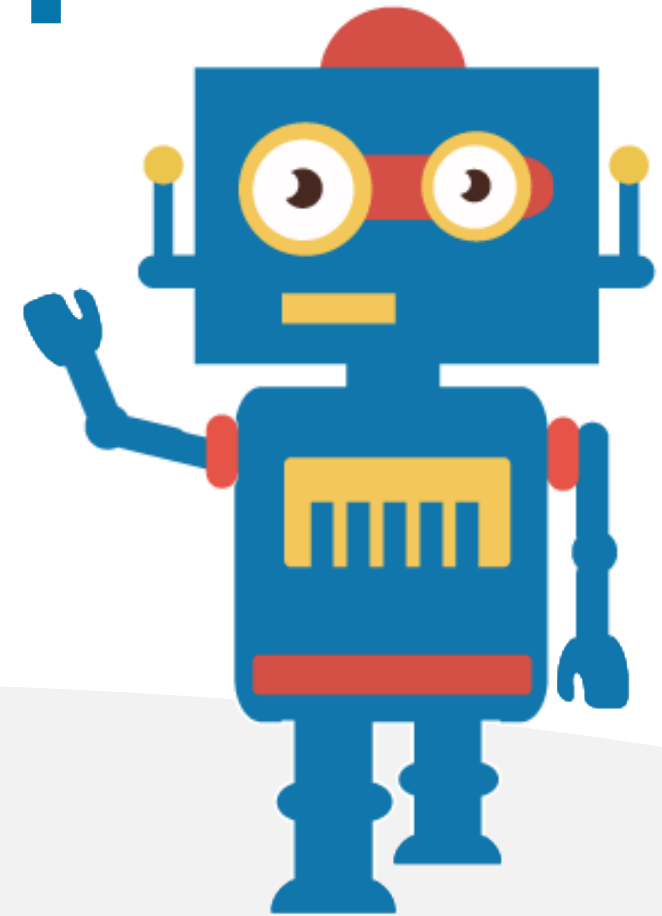
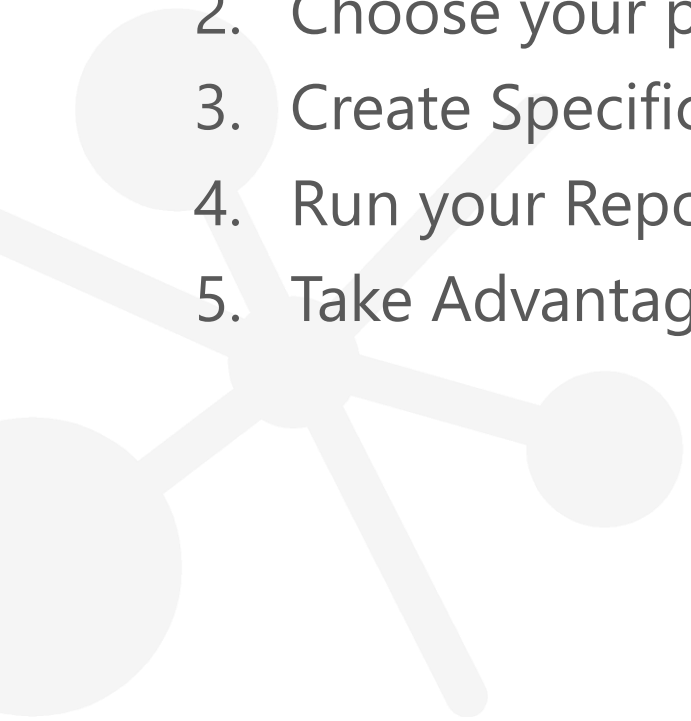


Best Practices in Committee Management



Contents

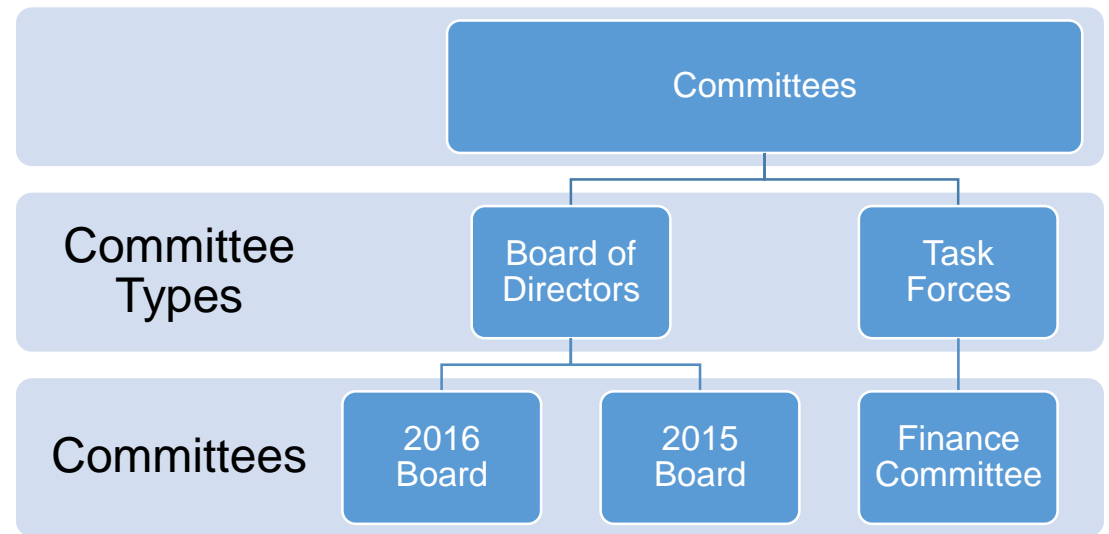
1. Know your options
 2. Choose your path
 3. Create Specific Types
 4. Run your Reports
 5. Take Advantage of other Features
- 

Know your options

- Committees are assigned a **Committee Type** to help you organize your many Committee Records into larger categories
- Individuals can represent the organizations they work for so that you see history from both perspectives
- Each **Committee Meeting** can be tracked and managed separately
- **Committee Reports** help you track and manage each meeting, member attendance history, and more
- Because Committees each have their own Affiliation Codes linked to them, you can take advantage of many other features

Step 1: Configure your Committees

1. Start by building your Committee Types
2. Decide if you want a new Committee for each year, or one Committee that lasts multiple years
3. Build Each Committee using the right Type and Affiliation Code



Step 2: Build Committees

- Create a Committee Record for Each Committee
- Select the right Committee Type to keep them organized
- Add as much detail as possible to each one:
 - Location and time of meetings
 - Purpose
- Add Members to the Committee.
 - If you are Organization-based, add the individual to the committee and then identify the organization they work with

Step 3: Document Every Meeting

- Create a Meeting Record every time
- Copy and Paste the Agenda and Minutes text in to the right tabs
- Use the Attendance Tab to identify who showed up

Step 4: Run your Reports

There are 4 stock Committee Reports in the WebLink Committee Reports Menu. Use them to make Committee Analysis and Management easier

- **Committee Summary**
 - Displays all Committee Information
- **Committee Roster**
 - Displays all committee members, including meetings attendance history for each member
- **Meeting Attendance Sheet**
 - Creates a sign-in sheet you can use at the meeting
- **Committee Meeting Details**
 - Bundles everything about a specific meeting in to one consolidated report. Very good for Board Reports

Step 5: Take Advantage of Other Features

- Easily Print Mailing Labels
- Offer Event Discounts to Committee Members
- Track when Committee Members download Board Packets and other documents

Step 5: Take Advantage of Other Features

Affiliation Codes

- Use the Committee Affiliation code to easily:
 - Print Mailing Labels (Reports > Profile Reports > Mailing Labels > Mailing Labels by Affiliation Code)
 - Find committee members in the Profile Selector
 - Offer discounted Event Entry on specific Event Items

Web Content Records

1. Upload documents as Web Content Records so that they can be accessed by committee members via a link
2. Restrict the Web Content Record to the Committee Affiliation Code
3. Share the document link with committee members
4. Track Content Views to see who downloaded it