



# Welcome to the

**2025**

# Life & Legacy<sup>TM</sup>

## Leadership Conference

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Harold Grinspoon  
FOUNDATION



Jewish  
Federations  
of North America

# Volunteers: Your Best Resource



# Agenda

- Finding Volunteers
- Culture of Volunteerism
- Discussion of Best Practices
- McClelland's Theory
- Review & Your Action Plan



A stylized flame logo on the left side of the slide, composed of three overlapping leaf-like shapes in yellow, orange, and red. 

# Table Exercise – 15 min.

**Introduce yourself and your role with Legacy**

**Why do YOU volunteer?**  
(either this or another volunteer activity)

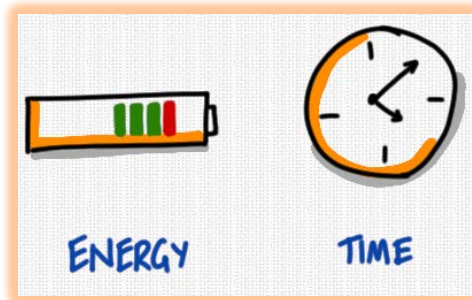




# Top 2 Reasons Why



# Finding Volunteers



# Ends of the Spectrum



A Tale of 2 Organizations



# Success Stories



- **Personal communication**
- **Check in every 6 months**
- **Kind, friendly, Nudge**





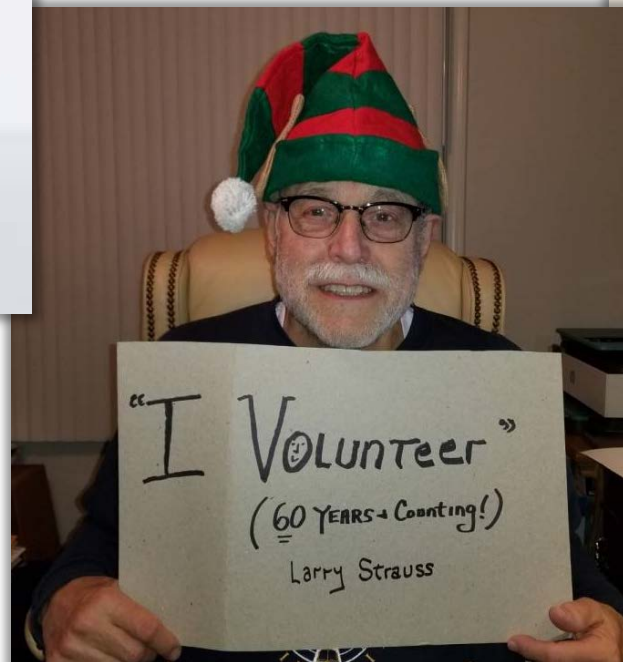
# Culture of Volunteerism



Do you have time to volunteer?

It takes:

- 1 hour to organize the clothing closet
- 2 hours to cook and deliver a meal for 20 people
- 3 hours to serve food and visit youth in the Drop-in Center



WINTER 2020 - PALATINE PARK DISTRICT

## VOLUNTEER VOICE

Gratefully acknowledge the many individuals who dedicate their time, talents, and energy to make a difference in our community.

**IN THE NEWS**  
Pesch Earns Honors

The Claydon House and Museum in Palatine recently celebrated its 40th anniversary and offered a delightful Victorian Christmas experience for the community. The Claydon House is a Palatine Park District entity operated by Palatine Historical Society volunteers and museum coordinator, Linni Pesch.

Prior to Pesch, longtime local historian Marilyn Pedersen undertook the restoration of The Claydon House in the 1970s and was its primary steward until her passing in 2018.

Pesch was an active volunteer when Pedersen passed away and was hired by the park district to replace her. Despite having enormous shoes to fill and a local legend to live up to, Pesch has almost single-handedly added a new vibrancy to The Claydon House. No small feat. Many on the team should be recognized as well including Joe Paykowsky, Jan Dagner, Denise Limburg, Carolyn Margoli, Susan Minor, Connie Rawla, Alice Rosenberg and others.

Pesch has managed to surprise longtime supporters of the historical society with attendance at events, a dramatic increase in the number of visitors, and a spirit of success that is both admirable and impressive. She has rallied the troops with her 'lean on' spirit and her commitment to elevating The Claydon House to greater exposure, increased opportunities for participation, and a more visible role in the community.

Though we all miss Marilyn dearly and deeply respect her efforts to rescue The Claydon House and transform it into what it is today, we are grateful that her legacy lives on in Pesch and her endeavors to bring it to the next level.

The enthusiasm she generates with her Claydon's Kids Days and her community outreach set new standards.

Thank you and (Victorian!) hats off to Linni Pesch for her irrepressible spirit and contagious charm, from which our entire village and the surrounding area benefit!

Source: Northwest Suburban Daily Herald

**Upcoming Volunteer Opportunities**

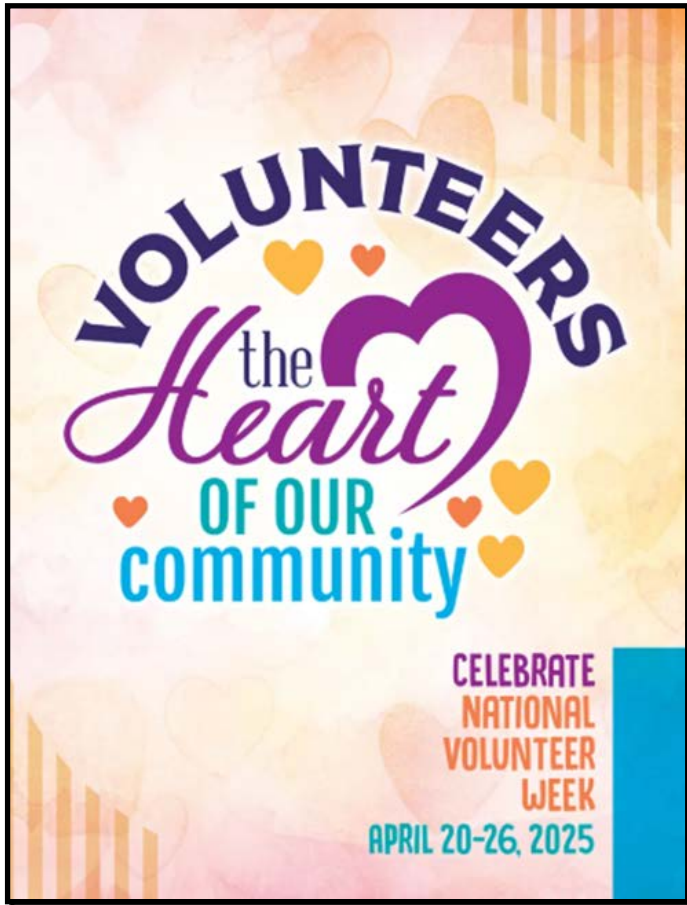
- Indoor Drive-In Movie Night - March 6
- Hound Egg Hunt - April 4
- Easter Day - April 12
- Musical Matinee - April 22
- Head to the Hills - April 25
- Big Trucks - May 4

Sign up today at [volunteer.palatineparks.org](http://volunteer.palatineparks.org)



"Giving is the master key to success, in all applications of human life"  
-Bryant McGill

# Culture of Volunteerism





# Reward & Recognize



## National Volunteer Month Highlights the Power of Giving Back

April is National Volunteer Month, and it's the perfect time to celebrate the inspiring individuals who give back to their communities. Susan and Barry Roberts are shining examples of this spirit, having dedicated over five years to supporting JFCS. "Whether it's counseling, helping youth or delivering food, there are so many ways JFCS strengthens the community," says Susan. Their story is a reminder that every effort counts, no matter how big or small. [Read more about their journey](#) and find out how you can make a difference too!

[Learn More About Volunteering With JFCS](#)

## Life & Legacy

### Tips to Reward and Recognize Volunteers

#### For Legacy Team Leaders:

Remember to reward and recognize in a way that will be meaningful to the volunteer. You should have a clear understanding for what each person wants to get out of this experience, then you can tailor rewards and recognition appropriately.

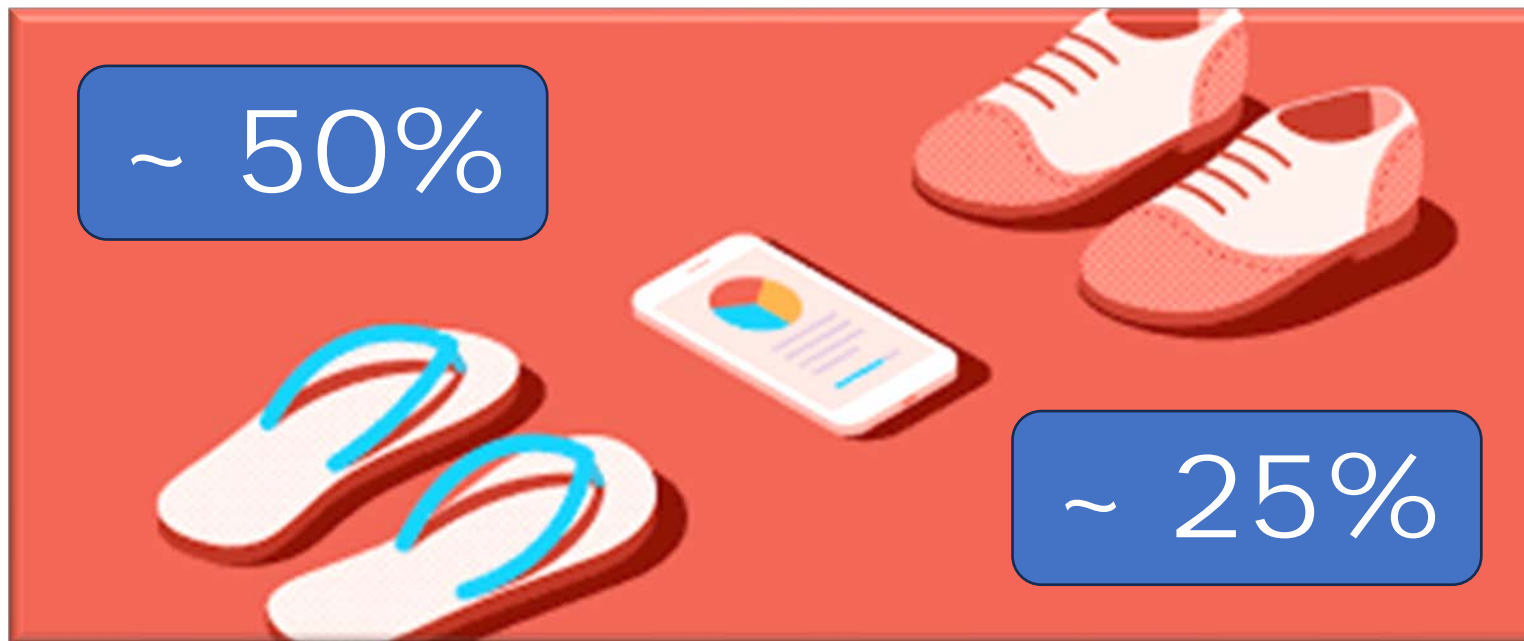
#### Reward personally:

- Active communication: Tailor to how they prefer to communicate (phone, Zoom, email, text...)
- Get to know them personally, whatever life and family circumstances they are willing to share - you can use this information to celebrate with or support them
- Communicate organizational impact often so they feel engaged
- Consider assigning a mentor to newer volunteers so they immediately feel part of the team and they have support for the tasks required
- Develop skills, especially in the areas that you know they want to practice or improve
- Appreciate often (including kudos from the board)
- Celebrate birthdays
- Celebrate all successes
- Check in periodically with each team member to understand how their experience is going and offer support

#### Recognize in Organization:

- Twice a year share an infographic showing volunteer impact, hours, and/or efforts
- If appropriate, set a goal for number of volunteers and/or volunteer hours and share how you are progressing toward this metric (thermometer or chart)
- Spotlight volunteer opportunities
- Share volunteer testimonials with the organization - what has this volunteer experience meant to them?
- Quick video thanking volunteers sent to entire organization
- Implement a Volunteer of the Month program
- Recognize volunteer milestones within the organization
  - Met a goal
  - Volunteered a certain number of hours
  - Completed specific volunteer service
  - Introduce new volunteers

# Types of Volunteering





# Micro-volunteering

ONE HOUR  
A MONTH

- **Small tasks**
- **Specific tasks**
- **Time limited**



# Tip



# Best Practices



**2025**  
**Life & Legacy**  
Leadership Conference



## Life & Legacy Checklist for Successful Volunteer Experience

### Clear Expectations and Goals:

- ☐ Written job description for team members, including goals and purpose
- ☐ Each team member has specific tasks to accomplish and understands their role
- ☐ Team leader understands what each team member wants from this experience
- ☐ There is ongoing education re: legacy giving, especially as team members evolve
- ☐ There is a prospect list for potential team members and a plan for recruiting them and training them
- ☐ Team members are familiar with the mission of the organization and understands the impact the organization has on individuals in the community
- ☐ Shares stories of the impact the programs and services have on constituents
- ☐ Leader has a good understanding of each team member's talents, skills, and interests

### Accountability

- ☐ The team has a method to track tasks and hold people accountable to the tasks
- ☐ Hold regular team meetings
- ☐ Team members choose and share their own deadlines for their tasks
- ☐ Team members are accountable to their own deadlines for tasks

### Communication

- ☐ Have an agenda for each team meeting
- ☐ Prior to meetings each team member is reminded of their current tasks by team lead
- ☐ After meetings, team lead confirms each member's understanding of progress and reminds of upcoming tasks with due dates
- ☐ Overall progress is shared often
- ☐ Tailor communication to team members (phone, Zoom, email, text...)
- ☐ Leader periodically checks in with team members to be sure they are enjoying the experience and/or finding it meaningful

# Table Discussion

On the checklist, what is one item that surprised you or that you feel is particularly important?







# Accountability

## Life & Legacy

### Tips to Promote Accountability

#### For Legacy Team Leaders

- Every person has a clear understanding of their tasks
- Every person has chosen their own timeline for progress and completion of their tasks
- Be a gentle, kind "nudge" reminding and questioning completion given each person's own timeline (this might be someone other than the leader)
- Hold regular team meetings with agenda beforehand
  - Everyone knows they will report on their progress
  - Remind each person of their specific tasks 1 week prior to the meeting
- Celebrate success to motivate action
- Regularly evaluate each team member's progress, then coach them on steps to move forward
- Periodically check in with each team member to see how the experience is going for them
- Schedule regular meetings with your LIFE & LEGACY Community Coordinator so that you are held accountable

LIFE & LEGACY, 2024

**ACCOUNTABILITY**  
is the glue that ties  
**COMMITMENT**  
to **RESULTS**

# McClelland's Theory of Needs

**Affiliation**



**Power**



**Achievement**



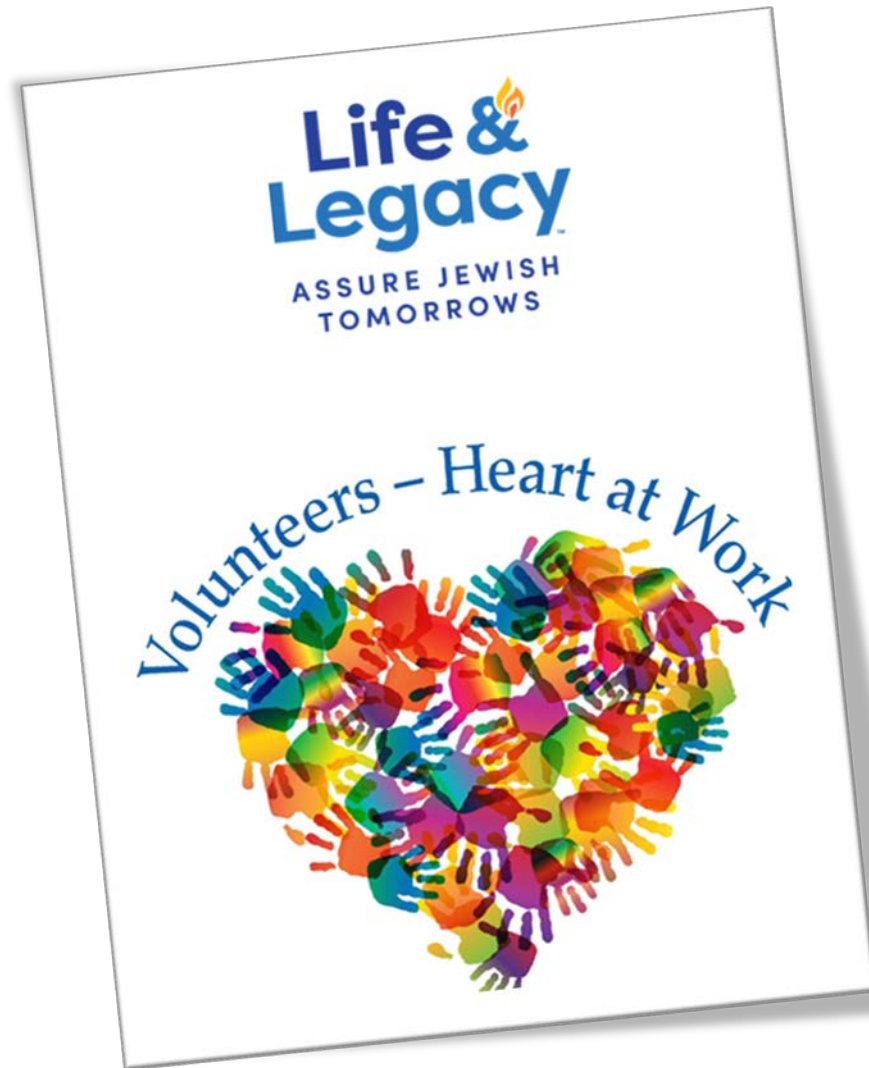
# Your Challenges


 Your  
**CHALLENGES**  
 HELP  
 you   
**GROW**  


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# Workbook





# Final Exercise

**Take a moment for your Volunteer action plan:**

- **Immediate action**
- **Implement next month**
- **Longer term goal**



# Your Thoughts

Questions

Ideas

Feedback

Comments

Thoughts

Suggestions





# Thank you!

2025

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