



REPAIR
THE WORLD

The Engaged Congregation:
A Guide to Creating
a Volunteer Culture

This guide was originally published as a STAR Map. STAR (Synagogues: Transformation and Renewal) was a philanthropic partnership of the Charles and Lynn Schusterman Family Foundation, Jewish Life Network/Steinhardt Foundation, and The Samuel Bronfman Foundation. It was designed to promote Jewish renewal through congregational innovation and leadership development. These guides were originally published under the auspices of STAR and, through the generosity of the Charles and Lynn Schusterman Foundation, have been updated and are now distributed under license by Repair the World.

The Engaged Congregation Series

This guide is one in a four-part series designed to provide synagogues with a step-by-step process of creating and maintaining a culture of volunteer engagement. Volunteer engagement is a strategy that can build a congregation's capacity beyond what staff alone can accomplish. It transforms a congregation into an engaged community in which congregants are partners in co-creating their community's future, as they serve as members, learners, volunteers, contributors, donors, participants, and passionate advocates. The four main steps to implementing a volunteer engagement initiative are addressed in these four guides:

The Engaged Congregation:
A Guide to Creating a Volunteer Culture

The Engaged Congregation:
A Guide to Volunteer Cultivation

The Engaged Congregation:
A Guide to Supporting Volunteers

The Engaged Congregation:
A Guide to Acknowledging Volunteers

The guides can be downloaded at <http://weRepair.org>

About the Authors

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Ms. Friedman Fixler's client list includes STAR (Synagogues: Transformation and Renewal), Repair the World, Hostelling International, Corporation for National & Community Service, Canadian Cancer Society, National Multiple Sclerosis Society, and The Leukemia and Lymphoma Society, among others in health care, animal welfare, government and culture. Jill's many articles on volunteer engagement and board development have appeared in *The Volunteer Management Review*, *Contact Magazine*, *You and Your Nonprofit: Practical Advice from the Charity Channel Professional Community*, *Nonprofit Board and Governance Review*, and *E-Volunteerism Journal*. She is the author of *Boomer Volunteer Engagement: Collaborate Today, Thrive Tomorrow* and *Boomer Volunteer Engagement: Facilitator's Tool Kit*.

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Learn more at www.jffixler.com.

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How to Use this Engaged Congregation Guide

1

Set aside an hour to read through the material and make notes.

2

Come back a few days later with 90 minutes to 2 hours to devote to this Guide's activities.

3

Work through the contents of each section.

Introduction	2	Figure 1.....	9
Activity 1.....	3	Activity 3.....	10
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4

Share results with at least one other individual at your synagogue. Brainstorm together on next steps.

5

Make it practical: Immediately try at least one new idea.

Use this Guide to...

- Identify 4 reasons volunteers are critical to the health and sustainability of your synagogue
- Describe the 7 core competencies required for an effective engagement effort
- Assess your current culture of volunteer engagement against established criteria
- Compare your current volunteer culture against the core competencies and create a plan for moving toward best practices

Introduction

The Outcomes of Effective Volunteer Engagement

Our Sages teach, "K-fum tza'ara agra," which means "The reward is proportionate to the effort," Avot (5:24). This maxim is true in all walks of life and can be especially true in the world of volunteer engagement.

The culture shift toward volunteer engagement takes energy and effort, but the rewards make an enormous difference in the overall health and welfare of the synagogue. Synagogues that fully embrace the volunteer resource are more efficient, effective, and achieve their mission, vision, and goals. These organizations have the ability to accomplish far more than synagogues that depend on a few volunteers or their staff.

A vision is like a lighthouse, which illuminates rather than limits, gives direction rather than destination. Almost all successful individuals and organizations have one thing in common: the power and depth of their vision. A positive, meaningful vision of the future supported by compelling goal provides purpose and direction in the present.

—James J. Mapes

Synagogues with a culture of volunteer engagement gain the following four benefits:

1

Better Use of Talent and Resources. Synagogues with a strong culture of volunteer engagement can utilize a skills bank to match volunteers to assignments that make use of their demonstrated skills and interest. They are able to engage their volunteers at higher levels and have an easier time with volunteer recruitment.

2

Satisfied Members. Congregants who volunteer are more satisfied with their congregational life. They enjoy close relationships with other congregants and staff. Synagogue volunteers feel that they make a difference by what they do and that they have input in what is done with and for the congregation.

3

Increased Financial Giving. According to the Independent Sector's Giving and Volunteering 2001 report, volunteers donate twice as much as non-volunteers. Synagogues that have effective volunteer models of engagement have a mechanism in place for excellent fundraising results. And "the more the entire family is involved in volunteering, the more generous the household" (Faith and Philanthropy: The Connection Between Charitable Behavior and Giving to Religion Independent Sector).

4

Leadership Development. Synagogues that embrace and celebrate volunteers have little difficulty recruiting and retaining board members, as volunteering in any capacity is a natural career path to volunteer leadership positions.

How well does your synagogue cultivate a culture of volunteer engagement? Complete Activity 1 to gain insight into how well you are currently doing and how you can be doing even better.

2do:

Complete Activity 1, page 3

Activity 1

Assessment of Volunteer Engagement

Score	Score 1 if you...	Score 2 if you...	Score 3 if you...
Organizational Support for Volunteers			
All aspects of synagogue life involve volunteers	Have staff and/or a few dedicated volunteers do most of the work	Have a volunteer presence in all aspects of synagogue life, activities and programming	Mandate that staff and leadership utilize volunteers in their work
Resources, including budget, space and tools, are allocated for volunteer engagement	Assume that volunteers are "free" and do not require resources	Have a budget for volunteer resources	Reflect in your annual budget detailed expenses for volunteers, including supplies, space, software, training, recruitment, staff time & recognition
Synagogue staff and board leadership are trained to work effectively with volunteers	Assume staff and key leadership know how to work with volunteers	Reflect responsibility for volunteer engagement in staff and lay leadership descriptions	Provide formal training to staff and lay leadership on how to work with volunteers
Needs Assessment & Program Planning			
Needs Assessment & Program Planning	Use volunteers for activities & programs as they are needed	Have identified volunteering as an important aspect of congregational life	Have a written philosophy statement about volunteer engagement that is clearly understood by all constituents within the synagogue
Volunteer engagement is factored into all long range and strategic planning	Use volunteers in all activities and programs	Include volunteer engagement in the synagogue's goals	Consider volunteer engagement an important strategy for organizational capacity-building and an action-item in strategic planning
Volunteer engagement is part of synagogue risk management planning	Do not consider volunteer assignments in your risk assessments	Evaluate all volunteer assignments for risk	Have appropriate insurance for volunteer engagement and evaluate/update it as necessary
Effective Recruitment			
We have written position descriptions for all volunteer assignments	Verbally explain to volunteers what they are going to do	Have a position description for each volunteer assignment	Conduct an annual (at minimum) review and update of all position descriptions
We have a process for volunteer recruitment	Do recruitment exclusively through announcements in the newsletter, Web site postings, etc	Figure out who knows prospective volunteers and have them do the recruiting	Have a written, strategic recruitment plan for all volunteer assignments and needs
The synagogue maintain current and accurate records on volunteers	Do not track volunteer involvement	Have a record of all volunteers & what they do for the synagogue	Integrate volunteer records with membership & donor information

Activity 1

Assessment of Volunteer Engagement (continued)

KEY:

Do you score mostly 3s?

If so, you are well on your way to having an outstanding process for volunteer engagement. Your synagogue understands the benefits of a culture that embraces and celebrates volunteerism.

Do you score mostly 2s?

Then your volunteer engagement process has room for improvement. Look at the number 3 answers to see where you need to improve your volunteer engagement practices.

Do you score mostly 1s?

It's not unusual to start developing a volunteer engagement strategy from the ground up. This guide will help you identify specific ways to develop greater competency in volunteer engagement and nurture volunteer talent.

Score	Score 1 if you...	Score 2 if you...	Score 3 if you...
Interviewing and Placement			
Volunteer assignments are available for a wide range of skills, ages and interests	Rely on a specific group of volunteers (e.g., stay-at-home mothers, retired, etc.) to get the work done	Include all age groups and demographics among your volunteers	Design assignments specifically to reflect a wide range of skills and not limit work to clerical and administrative positions
Volunteers are screened and placed in assignments that are right for them and for the synagogue	Let anyone volunteer for anything	Match volunteers to the assignments that aligns with their interests	Recruit volunteers based on their preferences for what they want to do, the skills they willingly share and the relevant qualifications for the job.
Orientation and Planning			
We have written policies and procedures for volunteer engagement	Assume that volunteers know what is acceptable for them to do	Have some policies that relate to volunteers	Have detailed, written policies and procedures and orient all volunteers to these guidelines
Supervision and Support			
Volunteers are held accountable for what they do	Cannot fire a volunteer	Clarify for volunteers the limits and boundaries of their assignments	Have staff and lay leadership follow up with volunteers to make sure they accomplish what they set out to do
The synagogue actively solicits volunteer input in decisions that affect them	Have volunteers do whatever they are assigned	Encourage current volunteers to give feedback	Have a system in place for collecting and reflecting on volunteer feedback on decisions that affect them
Retention Strategies			
Volunteer assignments are meaningful and have an impact on the synagogue's ability to achieve its mission	Design volunteer assignments around having people do the work of the staff and/or board of directors	Design volunteer assignments to have an impact on the mission of the synagogue	Reflect a diversity of work in volunteer assignments, from direct service to program deliver, and incorporate high-level assignments such as the provision of professional services
Synagogue staff and lay leadership recognize volunteers informally	Host an annual recognition for volunteers	Give frequent recognition to volunteers from the board, staff and other volunteer leaders	Share celebratory information about volunteers in all synagogue collateral materials, including the Web site, newsletters, announcements, emails and written materials

Activity 1

Assessment of Volunteer Engagement (continued)

The results of the volunteer engagement assessment provide a snapshot of where your synagogue stands right now in terms of volunteer engagement. They are your initial benchmarks. The lower-scoring areas point out strong candidates for change. If you scored mostly 3s, congratulations! You already have a strong baseline of volunteer engagement practice. As you debrief this exercise, consider these questions:

- What are your strengths?
- What surprised you most about the results?
- What will you have to do differently to raise your scores to all 3s?
- Do you have volunteers aging in place?
- How is your volunteer landscape changing?
- Can you project how your congregation will score on this assessment if you change nothing as Boomers and the generations that follow begin to dominate the volunteer workplace? Are you positioned to meet volunteers' evolving needs for flexible schedules, high-impact volunteer roles, and collaborative relationships?
- What were your "aha" moments and why?
- What are the biggest challenges for you in making changes for quality improvement?
- What are you willing to invest (time, money, people, etc.) in this process?

Understanding Volunteer Culture

The Hebrew word for volunteer is mitnadev. The word literally means "one who becomes noble." This word reflects Judaism's ideal attitude toward volunteering, namely that it can become a self-transformative act that increases one sense of nobility by having done good work. Moreover, the word mitnadev tells us that we should treat our volunteers with respect and honor, as if they were nobles visiting our congregations.

Every synagogue has volunteers. In fact, most synagogues would say that their organization could not run without the efforts of countless volunteers. However, few synagogues employ a strategic and thoughtful process of engaging congregants in volunteerism.

Most synagogues utilize the same volunteers over and over again—often burning out these dedicated individuals. As a result, the leaders of the synagogue end up literally begging for volunteer help, often at the last moment, and volunteers who have been coerced into helping may feel resentful.

Some synagogues rely on their beleaguered staff to do the work because they consider utilizing volunteers to be fraught with problems, even adopting an attitude that volunteers are "more trouble than they are worth."

Many synagogues report a drop in volunteering at the same time that more than 63 million Americans volunteer each year
(Volunteering In America, 2010 Report).

Volunteers: The Heartbeat of the Synagogue

Many of us can recount our own personal horror stories of being abused as a volunteer: the amount of time for the volunteer assignment was underestimated; other volunteers did not carry their

weight; the assignment turned out to be something completely different than what was agreed to; or the work was drudgery.

All Jews are responsible for one another—kol yisrael arevim zeh bazeh.
—Bemidbar Rabbah (10:5).

Many synagogues report a drop in volunteering at the same time that 83 million Americans volunteer each year (Independent Sector survey, Giving and Volunteering in the United States 2001). Just like you and your staff, congregants have many demands on their time, both professionally and personally. They must have a compelling reason to volunteer. Obligation is not enough. Volunteers want to know that their time will be used wisely, that they will have an impact on the organization, and that their volunteer experience will be enjoyable. Even the volunteers who put together mailings want to know that their work will make a difference.

2 do:

Complete Activity 2, page 7

Activity 2

What Motivates Volunteers?

Do you know why volunteers agree to participate? Are you sure?

Copy this page and ask volunteers throughout the synagogue to complete it.

Be sure to cover all the areas in which volunteers have a presence, including the Board of Directors.

You may add your own questions at the bottom of the page.

Why did you agree to do your current volunteer assignment?
(Please check all that apply)

- | | |
|---|---|
| <input type="radio"/> To feel connected to the congregation | <input type="radio"/> To network |
| <input type="radio"/> To work with people I like and admire | <input type="radio"/> To grow Jewishly |
| <input type="radio"/> To learn and exercise new skills | <input type="radio"/> A friend invited me |
| <input type="radio"/> To make a contribution to synagogue life | <input type="radio"/> A board member invited me |
| <input type="radio"/> To be with family members who are also volunteering | <input type="radio"/> To have fun |

Other Reasons:

Take it online!

Use a low-cost or free online survey tool, such as SurveyMonkey, or Zoomerang (www.surveymonkey.com, www.zoomerang.com), to conduct simple research projectseasily and automatically. Simply enter the questions you want answeredinto the online tool and e-mail a linkto the people you want to survey.

What Is a Culture of Volunteer Engagement?

The Mishkan, the portable sanctuary that our ancestors carried with them in the wilderness, was built by volunteers. Apart from a few supervisors, Israel's weavers made the embroidered curtains, metal workers made the metal implements and wood carvers made the furniture. Every single square inch of the Mishkan was fashioned by a volunteer working for the good of the nation. The Mishkan set an original model for a community culture of using volunteer talent.

Synagogues with a strong culture of volunteer engagement demonstrate a high level of skill in seven core competencies. What does it look like when it works? Imagine this:

You walk into a synagogue where volunteers are engaged at all levels of the organization. As you walk the halls, you find visible evidence as you observe the volunteer receptionist, the volunteer preschool classroom assistant, the volunteer marketing consultant assisting with the development of a marketing plan, the Torah study group working through text with its volunteer leader, and a volunteer accountant reviewing the audit report.

In this synagogue, the board of directors has adopted a philosophy statement about volunteer engagement that is posted in all collateral materials. The board includes volunteer engagement in budgeting and resource allocation. All strategic planning includes volunteer engagement. Staff is trained to work effectively with volunteers and is held accountable for that work.

Understanding Volunteer Culture

At this synagogue, congregants understand that volunteering is part of their membership commitment and they thoroughly enjoy their volunteer assignments. When volunteers are needed, the skills bank database is reviewed to find members who have the skills required for the assignment. Volunteers are screened and placed in assignments that are appropriate for them and fit the needs of the synagogue. Volunteers are held accountable for the work that they do. They are trained and supervised as their responsibilities warrant. The annual report includes information about volunteer engagement. Families regularly volunteer in synagogue activities and programs. Volunteer leaders are seniors, board members, young parents, teenagers, and retired professionals. Most importantly, volunteers understand that the work that they do is important and directly impacts mission fulfillment. That's what a culture of volunteer engagement can look like. Is your synagogue ready for it?

2 do:

Review Figure 1, page 9

Complete Activity 3, page 10

Figure 1 Core Competencies for a Culture of Volunteer Engagement

ORGANIZATIONAL SUPPORT

- Resource allocation for volunteers includes budget, tools, staffing, recognition and space.
- Volunteer engagement is considered a key component in strategic planning and goal setting.
- The board has developed a philosophy statement about volunteer engagement that demonstrates commitment to volunteerism.
- The ability to work effectively with volunteers is a criterion for employment at the synagogue, and staff are held accountable for their work with volunteers.

NEEDS ASSESSMENT

- Volunteer participation is factored into every facet of congregational life from the top down to the bottom up.
- Position descriptions for volunteers aim at fulfillment of the synagogue's mission.
- Volunteer assignments are designed to assist staff with the day to day operations as well as fulfill the synagogue's dream list.

RETENTION STRATEGIES

- Volunteers receive both formal and informal recognition for the work that they do.
- Volunteer successes are celebrated and documented.
- Volunteers have flexibility in what they do and where they do it.
- Volunteers are encouraged to volunteer in different areas of the synagogue.
- A volunteer benefit package has been developed.

INTERVIEWING & PLACEMENT

- Prospective volunteers are matched with assignments that are right for them and right for the synagogue.
- Volunteers are screened based on the level of risk of the assignment.
- New members are encouraged to volunteer as a means to establishing themselves in the synagogue community.
- Volunteers have the flexibility to change assignments from time to time.
- Career ladders for volunteers that provide increasing responsibilities are available to develop potential board members from the volunteer pool.

SUPERVISION & SUPPORT

- Every volunteer receives support, based on the level of responsibility required in the volunteer assignment.
- Volunteers are held accountable for the work that they do.
- Volunteer work is regularly evaluated for efficacy and impact on the synagogue.

ORIENTATION

- Resources such as space and equipment are allocated to volunteers as needed.
- The synagogue budget reflects the costs involved in effective volunteer engagement including recruitment, training, retention and recognition.
- All volunteers are oriented to policies and procedures that are relevant to their assignment.
- Each volunteer receives training based on the level of responsibility of his or her assignment.

EFFECTIVE RECRUITMENT

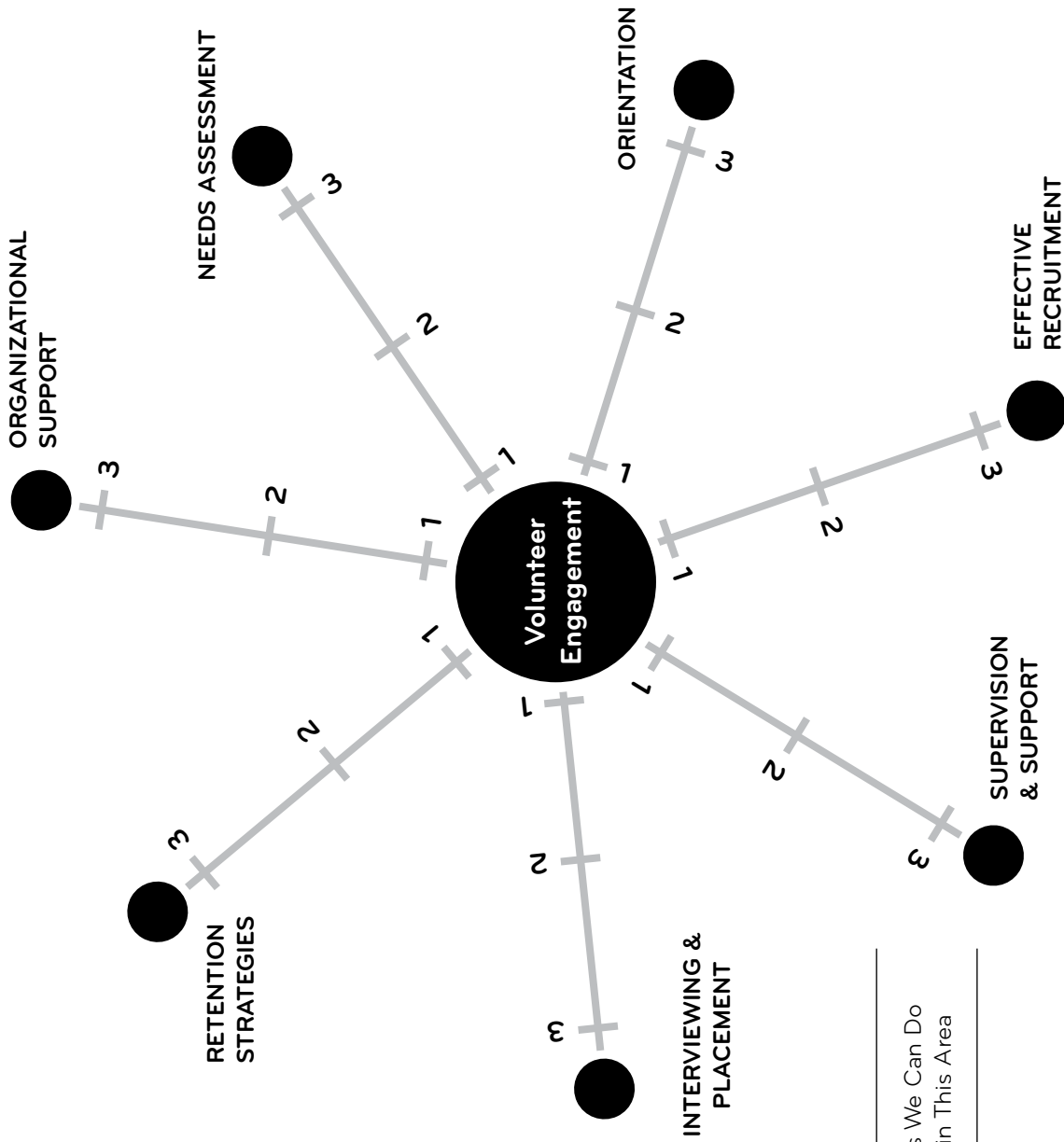
- Each volunteer position has a recruiting plan.
- The synagogue's member database includes information on the skills and talents members are willing to share.
- Recruitment is personalized, and existing volunteers are considered the best recruitment resource.
- All synagogue collateral materials (brochures, flyers, newsletters, invitations, bulletin boards, and Web site) include information on volunteering.

Volunteer
Engagement

Activity 3

From Needs to Action Plan

Compare your Activity 1 results with the Core Competencies described in Figure 1. On this diagram, place an X along the "spokes" to indicate how well your synagogue acts on each area of competence. Draw a line connecting the Xs. How smoothly does your "wheel" roll? Reflect back on the information presented in Activity 1 and Figure 1 to identify best practices in each area of competence. Then complete this table below to hone in on specific things you can do in the synagogue to work towards your goal of an engaged and rich volunteer pool.



Core Competence We Can Improve	Three Things We Can Do to Improve in This Area

Understanding Volunteer Culture

Shifting the Culture

Much of the Bible concerns itself with cultural shift. Abraham shifted his family's culture from polytheism to monotheism. Moses transformed the Jewish people from a slave people into a free nation ready to follow its own spiritual destiny. The prophets had to shift the nation's culture time and again from immoral behavior to ethical excellence.

Synagogues must also master the art of cultural shift. Pull out a copy of your mission statement and your strategic plan (you do have one, right?) While you examine it, consider carefully the ways that volunteers can impact your synagogue and help it achieve its mission.

Creating a Volunteer Philosophy Statement

The first step to shifting culture takes place at the board level, with the development of a volunteer philosophy statement including core values, guiding principles, and program standards. The philosophy statement will create a foundation on which to build a successful volunteer engagement program. Good philosophy statements come from being clear about the values that are important and critical to the organization.

The first step to shifting culture takes place at the board level, with the development of a volunteer philosophy statement including core values, guiding principles, and program standards. The philosophy statement will create a foundation on which to build a successful volunteer engagement program.

Board Exercise:

Have the board members brainstorm what they feel are important values in volunteer engagement. Remember to follow the rules of brainstorming, all ideas are good ideas, no editing, repeated ideas are ok, and try to think of as many values as you can. Words which are helpful in creating value statements for volunteer engagement:

- Integrity
- Respect
- Accountability
- Impact
- Outcome
- Benefits
- Partnership
- Colleague
- Leadership
- Capacity Building
- Sustainability
- Strengthen
- Development
- Engagement
- Choice

Have the group vote on the top seven values that the organization will hold dear in the process of creating a culture of volunteer engagement.

Understanding Volunteer Culture

Philosophy statement:

Creating a philosophy statement builds on the values that your board creates. It is the platform on which the culture of volunteer engagement is built. The philosophy statement is a way to promote the culture of volunteer engagement to the entire synagogue community. It will tell the boards the direction that it will go in to quality improve volunteerism in the synagogue.

Sample philosophy statement:

Volunteer engagement is a key strategy for the fulfillment of our synagogue's mission. Volunteers are involved in all aspects of our congregation. We provide the appropriate infrastructure and financial resources to support volunteers in their work. Our volunteers are committed to their assignment, are accountable for the work that they do, and act with respect and integrity as they carry out their assignment.

Sharing the philosophy statement:

- Post it on the website
- Put it in newsletters and flyers
- Email it to your existing volunteers
- Have the rabbi do a sermon on volunteer engagement
- Put volunteerism into the Hebrew school curriculum
- Put volunteer engagement on the agenda of all committees, task forces, and auxiliary group agendas

From Ideals to Action

Making It Happen

It's one thing to start to ask and even answer these questions; it's quite another to create a specific, measurable plan for creating change. Complete the STAR Map™ to Excellence in Volunteer Recruiting to add activities and knowledge that will help you achieve your goals for a rich culture of volunteering within your synagogue.

Synagogues are successful in creating a culture for volunteer engagement when all paid professionals and lay leadership take responsibility for encouraging and nurturing this culture. They know they make a difference by doing something that is important and impacts the mission, and they gain recognition for their contributions.

Success begets success. The more you utilize volunteers in the work of the synagogue, the more congregants will choose to be involved. They in turn will model their passion about volunteerism to their children and a new generation of engaged congregants will be born.

Congregants who are engaged as volunteers will find more value in their membership because they have a stronger stake in their community.

V'lo hamidrash hu ha'ikar, ela hamaaseh. "It is not the study of the mitzvot that is the most important thing, but rather the performance of the mitzvot."

—Mishna Avot (1:17)

Additional Resources

Further reading and resources in volunteer engagement:

- Aron, Isa. *The Self-Renewing Congregation*.
- Lederman, Richard C. and Robert Leventhal. *Leadership Management and Accountability: A Guide to Successful Volunteer Development in Synagogues*.
- Union for Reform Judaism. *Building Sacred Community: Volunteers in Your Congregation*. Free download available at http://urj.org//congregation/board//?syspage=document&item_id=14871.

Useful sources of data and tools on volunteer engagement:

- Corporation for National & Community Service. <http://www.nationalservice.gov>
- Hands On Network. <http://www.handsonnetwork.org>
- Independent Sector. www.independentsector.org