Time for Good in Action: Implementation and Potential Outcomes

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December 2017
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Acknowledgements

We gratefully acknowledge UJA-Federation of New York for initiating this project and the Caring Commission and its members for their support for this project. Sheryl Parker, Yardena Pressner, Judith Samuels, Jennifer Rosenberg, Shana Bloom, and Elise Slobodin provided helpful feedback, advice, and direction throughout our initial planning and data collection. We would also like to thank the lay leaders on the Time for Good Evaluation Subcommittee. Susie Stern, Laurie Blitzer, Marc Utay, and Stuart Himmelfarb encouraged us with their thoughtful questions and insights and inspired us with their commitment to this project. We are grateful to our colleagues at the Cohen Center for Modern Jewish Studies, in particular to Deborah Grant and Masha Lokshin for their editorial and production assistance and Ilana Friedman for managing day-to-day operations of the center. We also want to thank the four organizations that hosted members of our research team for site visits and enabled productive meetings and observations. We appreciate all of the volunteers, volunteer managers, and staff who took the time to speak with us and inspired us with their thoughtful perspectives.
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Executive Summary

UJA-Federation of New York’s Time for Good/Jewish Service Enterprise Initiative (TFG/JSEI) is designed to build the capacity of communal organizations to productively work with volunteers. This initiative seeks to address pressing needs and to establish UJA-Federation as the architect of innovative approaches to volunteerism. This report presents findings from the first phase of research on TFG/JSEI conducted by the Cohen Center for Modern Jewish Studies (CMJS) at Brandeis University in collaboration with Sue Carter-Kahl Consulting. The goal of this element of the research was to explore the implementation of TFG/JSEI components and their impact, as perceived by organizations and volunteers from the first two cohorts of the initiative. The study employed multiple data collection strategies including interviews with volunteers; volunteer managers, executives, and other paid staff from participating organizations; and in-depth case studies of four of these agencies. The findings regarding the impact of TFG/JSEI are preliminary and will be more rigorously tested in the second phase of the research.

Accomplishments

The organizations included in this report consider TFG/JSEI an important catalyst for the development of volunteer management practices and the culture of volunteerism. The following accomplishments are attributed to participation in TFG/JSEI:

- **Establishing Volunteer Management Functions**: A major success is the development, and in many cases, the inauguration of formal departments of volunteer management.
- **Linking Volunteer Work to Organizational Goals**: Volunteer managers received tools and training for using data to bolster those aspects of the mission-related work done by volunteers.
- **Developing Uniform Volunteer Guidelines and Policies**: Organizations created and codified standardized procedures for recruitment, vetting, placement, evaluation, and follow-up with volunteers.
- **Expanding Volunteer and Skilled Volunteer Roles**: Volunteer managers thought more creatively and expansively about the types of volunteer roles available in the organizations, especially positions requiring professional skills and expertise.
- **Developing Organizational Support for Volunteerism**: Inclusion of senior leadership in the TFG/JSEI core team was instrumental in developing strong organizational support for the initiative.
- **Building Productive Partnerships**: Volunteer managers developed dialogues with diverse departments and service areas and used these platforms for designing new volunteer roles and building support for volunteering.
- **Reassessing Group Volunteering**: Focusing on the alignment of volunteer service with organizational priorities highlighted areas where the needs and desires of groups seeking to do one-time volunteer work did or did not serve the needs of the organizations.
• **Strengthening Language and Ethos of Volunteering:** Volunteer managers used branding symbols, language, and celebrations to make volunteers more visible and highlight the importance of volunteerism within their organizations.

**Continuing Challenges**

The following areas would benefit from further thinking and development of TFG/JSEI resources:

• **Adapting Practices for Decentralized Organizations:** Implementation of TFG/JSEI best practices is premised on the development of a centralized volunteer management function. Organizations with a more decentralized structure often allow each program and department to work with volunteers in their own way. This distributed approach represents a structural mismatch. More thought is needed to translate TFG/JSEI best practices for varied organizational structures.

• **Balancing “High-Tech” and “High-Touch”:** As the volume of traffic on the TFG website and other “high-tech” recruitment pipelines grows, the challenge will be to maintain the “high-touch” on-boarding approaches that have proved effective for getting to know, place, orient, and integrate volunteers.

• **Integrating a Jewish Lens on Service:** Many organizations work with a very diverse group of volunteers and clients, many of whom are not Jewish. Volunteer managers struggle with how to encourage Jewish participants to see their service through a Jewish lens and for all volunteers to more explicitly understand the foundational Jewish values underlying these organizations.

• **Working toward Sustainability:** Organizations universally express concern about establishing sustained funding for the volunteer functions they developed through the TFG/JSEI initiative.

**Identifying Areas of Social Return on Investment**

One of the goals of the first phase of the research was to identify the full spectrum of ways in which the successful integration of volunteers can lead to direct and indirect benefits for an organization. The following forms of Social Return on Investment emerged from the research:

• **Meaningful Service Enriches the Lives of Volunteers:** Volunteers see their service as a way to make a meaningful contribution, and it gives them a way to connect to their community.

• **Volunteers Extend the Reach and Enhance the Impact of Services:** The work of volunteers allows organizations to do more and reach additional clients and diverse populations.

• **Volunteering Expands the Definition of Who has Value:** Some volunteers come from populations that have traditionally been seen as the recipients of service. The service of these volunteers expands everyone’s ideas about who can contribute to the community.

• **Volunteering Expands Shared Ownership of Organizational Goals:** Volunteers become committed to the organization and its goals and see themselves as organizational ambassadors.
- **Tracking Volunteers Encourages Data-Based Thinking**: A focus on the collection and use of data encourages an emphasis on evidence-based thinking and contributes to informed decision-making processes in the volunteer space.

- **TFG/JSEI is Building a Community of Volunteer Practice**: Participation in TFG/JSEI programs, especially the Volunteer Management Institute, contributes to a sense of professional community among participants. Participants also begin to see their work as contributing to a shared “commons” of communal volunteering.
Introduction

*A Jew is asked to take a leap of action rather than a leap of faith.*

Abraham Joshua Heschel

Service to community and care for those in need are fundamental imperatives in Judaism and have a long history in individual and communal volunteer action (Jacobs, 2009; Wenger, 1989). UJA-Federation of New York’s Time for Good/Jewish Service Enterprise Initiative (TFG/JSEI) was designed to build the productive capacity of communal organizations to work with volunteers. This initiative seeks to address pressing local needs and to establish UJA-Federation as the architect of innovative approaches to volunteerism. The elements of TFG/JSEI include grant-making; Service Enterprise training, coaching, and certification; a web platform for matching volunteers to opportunities; designated days of service; and a community of volunteer management practice through professional development sessions.

This report presents findings from the first phase of research on TFG/JSEI conducted by the Cohen Center for Modern Jewish Studies (CMJS) at Brandeis University in collaboration with Sue Carter-Kahl Consulting. The overall goal of this multi-phase program of research is to better understand the implementation and impact of TFG/JSEI on the effective involvement of volunteers by communal organizations. The research is designed to support the continued development of TFG/JSEI. The first element of the research, described in this report, explores the implementation of TFG/JSEI components and their impact as perceived by participating organizations and volunteers. More specifically, this report provides initial findings addressing the following areas of inquiry:

- What are the patterns of implementation of TFG/JSEI best practices?
- How did organizational context and characteristics influence the implementation of TFG/JSEI?
- What obstacles and dilemmas were encountered during implementation and how were these addressed?
- In what ways do organizations perceive that participation in TFG/JSEI enhanced their ability to effectively leverage the engagement of volunteers to meet community needs?
- How do organizations define the Social Return on Investment (SROI) of engaging volunteers?
- What are the motivations and experiences of volunteers in TFG/JSEI-participating organizations? How do they perceive their volunteer work is understood, facilitated, and recognized by the organizations they serve?

The report first describes the research methodology. After presenting findings, the discussion explores the areas of potential SROI that emerged from interviews with paid and volunteer staff.
**Methodology**

The findings presented in this report are based on an in-depth exploration of the implementation of the TFG/JSEI initiative in the first two cohorts of participating organizations. Six organizations were included in each of the first two cohorts of TFG/JSEI. Half of these organizations were already participating in the Engage program, the goal of which is to create a cadre of Baby Boomer age volunteers across UJA-Federation catchment communities. All of the cohort 1 and 2 organizations participated in JSEI training and Volunteer Management Institutes. Three-quarters of these organizations received grant funding and eight achieved Service Enterprise certification.

This section provides an overview of the qualitative research strategies employed in the first phase of the research. Protocols for interviews, focus groups, and observations are presented in Appendix A. Information gathered through these methods were analyzed through the grounded theory method which consists of an iterative process of content analysis that results in the identification of main themes and categories (Strauss & Corbin, 1998). Data collection took place between February and June of 2017 and included the following sources of information:

**TFG/JSEI Leadership Interviews:** In February 2017, the research team met with staff and lay leaders of TFG to clarify the goals for the initiative. Additional interviews were conducted with UJA-Federation information technology staff knowledgeable about the development and characteristics of the TFG website.

**Volunteer Manager Focus Group:** A focus group discussion was conducted in February 2017 with volunteer managers from seven organizations participating in the first two cohorts of TFG/JSEI. The focus group explored their experiences with the initiative and their use of the TFG website. The discussion was recorded and transcribed.

**Document Analysis:** The research team reviewed documents related to the application and participation of cohort 1 and 2 agencies. Also examined were marketing materials, annual reports from participating organizations, guidelines, and instructions used with volunteers for the 2017 MLK day-of-service event and the volunteer evaluations of that event.

**Volunteer Management Institute Observation:** Members of the research team observed the March 2017 session of the Volunteer Management Institute. Their observation focused on the goals, content, and training strategies employed and the interactions among attendees.

**Key Informant Interviews:** Individual interviews were conducted with 23 volunteer managers, executives, and other paid staff from 13 organizations participating in the first two cohorts of TFG/JSEI. The interviews, conducted in February and March 2017, were recorded and transcribed.
**Points of Light Staff Interviews:** Interviews were conducted with two staff members from Points of Light. These staff members were responsible for administering or evaluating the training and certification components of TFG/JSEI. The interviews were conducted in March 2017 and were recorded and transcribed.

**Case Studies:** Four cohort 1 or 2 agencies were selected to participate in case studies. Site visits began in May 2017 and concluded in June 2017. The purpose of these in-depth case studies was to better understand how organizational context, characteristics, and readiness influenced the implementation of TFG/JSEI and to identify potential areas of SROI for the initiative. The organizations selected were intended to highlight the ways in which the elements of TFG/JSEI played out in agencies with differing missions (social service versus community building) and geographic locations (urban versus suburban). We were also interested in learning about organizations that did not elect to pursue JSEI certification.

Each case study involved a two- to three-day site visit by a two-person research team. During their time onsite, researchers interviewed a broad array of stakeholders including executive and senior staff, volunteer managers, and program directors. Focus group discussions were also conducted with volunteers at each organization. Where possible, site visit teams also observed volunteers engaged in service and gatherings and meetings for volunteers. Interviews and observations were conducted at organizational headquarters, satellite locations, and other community venues where volunteers serve.

Overall, 36 individual interviews were conducted with paid staff and volunteers as part of the case study visits. Fifty-three volunteers were also interviewed as part of eight focus groups. Interviews and focus group discussions were recorded and transcribed.

**Findings**

The collection of data from multiple channels provided a wealth of information about organizational context, implementation strategies, initial successes, and obstacles encountered. Clearly, there are many options for organizing the rich information gathered in this phase of the research. Throughout data collection and analysis, the research team was guided by a conceptual approach which uses four “frames” for understanding how organizations operate and the strategies for implementation of change initiatives (Bolman & Deal 1984, 1991). This approach focuses on the structural, human resource, political, and symbolic aspects of organizational operations. The following discussion of findings is organized around these four frames.

**Structural Frame**

The structural frame looks at how the “work” of an organization is divided among functional areas and considers how these components operate and interconnect to accomplish organizational goals. This perspective explores how well the organization’s strategic priorities
are mapped onto the formal structure of the organization, how clearly and distinctly responsibilities and tasks are assigned to departments and roles, and the patterns of coordination between these areas of operation. Following are the key takeaways about the implementation and perceived impact of TFG/JSEI as viewed through the structural frame.

**TFG/JSEI Substantially Contributed to Establishing Volunteer Management Functions**

A major success of TFG/JSEI is the development, and in many cases, the inauguration of a formal department of volunteer management. The grant-making component of TFG/JSEI was seen as critical to the hiring of volunteer managers in many organizations. For some organizations, the process of establishing a volunteer management function started with their involvement in the Engage program but even in these cases, TFG/JSEI contributed to the emphasis placed on this aspect of organizational operations.

Most cohort 1 and 2 organizations utilized volunteers prior to TFG/JSEI; however, responsibility for their recruitment and placement was distributed across different units and departments without clear or consistent guidelines or policies. Potential volunteers might enter these organizations through any of a number of different departments or programs. Without a central portal or uniform procedures, the process of volunteer recruitment and placement was inefficient and often “hit or miss.” TFG/JSEI introduced or strengthened the idea of a centralized volunteer management function that would oversee all activities related to the recruitment, placement, and involvement of volunteers.

*We have a whole volunteer department that we never had before!* (Executive Director)

*There was no formal portal for volunteerism. Somebody would call up and say ‘I want to volunteer,’ and there was no volunteer application. Or maybe there was, but maybe there were six of them. There was no streamlining of the process whatsoever. There was no screening of volunteers. There was no evaluation of volunteers. The very first thing that I did was I created an infrastructure.* (Volunteer Manager)

*People would come in and say, ‘We’d love to volunteer’ and without a professional volunteer coordinator we were just screwing it up. We didn’t really know what to do with it. UJA came to us, and we grabbed onto it [TFG/JSEI] because I thought here’s an opportunity to take this idea of volunteerism seriously and see what happens.* (Executive Director)

*I saw it [TFG/JSEI] as a great opportunity for us to take what was a great volunteer program that we had in place that just was very unofficial and wasn’t really done properly.* (Executive Director)

**Volunteer Managers were Equipped to Link Volunteer Work to Organizational Goals**

Spurred by what they learned through JSEI training and certification, volunteer managers identified and highlighted connections between the service of volunteers and the accomplishment of organizational priorities. The ability to quantify the number of hours served
by volunteers or the return on investment of volunteer work bolstered the importance and centrality of the volunteer function in these organizations.

One of the very first things that we did, we put a mission statement in our volunteer manual. The mission statement has to be in alignment [with] the volunteer department. (Volunteer Manager)

We implemented hours tracking at all of our senior centers, which was not something that we were doing before. That really helps us to quantify our volunteers’ hours. Otherwise we were just guessing how many hours people were volunteering a year. But now we actually have the data. (Volunteer Manager)

Being able to show our board the return on the investment that we had made. We were now able to quantify this to them because they have the fiduciary responsibility to make sure we’re doing what we should be doing. (Executive Director)

**Higher Positioned Volunteer Manager Roles were More Effective**
The organizations that seemed to have the most success with implementing TFG/JSEI, created volunteer management positions in positions with sufficient authority and access to develop successful relationships throughout the organization. By contrast, organizations that established volunteer management as a collateral duty or as a coordinator-level position (or lower) struggled to develop a strong volunteer management function. In several agencies, we observed that volunteer managers holding less than middle management level positions had neither the access nor the authority to engage more senior staff in discussions about the potential involvement of volunteers. They simply did not have the professional status to initiate critical conversations with leadership of major departments or programs within their organizations.
The successful implementation of JSEI training and certification is premised on a strong centralized volunteer management function. Organizations with a more decentralized structure often allow each program and department to work with volunteers in their own way. This distributed approach represents a structural mismatch with TFG/JSEI. More thought is needed to translate TFG/JSEI best practices for varied organizational structures.

For some organizations, the creation of a central portal to recruit, process, and place volunteers was a straightforward match with their existing approach to orchestrating functions across departments. These organizations had well-developed patterns for “pulling across” departments for centralized functions. However, we also observed several organizations where the successful implementation of TFG/JSEI was hindered by a structural mismatch. These organizations have decentralized and even “silooed” structures. This structure suited these organizations’ approach to development and innovation by allowing for new ideas to bubble up from committed staff and volunteers.

*The reason [agency] works is because, while decentralized, there’s a lot of empowerment.* (Executive Director)

However, the distributed approach also made it more difficult for prospective volunteers to know where to start or what volunteer opportunities would be a good fit for them. Tracking volunteers across the organization was also more difficult and sometimes resulted in duplicated efforts, as each program created their own processes for volunteer engagement.

*People find their way into volunteering here through any number of portals and they don’t necessarily know about everything else going on. It’s sort of program-specific, and people feel enormously recognized but have no clue how many other people are volunteering in the organization.* (Executive Director)

The volunteers we interviewed expressed a strong commitment to these organizations but were also concerned about what might be available to them as their preferences and availability changed. For example, several volunteers who worked with committees related to young children were unsure of how they would continue their participation once their children aged out of this area of programming. Other volunteers wondered if they were receiving the same access to organizational benefits and recognition as their peers and were unaware of where to go in the organization to find answers to their questions.
Human Resources Frame

The human resource frame focuses on how the human capital of an organization is recruited, deployed, and developed to accomplish organizational goals. From the vantage point of the human resources frame, the emphasis is on how best to employ best practices in recruitment, hiring, placement, coaching, and supervision in order to align the preferences, skills, and potential of staff members (paid and unpaid) with organizational needs. The human resources frame focused the research team on understanding how TFG/JSEI influenced the development of processes and procedures for working with volunteers as an integral component of the human capital of participating organizations.

TFG/JSEI Encouraged Creation of Uniform Volunteer Procedures, Guidelines, and Policies

Many interviewees noted the critical contribution of TFG/JSEI training and certification to the creation of standardized procedures, guidelines, and policies for working with volunteers. In many cases volunteer managers adopted and adapted policies and procedures used with paid staff. For example, organizations created volunteer handbooks and job descriptions and formalized the on-boarding and placement process. Several organizations reported that the JSEI certification process highlighted areas of policy and procedure where additional thought and development were needed.

I basically started from scratch. I began by working on the handbook, working on the forms, doing the flowchart, everything from the intake to the supervision to the exit interview and getting everything in place so that we can really take charge of the volunteers we already had and can identify new volunteers and new ways we can use volunteers. (Volunteer Manager)
We updated the way that we were posting our volunteer opportunities to make it more of a job posting rather than just a paragraph. It included the purpose, the requirements, skills, and background information about agency. I think that’s been helpful for people, so they can see more of what we’re looking for. (Volunteer Manager)

We finally got a volunteer handbook. We finally had a real, sit-down conversation with human resources about making sure that volunteerism was in the staff manual. Before we didn’t have any of that. We thought about it. We had it in our parking lot. But now it became real. (Volunteer Manager)

The JSEI training really helped us to look at onboarding as an important piece. The volunteer handbook, really looking at what we expect from volunteers, an evaluation process, giving staff the tools to write up a job description for volunteers so now the department has expectations. (Executive)

The development of a formal and sophisticated approach to volunteers influenced how other departments perceived and related to the volunteer management function. Departments and programs were encouraged to be intentional in planning how and when they would work with volunteers. These policies and resources also focused department and program leaders to think of volunteers as a valuable resource.

We developed a management handbook for our staff so they know what’s expected of them, what their responsibilities are when they have a volunteer on-site. Before, it was more informal, and now we have it written. It’s much better. (Volunteer Manager)

It really has changed the whole situation, because now we have forms that we have to fill out and we have to make descriptions of what the roles are going to be and expectations. (Program Manager)

When people want to use volunteers in a mission-aligned way, they have to be planful about it. You can’t just be like, ‘Oh my God, tomorrow we have an event. Can you get me six people?’ Whereas if you go through your program calendar and say, ‘Here are four big events that we know we’re going to have around particular holidays, and here’s where we would like volunteers to show up.’ That conversation’s happening three or four months out. (Executive Director)

**The Number and Type of Volunteer and Skilled Volunteer Roles Expanded**

TFG/JSEI training and certification encouraged volunteer managers to think more creatively and expansively about the types of volunteer roles available in their organizations. This approach was particularly important in the creation of skilled volunteer positions. Volunteer managers recounted their successes in developing new volunteer roles in marketing, human resources, finance, development, and other areas of skilled work where they had never before placed volunteers.
[TFG/JSEI] gave a bigger push and made us look at how skill-based volunteers can be such an important part of what goes on here. (Volunteer Manager)

One of the first things that I did was a staff orientation to try to inspire staff members to think out of the box on ways that they can better improve their services by utilizing volunteers. (Volunteer Manager)

We just added a volunteer in our human resource department, and that’s a skilled volunteer. That’s what Service Enterprise was really teaching us about. That has worked out beautifully. (Volunteer Manager)

Our marketing and communications operation relies heavily on skilled volunteers. I don’t know that we couldn’t do it without them, but it’s much better with them. I think that it, first of all, improves our product and the quality of what we put out, and it’s also a tremendous peace of mind for our two-person team here to know that there’s other heads that are thinking about these issues, and other people that they can delegate some work to. (Executive)

I’m an event planner. I felt very good about being able to help the events that exist here and work with development in trying to make those as successful as they can be and helping raise money here. (Volunteer)

The expansion of volunteer work to areas that involved vulnerable populations or sensitive information also raised important issues about confidentiality, supervision, and the boundaries of the volunteer role. Volunteer managers were candid in their descriptions of departments and programs where they faced resistance and, in some cases, were not been able to place a volunteer. In several of these cases, the barriers related to the client population, such as early childhood programs. Program directors felt that the time and cost associated with the vetting and training required for working in these programs made staff wary of involving volunteers.

I think anything that involves direct services with children is just extremely hard. I don’t think that there’s any way around that and it’s for good reason. Anyone who goes into an early childhood classroom needs to be fingerprinted and have a health screening, which a volunteer, honestly, may not want to do. And we may not even want to get involved with that. (Executive)

We did observe some volunteer managers who were able to negotiate these issues with paid staff and include volunteers in work with children and with young adults and seniors with cognitive disabilities. In these instances, the volunteer managers worked to address the concerns of paid staff, develop clear guidelines about the role of the volunteer and, where needed, require extra documentation and vetting from prospective volunteers.

One of the staff said to me, ‘But what about confidentiality?’ I said, ‘What makes you think you don’t have that same conversation when you hire a staff person or when you
hire a volunteer? Confidentiality is critically important in the work we do, but that’s part of the process.’ (Executive)

Sometimes they forget they’re volunteers, they forget their boundaries, or they feel like—why can’t I do what the staff does? Because as a volunteer, [there] are things you cannot do. You cannot take a child to the bathroom by themselves. You cannot do any kind of consequences or behavior management protocols. You’re there to help facilitate activities but you can’t do these things. (Program Manager)

**TFG/JSEI Reinforced the Need for Supervision and Evaluation of Volunteer Placements**

Even before their participation in TFG/JSEI training and certification, seasoned volunteer managers were well aware of the importance of developing an ongoing relationship with volunteers that begins with but does not end with onboarding and placement. TFG/JSEI training encouraged organizations to codify their procedures for regularly checking in with volunteers and their supervisors to track the success of their placements. Volunteer managers also developed guidelines for supervision and evaluation of volunteers as well as for exit interviews.

I check in with program directors on a regular basis. Especially after the first experience I’ll give them a call, ‘How did it go?’ And then we’re always communicating with one another at the yearly evaluation. We have an exit interview if a volunteer can no longer be with us. (Volunteer Manager)

It’s an ongoing conversation. The fact that they [volunteers] come into my office now to check in also continues to create the relationship for me to say, ‘Oh, how’s it going?’ ‘Oh, I really like this. I’m wondering if I can do this.’ Or, ‘This isn’t working for me, can I do something else?’ (Volunteer Manager)

The JSEI training also empowered volunteer managers to change volunteer placements and to relocate or, if need be, dismiss volunteers if necessary. Staff buy-in for engaging volunteers seemed to increase with the understanding that they could turn down prospective volunteers or “fire” volunteers who were not a good fit.

There are those departments that [say], ‘We don’t have volunteers because I can’t depend on them.’ Then we start to show them that, in fact, there is an onboarding process and there is a termination process and there is an evaluation process. (Executive)

One of the things we can do is fire a volunteer, which is really good. In years past, it wasn’t that case. People would come, they might be people who gave you money and they would volunteer, and whether or not they were really helpful didn’t really make a difference. (Program Manager)

I remember that when we went through the [JSEI] training that was a topic that we learned about and we all chuckled. It resonates. Firing someone in the business world, in any situation, is not pleasant, and when it’s a volunteer, it’s even more complex. I would
add that in a community center, where we’re really striving to be inclusive, it’s even more complex. If we fired them, do they then feel fired from the community overall? (Volunteer Administrator)

**Challenge of Balancing High-Tech and High-Touch**

The development of online resources for matching volunteers to opportunities, like the TFG website, has the potential to fuel the growth of volunteerism in communal organizations. We learned from our interviews with volunteer managers that they see the time they devote to personally getting to know volunteers as critical to the success of their placements. Both “high-tech” platforms to increase the number of volunteers and “high-touch” approaches to getting to know, place, orient, and integrate volunteers are needed. Balancing and integrating these two systems will be important as the pipeline of volunteers expands.

Volunteers are often initially presented with a slew of forms to complete, including the registration process for the TFG website. This can feel clinical and impersonal. Volunteer managers understand that they need to balance administrative needs with a more relational process that allows the volunteer manager to get to know and then place the new volunteer.

* I think it's really important that that piece of it is not lost—face-to-face building trust, building dialogue with volunteers. Every volunteer came in and they sat with you and you got to understand who they were as a person and what they were looking for. I always say to somebody, ‘If I do my job right and I match you right, you’re going to be happy.’ But I have to first know who you are to make that [match]. (Volunteer Manager)

* I always say my job is about concierge service. You meet somebody—what are their interests, what are their talents? What feeds their soul? And finding something that’s going to meet that. (Volunteer Manager)

* I try and build upon what people need, rather than just a volunteer experience. It’s important. (Volunteer Manager)

Volunteers told us that they appreciated the personal attention they received in determining the best volunteer placement for them. This process helped them learn more about the volunteer management team and the organization.
Initially I filled out an application online and I checked off this, that, and the other thing. But then I came in and I met with [Volunteer Managers] and [they] really draw you out and see where the best give and take could be. I’ve had the most wonderful experiences. (Volunteer)

I went online and I looked for volunteering in New York and I saw [agency] so I clicked on it and I enter[ed] my interests and [Volunteer Manager] called me and she spent a long time on the phone with me, asked me a zillion questions, who I was, what I’ve done. She really was very thorough, I think, in trying to get to know who I was. (Volunteer)

As high-tech marketing efforts increase the volume of potential volunteers, volunteer managers will need strategies to help them keep up with the increased flow while maintaining the key elements of their relational approach to onboarding volunteers. This might include incorporating technology in the relationship-building process or using templates and routines to expand the number of staff (paid and unpaid) that can be involved in these first steps of onboarding new volunteers.

**Political Frame**

The political frame views the organization as a set of interests or constituencies that compete and negotiate for access to resources and examines how stakeholders leverage different forms of influence and coalition building to optimize their allocation of resources. Using the political frame, the researchers explored the ways that cohort 1 and 2 organizations built support for the TFG/JSEI initiative and the types of resource investments required.

**The TFG/JSEI Process Built Organizational Support from the Start**

TFG/JSEI training and certification requires the development of a guiding coalition drawn from leadership across the organization, including senior staff right up to the level of executive director. Inclusion of senior leadership in the TFG/JSEI core team was instrumental in developing strong organizational support for the initiative from the start and relaying the message that the investment of time, money, and other resources in volunteer engagement was a priority for the organization.

*When you look at the certification process, there were some pieces of it that had to do with building support for volunteerism throughout the organization. From a community organizing perspective we’re building a great foundation. It was a lot of work. I can tell you now that I feel that what we did internally here was incredible work. By having a guiding coalition, by really having all layers of this agency buy into it and understand it, we were setting up for successful sustainability. (Volunteer Manager)*
There was buy-in to do this. They [leadership] were saying, ‘We are committed to doing this in the long-term.’ It sounds obvious, but I do think it forces you to understand what that really means, not just having your boss be, ‘This is okay,’ but having every leader in the agency say this is something that’s important to us, and we’re actually going to put time and money into this. I think for me that was a great learning experience of how to galvanize those people. (Volunteer Manager)

Organizations that lacked the involvement of senior leadership or a high-level champion for TFG/JSEI were less likely to pursue and achieve certification. Limited buy-in from senior leadership was a possible indication of a weaker commitment to shifting the organization’s culture and practice around engaging volunteers. Organizations without an effective internal coalition also potentially lacked access to the personnel resources needed to plan, organize, and complete the many tasks involved with deepening volunteer engagement.

**Volunteer Managers Built Productive Partnerships**

TFG/JSEI training and certification encouraged volunteer managers to focus on building productive relationships with a broad array of departments and service areas in their organizations. By demonstrating their interest in the unique challenges faced by each department, volunteer managers helped develop trust and a willingness in those departments to work with volunteers—often in areas where volunteers had never previously been considered. For example, in one organization, the volunteer manager noted that the work of paid staff in the membership office was continually interrupted by people asking questions not just about membership, but more broadly about the organization’s policies, programs, and services. The volunteer manager suggested using a volunteer as a receptionist to answer routine questions and to determine when the attention of another staff member was required. The result was the creation of a volunteer role that is now seen as indispensable. As a result of these types of positive experiences, staff members joined volunteer managers in advocating for increased volunteer involvement.

*I think you have to get buy-in from people. From development people. From program people. We have this wonderful employment service, and we found out they really needed volunteers to work with people on financial literacy. Now we have a group coming, and they can do that and actually be useful to people.* (Executive Director)

*Nothing’s better around the watercooler than somebody saying, ‘Oh I have this volunteer, she’s fabulous. I couldn’t do without them!’* (Volunteer Manager)

*We chipped away at it, little by little. If we put one volunteer in the bookkeeping department, we made sure that everybody knew how successful that volunteer was. Three months later we put a second volunteer in there. Or [in] marketing, [where] we never had a volunteer before. We made sure we celebrated that success. We talked about it at every team meeting. Not us. Not the volunteer department. But we had the directors talk about it.* (Volunteer Manager)
Volunteer Managers Reassessed their Approach to Working with Groups of Volunteers

Volunteer departments are often asked to accommodate requests from groups seeking to volunteer on a short-term or one-time basis. This can be a politically delicate situation especially when volunteer managers have to respond to group volunteering requests that originate with current or potential funders. Volunteer managers recounted instances in which the involvement of groups of volunteers did not meet the needs of programs, were seen as an imposition on program staff, and/or degraded the internal “brand” of volunteering.

There was a real culture here of hating volunteers because they [staff] associated [group] volunteers with our development department being like, ‘Hey, you have to have these people come tomorrow, I don’t care what else is going on [in] your program or if they’re needed.’ (Volunteer Manager)

They (development) have donor groups that want to volunteer with us. A lot of the time we feel obligated to find an opportunity for them, even if it’s not necessarily going to work out. Or if it’s not the best fit for us, not going to be so beneficial. Even this past week, we were planning [for] a corporate group and they canceled two days before. So it just ends up being a lot of time and energy on our part to try and find something and then it doesn’t really come to be. (Volunteer Manager)

Basically, rich people from uptown would be like, ‘I want to come help out,’ and we would create an opportunity for them to feel helpful. It was not helpful. (Executive Director)

The focus of TFG/JSEI training on the alignment of volunteer service with organizational priorities highlighted areas where the needs and desires of groups seeking to do one-time volunteer work did or did not serve the needs of the organizations. As a result, several volunteer managers reassessed their approach to decision making about volunteer groups. Volunteer managers were able to develop criteria for which venues and programs would benefit from one-time groups of volunteers and which would not.

I think it starts with: Is there a match in terms of a need that we’re filling? So, if a group is interested in doing something and that's not going to help us, then it’s not a match. We have adult residences. So if a group wants to come and say, ‘We want to play games and have dinner,’ that's great, because that is filling a need because socialization’s a need. So it really depends [on] what needs look like. (Program Manager)

I think in the past, if we heard that there was a group that wanted to volunteer and they told us what they wanted to do, the project would be created. And that was not necessarily very functional. I think that was one big piece that changed, and people inside the agency were appreciative of it. (Executive)

We had some interesting conversations about when do you say no to a group, and do you create projects just for groups? That was very helpful. (Program Manager)
We put a couple of parameters on what would make [groups of volunteers] useful and we try to look at that. Things like: of these one-time groups what percentage of them came back for a second time or have a plan to come back, what percentage translated in some way into more ongoing service? So if you came to your one day of [Company] service, and then decided to be a yoga teacher once a month at our program, we’ll count that as value added. It could also be around money. Did this one-time group experience in some way translate into funding? Did they make a donation to the organization? Were they connected to a corporate foundation that we now might be able to get funding from? Did they underwrite something at the program as part of coming and doing their service there? (Executive)

**The Challenge of Working toward Sustainability**

UJA-Federation’s investments of funding, training, certification and professional development served as crucial resources to launch more strategic approaches to service at cohort 1 and 2 agencies. Organizations universally expressed concern about establishing sustained funding for the volunteer functions they developed through the TFG/JSEI initiative. Many agency leaders reported great value from their participation in TFG/JSEI but expressed concern that external grants and funds to support volunteer engagement were hard to come by and that internal discretionary operational dollars were limited. As one senior leader noted, her organization was committed to engaging volunteers in the future, “but that doesn’t mean we can fund it.”

*This year our goal is to do a very intensive ROVI [Return on Volunteer Investment] to present to the board at the time of budget because the volunteer department budget doesn’t tell the story. So, we’re going to be doing a ROVI department by department now that it’s [TFG/JSEI] really launched. So that is our task for this year because when we go into budgets for 2019 we have to be able to show our worth and our value.*

(Executive)

*The challenge is to continue the funding and to continue supporting this program to make it successful, because it takes multiple years for it to be successful.*

(Volunteer Manager)

*Having the Service Enterprise certificate is a large piece of the sustainability for the programs because [in] trying to approach other funding sources, we have something that could be a big tool in convincing them that we’re worth the time and money to keep supporting.*

(Volunteer Manager)
Symbolic Frame

The symbolic frame focuses on the nature and strength of the internal culture shared by organizational stakeholders. Exploring an organization through the symbolic frame involves examining language, traditions, ceremonies, stories, and rituals. Working from the symbolic frame, researchers considered how discourse on and the meaning of volunteerism changed within organizations and was manifest in language, metaphors, and traditions.

TFG/JSEI Strengthened the Language and Ethos of Volunteering

In many ways, TFG/JSEI training and certification asks organizations to create a new way to understand the place and importance of volunteerism. In organizations where this culture shift was taking place, we noted the use of branding and language to capture the new ethos of thinking about volunteers. For example, we were struck in one organization by how consistently everyone interviewed used phrases such as “unpaid staff” or “non-paid staff.” This use of language made clear that the only difference between volunteers and paid staff was a paycheck and that both were critically important elements of their operation. These phrases captured a deeper shift in the centrality of volunteerism for the organization. Some organizations used Time for Good branding or developed their own (e.g., “More Hearts, More Hands”) and repeated these phrases in posters, apparel, and communications.

We operate with staff throughout this building. Some are paid and some are non-paid staff and that to me should be the only difference between the two. I really embraced the concept of we need both. The expectations of volunteers have to be the same as those that get paid salaries. (Executive)

We treat our volunteers like staff. It’s the site coordinator’s job to include that person, and make them feel like staff, and then also make staff feel like they’re part of staff, not like, ‘Oh, this is just an extra person here we have to watch them.’ No. They should feel like they’re a part of the work. They’re held to the same responsibilities as we are. (Volunteer Manager)

I know we are going through a shift ourselves culturally. Big picture, most definitely because whether they’re volunteers or not, they’re still a member of our team. Ideally,
I’d love to see it as far as new hires and volunteers being one and the same, where they partner and worked together. (Executive)

**Strategies were Developed to Highlight and Recognize Volunteers and their Work**

A major change in many organizations was the development of symbols, ceremonies, and norms for highlighting and recognizing the volunteers and the work they were doing. Prior to TFG/JSEI, volunteers in some organizations were invisible because they were demographically similar to other clients and members or because they actually were participating in other ways. Volunteer managers described their intentional efforts to make the volunteers more visible, especially to staff. For example, one organization developed volunteer name tags so that volunteers could be recognized throughout the building.

I’m starting to recognize who the volunteers are because it (ID tags) clearly says so, and that gives me an ability to say thank you. So there’s a consciousness that did not exist five years ago. The volunteer at that point was pretty much invisible. Now the trend is visibility, recognition, and understanding that these are quasi-staff members. (Executive)

Many volunteer managers also implemented ceremonies to celebrate the work of volunteers. Others made use of ongoing communication channels such as organizational newsletters or bulletin boards to tell stories of volunteer contributions. Volunteers described how much the gratitude of paid staff, including from top leadership, meant to them.

We’ve always had volunteer recognition every year at our annual meeting and each department would recognize the volunteers in their department. I said, ‘I don’t think we’re doing it right. I think we need to start collecting and looking at the hours and let’s start rewarding for the number of hours,’ and now it’s not about the department rewarding you. The next year when we presented, I don’t know how many thousands of hours of volunteer work was being done in this agency. The audience went [gasp sound]. (Executive)

Something else that’s been beneficial is the volunteer recognition. We were able to recognize one of our volunteers who has been really helpful for us. And I think she was really touched by it, too. It’s someone who helps in the office here, and she’s mostly working on the computer or with files. Maybe she doesn’t realize how big of an impact that she has, but it really is a huge impact for us. (Volunteer Manager)

Everyone knows you. Everyone greets you. Everyone thanks you. The CEO doesn’t stop coming up to thank us. If [program director] has a meeting here, she’ll stop upstairs and she’ll say, ‘Is everything okay? How’s everything going? We can’t thank you enough being here today.’ They’re really appreciative. That’s what makes you come back. You know that they really appreciate you and that’s so important. That ‘thank you’ is bigger than a paycheck. (Volunteer)
The Challenge of Integrating a Jewish Lens on Volunteering

Many cohort 1 and 2 organizations work with a very diverse group of volunteers and clients, many of whom are not Jewish. Our conversations with volunteer managers and organizational executives highlighted the challenge of encouraging Jewish participants to see their service through a Jewish lens and for all volunteers to more explicitly understand the foundational Jewish values of these organizations.

In some cases where volunteer programs were expressly Jewish in content or where a group of volunteers were coming from a Jewish organization, such as a synagogue, efforts were made to create a Jewish element of the experience. For example, we observed one group of Engage volunteers, all of whom were Jewish, as they participated in a Shavuot program led by a local rabbi. At another organization we learned that when synagogue groups volunteer, one of the volunteer management staff engages them in a brief text study.

For our volunteers who have come through specifically Jewish community, we’ve done text studies with people. Even some of the non-Jewish people are interested in this as well. (Executive)

Volunteer managers were mindful of the Jewish roots and values of their organizations but also respectful of the diversity of volunteers and clients they serve. They were faced with the challenge of fostering a Jewish lens on volunteering that neither offended nor inhibited the participation of volunteers from other faith traditions.

While we’re a Jewish community center, you do have other people...I don’t think that somebody from a religious or an ethnic base is a better volunteer than somebody else. So if anybody comes to me, I want them to feel welcome. I don’t want them to feel like, ‘Oh, am I supposed to be Jewish?’ If you’re a friendly visitor, it doesn’t matter what your background is. I think sometimes we get stuck there. (Volunteer Manager)

Some organizations approached this issue by conceptualizing their work, regardless of the religious identity of volunteers or clients, as founded on Jewish values. For other organizations, it was their identity as a Jewish organization that lent the Jewish aspect to volunteering. Some organizations were keenly aware that they needed to do more to integrate a Jewish perspective on volunteering.

There’s a profoundly Jewish values piece that’s at work here, which is really this concept of B’Tzelem Elohim, people are created in God’s image and they have infinite capacity and infinite dignity, and how do we enact that in everything that we do, including service. (Executive)
Exploration of Social Return on Investment

The metrics currently tracked by cohort 1 and 2 organizations capture the number of volunteers recruited and the number who are skilled or have repeat volunteer engagements. This data, requested by UJA-Federation, is in keeping with best practices in the larger field of volunteering. Local and national volunteer programs typically track the number of volunteers and hours of service to measure success.

Volunteer managers reported that this information proved useful internally for building a case for the value added by volunteers. However, in almost the same breath, they pointed out that these metrics did not fully capture what the involvement of volunteers added to the success of their organizations and the lives of these volunteers.

What we send to UJA [is] all about how many hours did you get a volunteer, how many volunteers did you get. But those numbers are semi-meaningless unless you know what they were for. I think we can have double the volunteer numbers if we wanted to. How do we really measure the impact of it [TFG/JSEI]? How do we judge this a success? Because we don’t necessarily think ‘we had this many volunteers this year’ is a real measure of success. (Volunteer Manager)

Designing an approach to evaluation of initiatives such as TFG/JSEI that recognizes the full spectrum of outcomes for volunteers, organizations, service recipients, and the community is a challenge also recognized by the professional and lay staff of TFG/JSEI. One of the goals of the first phase of the research on TFG/JSEI is to identify the ways in which the successful integration of volunteers can lead to direct and indirect benefits for an organization.

The concept of Social Return on Investment (SROI) was developed to capture the value and impacts of volunteer activity including the reduction of labor costs, invigorating the support of donors, enhancing the ability to provide quality service to the beneficiary population, creating thicker lines of connection within the local community, and highlighting the relevance of the
organization to its stakeholders and to the larger community (Handy & Srinivasan, 2004; Hotchkiss et al., 2009; Narraway & Cordery 2009). The enthusiasm and commitment of volunteers can mobilize a community and reinvigorate the work of paid staff (Odenheimer, 2012). This section describes the host of ways in which TFG/JSEI is furthering the “social good” through the engagement of volunteers.

Social Return for Volunteers

**Meaningful Service Enriches the Lives of Volunteers**

Many of the volunteers with whom we spoke were entering new stages in their lives and were seeking ways to make a meaningful contribution. Whether they were empty nesters, recent retirees, or young adults new to their community, volunteers wanted to find ways to connect locally and act on their desire to give back. Most volunteers told us that they appreciated events to recognize their service but that their strongest reinforcement was the satisfaction they received from seeing the impact of their volunteer efforts.

*I was looking for a meaningful experience. It wasn’t purely altruism that drove me to this. I feel like I found it. I found something that is very meaningful to me. I’ve formed relationships, and I feel committed to the group. It’s also a way of giving back.* (Volunteer)

*I found [tutoring] to be a wonderful experience. The kids are great. I really felt as if I was making a difference for them, to just meet with them for a couple of hours a week. It became clear to me, in the course of the school year, there was improvement. There was a change in the way they were able to perform. That was very fulfilling.* (Volunteer)

*It’s both the personal emotion connection and the academic writing that shows that you made a difference. When the kids first come in they don’t even want to look at you the first few weeks, and then the next few weeks they come and they run and they smile and come running over to you. That is such a wonderful validation that you’re making a difference in their lives.* (Volunteer)

In the corporate world, one of the hallmarks of an engaged staff member is their willingness to recommend their workplace to peers. The willingness of volunteers to recruit peers to this activity similarly demonstrated their strong engagement.

*I am so enthusiastic and excited and joyful about this experience. I won’t openly proselytize, but I convey it if somebody hints at wanting to volunteer or do some sort of service. If somebody is looking for something to do, I convey my enthusiasm for it. I tell them how joyful and what an easy, fun experience it is.* (Volunteer)

*I’ve taken a lot of them [pamphlets on volunteering], handfuls of them, and I put them in my synagogue. We have a table in the lobby when you walk in.* (Volunteer)
[Volunteers] are our greatest ambassadors. They’ll sit around a table and they’ll talk about what their volunteer experiences are and they’ll share. ‘Oh, that sounds great, I really want to do literacy,’ or, ‘how’d you get involved in friendly visiting?’ (Volunteer Manager)

Volunteerism Builds Community
In a speech honoring the 20th anniversary of the Points of Light Institute, President Obama told his audience that, “In the end, service binds us to each other—and to our communities—in a way that nothing else can” (The White House, Office of the Press Secretary, 2009). TFG/JSEI helped many organizations better understand that the inclusion of volunteers was a fruitful way to pursue their larger values and goals of creating community.

Everything that we do has got to be something that answers the question as to whether or not I’m creating those hundreds of communities that connect people in order for their lives to flourish. As a community center, I need to be able to connect you to something to provide some meaning in your life and then I need to connect you with other people that are looking for the same thing. (Executive)

Finding ways for volunteers to meet one another also builds community among them. Both millennial and Baby Boomer volunteers told us that they were in a new stage of their lives. Volunteering provided many of these volunteers with new connections and networks. Building a sense of community among volunteers also strengthened their commitment to their service work.

Through being here I’ve definitely gotten to know the other volunteers pretty well. I didn’t go into it from that perspective but it’s an advantage that comes out of volunteering because you find like-minded people. (Volunteer)

Very often people want to do something together. They don’t want to do it alone. So if someone’s stuffing envelopes or labeling something, it’s more fun to be chatting as you’re doing it. It might slow the process down, but it’s the social part of it that people are looking to do. (Volunteer Manager)

Our larger vision is that people will feel a part of this community of volunteers. Which is not easy especially because we have so many different types of volunteers here. I think it’s really exciting when they connect with each other. We do want them to feel that they are [agency] volunteers and are part of this larger community. (Volunteer Manager)
Social Return for Organizations

Volunteers Extend the Reach and Enhance the Impact of Services
A repeated theme in conversations with volunteer managers and program staff was that the work of volunteers allowed organizations to accomplish more and reach additional clients and diverse populations. We were told that some programs would not be able to function and others would be severely hampered in their operations without the person power of volunteers. This was especially true in organizations experiencing dramatic programmatic growth.

What would happen if we woke up today and none of our volunteers showed up? We couldn’t run our adult day program and have support for the staff downstairs. [The] development department wouldn’t have had a successful auction last year if that development-skilled volunteer wasn’t making phone calls and getting donors. The staff is working hard with very limited resources. We’re a busy, busy place. And any help and true support that you can place, the return on investment is tremendous. (Volunteer Manager)

We could not run our senior program if we didn’t have volunteers. There’s literally no way that that program can happen. That’s one big thing, and that serves 4,200 older adults in this neighborhood. So we could not function [without volunteers], and we would have had to shut the program down probably. (Executive)

I just want to say some of the programs are set up only because we [volunteers] are here. For example, the book bagging project, where we had to stuff thousands of bags of books to be distributed for summer reading in certain school districts. We spent several hours one morning. That wouldn’t have happened if we hadn’t been here. (Volunteer)

Our literacy volunteers...make the difference between a kid reading on grade level and not. (Executive)

Volunteers represent an extra set of hands freeing up staff time by completing necessary tasks. Both paid and volunteer staff told us that volunteers contributed to the effective operation of services when they set up for and cleaned up after programs, did the prep work in the kitchen, checked participants into programs, served as greeters and receptionists, and performed clerical tasks. In these and many other roles, volunteers extended the impact of available paid human resources.

If there weren’t the extra people in the room when a staff person is out then that director couldn’t be doing what she needed to do to manage and make sure all of these other things are going on. I don’t think we would’ve been able to grow if we did not have volunteer staff. (Executive)
Our art school functions using volunteers in terms of studio monitors and people who do open studio. That’s really important also because we’re trying to run our classes in a way that’s affordable for the community, and so the margins are really thin. We rely on being able to have a [volunteer] who just wants extra time in the studio, training them to be a monitor, or training them to do some of the work of cleaning things up afterwards. 

(Executive)

I’ll set things up for them, tables and art supplies, whatever, while the professional staff is dealing with [clients]. I will be the—I won’t say the [facilitator], but certainly able to move the props or whatever it is, to make the day run that much smoother. It certainly feels important because this way the professional staff can do more and help [clients]. (Volunteer)

We want volunteers to really help support our staff in the services that they’re providing and lift some of the burden of the work off of them so that they can be more focused on serving the clients. Especially with filing paperwork, instead of our staff taking hours to file away all these documents we can have a volunteer do it so that the staff can call clients and help serve them. (Volunteer Manager)

In some cases, volunteers also provide authentic personal contact that is critical for clients. While program staff need to focus on the experience of the group overall, volunteers can focus on individuals who may need a little extra time or attention. Volunteers in these situations make an important contribution to the social and emotional tenor of programs and enhance the experience of clients.

I give the TLC, the time. They [clients] sometimes get agitated or I could sit next to them and just listen, just spend time to just hold their hands and show them love and attention, and make them calm down. That part is not so easy for all of them [staff], since they’re running the program. (Volunteer)

Volunteers can be a Conduit to Diverse and Minority Communities

Volunteers from ethnic, linguistic, or cultural minorities bring a unique cultural toolbox including shared background, language, national heritage, and familiarity with the same cultural norms and understandings. These volunteers can serve as a bridge to minority and diverse communities both within and outside of the Jewish community.

As people from the Persian community were coming here, there was a language issue and a cultural issue. We found two incredible volunteers from the Persian community who speak Farsi and really the [early onset dementia] program could not have been successful had it not been for those volunteers really handholding the staff through the process. The trust and the connection would not have been there as early, and I don’t think as successfully, quite honestly, if it had not been for that connecting piece. (Volunteer Manager)
I enjoy working here because most of my friends, I think all of my friends are almost my same age and we have a happy time here. We have a holiday party. We can try the American food and on Chinese holidays I can have Chinese celebration and the Chinese New Year because this is like a big family here. (Ethnic Chinese Volunteer)

Volunteering Expands Shared Ownership of Organizational Goals
Volunteer work encourages a sense of shared responsibility between individuals and organizations. Volunteers and paid staff reported that volunteers increased their commitment to the organizations they served and often came to see themselves as organizational ambassadors. This was their community center or agency, and they wanted it to succeed.

The entire agency works because of the professional volunteer partnership. Period. I’m serious. (Executive)

I think we present a face to the community about what [agency] is and what Jewish people can be in terms of their giving to the community. It’s a very important presence that it represents for [agency] to be seen as a Jewish people, to be seen as giving. (Volunteer)

Volunteering Expands the Definition of Who has Value in the Community
Several of the organizations we visited serve underprivileged, disabled, or other populations that typically and often exclusively are viewed as the recipients of service. When individuals from these populations are given the opportunity to volunteer, it expands everyone’s ideas about who can contribute to the community. For example, in one organization we observed a volunteer with developmental disabilities who helps with clerical work. This volunteer told us that he has always participated in programs at this agency and was proud to be able to give back. We also spoke with individuals who were volunteers and also clients of a nutrition program who expressed gratitude for the opportunity to help the program that helps them.

You’re a recipient, you’re a giver, and that dichotomy exists just by virtue of your socioeconomic status or the color of your skin. We’re trying to build something that is much more deeply imbedded within the concept that people have infinite capacity, infinite ability. Why is it that someone who’s coming from the outside, why do they have something to give, where someone who spends every day here doesn’t have the same ability or desire or capacity to give something back? I started to really think about how do we really develop an internal culture of volunteerism, of people who are in this building, from across the economic spectrum, working alongside of our staff? (Executive Director)

The line between volunteer and client and even staff are kind of purposefully blurred and I think that’s part of what we’re going for. (Volunteer Management Staff)
One of the things that really excited me about working in a community center was how can we take our clients, who are getting all the services, and empower them to have opportunities to do service. [How do we] have this really diverse neighborhood and help bridge some of those gaps through service. (Volunteer Manager)

Social Return for Larger Field of Volunteer Practice

*Tracking Volunteers Encouraged Data-Based Thinking*

TFG/JSEI gives organizations the motivation and tools to track volunteer metrics. This focus on the collection and use of data encouraged more emphasis on evidence-based thinking and contributed to informed decision making processes in the volunteer space. Volunteer managers reported this practice increased their sense of curiosity about what else the data might reveal.

> What they (UJA-Federation) did for us was incredible by offering us a database. So all of a sudden we were speaking the same language, which was so important. What is a prospective volunteer versus an applicant versus an active volunteer? (Volunteer Manager)

> One of the first things that I did was try to understand the information that already existed and why and how and in what ways, and then figure out what actually are the important data points for us. (Executive)

Some volunteer managers also stated that they were putting thought and creativity into what other forms of data they might want to collect. For example, one organization was looking at “value-added” to see what other activity happened as a result of group volunteering, including donations or repeat volunteering by individuals. TFG/JSEI participating organizations were also starting to think about tracking how volunteers moved through or out of the organization, how many members were volunteers, or trends in volunteer engagement by department or by season.

*TFG/JSEI is Building a Community of Volunteer Practice*

Participation in TFG/JSEI programs, especially the Volunteer Management Institute, contributed to a sense of professional community among participants. Many organizations only have one staff member in the volunteer office, which makes it a lonely job, especially when other staff do not see the value or complexity of the work. One interviewee reported feeling “alone with a lot of people.” TFG/JSEI events helped reduce the isolation of the position and build a “community of practice” (Wenger, 1999) among professionals who were starting to share resources, challenges, a common language, and support.

> We’re making the schlep, because it’s worthwhile. (Volunteer Coordinator)

> People said, ‘You’re going into the city for an hour?!’ I said, ‘Yeah, I want to be around the table. I want to be with those people. I want to hear what’s going on.’ I like the
connection. I feel part of a community. And UJA has created that by doing these Volunteer Management Institutes...I think Time for Good has created a community of colleagues for all of us. I’m very comfortable with the people I’ve met. I’m comfortable shooting someone an email saying, ‘Hey, we sat in that meeting today and you mentioned...and I’m wondering if you could provide more information?’ Or, ‘I have an idea about what we were talking about.’ (Volunteer Manager)

It’s really the networking. If I have a question about something, I can call someone. It’s good to have that network. We were thinking about doing background checks for all of our volunteers, so we called [agency] to talk to them about what their process was. I’ve also been in touch with [agency] when we needed volunteers [on] short notice in Manhattan, and they sent out emails to their volunteers. So we’ve got people that way. (Volunteer Manager)

TFG/JSEI Laid the Foundation for a Shared “Commons” of Volunteering
The term “commons” is used to refer to jointly owned and maintained resources available for use by community members. Thought leaders in the volunteer space have proposed that volunteers are a natural, renewable resource and volunteer time and talent can be thought of as belonging to the larger community commons (Brudney & Meijs, 2009). Applying a commons model to volunteerism shifts the focus from the short-term needs of any single organization to the longer-term emphasis on all volunteers, volunteer prospects, and host organizations in a community. TFG/JSEI has taken the first steps to cultivate an appreciation of the “commons” of volunteering within their catchment communities.

I want to create collaboration, because we never had that roundtable discussion between five JCCs to talk about the Jewish community and volunteerism. (Volunteer Manager)

Summary and Next Steps
The findings of the first phase of the research suggest that the first two cohorts of participating organizations view TFG/JSEI as an important catalyst to the development of volunteer management practices and a culture of volunteerism. UJA-Federation’s investment of funds and resources have profoundly affected the volunteer landscape. With the help of TFG/JSEI, organizations have created volunteer management staff positions and a central portal into volunteering. Volunteer managers affirm the importance of building a foundation of buy-in with the leadership and describe how they use metrics on volunteering to consolidate and expand this support. Participation in TFG/JSEI has encouraged organizations to develop uniform systems for recruiting, onboarding, placing volunteers, evaluating, and where necessary, firing volunteers. Paid staff of participating organizations have expanded their understanding of what roles volunteers can potentially serve and have cultivated more ways to show their appreciation for the service of volunteers.
The study also explores potential areas of social return on investment and finds that there are positive outcomes for volunteers, organizations, and the larger community of volunteer practice. Service enriches the lives of volunteers and gives them a sense of connection to the local community. Volunteers extend the capacity and reach of programming, increase the sense of shared ownership for organizational goals, and expand the definition of who can make a valuable contribution to the organization and the community. TFG/JSEI also fosters a community of practice among volunteer management professionals and creates the foundation for thinking about a “commons” of volunteers.

Our exploration of the implementation and perceived outcomes of TFG/JSEI also indicates the need for continued reflection and development in certain areas. The integration of JSEI best practices presents unique challenges for organizations with a decentralized structure. The potential for dramatically increasing the flow of volunteers through online resources needs to be integrated with the personal and “high-touch” approaches that volunteer managers and volunteers appreciate. Additional thinking needs to be done on how to best integrate a Jewish lens on service into the experience of diverse volunteers. Although not insurmountable, this set of challenges needs to be more explicitly addressed in group problem solving, training, coaching, and certification.

The case study methodology employed in this study is particularly well suited to capturing the nuance and natural flow of a phenomenon and the emergence of new ideas and understandings. At the same time, case studies do not provide the most robust case for drawing causal inferences or generalizing findings (Cook & Campbell, 1979). This methodology does not allow us to distinguish between the contribution of different aspects of the TFG/JSEI initiative or between the contribution of TFG/JSEI and the Engage program in organizations that have both. Findings regarding the impact of TFG/JSEI are initial and tentative and will be more rigorously tested in the next phase of the research.

Building on this initial qualitative work, the next phase of the evaluation will focus on assessing the outcomes of TFG/JSEI using a more quantitative approach. The forthcoming phase of the research will include surveys of volunteer management staff and volunteers at all cohort 1-3 organizations.
References


Appendix: Interview, Focus Group, and Observation Protocols

Volunteer Event/Service Engagement Observation Guideline

Describe the event or service engagement:
- Who is present (# or % volunteers, program staff, program recipients)?
- What are the basic demographics of the volunteers (gender, age)?
- What types of work are the volunteers doing?
- Who are the volunteers working with (e.g., community members, paid staff, on their own)?
- What is the division of labor with paid staff? Who does what types of tasks?
- Are volunteers identified in any way (name badge, t-shirt)?
- Location (onsite, offsite)?
- Are volunteers involved in event/program leadership?
- How long is the service?

Orientation/supervision of volunteers
- How are volunteers oriented to/trained for the work? Are written instructions available?
- To what extent are volunteers guided vs. self-directing?
- Do volunteers seem to know what they need to do? When they are confused/unsure, who do they go to for further instruction?
- How are the goals/purpose/mission of the event/service work communicated to volunteers?
- Do the volunteers get information about the recipients and their needs? About the larger social issue being addressed?
- Who supervises the volunteers (other volunteers/staff)?
- Is there evidence of volunteer guidelines or policies (written, orally delivered)
- Is there any tracking of volunteer work (e.g., reporting to a manager/coordinator, checking in or out, documenting completed tasks)?
- What is the role of volunteers in orienting or supervising other volunteers?
- Are there any incidents of volunteers running into difficulty and how are these handled?

Interactions
- What is the nature and tenor or staff/volunteer interactions?
- How is the work of volunteers and paid staff structured? Is it coordinated, separate, duplicative or parallel?
- What is the nature and tenor of interactions between volunteers? Is this a team that knows each other or a group of separate volunteers?
- Describe the interactions between volunteers and program participants.
- What, if anything, is done to facilitate the interactions of volunteers with staff, other volunteers or participants?
- Overall is there a difference in the interactions among volunteers and between them and the paid staff?

Ties to Organizational Goals
- What is done to orient the volunteers to the mission/goals/values of the larger organization? Or to the role of volunteers in the organization?
• How, if at all are Jewish values/thought used to frame the volunteer’s work or the work of the organization?
• What are the symbols (e.g., language, visual) used to communicate the underlying values of the organization (e.g., social justice, Tikkun Olam?)
• Are there any symbols (e.g., marketing materials, logos, or banners of the organization) that mention use of volunteers, TFG or UJA-Federation?

Recognition/ Next steps
• How, if at all is the work of volunteers recognized during or after the event? How, is the role of volunteers integrated into how leaders/staff talk about the event?
• Is there any post-event debrief or reflection or celebration?
• Does anyone talk to volunteer about next steps in their volunteering?
Volunteer Focus Group Protocol

Introduction
- Our team
- Confidentiality
- Recording and notes
- Goals for the conversation

Meeting the volunteers
1. We’d like to get to know you. Let’s go around the table and tell us
   a. Your name
   b. What do you do when you are not volunteering for [Organization]
2. When did you first start volunteering?
3. Where else do you volunteer now?

Goals of volunteering
4. What brought you to volunteer with [Organization]? How did you find out about the volunteer opportunities here? Social networks, TFG website, local ads, in the building for other programs?
5. What do you hope to achieve through your volunteer work with [Organization]? For yourself, for others, for the organization, for your community?
6. What was the process like getting started as a volunteer here? What kind of orientation did you get to the organization and its goals, to volunteer work?
7. How did you decide what types of volunteer work to do here? Who helped you figure that out?
8. Over time has anything changed in terms of the types of volunteer work you are doing here? Have you been invited/encouraged to take on different tasks or roles with more responsibility? Would you like to be?

Volunteer experience
9. Tell me about your most recent volunteer job/assignment here.
10. What did you do and what was the experience like for you?
11. Tell me about a time that you really felt that your volunteer work was important or meaningful.
12. What do you like most about your volunteer work here?
13. What have you gained through volunteering here? Friends, commitment to/understanding of the issues, greater sense of connection to your community?
14. Tell me about a time you had a problem with your volunteer work here or felt it was not meaningful or important. Who did you go to for help and what did they do?
15. What is most challenging about volunteering here?
16. What is it like to work with paid staff? Any issues and how are they handled?
17. How do you think [Organization] sees its volunteers?
18. How much do you think your volunteer work here is appreciated and how do you know it is?

Organization’s goals for volunteer engagement
19. What is your understanding of the mission or goals of [Organization]?
20. How does your volunteer work fit into those goals? How do volunteers help the organization accomplish those goals?
21. How well are volunteers integrated into the work of this organization? In what areas have you been invited to be involved in the organization and in what areas are volunteers not involved?

**Volunteer management by the organization**

22. Tell us about your experience with the management of your volunteer service by the organizational staff.
23. How is your service experience managed in the organization? Share some of the processes, policies and guidelines.
24. Tell us about your communication channels with the organization’s staff and volunteers?

**Time for Good and the UJA Federation of NY**

25. What role do you think UJA-Federation has with developing opportunities for volunteers here at [Organization]?
26. What do you know about the Time for Good initiative of UJA-Federation?

**Anything Else**

27. If a friend asked you if they should volunteer here, what would you tell them?
Volunteer Administrator Protocol

Introduction
- Research goals and purposes
- Recording of the interview
- Confidentiality

Your Background
1. How did you come to work as a Volunteer Administrator here?
2. Who do you report to and who reports to you? What is useful and problematic with how volunteer management is situated within this organization? History of that set up?
3. When people ask you what your job is like, what metaphor or image do you use to describe what you do?

Use of Volunteers
4. How does [Organization] understand the role of volunteers? How has that evolved though your participation in JSEI training/certification/Engage?
   - Heroic story/myth about the use of volunteers here?
   - Disaster story/myth about the use of volunteers here?
   - What has been the reaction of other staff and lay leaders to the use of volunteers?
5. How is the role of volunteers integrated into the overall goals or strategic planning of the organization and where is it not integrated? Change over time in that regard?
6. How has the use of volunteers helped [Organization] to accomplish its goals in the past year? What community needs were met through the use of volunteers this year that could not have been met without them?
7. Thinking ahead to next fiscal year, what organizational goals do you hope to accomplish through the use of volunteers?

Recruitment/Training/Recognition of Volunteers
8. How do you find out about what parts of the organization/programs need volunteers?
   - What do you do to advocate for the use of volunteers throughout the organization? Successes? Areas of resistance?
   - How do you understand the division of labor between paid and volunteers staff? Has that raised any issue and how were they handled?
9. In what roles/ways are volunteers integrated into different departments and functional areas of your organization? How has this evolved through participation in TFG?
10. How do volunteers typically become involved with your agency: [websites, TFG website, word of mouth]? How are those recruitment strategies working?
11. What are the major “buckets” or types of volunteers you have at [Organization]?
   - What are they looking for in the volunteer experience? How well can you match what they expect/hope for?
12. How do you orient and supervise volunteers? Who is involved in orientation/supervision?
13. Is there a “career path” for volunteers and how do you help volunteers move along it?
14. How do you recognize the work of volunteers here? Who is involved in recognition?
15. What goals do you have for next year for how the organization manages/uses volunteers?

Metrics
16. What is important to you/your organization when evaluating the role/functions/impact of volunteers here?
17. How do you go about evaluating the volunteer function internally? What is evaluated? How are the results used?
18. What volunteer data or metrics do you currently use to track the success of your efforts?
   - What are the most useful metrics to your work? For planning/decision making
   - What metrics/info is missing that you wish you had?
19. What impact has involvement in TFG had on the metrics you collect/use?

Interaction with TFG-UJA-Federation
20. Which of these TFG components have been of most value to you in your work? To your agency in accomplishing its goals? [Probe for Engage, JSEI, VMI, the website]
21. What has been least helpful? Why?
22. Was your organization ready for participation in the UJA programs (in terms of staffing, training, technology, attitudes about volunteers, etc.)? Why or why not?
   - What would have improved your organization’s readiness to participate in the UJA volunteer initiatives?
23. Describe one way that your agency’s participation in TFG had a positive influence on volunteerism in your organization.
24. What do you consider the main challenges for your organization’s participation in TFG going forward (technical/communication/financial/human resource/structural and others).
Executive/Leadership Interview Protocol

Introductions
- Research goals and purposes
- Structure of the interview
- Recording of the interview
- Confidentiality

Organization Mission
1. From your perspective, what is the mission of [Organization]?
2. How does the use of volunteers fit into the overall goals of [Organization]? Into strategic planning?
   - How has that evolved through participation in JSEI training/certification/Engage?
3. How does [Organization] understand the role of volunteers? How has that evolved through your participation in JSEI training/certification/Engage?
   - Heroic story/myth about the use of volunteers here?
   - Disaster story/myth about the use of volunteers here?
4. Thinking about the fiscal year that is just ending, how has the use of volunteers helped [Organization] to accomplish its goals? What community needs were met through the use of volunteers this year that could not have been met without them?
5. Thinking ahead to next fiscal year, what organizational goals do you hope to accomplish through the use of volunteers?

Organization’s background in volunteer management
6. What is the history of the use of volunteers in this organization?
7. Who was involved in the decision to apply for TFG?
8. What did you hope participation in TFG would achieve for your organization?
9. Where is volunteer management situated within this organization? How has that evolved since participating in TFG?
10. What are the challenges/benefits of that organizational structure?
11. What have been the main impacts of TFG on the volunteer enterprise here?
    - Professionalization of volunteer management role
    - Resource allocation to volunteer recruitment and management
12. What have been the major challenges/sources of resistance?
13. Was your organization ready for participation in the UJA programs (in terms of staffing, training, technology, attitudes about volunteers, etc.)? Why or why not?
    - What would have improved your organization’s readiness to participate in the UJA volunteer initiatives?

Interaction with TFG and UJA-Federation
14. To what extent do you and your staff and UJA Federation, understand and/or share the same goals for your agency’s recruitment and use of volunteers?
    - Where do you diverge?

Metrics
15. What is most important to you and your agency when evaluating volunteerism in your organization?
   o For the volunteer experience
   o For serving the needs of your members or beneficiaries
   o For contributing to the overall mission of your agency

16. In what ways do you currently evaluate and assess volunteerism at your agency?

**Going forward**

17. What are your future plans for improving recruitment and utilization of volunteers within your agency?

18. In what ways do you hope that TFG will [further] help you to better manage your volunteers and actualize your vision?
Program Director Interview Protocol

Introductions
- Research goals and purposes
- Structure of the interview
- Recording of the interview
- Confidentiality

Background and Role
1. Can you tell me a bit about your career and how you got to the organization? Tell us about your history working at the organization and the roles you worked in the organization.
2. Can you tell me a bit about the program(s) you direct? Their focus, structure, staffing etc.
3. How has your department/unit/program evolved in the last 2 years in terms of participants, reach, structure, resources, staffing, volunteer?

Volunteers and the organization
4. In what ways has the conversation around the role and use of volunteers changed at the organization over the last 2 years?
5. What do you see as the added value of volunteers to the organization?
6. What do you see as the added value of volunteers to your department/unit/program?
7. What community needs are met by the different roles performed by volunteers in your department/unit/program?
8. How does volunteerism fit in your department/unit/program overall mission?

Program structure (10 minutes)
9. Can you tell me about the staff and volunteers (if applicable) who work on the program?
   o How do you organize who works on the program? Who do you work with in terms of staff, volunteers, suppliers, external providers etc.?
   o How does the work get divided among them? Who defines the responsibilities of the volunteers?
   o Has the number of people involved in your program, and their type (staff, volunteer) changed over time?
   o Are there roles that you have moved from staff to volunteers or vice versa?
     ▪ Can you give me an example of a time when you changed the role of a volunteer?
   o How does communication work between staff, volunteers in this program?
10. Can you describe a volunteer placement that was successful in your department?
11. Can you describe a time when a volunteer did not work out?
12. (For departments that involve sensitive data i.e., development, HR, accounting) How did you approach the incorporation of volunteers in the department in terms of managing sensitive data?
13. *(For development staff)* How do you see the role of volunteers in your work in development?
   - How have you seen volunteers get involved as ambassadors in the community spreading the message about the Jewish Board?
   - In what ways have volunteers contributed in terms of volunteers giving donations, becoming members (*where applicable*), or in how you can present information for fundraising?

14. In your experience, what ways has any of this changed since the Jewish Board became involved in the TFG initiative [JSEI/Engage/VMI]?
   - Number of volunteers
   - Staff allocation to volunteer recruitment and management
   - Volunteer roles
   - Volunteer recognition
   - Budgets allocated towards volunteers (events, social gatherings, travel expenses, training, etc.).

**Volunteer Management**

15. Can you tell me a bit about your working relationship with the volunteer manager?
   - In what ways does your work overlap?
   - What have been some of the changes in the division of labor in the development of that role?
   - What are the challenges and dilemmas in the development of volunteer management in the organization?

16. How would you like to see volunteer management in your organization?

**Jewish Content**

17. TFG is particularly interested in connecting volunteer engagement and Jewish content. How do you perceive your program/department as strengthening a Jewish volunteer experience?
   - Can you give me an example of how the Jewish content is presented?
   - If not, have there been any conversations about how to incorporate that?

**Going forward**

18. What are your future plans for improving recruitment and utilization of volunteers within your department/unit/program?

**What else?**

19. What haven’t we asked about you, your organization, or its volunteer program that you think we should know?
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