

# **Engaging Your *Faith in Action* Coalition for Program Sustainability**

***A GUIDE FOR MAPPING YOUR SUCCESS***



***FAITH  
IN ACTION***



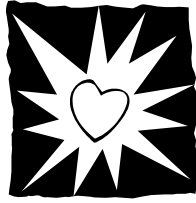
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**FAITH**  
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# Preface

This coalition guide of nearly 100 strategies and ideas has been designed by *Faith in Action* directors for *Faith in Action* directors to help better engage interfaith coalitions in the sustainability efforts of their programs. It goes beyond the basics for building an interfaith community coalition and presents strategies for gaining coalition members who are highly committed and involved in the leadership of the program and assist in securing the key resources of volunteers and funding. This manual will discuss ideas that both new and well-established programs can implement to achieve this goal.

Before applying any of the strategies offered, you will first want to carefully review the mapping process to effectively assess your coalition profile and “plot” your portfolio. The steps in this process should not be shortchanged, and we highly recommend that you solicit the involvement of your board/advisory committee and coalition members in this mapping and strategic planning.

We recognize the great diversity among programs. Not all ideas will be appropriate for every program. You will want to carefully evaluate the strategies for involving your partners and tailor those that appeal to you, your board and your coalition members.

We hope this guide is helpful to you. Its purpose is not to provide an exhaustive list of coalition development strategies; rather, it focuses on how you can further engage your coalition members by increasing their involvement in the never-ending work of volunteer recruitment, fund raising and community awareness. Topics addressed include a brief review of various program models, re-engaging and deepening the commitment of coalition members and suggestions for resolving inevitable challenges that arise in even the most exemplary programs.

We at *Faith in Action* wish you much success as you continue to strengthen your program and deepen your relationships with your coalition members. Thank you for your tireless efforts and dedication to helping your neighbors remain independent.

*Sarah Cheney*

# Acknowledgments

Realizing the need for a resource such as this, the *Faith in Action* National Office turned to successful programs across the country to better understand the various ways to leverage the support of interfaith coalitions. A specially organized work group of *Faith in Action* program directors and leaders was convened in September 2004 to consider the essential strategies for “mapping” the involvement of interfaith community coalitions to support *Faith in Action* activities. The members of this group have first-hand experience with a diversity of programs, representing Generations I, II and III; rural and urban; small and large coalitions. This guide is the product of this dedicated work group.

A special word of thanks goes to David Scruggs with Organizational Insight, Winston-Salem, North Carolina, for facilitating a productive work group session and for helping participants apply the concept of “mapping your partnership portfolio” to the *Faith in Action* model. David continued to influence the development of this manual with his positive encouragement and guidance throughout production.

The work group of *Faith in Action* leaders generously gave of their precious time to share their wisdom and expertise and then to write this guide so that the mapping process and strategies for engaging coalition members would be in a form that both new and well-established *Faith in Action* programs could benefit. We are grateful to the following work group participants for their contributions:

Lisa Carmalt	<i>Faith in Action</i> mentor, Lawrenceville, New Jersey
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Laura Gilliam	<i>Faith in Action</i> of the River Cities, Huntington, West Virginia
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Michelle Hardy	<i>Faith in Action</i> Health Coalition, Cavalier, North Dakota
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Gary Stewart	<i>Faith in Action</i> mentor and director, <i>Faith in Action</i> : Elder Outreach, Lexington, Kentucky

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# 1

## **Creating A *Faith in Action* Coalition for Long-Term Program Sustainability**

*Sarah B. Cheney*

### **INTRODUCTION**

Are you challenged by the need to raise more money and recruit new volunteers for your *Faith in Action* program? Do you have burning questions about how to gain the support of your program leadership to help acquire these vital resources? Do you struggle to gain the commitment of your community coalition to help with volunteer recruitment and fund raising? You are most assuredly not alone in your quest for achieving long-term sustainability for your program.

A key component of any *Faith in Action* program is a strong interfaith coalition of congregations, reflecting the religious diversity of the community, along with social service, civic, health and other important organizations and businesses. All these groups unite to help the *Faith in Action* program serve the unmet needs of people with long-term health issues; and, through collaboration, each coalition member has the opportunity to fulfill not only its own mission and call to service, but also to make a positive impact on meeting the needs of the greater community.

This chapter will offer an overview of the various functions of active *Faith in Action* coalitions, with a focus on the characteristics of an engaged, successful coalition. A process for mapping your coalition member profiles is presented to help you determine the most appropriate strategies you will want to consider to further leverage the support of your collaborating members. You are urged to review the mapping process carefully and discuss the options with your board/advisory committee as well as your coalition members.

### **OVERVIEW OF FAITH IN ACTION COALITIONS**

Coalitions serve a variety of functions, including:

- Recruiting volunteers
- Assisting with fund raising
- Increasing community awareness
- Referring care receivers/clients
- Strengthening the board

To fully understand the crucial role of the *Faith in Action* community coalition, it is helpful to review a study of those interfaith coalitions that have had long-term success in the arena of volunteer caregiving. In 2002, The Robert Wood Johnson Foundation (RWJF) commissioned the independent, nonprofit research firm of Public/Private Ventures (P/PV) to identify and evaluate

characteristics associated with local program survival. While programs achieve sustainability through a variety of strategies, all successful programs were found to have key factors in common that we have come to refer to as the “3-2-1” framework for sustainability. These are:

- **3 leadership elements**, comprised of an *experienced program director*, an *active coalition* and an *involved board/advisory committee* that helped to secure the
- **2 key resources** of committed *volunteers* and adequate *funds* for achieving the
- **1 overarching goal** of long-term sustainability.

Interestingly, P/PV found that “even mature” programs often continue to struggle with issues of involving and engaging coalition members in the work of *Faith in Action*. This resource guide has been designed to help both new and experienced programs appreciate and apply a variety of strategies to better engage members of the coalition in the delivery of services and in long-term sustainability of every *Faith in Action* program.

### **CHARACTERISTICS OF A SUCCESSFUL COALITION**

Realizing that an active and involved coalition is, in itself, an important leadership component, P/PV was able to document that successful *Faith in Action* programs receive much-needed assistance from their coalitions in securing the two key resources of funds and volunteers. Let us take a closer look at the characteristics and ways in which coalition members can serve in a leadership role:

- Both faith and secular organizations are vital to a successful coalition; they provide a rich variety of resources for programs as well as help build awareness of services and the needs of care receivers in the community.
- At least 85% of volunteers are recruited from congregations. Coalition members help identify new volunteers each year to help a local program recruit at least 15 new volunteers annually, or a little more than one per month.
- The size of a coalition is associated with program sustainability, with the average successful coalition consisting of about 25 members—approximately 20 faith congregations, 1-2 faith-based organizations and 4 non-faith community groups. Larger coalitions are more likely to help raise larger amounts of funds, either through the members’ operating budgets or special offerings, and to help reduce the program’s costs per service hour by providing more potential sources of in-kind support.
- On average, programs added 1½ new members to the coalition a year. Continued growth and development is desirable.
- Involving congregations directly in the program’s work is associated with increased diversity of volunteers and care receivers.

Recognizing the value and unique contribution a broad-based community coalition provides a *Faith in Action* program, it is appropriate to now turn to ways for deepening the involvement of both faith and non-faith groups to help sustain your program. Clearly understanding these characteristics of success is key to evaluating the strengths of your coalition.



There are three basic steps for working with a coalition of congregations and secular organizations:

1. Finding willing congregations and social service, civic and health organizations
2. Getting these groups interested and involved
3. Keeping them interested over time

This guide will take you “beyond the basics” of coalition building and addresses steps 2 and 3 above. The task of finding willing congregations and community agencies is addressed in the resource document, “How to Create Community Ownership,” a PowerPoint presentation available on the *Faith in Action* Extranet.

To reach, retain and increase the involvement of coalition members, *Faith in Action* programs must:

- Educate local congregations and organizations about the program’s work and the services to be provided to the care receivers
- Highlight how the coalition members will benefit from the collaborative effort
- Communicate with professional staff, clergy and volunteer congregational liaisons on a regular basis
- Develop lay leadership within the congregations to provide structure for the group’s mission
- Help congregations of different denominations and faiths work together smoothly and efficiently

All of these issues are addressed in the chapters to follow.

## **YOUR FAITH IN ACTION COALITION PROFILE**

The ongoing collaborative process of cultivating a successful *Faith in Action* community coalition is about developing relationships. The initial phase is a “courtship” comprised of making introductions, discovering shared interests and likes, learning ways to collaborate for mutual satisfaction and venturing small commitments to each other. As the “courtship” progresses, both parties gradually become more invested in a longer term relationship. Eventually the collaboration evolves into a “partnership” with appropriate mutual commitments, a long-term venture of helping and supporting one another through shared expectations and renewing commitments. We encourage you to think of your relationships with your coalition members in just such terms. If the collaboration is already a good fit for everyone involved, how can you help move the relationship along to develop deeper commitments? The format of this guide is designed to help you assess where you are in your relationships with your coalition members and to evaluate where you want the relationship to go, along with some effective ways for getting the partners to “move up the commitment ladder.”

One approach to this process is a tool used in the business world—the concept of mapping your partnership portfolio. The purpose of mapping is to first assess where your partnerships stand and then to evaluate the potential for strengthening them by moving them to a higher level of involvement and commitment. Having a clear vision of your partnerships will help in identifying the appropriate steps to get you where you want to go, thus achieving success. This perspective may also be applied to the successful development of *Faith in Action* coalitions.

## **Steps for Mapping Your Coalition Member Profile**

**Step 1:** Review the definitions and characteristics of commitment. It is important that you have a clear understanding of the terms and characteristics for the mapping process. The work group convened for the development of this project agreed on the following definitions and categories:

*Small congregation*—fewer than 50 members of the faith group

*Medium congregation*—51-1,000 members

*Large congregation*—greater than 1,000 members

*Civic organizations*—may include, but are not limited to, such groups as Boy Scouts or Girl Scouts, Rotary Club, Kiwanis

*Social service/health organizations*—may include, but are not limited to, local hospitals, the Area Agency on Aging, Alzheimer’s Association, senior service agency, faith-based social service agency

*Businesses*—examples include local banks, larger community employers and newspapers or radio stations

The ongoing commitment of both faith and non-faith groups is essential. Different congregations and community organizations will be involved with your *Faith in Action* program at different levels of commitment. Your goal should be to engage each member at the highest possible level of commitment that organization can make.

Throughout this guide, strategies for strengthening the commitment of your coalition members will be presented in tables with further detail for implementation of each strategy discussed in the text. Note how the grid is laid out and become familiar with how to use it. The highest level of commitment is at the top and the lowest at the bottom. The grid is designed to offer “at a glance” strategies for increasing the involvement of your coalition members. The strategies discussed in the following chapters will be presented in two grids or portfolios; the first for faith groups and the second for non-faith or secular groups.

You will want to weigh the various strategies to determine which you will want to explore for moving up the commitment for your coalition members or re-engaging those whose commitment has tapered off. One size does not fit all; different strategies will be appropriate

for different faith and non-faith members given their leadership, mission and relationship with your *Faith in Action* program.

Consider the commitment ladder and definitions of high, moderate and low as follows:

Level of Commitment	Strategies for Enlisting Support
High commitment	The partnership is now a “marriage” that needs to be nurtured; the group has a long-term ongoing relationship with the <i>Faith in Action</i> program and is consistently involved in a variety of program activities, in particular helping to recruit volunteers and providing ongoing financial support.
Moderate commitment	The partnership has evolved beyond an informal or casual relationship; the group has committed resources more than once; usually the collaborative efforts are more intentional and fulfilling.
Low commitment	Usually a commitment that is part of the “courtship” stage of the relationship; that is, the partner is learning about your <i>Faith in Action</i> program services and ways the group might be involved; the group has dedicated some resources to help the <i>Faith in Action</i> program.

**Step 2:** The second step in mapping your coalition member profile is to plot the location of each of your coalition members using the grid and definitions outlined. Where do your coalition members fall on the grid in terms of their current commitment? Do you have members at each level of commitment? Mapping your coalition members’ involvement and commitment on the grid can be a valuable program assessment exercise carried out by the program director and board, or you may want to consider inviting your coalition members to self-identify precisely where they perceive themselves to be; or the program director and coalition member representative may want to meet for a joint assessment. Having discussions with your coalition members both to review and to celebrate their past involvement can be a positive step in exploring ways for enhancing their future commitment.

Each coalition member, whether a small or a large congregation or a community organization, should be supporting your program efforts at some level. The ideal portfolio will have a mix of

congregations of differing sizes and other community organizations supporting your *Faith in Action* program at various levels. You will want to view your mapped profiles as opportunities to move coalition members' involvement up the commitment ladder and at the same time interest new potential coalition members in becoming involved with your program.

What strategies can you use to help move partners to the top of the ladder? What strategies can you use to encourage new coalition members to join your group? We will be discussing specific strategies to answer these questions.

**Step 3:** With your coalition members accurately plotted on the grid, the critical third step in this process is to consider if each coalition member is at the appropriate level. Could some members be moved up the commitment ladder? What strategies can best help you to deepen the commitment of a coalition member? Has the commitment and involvement of some fallen off, or down the ladder? If so, what strategies can best re-engage and involve them in your program services?


In this resource guide, successful strategies will be provided for each section of the grid and suitable for the type of organization at each commitment level. You will need to discuss with your board and coalition the strategies you feel will best engage everyone in your program's efforts. Toward that goal, we have included a "sample case" to get you started.



### **Case Example**

Your *Faith in Action* program has 20 coalition members: 10 faith congregations and 10 non-faith organizations. You have a specific need for more volunteers and increased financial support to carry out your program activities. You want to raise more money and recruit new volunteers with the help of your coalition members. How do you map your coalition member's profiles and enlist the help of each coalition member in these efforts?

**Step 1:** Based on the definitions provided, you have identified that three of the faith groups are small congregations, five are medium and two are large congregations. You have determined that you have two businesses, three non-faith social service agencies and one faith-based social service agency, and four civic organizations. In this scenario, we will focus on the congregational partners.

**Step 2:** Now you are ready to plot the location of each congregational member on the commitment ladder. Consider how you will want to complete the "commitment assessment." Will you work with your board/advisory committee? Will you have your coalition members complete self-assessments or perhaps work together with your coalition members in assessing their levels of commitment using the profile approach?

In this scenario, upon evaluating the level of commitment of the various congregations, each is plotted on the grid at the low or moderate levels. Of the 10 congregations, you map seven at the low and three at the moderate commitment levels. See the grid below with each symbol  representing a different faith congregation.

Level of Commitment	Strategies for Enlisting Support
High commitment	
Moderate commitment	
Low commitment	

Given that your congregational members are on the lower rungs of the ladder, you will want to consider strategies for moving them up, thus engaging them more deeply in your efforts to recruit new volunteers and secure further funding.

When plotting the current involvement and commitment of your coalition members, also evaluate the ability of the member to help fulfill the critical leadership roles in fund raising, volunteer recruitment and community awareness. Make these expectations explicit in your conversations together. In this case, for example, you want to increase your number of volunteers and have identified two congregations that you believe have the capacity and potential interest to assist your program with recruitment efforts. Two other congregations are identified to enlist support in fund-raising activities.

**Step 3:** In reviewing your portfolio of congregational members (e.g., the grid and where your partners fall), you want to determine if each coalition member is at the appropriate level. In our case example, we have identified four congregations we wish to better engage with the hope of raising their commitment to a higher level, particularly with regards to recruiting volunteers and providing ongoing financial support.

Review the strategies outlined for volunteer recruitment and fund raising at a high level of commitment (discussed in Chapter 6, “Enlisting Coalition Support to Recruit Volunteers” and Chapter 7, “Enlisting Coalition Support to Raise Funds”). See sample.

Level of Commitment	Strategies for Enlisting Support to Recruit Volunteers
High commitment	<ul style="list-style-type: none"> <li>• Commissioning and recognition services</li> <li>• Congregational coordinator</li> <li>• Working with congregation’s paid staff</li> </ul>

Moderate commitment	Time and talent surveys Affirmation from the pulpit Continuing education training Board member representative Group projects Events/training
Low commitment	Presentations Program announcements <i>Faith in Action</i> publications
High commitment	Budget line item Congregation encourages individual donations
Moderate commitment	Denominational funding sources Regular special event/offering Congregation initiates fund-raising activity
Low commitment	Donor appeal Occasional donations

Which of the strategies in the high commitment boxes do you think you could implement most successfully? Which appeals personally to you and/or your board/advisory committee? Which strategy do you think will most appeal to the congregations identified? You will want to carefully weigh which of the strategies to further explore with your coalition members. You have nothing to lose and everything to gain in discussing with your coalition members the best and most mutually satisfying options for increasing their levels of involvement and commitment to your program's ongoing success.

If you follow these steps for mapping your coalition member profiles and implement the strategies presented for moving up the ladder, your *Faith in Action* program will be sure to discover a host of fresh, new ideas. To aid you in your process, this guide is filled with proven strategies to help you both re-engage and deepen the commitment of your coalition members, thereby enabling you to help more people and achieve your goal of long-term program sustainability.

### **OTHER RESOURCES**

Herrera, C. & Pepper, S.K. (2003). *Faith in Action: Using interfaith coalitions to support voluntary caregiving efforts*. Philadelphia: Public/Private Ventures.

# 2

## **An Overview of Coalitions, Boards & Advisory Committees**

*Doris Rubinsky & Gail Hurst*

### **INTRODUCTION**

This chapter offers a brief overview of the typical makeup of *Faith in Action* coalitions, the responsibilities of coalition members, potential resources that coalition members may bring to your program and strategies to strengthen your coalition. Descriptions of two types of boards of *Faith in Action* programs are included, along with the distinct characteristics of a board versus an advisory committee. Also outlined is the role of the coalition corresponding to each type of board structure. Many of the topics mentioned in this chapter are covered in greater detail elsewhere in this guide.

### **REVIEW OF FAITH IN ACTION COALITIONS**

#### **What is a *Faith in Action* coalition?**

Ideally, *Faith in Action* coalitions bring together people from congregations of many faiths, businesses, faith-based agencies and other community organizations (such as social service providers, hospitals, local agencies). These groups have a common mission to provide volunteer care to their neighbors with long-term health needs. Developing a strong coalition allows these diverse groups to combine their capabilities and “people power” to make a positive impact on the community. The role of a coalition member is to provide specific input as to the needs of the local community and resources to help meet these needs. Also, coalition members may receive program services for their constituents.

#### **Who are potential members of your coalition?**

1. Faith congregations
2. Faith-based organizations
3. Social service organizations
4. Community organizations
5. Human service organizations
6. Civic groups
7. County agencies
8. Health care providers
9. Businesses and corporations
10. Local media—newspapers, radio, television stations
11. Schools and universities
12. Others, usually groups unique to your community and the coalition’s focus

If you make the effort to reach out and build a coalition that includes a diverse group of faith congregations and community organizations, you will create a much stronger referral network and be better able to identify gaps in services. The larger and more broad-based the coalition, the greater it's potential for increased resources of all kinds, not only more money, but more volunteers and more people identified for services.

### What resources does a coalition provide?

- **Volunteers:** Most of the volunteers for your program will be recruited by your coalition members. A volunteer may serve on the *Faith in Action* board, act as a congregational liaison or coordinator, provide administrative services in the program office or perform caregiving services directly to care receivers.
- **Leadership:** Coalition member representatives should be asked to serve on your *Faith in Action* board as well as chair important committees.
- **Referrals of care receivers:** Care receivers may be referred from the coalition members or the local community.
- **Financial support:** It is crucial for coalition members to take a leadership role in areas such as fund raising, pledges, assistance with securing grants and direct donations to your program.
- **In-kind support:** This support may include printing, office supplies, office space, temporary secretarial support, Internet services and publicity. All in-kind support helps to reduce costs associated with the program and increase involvement.
- **Pro bono (donated) professional support:** This may include legal services, accounting, public relations, marketing and counseling services.
- **Public relations and community awareness:** Coalition members are usually well-positioned for building support for and awareness of the *Faith in Action* program in the community at large as well as within their congregations and organizations.

### How can I strengthen my coalition?

- **Maintain diversity:** Try to involve congregations and faith-based service organizations of all faiths and beliefs that reflect the diversity of your community. It is important to respect the various faiths represented, so do your homework. You may want to research on the Internet the beliefs of each faith.
- **Support education:** Keep all your members informed about the ongoing work of the program. Members should receive newsletters, brochures and monthly reports, which include heartwarming anecdotes about care receivers along with updated financial information and statistics that accurately profile the community's needs. Give your members the tools to successfully represent the *Faith in Action* program.
- **Foster ongoing involvement:** Delegating significant responsibilities to coalition members and regularly seeking their thoughtful input is crucial for their "claiming ownership" of your program. Encourage representatives of your coalition members to serve on either the *Faith in Action* board or a working committee or to provide the



program with a liaison or coordinator. Coalition members should meet at least twice a year, face to face, to continue to build strong mutual relationships.

- **Connect with the community:** Expect members to actively represent your *Faith in Action* program to the greater community and to elicit information about unmet community needs. The more your members “talk up” the program, the more invested in it they will become.

### **What is the role of the coalition with *Faith in Action* programs?**

Each *Faith in Action* program is governed by either a board of directors or an advisory committee. The two basic types of programs dictate the leadership team:

Independent *Faith in Action* program—Consists of a “stand-alone” coalition of faith groups, volunteer organizations, agencies, community organizations and businesses, which is governed by its own *Faith in Action* board of directors under a 501(c)(3). Representatives of the coalition members serve on the board. In some instances, typically with smaller coalitions, each coalition member has a seat on the board. With larger coalitions, members often serve on a rotating basis. Refer to the list of resources at the end of this section for more information on board development.

*Faith in Action* program within an umbrella organization—The larger agency receives the grant to operate a *Faith in Action* program. The umbrella organization may be private, faith-based, a governmental agency or community institution (e.g., hospital, university). The *Faith in Action* program is a component of the larger organization, with its own distinct advisory committee that has a member on the board of the larger organization. The *Faith in Action* program cannot act independently of the parent organization. As with an independent program, the coalition members should have representatives on the advisory committee and/or board of the parent agency.

### **REVIEW OF FAITH IN ACTION BOARDS OF DIRECTORS AND ADVISORY COMMITTEES**

A *Faith in Action* board of directors is an elected group legally responsible for governing all aspects of the *Faith in Action* program’s efforts to fulfill its mission. By law, an independent *Faith in Action* program must have a board of directors. A program that is part of an umbrella organization will have an advisory committee that reports to the board of the parent agency. The advisory committee oversees the *Faith in Action* program within the larger organization. Ideally, at least one member of the advisory board also should serve on the board of directors of the parent organization.

The table below summarizes the characteristics and responsibilities of a board of directors and an advisory committee. In an independent program, the *Faith in Action* director reports to the board of directors. In a program that is part of an umbrella agency, the program director reports to a staff supervisor.

## Summary of Characteristics of the Board of Directors and Advisory Committee

<i>Faith in Action Board of Directors</i>	<i>Faith in Action Advisory Committee</i>
Limited number of members prescribed by the by-laws	Any workable number of members
Legally responsible for the program's financial and property assets	Members have no legal responsibility for assets but committee advises program director on effective strategies for program management
Members covered by directors and officers liability insurance	Members covered by volunteer liability insurance
Candidates put forth by board nominating committee; members are voted on by the organizations' entire board membership	Candidates usually put forth by other advisory committee members such as the nominating committee
Length of service is defined in the by-laws	Members may not have term limits
Members accountable to chairperson/ president of the board of directors	Reports to umbrella agency board of directors; membership could be a potential training for position on umbrella agency board of directors
Meets at least quarterly, preferable 8-10 times per year	Meets at least quarterly
Handles all fiscal oversight, including developing a diverse funding base	Supports and assists in developing a diverse funding base
Reports to the coalition	Reports to the coalition and board of directors
Develops a mission statement and review it regularly	Develops a mission statement in conjunction with board of directors and review it regularly
Establishes by-laws to include committees or task forces	Reviews by-laws and makes recommendations to the program director
Establishes working committees to support the program, among them fund raising, public relations, volunteer recruitment and retention	Establishes working subcommittees to support the program, among them fund raising, public relations, volunteer recruitment and retention
Assesses changing needs of the community	Assesses changing needs of the community and advises program director
Recruits new board and/or committee members	Helps recruit new committee members
Develops strategic plans	Develops strategic plans in conjunction with the board
Hires and supervise the program director	

Sets policies	
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Diverse funding sources are necessary for the survival of any program. A balanced combination of individual and corporate donations, special events and grants is best for sustaining a program. Either the board of directors or advisory committee, a delegated subcommittee or some combination may be responsible for fund-raising activities. Board members also can identify grant-making organizations and act as advocates for grants. Grants may even be written by talented board members. Board members should solicit donations face to face and through personalized mailings.

It is the responsibility of the board of directors to recruit board and advisory committee members. The board of directors can draw upon the knowledge base of the coalition, the community and staff for suggestions for other potential members. The board should assess the qualities and skill sets required. It is hard work! The search takes time, and the board should not hastily accept a new member simply because the candidate is willing. It has to be a good match, and potential members need to understand clearly the level of commitment. Potential candidates may be asked to serve on a committee or subcommittee in an ad hoc capacity before being asked to serve as a member of the board of directors or advisory committee.

**Characteristics of an Effective Board or Advisory Committee**

- A variety of faiths are included, representing the diversity of the community.
- All members clearly understand the *Faith in Action* mission, embrace the interfaith concept and have a deep commitment to the program.
- Regular meetings are held as scheduled and members attend faithfully. The board or advisory committee is encouraged to hold meetings monthly. This allows for continuity and a deeper level of involvement and knowledge among members. According to the Public/Private Ventures study, members of boards that meet frequently may be more attuned to program needs and more committed to addressing those needs.
- The composition of the board/advisory committee is diverse in experience, talent and background. Get to know the specific interests of your members. Assign identified members with tasks around appropriate issues and listen well to their feedback. Be sure that the committee members of an advisory board understand the importance of their role. Corporate representation on the board or advisory committee may be helpful for a variety of professional skill sets and resources.
- The board/advisory committee must have strong, active members who assume a leadership role. The board of directors of an umbrella organization needs to give the advisory committee enough authority to carry out its separate mission. The advisory committee members need to have a clear understanding of their authority.
- The personalities of the members “mesh,” enabling them to work well together. Operating somewhat indirectly, committee members especially need to feel ownership of the program and that they have the authority to be effective. In turn, the board of directors of an umbrella organization should not compete or feel threatened by the advisory committee; rather, they should be educated to understand how the advisory committee helps to carry

out their part of the overall mission. Establish a formal mechanism by which these two groups will communicate.

- Be careful not to recruit targeted members simply to parade prominent names on a letterhead thinking it will enhance your program's status. This will tend to minimize the real value of active board members who may not be as well known.

### **Why can't the *Faith in Action* coalition act as the advisory board when a board of directors of the umbrella organization is already in place?**

An advisory committee has a different role and level of commitment from that of the coalition. The advisory committee understands that they are responsible for the oversight of your *Faith in Action* program and are therefore recruited for their talents and availability to nurture the program. The coalition members have a common interest, but their time and talents are focused upon their own faith groups and organizations.

An advisory committee and coalition may be one and the same in the very early stages of your program, but they will eventually grow to become two separate leadership entities for the *Faith in Action* program. The coalition will be effective for its advocacy role. The advisory committee will be effective in carrying out its management task.

### **CONCLUSION**

Coalitions, boards of directors and advisory committees are essential leadership bodies and have distinct functions within your *Faith in Action* program. The coalition is a network of congregations representing different faiths and community organizations with the purpose of helping to recruit volunteers and to provide financial support for the sustainability of your *Faith in Action* program. The board or advisory committee has governance responsibility for the *Faith in Action* program. United by a common purpose, the coalition members and board/advisory committee work to ensure your volunteer caregiving program carries out the mission to serve the community. For the long-term survival of your program, both the coalition and the board or advisory committee must be strong.

### **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

Board of Director Committee Descriptions

Board Self-Assessment

*Building a Working Board - Faith in Action* Power Point Presentation

Checklist for Potential Coalition Members

Coalition Brochure

Committee Guidelines

Congregation Survey for Planning

Creative Coalition Fund-Raising Ideas

*Faith in Action Program Directors Share Successful Strategies for Program Management - A Faith in Action video*

*Faith in Action* Support for Coalition Members  
How to Create Community Ownership  
Job Descriptions for Board Members  
Memorandum of Understanding  
Overview of Selected Faith Communities  
*Program Benchmarks & Planning Tool: A Self-Assessment Tool*  
Quick Tips for an Effective Board  
Quotes from Faith Traditions  
Suggested Resources for Coalition Building  
Talking Points for Coalition Building  
Tips for Selecting Board Members  
Tools & Hints for Boards  
Ways Coalition Congregations Can Help

## **OTHER RESOURCES**

Herrera, C. & Pepper, S.K. (2003). *Faith in Action: Using interfaith coalitions to support voluntary caregiving efforts*. Philadelphia: Public/Private Ventures.

[www.beliefnet.org](http://www.beliefnet.org)

[www.boardsource.org](http://www.boardsource.org)

[www.interfaithalliance.org](http://www.interfaithalliance.org)

# 3

## Models for Faith-Based Coalitions

Lisa Carmalt, Bill Northcutt & Gary Stewart

### INTRODUCTION

The purpose of this chapter is to outline the characteristics of the different models for faith-based coalitions used by successful *Faith in Action* programs. Both the advantages and disadvantages of each model with regard to various programmatic issues are presented to help you decide which model is best for your particular situation. These issues include: recruiting and training volunteers, generating referrals, establishing and monitoring standards of care, fund raising and community awareness. Each section in the chapter first addresses questions about these issues and then describes those conditions under which the model in question may be most effective.

### CENTRALIZED MODEL

The centralized model posits an organized office and program structure within which all activities of the *Faith in Action* program are closely coordinated. In this model all program activity originates in and is monitored by this central organizational structure, with the program director providing daily oversight. Additionally, all communications to and from the program occur within a centralized system. In some cases, there may be more than one office location, but a centralized system of communication is nevertheless maintained to ensure that program procedures and record-keeping are consistent.

#### How does the centralized model work with congregations?

The simple, tight, coherent program structure of a centralized model helps congregations to more easily understand the basic building blocks of a *Faith in Action* program and how they can best relate to them. This approach is particularly helpful when congregations have members who: 1) need the services *Faith in Action* offers; 2) have a mission to provide the services, but do not have the resources to train their own members; and/or 3) want to develop an outreach program but do not have the financial resources to do so. In such cases, developing a partnership with *Faith in Action* may be extremely beneficial. Since the centralized model has systematic methods of monitoring much-needed services, these procedures that are already in place can be used to train members of the congregation as volunteers, to serve both their own members and those outside their faith community.

*Faith in Action* staff, as well, can provide expertise about service development to members within the congregation and further assist the congregation in establishing outreach programs. Congregation members often work/volunteer at the *Faith in Action* office to observe procedures at close hand and eventually take on a liaison role between the congregation and *Faith in Action*.

### **What are the advantages of a centralized model?**

A centralized model has clear advantages over other models in its ability to reach the broader community, having positioned itself as an independent entity not associated with any particular faith group. The centralized model, more than the other models, may best represent the mutual goal of serving neighbors in need that all faith groups have in common because it intentionally seeks not to be identified with any one particular faith or organization in the community.

Additional advantages of the centralized model include:

- The consistency of procedures and methods of evaluation of volunteer training and service delivery directly contribute to quality control.
- A centralized model is more likely than other models to have professional staff with expertise in training and managing volunteers and nonprofit management, a characteristic that has been shown to be associated with sustainability in the Public/Private Ventures (P/PV) study.
- Centralized *Faith in Action* models are especially effective in matching volunteers with care receivers, and providing overall consistency and continuity of program activities.
- The model can be developed much more rapidly.
- Agency referrals are easier to track using one system, and record keeping is systematic and centralized.
- The centralized training of volunteers promotes and ensures the *Faith in Action* policy of not proselytizing.
- There is a potential for attracting funding from sources that do not want to support a particular faith group, but see the unmet need and would support a program that is unaffiliated/independent.

### **What are the disadvantages of the centralized model?**

Among the disadvantages of the centralized model the most salient would likely be the tendency for congregational and group members to not experience the same level of ownership or easy access that may occur in other models.

Additional disadvantages include:

- A centralized model has a probability of greater costs for professional staff to administer the program compared to other models.
- There is less awareness of needs within congregations and less access to those informal communication networks that exists within all congregations and groups.
- There is a requirement for more technical resources to maintain the centralized system.

### **Under what conditions would the centralized model be preferred?**

Having resources and personnel that are centrally located allows for the *Faith in Action* program to effectively coordinate program activity, closely oversee the program and maintain high quality control. These centralized resources and technical supports can also prove valuable as the program grows and requires ever greater levels of program management. During the start-

up phase of a new program, the centralized model has the advantage over other models of providing consistency and control over the delivery of services. Other pre-conditions for considering a centralized model would include having sufficient technical support and personnel to establish the model. As mentioned above, programs operating within centralized models are able to be clearly identified as *Faith in Action*, and it may be easier to gain funding from sources which would otherwise be leery of funding a congregational effort. In addition, the consistent procedures and record keeping help provide good program statistics that accurately reflect a well-run program.

### **What are the issues of the centralized model related to recruiting, training and matching volunteers?**

Maintaining a balance between the recruitment of volunteers and individuals requesting services is an ongoing needs assessment task and requires painstaking preparation. A centralized model is likely to have multiple referral sources, a valuable resource when the volume of referrals may exceed the available pool of trained volunteers. A centralized model casts a wide net in regard to recruitment of volunteers. This broad-based approach can be an advantage but may also present challenges in the retention and matching of volunteers with care receivers.

A centralized model may be unexpectedly challenged by the great diversity of volunteers from a range of faith communities. This welcome, but potentially problematic, diversity may further present challenges in bringing the volunteers together to form a sense of their own shared "service community." In order to do this effectively, a significant amount of staffing resources and an experienced program director and/or volunteer coordinator will be required.

Matching volunteers with care receivers is an important part of all *Faith in Action* models. With the centralized model this becomes both an advantage and disadvantage. On the one hand, there are members of a congregation who would like to have anonymity and would prefer to be helped by someone other than members of their own congregation or organization. On the other hand, there may be individuals who strongly prefer someone from their own faith, someone who they believe they can relate to best because of shared values. Yet there may not be enough volunteers of the same faith or congregation available to match with them.

Some issues may be more sensitive than others and require further discernment in matching. For example, problems with substance abuse or AIDS may result in a sense of shame and/or anxious concern that members of one's own congregation would not be able to maintain strict confidentiality. A family member may be embarrassed about a parent's dementia and not want people they see regularly to know about their family's situation. When confidentiality is desired, this may be more easily handled with a centralized model because there is an excellent probability that volunteers will come from many locales in the community; in many instances, the size of the volunteer pool even more than the model itself would tend to contribute to anonymity.



### **What are the issues of a centralized model related to referral sources?**

A centralized model that is not identified with an established agency or organization in the community (such as Hospice) must carve out its own distinct identity. The *Faith in Action* program will want to develop a knowledge base of the community's unmet needs and then to identify potential sources of referral. Next, it must establish a firm foundation of trust with potential referral sources and effectively communicate both the value of the *Faith in Action* program to them and the confidence that they may place in it. Predictably, referrals will eventually come from multiple sources; this success will, of course, require sufficient staff support to respond effectively to requests for services and follow-up.

A centralized model has the advantage of having systematic procedures and record keeping that enables it to track and monitor referrals. This leads to good relationships with referral sources and allows the program to maintain a balance between its available resources and its ability to receive and service new referrals.

### **What are the issues of a centralized model related to quality of services?**

Quality of services may be compromised if the centralized model does not have sufficient technical resources and personnel to adequately monitor services. In order to maintain good quality control, the centralized model will need to acquire sufficient technical resources and staff support to manage the complexity of providing services to care receivers arriving from multiple referral sources. High standards of volunteer service can be instilled in an effective volunteer training program. The volunteer training needs to specifically address the issue of diversity and to provide volunteers with sufficient information to manage their role and responsibility. Regular meetings and ongoing supervision of volunteers can help reinforce the training and ensure quality control.

### **What are the issues of a centralized model related to fund raising?**

It may take a while for a centralized model that is not associated with an established faith group, agency or organization to establish a distinct identity in the community it serves and cultivate new relationships with potential stakeholders. In order to get potential stakeholders to make a commitment, the centralized model will have to show unique and tangible evidence of meeting the needs of the community in ways that other programs cannot.

Once relationships are well established and there is unmistakable evidence of the value added to the community by *Faith in Action*, the next challenge is to persuade stakeholders to commit to support the program financially. This is likely to require much of the program director's time and the program director may be challenged daily to find ways to balance this task with other responsibilities. The pressing need for fund-raising strategies may challenge both the program director and the board's understanding of their relationship. Staff and board retreats that incorporate strategic planning may be an effective tool for clarifying their respective roles and responsibilities.

In a centralized model, stakeholders may be able to more easily identify with the program's mission, which may not be as evident in other models. Stakeholders may choose to invest in it because they see it as the one program that can best provide specific needed services. The centralized model may also be easier to donate money to if it is perceived as the single program in the community meeting those needs that are particularly important to stakeholders, such as older adults and families.

### **What are the issues of a centralized model related to community awareness?**

The centralized *Faith in Action* model will have to cultivate relationships with many community organizations and agents. These include the media, such as radio and television stations, daily newspapers and suburban/rural weekly papers, elected officials and various informal community leaders. It will be important to emphasize to faith groups and community organizations that have a stake in the establishment of a *Faith in Action* program the common goal of serving neighbors in need. Some leaders will need to understand that *Faith in Action* does not intend to compete with other existing service programs, such as congregational and specific local community programs. Getting the media and community leaders to endorse the *Faith in Action* program publicly will take time, patience and perseverance.

### **DECENTRALIZED MODEL**

In a decentralized model, individual congregations have a high degree of autonomy in designing and implementing volunteer caregiving services. The central *Faith in Action* staff serves in a "coaching" role, assisting each congregation in strengthening and expanding these services according to the congregation's own traditions and organizational structure. The program may be developed as a new outreach, or it may be an extension of an existing group, such as the social concerns committee, mission action, youth or seniors' group.

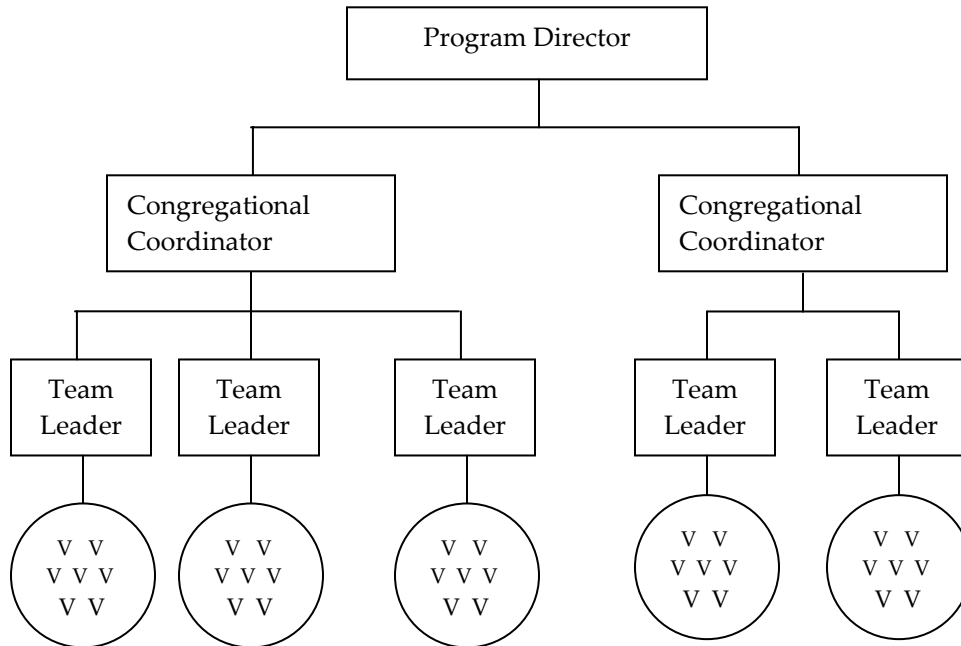
The recruitment and training of volunteers usually begins with an announcement at a worship service and/or a blessing ceremony or prayer service led by the head of the congregation. The head of the congregation often selects a scriptural passage that will serve as the theological basis of the program. The *Faith in Action* staff must be reasonably familiar with the beliefs, traditions and organizational structure of each particular faith community.

### **How does the decentralized model work with congregations?**

Key persons in the decentralized model are the "congregational coordinators" or "group leaders," who are usually appointed by the head of the congregation. These persons assume primary responsibility for matching volunteers with care receivers. The central *Faith in Action* staff works with the head of the congregation to identify suitable candidates for this important role. The *Faith in Action* staff then trains these individuals and provides ongoing hands-on coaching in recruiting volunteers from within the congregation and the surrounding neighborhood, as well as identifying needs, interviewing potential care receivers, assigning and following up with volunteers and keeping records. Larger congregations usually appoint

several persons to this position, with each coordinator being responsible for no more than 5-10 matches.

The following diagram illustrates the chain of communications and responsibilities.



In the early stages of program development, most referrals come from within the congregation, but once the program is successfully under way, some congregations may accept referrals of non-members. The sacred scripture of most faith groups includes a call to serve people in need, regardless of their religious affiliation. All congregations involved with the *Faith in Action* program must agree to a non-discrimination policy which includes faith beliefs.

In addition to training congregational coordinators, the *Faith in Action* staff provides pre-service and in-service training for the direct service volunteers, maintains a record of services and participants, coordinates back-up for absent volunteers and coordinators, maintains insurance coverage for volunteers, provides volunteer recognition and/or assists congregations with their own recognition activities while providing a clearing house for referrals to and from social service and health care agencies.

**What are the advantages of a decentralized model?**

- The head of a congregation may be more willing to make a commitment to a program which gives him/her a hand in its design and implementation.
- Studies have shown that program models such as this one which encourage congregation-based leadership often serve the greatest number of people in need at the lowest cost.

- Caregiving outreach is developed in keeping with each congregation's own culture and traditions.
- Many, perhaps most, members feel comfortable giving and receiving help from each other under the leadership of a fellow member.
- Many congregations already have an informal system for caregiving outreach. Helping to refine and strengthen what is already in place instead of starting from scratch shows respect and saves *Faith in Action* staff time.
- Clergy and fellow members who are acquainted with the volunteers provide a natural screening, thus facilitating background checks.
- Special talents and latent expertise within the congregation, for example, in the areas of nursing and social work, are able to be utilized.

### **What are the disadvantages of a decentralized model?**

- The model takes longer to develop. The intermediary steps of recruiting and training congregational coordinators delay program implementation.
- Success depends on the strong support of the head of the congregation and on competent, reliable congregational coordinators who are volunteers. Gaps in this support and leadership can result in gaps in service.
- Agency referrals are somewhat more difficult to track, since accountability and follow-up are shared between the central office and the participating congregations.
- Record keeping can be a challenge. Some congregations need frequent reminding to report matches and hours of service to the central office. In interviewing potential care receivers, congregational coordinators are sometimes reluctant to collect certain personal information from their fellow members, such as income levels, which may be required by grantors.
- Direct service volunteers' identity with *Faith in Action* may be weaker than in the centralized model. They may see themselves primarily as members of their congregation, rather than as part of the community-wide program.
- It may be difficult to preserve confidentiality when volunteers are serving their own fellow members.
- The program depends partly on the commitment of the advisory board, staff and congregations to share ownership and program development. If this commitment and mutual trust should decline, services may be jeopardized.
- Fund raising may be more difficult or limited since some funders are reluctant to fund services too closely affiliated with a single faith tradition.

### **Under what conditions would a decentralized model be preferred?**

The decentralized model works well in communities with strong congregations which have consistent leadership. This model is helpful in working with congregations that have a strong ethnic identity, where the culture and traditions differ somewhat from the mainstream. It also can provide a practical approach in communities that have had limited experience in interfaith interaction and those where congregations prefer to "take care of their own." Some heads of

congregations will favor this model owing to their own greater involvement and ability to tailor the program to their faith traditions and member needs.

The decentralized model is better suited to certain types of volunteer services than others. Consider the needs of your community before selecting the program model. Friendly visiting, telephone reassurance, transportation to religious services, chores and shopping are services which work well in this model. On the other hand, transportation to medical appointments may be best coordinated through the centralized model, wherein there is access to a larger pool of volunteers and scheduling can be handled by staff dedicated to the specific activity. Service to specific populations such as Alzheimer's disease or HIV/AIDS patients also may be handled best through the central office, because of the need to recruit volunteers from a larger pool of persons who may have a special interest and a willingness to undergo additional training.

### **What are the issues of a decentralized model related to recruiting, training and matching volunteers?**

The decentralized program model enables *Faith in Action* to tailor the recruitment, training and matching of volunteers to diverse groups in the community by directly involving congregation-based leaders in these activities. Volunteer training sessions are conducted by the central staff, but may occur at the house of worship with some input from congregational coordinators and members who have related expertise. Certain messages pertinent to a faith group can be easily incorporated without threatening others. In all areas, however, certain core agreed-upon policies and procedures should be adhered to in order to ensure community-wide consistency.

### **What are the issues of a decentralized model related to referral sources?**

The decentralized model has the advantage of generating many of its referrals from the clergy and members of congregations. Many congregations are in constant touch with their homebound members. Many elderly individuals and people with chronic health needs readily turn to their congregation for assistance.

When the central *Faith in Action* office receives a referral from a health care or social service agency, it determines whether the person being referred is a member of one of the *Faith in Action* member congregations. If so, the *Faith in Action* staff will discuss the referral with the appropriate congregational coordinator. If the coordinator does not have available volunteers, another congregation from the *Faith in Action* coalition may be asked to help out.

If the person referred is not from one of the *Faith in Action* member congregations, *Faith in Action* will look for a member congregation which is either of the same religious affiliation as the person referred or one located in the same neighborhood as the person needing help. The congregational coordinator interviews the person referred, matches him/her with a volunteer from the congregation, and reports the match to the *Faith in Action* office. The *Faith in Action* office then reports the match to the referring agency. The congregational coordinator follows up

the match and reports to the *Faith in Action* office on a regular basis. The *Faith in Action* office maintains a record of services provided and communicates with the referring agency.

If none of the congregations is able to serve the person referred by an agency at the time of referral, the person is placed on a waiting list and the agency is so informed.

### **What are the issues of a decentralized model related to quality of services?**

Because the direct service volunteers are a step removed from the central *Faith in Action* staff, both good communication between the central staff and the congregational coordinators and clearly written policies and procedures are especially important in this model. As discussed earlier, the volunteer training program and regular follow-ups are the crucial keys to maintaining standards of care. In addition, a specialized training program for congregational coordinators must be developed and implemented.

### **What are the issues of a decentralized model related to fund raising?**

Ideally, decentralized *Faith in Action* programs which foster ownership of the program by congregations will receive a substantial portion of their financial support from the congregations themselves. The coalition needs to agree on funding requirements and to communicate these to heads of congregations at the outset. Congregations in this model find that *Faith in Action* enhances their ability to achieve their own mission of helping people in need. They consider the coaching and support they receive in the area of caregiving to be well worth the investment of finances and other resources. Sometimes donations are made as a budget line item and other times as a commitment to conduct regular fund-raising events or special collections in worship services.

*Faith in Action* should emphasize that care receivers are never asked to give a donation in exchange for services. Some receivers are eager to donate in gratitude for services received and to help bring these same services to others in need. Often these care receivers are encouraged to give to their congregations and to mark the donations for *Faith in Action*. In a decentralized model, the congregation is more likely to include *Faith in Action* as a line item in its budget if it is already receiving donations from its members that have been designated specifically for this purpose.

Your *Faith in Action* program needs to explain in depth the many kinds of assistance it provides to congregations. Invite a representative of the congregation to participate on the board or advisory committee and to be involved in developing the *Faith in Action* budget. Report regularly to the head of the congregation regarding services provided for and by the members. Give the congregation several alternative ways to raise funds for *Faith in Action*.

### **What are the issues of a decentralized model related to community awareness?**

Community awareness in a decentralized model should put the congregations squarely in the spotlight. Feature at least one of the member congregations in each newsletter. Involve choirs and youth groups in volunteer recognition events and fund-raising activities. Help member congregations publicize their achievements. Be sure your news releases, brochures and other print materials emphasize the congregational ownership of the program.

Many congregations in this model will gladly include *Faith in Action* articles and announcements in their own bulletins and newsletters. Clergy and congregational coordinators will be happy to take an active role in developing publicity featuring their own members. All publicity and outreach materials should use the language of caregiving found in the individual congregations. For example, the word “ministry” may be preferred to “program,” “care receiver” to “client,” “caregiver” or “missionary” to “volunteer,” to name a few.

### **INFORMAL MODEL**

The informal model involves a large number of congregations working with the *Faith in Action* program without necessarily being part of the organized structure or coalition of the program. The arrangement allows an individual volunteer or donor in the congregation to choose how and when, how often and at what level he/she will work with the *Faith in Action* program. Participating congregations of various sizes and demographics are on an equal footing in this model. A “one size fits all” level of support requirement can be impractical for many small, economically disadvantaged, or aging congregations. This informal approach allows each congregation to be involved at a level it can handle comfortably.

### **How does the informal model work with congregations?**

It might be on a regularly scheduled basis such as a monthly contribution or scheduled volunteer service; a one-time event, like special support of holiday programs; or it could be an “on-call” arrangement, whereby the program makes specific requests, perhaps for people who need help in the congregation’s immediate neighborhood. More formal commitments such as those found in the centralized and decentralized models may also be incorporated as elements of this model when desired. Nothing in this model either precludes the heavier involvement of any individual congregation or prohibits the provision of a board/advisory committee position to a representative of that congregation.

Your *Faith in Action* program would provide group or individual volunteer training in accordance with its guidelines and procedures, along with activity oversight and care receiver screening.

### **What are the advantages of an informal model?**

- It is easier to recruit new congregations. The lack of a requirement for long-term commitments makes the request for support less intimidating and is more likely to generate a positive response.
- It involves more congregations in the *Faith in Action* program. Because congregations can choose their own level of commitment, many more congregations can be recruited.
- It allows the recruitment of congregations who, for whatever reason, do not wish to participate in activities with other faiths or groups. These groups can be assigned to non-cooperative efforts. A bonus here is that their participation paradoxically may help overcome their initial objections and ultimately foster more cooperative caregiving.
- Congregations are easier to approach for a special need or appeal, as most will not have made a long-term commitment.
- This model supports the involvement of smaller congregations that may feel they have little to contribute within the framework of more structured models.
- It opens more doors for recruiting individual volunteers. The initial contact with individual volunteers and donors often occurs through activities within their congregations.
- It can provide more diverse sources of funding, thus lessening the impact from the loss of a supporting congregation. The P/PV study shows that diversity in funding is one of the keys to sustainability.
- It can be an easy way to introduce new congregations to *Faith in Action*. Over time, and as the relationship with the *Faith in Action* office develops, the commitment may deepen.

### **What are the disadvantages of the informal model?**

- The informal model does not always provide a steady, dependable core of congregational support for volunteers and funds. The P/PV study has shown that ongoing volunteer recruitment is important to the continuing success of the program.
- Ministers and other congregational staff change positions frequently, and support for the program can change with the personnel. This necessitates revisiting the congregation and possibly reselling the program.
- Ongoing congregational recruitment is required as congregations drop in and out. This is not always a bad thing, as the support base is continually being broadened and renewed through these efforts, but it does require hard work.
- More staff time is required in matching needs with support, maintaining congregational relationships and coordinating volunteer activity.

### **Under what conditions would the informal model be preferred?**

The informal model may be preferable when the *Faith in Action* program provides an array of different services or works in a large geographical area. A single coalition might not always be practical in these cases based on congregational interest and location.



In addition, this model probably works best with programs that are part of a larger organization with an existing structure, well-developed policies and procedures in place and a strong and active board. For most independent and newer *Faith in Action* programs, it probably will not function as well as a “stand-alone” as the other two models offered here.

One real advantage to its flexibility is that it can be used as an adjunct to the centralized or decentralized models by creating a different, finer-grained, level for the coalition – a ministry partner rather than a coalition member.

### **What are the issues of the informal model related to recruiting, training and matching volunteers?**

This model typically provides a larger congregational pool to recruit volunteers from, since more congregations are involved.

- The first way congregations usually provide support is in allowing the *Faith in Action* program to conduct volunteer recruitment as part of the congregations’ regular organized activities.
- This requires a low level of commitment from the congregational staff, and sometimes it even fills a need they have for a speaker or program.
- The *Faith in Action* program can take advantage of these opportunities to recruit individual volunteers, promote group volunteering and seek financial support.
- Ongoing recruitment will probably have to be included in the plan, unless someone in that congregation is willing to take on that activity.

Volunteer training can be held at the individual congregation or in a centralized place with other volunteers.

- One of the advantages of on-site training is the creation of congregational involvement and ownership in *Faith in Action*.
- Combined group trainings can make more efficient use of staff time and encourage interaction between congregations.

Care receiver/volunteer matching can be based on what the group agreed to do and where.

### **What are the issues of an informal model related to referral sources?**

The acceptance of care receiver referrals from the congregational staff and members should be encouraged and promoted as one of the main benefits to the congregation’s participation in your *Faith in Action* program. This is an approach that promotes the *Faith in Action* program as an asset to the congregation and its leaders, one that can lead to more involvement by the congregational staff and members. Too often, the relationship between a *Faith in Action* program and a congregation is based on what the congregation can do for *Faith in Action*. A more caring and creative approach is to determine and implement what the *Faith in Action* program can do for the congregation.

An approach that offers to help before asking for help will generate many referrals, and the provision of services to congregational members will build trust and confidence in the program, thus making all the parties more receptive to building an ongoing relationship. For example, there may be many people within that congregation that either need the services of the *Faith in Action* program or know of others who do.

Also, though there are many needs within the congregational membership that are beyond the scope of direct services provided by the *Faith in Action* program, the program could nevertheless serve as a source of information and referral for the congregational staff to help address these related concerns. Some examples of benefits to the congregation other than referrals might include offering some *Faith in Action* program resources to the congregation to use in their other ministries (volunteer training, advice on program structure, sharing of manuals and materials) or matching the *Faith in Action* program with one of their existing ministries, thus helping the congregation to expand further into an area in which they have already elected to serve.

#### **What are the issues of an informal model related to quality of services?**

Generally, the informal model lends itself best to using individual volunteers recruited from a particular congregation; therefore the *Faith in Action* program's normal standards of care, reporting procedures and volunteer monitoring would be used. When a congregation, or group within that congregation, chooses to volunteer, standards of care would be communicated to the participating group just as it would be for individual volunteers, such as through the application, screening and training process.

Reporting requirements might need to be revised to accommodate the group nature of some activities. Much as in the decentralized model, a congregational coordinator or liaison will be required.

#### **What are the issues of an informal model related to fund raising?**

This is an excellent model for fund raising, inasmuch as it develops a high level of trust, relationship and credibility with many congregations. It allows the *Faith in Action* program to comfortably go directly to the congregation, secure in the knowledge that they are familiar with the needs of the organization and its commitment to financial integrity. It also provides a reliable venue for special needs or one-time requests.

#### **What are the issues of an informal model related to community awareness?**

- An informal model probably will involve a wider diversity in faiths, denominations and cultures, which then can be highlighted in community awareness campaigns.

- This noticeable diversity shows that your *Faith in Action* program brings more to the community than just the provision of direct services; it can also be a bridge-builder, as it focuses on what people of faith have in common, rather than what divides them.
- It can generate the type of photo-ops and stories that are always sought after by the local press.
- It can also provide a wider circulation of newsletters and literature

## **COMBINATION MODEL**

Many successful programs use a model which is a combination of all the above—centralized, de-centralized and informal. Such a combination allows programs the flexibility to adapt to different congregations and to diverse groups in the community. While some congregations are willing and able to participate in a more formal, centralized program, others will prefer a more informal model that will accommodate their own culture and leadership patterns. The choice of model depends, in part, on the kinds of services are offered. For example, transportation and services to a special target population may work best in a centralized model, while friendly visiting may work best in a decentralized or informal model. Each has its strengths and weaknesses, but all are capable of fulfilling the *Faith in Action* mission.

### **What are the advantages of a combination model?**

- Flexibility to adapt to different congregations and segments of a community is appealing to members. In reality, many modern communities are complex and such flexibility helps ensure compatibility with different coalition members.
- Capitalizing on the advantages of all models lends the ability to serve needs as they arise and adapt to changes in the community.
- Flexibility to adapt to different leadership styles and personalities of individuals on staff, in congregations, on boards.

### **What are the disadvantages of a combination model?**

- An attempt to “be all things to all people” can cause the program to appear disjointed, unless an extra effort is made to focus on core procedures and goals.
- Lack of standardized requirements for congregations can be confusing. Congregations that make a more formal commitment may feel unfairly burdened compared with those that participate on a more informal basis, especially those which do not make a substantial financial contribution.
- Strong, experienced leadership is required, with knowledge of how to apply the various aspects of the different models used.
- Board members, staff and coalition members may require additional training to understand the combined model.

### **Under what conditions would the combination model be preferred?**

One program director states, “The combined model could be defined as a model for ‘mature’ programs. In order for a program to grow it needs to become flexible.” At the same time, new programs can also benefit from this model, as they welcome a variety of coalition members with different needs, abilities and styles of participation. In general, program directors should be aware of different program models and consider drawing on various aspects of the models as their programs grow. No two congregations or coalition members are alike. For this reason, it is helpful to be able to adapt and remain flexible in your relationships.

The combined model is useful if a variety of services are being offered. For example, the program may choose to coordinate transportation services out of the central *Faith in Action* office (as in the centralized model), where there is access to a large number of volunteers who can be scheduled directly. At the same time, the program may offer friendly visitor services through congregations (as in the decentralized model) to take advantage of common social/cultural bonds of people in the same congregation.

### **What are the issues of the combination model related to recruiting, training and matching of volunteers?**

In the combination model, volunteers are recruited from congregations and also from the community at large. The *Faith in Action* staff members function both as coaches to congregations and as direct recruiters/coordinators. Individuals who have no religious affiliation or whose congregations are not members of the *Faith in Action* coalition can be matched and supervised directly by the *Faith in Action* staff, as in the centralized model. At the same time, individuals from member congregations have the option of joining a group within their congregation, under the leadership of one of their fellow members, as in the decentralized model.

Volunteer training is usually conducted by the *Faith in Action* staff. Some training sessions take place at a central location and draw volunteers from throughout the community. Some take place at a house of worship and are tailored for that congregation. Recruitment and matching are conducted both by *Faith in Action* staff and by congregational coordinators.

### **What are the issues of the combination model related to referral services?**

Referrals from within a congregation usually go directly to the congregational coordinator, who has been trained by the *Faith in Action* staff to screen, interview and match people in need. If the congregational coordinator does not have available volunteers in the congregation or if the person in need specifies that he/she would prefer to be served by someone outside the congregation, the congregational coordinator may then refer the person to the *Faith in Action* office. A person in need also has the option of calling the *Faith in Action* office directly if he/she would prefer more anonymity.

Referrals from agencies to the *Faith in Action* office can either be sent to a congregational coordinator, as in the decentralized model, or can be handled by the *Faith in Action* staff, as in the centralized model. In either case, the *Faith in Action* staff tracks the referral and records the matches and services provided.

The delays which can occur in the decentralized model in handling agency referrals are reduced in the combination model due to the *Faith in Action* office's ability to handle referrals directly, without going through congregations.

### **What are the issues of the combination model related to quality of services?**

Quality of care is maintained through written policies and procedures, standardized volunteer training, ongoing supervision of congregational coordinators, follow up and supervision of direct service volunteers by congregational coordinators and *Faith in Action* staff, record-keeping (usually through a computerized data base maintained at the central *Faith in Action* office) and periodic evaluations. As in the decentralized model, those functions of the combination model which are congregation-controlled are slightly more of a challenge to monitor because they are one step removed from central *Faith in Action* supervision. However, a proper balance of coordination and support from the central office on one hand and culturally sensitive, personalized care by congregations can yield a high quality of service in the combination model.

### **What are the issues of the combination model related to fund raising?**

The combination model is well positioned to attract funding from a variety of sources. Those congregations which are participating as fully active coalition members may contribute substantially in gratitude for coaching to fulfill their own mission, while others with a less formal involvement may also offer support. Grass roots support from individuals and fund-raising projects comes as a result of strong community and congregational ownership. The centralized functions such as volunteer training, volunteer recognition and record keeping create the structure and documentation of services that are required by government, foundations and businesses.

### **What are the issues of the combination model related to community awareness?**

The combination model utilizes the publicity strategies of all other models—developing a relationship with news media as in the centralized model, featuring congregational accomplishments in bulletins and newsletter as in the decentralized model, and building bridges between different groups as in the informal model.

## **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

Advantages of Support Team Model

Congregational Coordinator Position Description

Faith-Based Outreach Tool Kit  
FAQ's for Support Teams  
Handouts from the *Collaboration Handbook*  
How to Create Community Ownership  
Memorandum of Understanding  
Support Team Member Covenant  
Suggested Resources for Coalition Building  
Ways Coalition Congregations Can Help

## **OTHER RESOURCES**

*Handbook of Denominations in the US, New Tenth Edition.* Nashville: Abingdon Press, 1995.  
Winer, M. and Ray, K. *Collaboration Handbook: Creating, Sustaining and Enjoying the Journey.*  
Saint Paul, MN: Amherst H. Wilder Foundation, 1994.  
[www.beliefnet.org](http://www.beliefnet.org)  
[www.interfaithalliance.org](http://www.interfaithalliance.org)

# 4

## Re-Engaging Coalition Members with the Basics

Bill Northcutt & Peggy Preston

### INTRODUCTION

Mutually respectful congregational and community relationships are valuable to our *Faith in Action* programs. When you have successfully recruited a congregation, business or organization to your coalition, your job has just begun. The relationship must be carefully nurtured for the life of the *Faith in Action* program.

This chapter offers some suggestions and strategies for keeping coalition members engaged and excited about being a part of *Faith in Action*. The specific suggestions made are applicable to both congregations and community organizations; you are encouraged to tailor these as appropriate to a particular organization.

### STRATEGIES FOR RE-ENGAGING MEMBERS OF THE COALITION

Relationships with all coalition members should be reviewed on a regular basis, not only to sustain and nurture ongoing partnerships, but also to recognize and improve those that may have deteriorated. A plan should be developed for each coalition member based on this continuous review. An annual review will suffice in most instances, but an as-needed review should be done any time there are major personnel changes at the program or within the congregation, or whenever conflicts arise.

#### What information should be included in a review of the partnership?

Revisit what **first motivated** the congregation or organization to become involved with the *Faith in Action* program. Following are some questions you may want to ask:

Was there one person in that congregation who had a heart for the mission of your *Faith in Action* program?

Was the primary proponent of joining your coalition a clergy or staff member?

Was there one group that you first approached?

Is the current staff comprised of the same people who were in place when the congregation joined your coalition?

You will need to develop a strategy to re-engage or support the persons or groups who were instrumental in the congregation's becoming a part of the *Faith in Action* coalition. If it was a member of that congregation or someone on staff, contact them personally. Make sure they are aware of your appreciation for what they have already done and that they understand the value you place on their future contributions. If you have been working with specific groups within

the congregation (seniors group, youth group, Sunday school class, etc.), report to them. Again, make sure they know that they are appreciated and their actions have made and will continue to make a difference. Seek a chance to speak to them as a group and use that opportunity to thank, encourage and inspire.

Clergy and other paid staff positions are often transitory in nature. If there are new people in these positions, make sure you meet them, explain your program's mission and describe how the relationship between their congregation and *Faith in Action* came about. Follow up in like manner with others who may have assumed new leadership positions in the congregation. Timing is very important. Give new people plenty of time to learn about the community and the members of their congregation before arranging a meeting. Otherwise, they may be too overwhelmed to want to work with your program.

It is important to review the **mutual expectations** each congregation has of the *Faith in Action* program and the expectations the *Faith in Action* program has of the congregation. Has each met their commitment? Have they exceeded it? Make sure that both you and they understand clearly what commitment the congregation originally made to *Faith in Action*.

Ascertain if the congregation feels that the *Faith in Action* program has, in fact, provided them with what was promised.

Revisit the congregation's commitment to *Faith in Action*.

Review how the *Faith in Action* program has responded to the stated commitment of the congregation.

Your strategy will include making sure that everyone understands the level of commitment and determining if it is practical.

Review the commitment with the congregational leadership and together make a determination as to whether it is working as everyone had expected.

Find out if the congregation is currently comfortable with the commitment, or do they believe it needs to be revisited and/or revised.

Make sure they understand that this relationship is supposed to be a "blessing" to all involved and should not place anyone in a stressful position.

A written Memorandum of Understanding (MoU) might be considered to clarify expectations, roles and responsibilities.

There are a number of questions you need to ask to determine whether the congregation is satisfied with the support they have received from your *Faith in Action* program.

Do they feel as if they have in fact received what was promised from your *Faith in Action* program?

Was adequate training provided to them? How did it compare to their expectations?

Do they feel that they were consulted on important decisions that directly affected them?

Has the *Faith in Action* program been a significant asset to them in helping to meet the needs of their members and neighborhood?



An important strategy will be to discuss the relationship between the program staff and the congregation with its leadership and its members.

Find out what they think about the training provided to volunteers. Determine if the training met their expectations. What changes would they like to see in how it is done? Consider providing them with a written volunteer training evaluation questionnaire for this purpose.

Schedule a training session for new volunteers and a refresher course for existing supporters, carefully incorporating their suggestions.

Examine the relationship between the congregational staff and the *Faith in Action* program staff. Make sure they realize the important role they play and the need for their candid input in the decision-making process. Ask for their opinions on some specific issues affecting program plans and policies.

Find out if they used the *Faith in Action* program to help their own members and/or needy neighbors. Make sure they know that the program is there to serve and support them in any way possible.

It is also essential that your *Faith in Action* program respond appropriately to the commitment of the congregation.

Has your *Faith in Action* program provided the congregation with adequate volunteer opportunities to keep committed people engaged?

Has the congregation been overloaded with service requests?

Have members been asked to do things that they had not agreed to do in the first place? Do they feel pressure to do additional things that they did not originally commit to do?

Develop a strategy to discuss the opportunities to serve that have been offered to the congregation. Ask the leadership or contact person their candid opinion about the response of the *Faith in Action* program.

Find out what they would like the program to do differently or what might be changed in this relationship. Perhaps they want to do more; or, due to circumstances, they may need to cut back.

Perhaps they would like to change their focus with the *Faith in Action* program or expand to include even more services.

Be sure they know that you are genuinely interested in accommodating their wishes.

The level of **effective communication** between your *Faith in Action* program and the congregation is another important aspect that needs to be evaluated. Have regular reports of the *Faith in Action* program's activities been made available to the congregation? Have they been informed as to what impact their actions have had in the community? Have they been sincerely thanked?

Your strategy for re-engaging the congregation will include developing a regular communications plan for each coalition member.

As a coalition member they should be getting more than just the general newsletter. Make sure the leadership receives separate progress reports on the program's goals and activities. Also consider providing financial statements that bolster credibility and emphasize needs.

Create ways to let them know what a positive impact their support of *Faith in Action* has had in the local community, perhaps by sharing stories or relating specific achievements to a volunteer activity or financial contribution.

Make sure they know they are truly appreciated and that their contributions are respectfully acknowledged. Consider a framed certificate or plaque acknowledging their support. Another approach might be some form of volunteer recognition in conjunction with their regular worship services. It is always wise, of course, to seek the opportunity to appear in person before the congregation just to say a heartfelt "thank you."

### **What information should you have in hand when meeting with a coalition member?**

A budget document should be available upon request.

Copies of an annual report that deals with service hours, both services rendered and needs that were left unmet (and why) is a useful item. Congregations, community groups businesses all want to be able to see what the organization offers. They also want to see if *Faith in Action* actually does what the brochure says. The unmet needs may be very useful information because these groups may have an interest in meeting that need.

### **OTHER CONSIDERATIONS FOR STRENGTHENING OR RE-ESTABLISHING A PARTNERSHIP**

Review the list of ideas for strengthening or re-establishing your relationships with coalition members.

Become better informed about the coalition member; research the organization's current needs and interests regarding *Faith in Action* services.

Check to see if one of your board members or a representative of one of your other coalition members already knows the contact person.

Make an appointment to meet personally with the contact person and have your "talking points" ready.

Send the contact person updated information about your program and its current activities.

Make a follow-up call to the key contact person to inquire about their level of interest in continuing a relationship with *Faith in Action* or in resuming it if the continuity has been broken.

Review the table of additional strategies for re-engaging members of your *Faith in Action* coalition. These strategies are laid out with the highest level of commitment at the top and the lowest at the bottom. You are encouraged to consider how you might move up the commitment level of your coalition members.

	<b>Strategies for Re-engaging Members of the Coalition</b>
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<p><b>High Commitment</b></p>	<p>Co-sponsors an annual event, provides funding, volunteers, and is a partner in planning, implementing and evaluating the event.          Identifies representative to serve on board or advisory committee.          Offers opportunities for information about <i>Faith in Action</i> to be shared.          Regularly features <i>Faith in Action</i> in the in-house newsletter and highlights opportunities to volunteers and make donations.          Appoints a liaison between organization and <i>Faith in Action</i>.          Makes an annual donation of at least \$500.          Participates in events whenever common goals are identified.</p>
<p><b>Moderate Commitment</b></p>	<p>Representatives attend <i>Faith in Action</i> board meeting and learn about the program.          Agrees to annual sponsorship of at least \$100.          Participates in at least one of the program’s caregiving and fund-raising events.          Makes appropriate referrals for services.          Encourages constituents to volunteer.          Disseminates <i>Faith in Action</i> materials outlining opportunities to volunteer and to make a charitable contribution.</p>
<p><b>Low Commitment</b></p>	<p>Makes a one-time donation of at least \$100.          Makes brochures and other publications available.          Identifies potential care receivers and provides them with information about <i>Faith in Action</i>.          Allows speaker from <i>Faith in Action</i> to make presentation.</p>

**What if you are an older, established *Faith in Action* program that does not currently have strong congregational support?**

Is it too late to develop it now? Alternately, what steps can you take to strengthen your partnership with the faith community after you’ve been in operation for a few years?

Engage the help of a board member, volunteer or friend who attends a congregation that is not currently supporting the *Faith in Action* program. Ask them to go with you to visit the pastor.

Share information about your *Faith in Action* program and request help in finding appropriate ways to begin building a relationship with that particular congregation.

Learn the unmet needs of the congregation and try to find a way to help them, for example by taking the time to arrange a special service project for their youth or through leading an adult forum, you will begin to build a mutually beneficial relationship.

Establish a permanent working committee devoted to congregational coalition building. Recruit board members, volunteers, care receivers, their families and others to serve on this committee. Expand the membership to include people identified by their congregations as those with needed skill sets. Establish concrete committee goals and firm timelines.

Hire a part-time staff person to fill the role of congregational liaison in your *Faith in Action* program; or hire a part-time assistant and delegate some of your administrative work to them, thus freeing up your time to build relationships with congregations. If done correctly, the financial support received from this deepened relationship will more than cover your personnel costs.

Develop a short, simple e-newsletter and send it monthly to all the congregations in your area. Include upcoming *Faith in Action* events and a brief success story about how a congregational group volunteered. For example, tell the story of the youth group that washed windows for some elderly care receivers; or, thank the third grade religion class that collected enough pennies to purchase a new paper-cutter for your office.

Host a yearly salad luncheon for the secretaries of the congregations in your community. Ask board members to donate the food and give away inexpensive door prizes. Your reward for this simple act of kindness will be the reliable publication of your announcements in their congregational bulletins and newsletters throughout the year.

### **What can be done once a coalition member has been re-engaged and how can the renewed energy be maintained?**

Acknowledge the renewed decision in writing.

Send a document suitable for framing that recognizes them as a member of the coalition.

Consider sending the document already framed and/or delivering it in person.

Be sure that they are on your newsletter mailing list.

Make sure that they can easily contact you with questions or needs.

Follow up again in six months or just after a joint project to see how things are going.

Make sure to get the name of the group into any news releases so that the recognition is made appropriately.

### **Tips for Success**

Do your homework and find out what their long-term goals and priorities are. If they have developed a Web site, see if their goals and mission have been posted. Note when the information was updated and if it matches what you have on file for this group.

Have a separate file for each group you have approached, so that you can refresh your memory before meeting with them. This file will also make the information available for whoever follows in your footsteps, so that a new program director may easily learn what you already know.

Be aware of the areas where your *Faith in Action* program and the coalition member share common goals and interests. Come prepared to share ideas or plans for how you can work together for mutual benefit. It is important to keep in mind how you might be able to move their commitment from a low to a medium or high level and not to focus simply on maintaining the current relationship. Think of it as an ongoing process and not just a single encounter.

When looking for common ground, it is essential that your *Faith in Action* program accurately evaluate the mission and goals of the coalition member. Core values of each group

must have a common denominator in order for the coalition to be successful. Have these remained the same over time or has there been a subtle shift since you last met with them?

When you speak with the group, be sure to discuss the need for positive public awareness if you plan to have media coverage of an event or public acknowledgment of the coalition member. Every group, whatever its mission, is concerned about its excellent public image.

## **CONCLUSION**

It is essential to consider whom to approach when seeking to strengthen or re-establish a partnership with a non-faith group. Determining the right contact person in an organization is extremely important. Sometimes this information can be obtained simply by calling and asking a receptionist, "With whom should I speak?" Sometimes failure to maintain a successful relationship may be remedied partially by changing who your contact person is. Your task is to find out who should be the new contact person to help maintain this vital link between the coalition member and your *Faith in Action* program. The right contact helps to "set the stage" and prepares you for implementing specific strategies for re-engaging members of your coalition. Review the agreements you have with your coalition members regularly and discuss mutual expectations to ensure everyone is happy with the partnership.

## **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

- Assessment Tool for Coalition Development
- Certificate of Appreciation
- Checklist of Potential Coalition Members
- Coalition Brochure
- Congregation Survey for Planning
- Creative Coalition Fund Raising
- How to Create Community Ownership: Expanding and Sustaining Your Faith in Action Coalition*, Power Point presentation
- Memorandum of Understanding
- Overview of Selected Faith Communities
- Preparing a One Pager
- Presentation to Civic Groups
- Quotes from Faith Traditions
- Survey of Congregation Members
- The Story of Faith in Action: The Inspiration and Vision of Interfaith Volunteer Caregiving – A Faith in Action Video*
- Volunteer Recruitment Presentation
- Ways Coalition Congregations Can Help

## **OTHER RESOURCES**

Austin, J. E. *The Collaboration Challenge: How Nonprofits and Businesses Succeed Through Strategic Alliances*. San Francisco: Jossey-Bass, 2000.

Magida, A. J. and Matlins, S. M. *How to Be a Perfect Stranger (Vols. I and II)*. Woodstock, UT: Skylight Paths Publishing, 1999.

*Tool Kit for Success: A Resource for Creating Effective Program Materials*, 2<sup>nd</sup> edition. Winston-Salem, NC: Wake Forest University Health Sciences, 2001.

# 5

## Deepening the Commitment of Coalition Members

Gary Stewart, Pam Determan & Michelle Hardy

### INTRODUCTION

Have you been searching for ways to get coalition members to deepen their commitment in order to ensure the sustainability of your program? This chapter considers how you can further the development of a successful coalition as described in chapter one of this guide. The three steps for success are: 1) finding interested congregations, social, civic and health organizations; 2) getting these groups involved; and 3) keeping them committed to your *Faith in Action* program.

This chapter focuses on the second and third steps. The first two sections of this chapter illustrate ways to deepen the relationships with faith congregations and non-faith partners. It is intended to build on the strategies for re-engagement discussed in the previous chapter. Because of the diversity of both faith and non-faith groups, the chapter is designed in a question and answer format so that you may quickly go to specific sections of interest. The final section includes relevant examples of how you might cultivate relationships with contact person(s) in faith groups and community organizations of all types and how these various approaches can lead to increased levels of commitment. In addition, successful strategies for educating coalition members about the benefits of a partnership with *Faith in Action* as well as responding to changes in the relationship are provided. It may be helpful to review “Steps for Mapping Your Coalition Member Profile” outlined in chapter one prior to reading this section.

### COMMON QUESTIONS ABOUT HOW TO ENGAGE CONGREGATIONS

#### What do you have to know to increase the commitment of congregations?

Before approaching a faith congregation, do your homework on the following:

Identify key contact persons and cultivate cordial relationships with them.

Learn the organizational structure to discover how, when and by whom decisions about allocating resources are made.

Be familiar with factors that affect the congregation’s ability to increase commitment, such as changes in staffing, committees, lay leadership and finances, as well as the mindset of the congregation in regard to these factors.

Determine the congregation’s current level of commitment and what your expectations are for increasing the level in the future.

Each occasion of requesting an increased level of involvement depends upon both the ongoing development of the relationship between the *Faith in Action* program and contact persons in the congregation as well as also being aware of the current situation of the congregation. It is vital

to know if the congregation is growing, declining or undergoing some specific change, such as in lay leadership, clergy or new programs. If you want to increase its level of commitment, it is going to be necessary to make your way through the various levels of organizational hierarchy and to identify the persons, committees and venues that can lead to favorable decisions for your program.

It is important to know the internal organizational structure as well as the “insider political climate” of the congregation. Most denominations have lay committees, such as outreach or missions, which decide how scarce resources will be allocated. You need to know exactly which committees and persons are involved in these decisions. Depending on the type of commitment requested (e.g., volunteer training, in-kind gifts, financial assistance) and whether their current level is low, moderate or high, you can expect the complexity of the process and time involved to vary accordingly.

Deepening relationships with congregations is extremely “intentional” work. If a *Faith in Action* program is to enjoy long-term support from a strong interfaith coalition, it is vital that the program director and board members become personally involved in relationship-building and maintenance. It might help to schedule time in your calendar each month to personally visit the key persons responsible for the congregation’s relationship with *Faith in Action*. Lacking that, a simple telephone call to “touch base” may suffice.

### **When do you approach a congregation about moving their level of commitment to a higher level?**

When you become aware of changes within the congregation, when there are missions fairs, special offerings and especially at times when the congregation decides on their annual budget—these are all opportunities for you. In addition, whenever there is an increase in the use of *Faith in Action* services in the congregation or an increase in volunteers who are members of the congregation, you can point out the increased value of *Faith in Action* to the congregation and feel free to ask them for more support, whether it would be volunteer recruitment or financial assistance. Most congregations plan next year’s budget and missions outreach in the fall, so this is usually a good time to approach them directly.

### **Whom do you approach?**

Contact the proper congregational leader, council, lay leader, interest group or committee chairperson to set up a time to meet and discuss the possibilities of increasing their commitment. You may also consider using the network of your board, advisory committee and any knowledgeable others associated with *Faith in Action* to identify key contact persons. Volunteers who are members of the congregation can be excellent resources to tap. Consider, for example, having a volunteer accompany you to the meeting to share how his/her volunteer experience is important to his/her faith journey. Provide them with specific information about a variety of ways they can increase their commitment.



### **What can you do if the congregation is at a level that it is comfortable with and/or is reluctant to make a deeper commitment?**

Affirm what the leaders of the congregation are doing and recognize them for the contributions they have already made to your program. Let them know that even setting up meetings with your *Faith in Action* program and informing more congregational members of your services, volunteer opportunities and need for financial assistance is extremely helpful. Let them know you genuinely appreciate the support they are giving to *Faith in Action* and suggest specific ways in which they might increase their support in the future. Even if they are not ready now to step up their commitment, you are “planting seeds” for the future. It is helpful to have a representative from both the *Faith in Action* program and the congregation make this presentation and/or participate in the “ask.”

### **If they do not fully understand what their current commitment is to *Faith in Action*, how should you proceed?**

Begin by following those suggestions of re-engagement discussed in chapter four, “Re-engaging Coalition Members with the Basics.” Inevitably, there will be changes in congregational leadership, and it is important to have regular communication between the *Faith in Action* program and the congregation. Check to see if the newly elected chairpersons and other key contact positions (church administrator, outreach committee, clergy) are receiving and reading your newsletter, e-mails and other communication outreach.

As discussed in chapter four, it is important to make sure that you and the congregation fully understand the initial commitment the congregation made to *Faith in Action* before asking them to increase their level of commitment. The following questions may be helpful:

What was the initial commitment to *Faith in Action*?

Has the commitment been met? Has it been exceeded?

Do the current contact persons know the history of the congregation’s involvement with *Faith in Action*?

Are they aware of persons in their congregation who have volunteered with or received services from *Faith in Action*?

It is important to have answers to these initial questions and to be sure that persons you may be contacting have an in-depth understanding of what the congregation has committed to do, who made the commitment, who was to follow through and what their plan entailed. Keeping written records of the history of relationships with coalition members can prove crucial. These might be in the form of a “relationship diary” so that future program directors and other program representatives, such as board members, will know the whole story.

### **What specific strategies can you use to increase commitment?**

**Schedule periodic meetings.** Periodic meetings, perhaps quarterly or bi-annually, could help to revive the original commitment. Evaluate how it is working out and review progressive developments of the involvement of the coalition member with *Faith in Action*. These might be

planned to coincide with the time of year that the faith congregation makes decisions about its yearly budget, collects special offerings or holds outreach fairs. The program director and/or selected board members would be the most likely persons to set up these meetings with key contact person(s) and/or committees. Having a clergy board member who knows the community well to accompany the program director is particularly helpful.

**Cultivate relationships with key contact persons.** It will help to cultivate close relationships with key decision-making individuals or committees. These key leaders' roles will vary among different faith groups; it is very important to learn who they are and to stay in regular communication with them beyond simply attending periodic meetings.

**Network through mutual connections whenever possible.** Members of the congregation who are involved with and knowledgeable about *Faith in Action*, and have credibility and goodwill with the congregational leadership are invaluable.

**Inform the congregation about the benefits of *Faith in Action*.** It helps to inform the congregation of the specific activities of the program within the congregation itself; for example, how many members have been served, volunteers trained, outreach goals met, and so forth. They will then see the tangible rewards of their involvement and come to a better understanding of the mutual benefits of deepening their level of commitment. Finding the right member of a congregation who is already involved in *Faith in Action* and having him/her on board for increasing the level of commitment is helpful, because it is more likely that the member of the congregation knows where available funds might be obtained, and also knows who, when and how to ask. This may be more effective in the long run than the "ask" by nonmembers.

**Inform interfaith organizations about *Faith in Action*.** Community interfaith organizations, such as ministerial associations, will consider social issues and welfare needs of the greater community when they meet. You will need to know the members of these organizations and to get on the agenda when important community issues are being considered, especially when they directly relate to the *Faith in Action* program services. Informing the members about the *Faith in Action* program will let them know the various ways their congregations may become involved in meeting the needs of the community.

**Become involved in the network of social outreach ministries in the community.** This is an excellent way in which the *Faith in Action* program director can stay aware of the evolving needs in the community and gaps in meeting these needs. With this broader perspective he/she can convey the larger picture to congregations and inform them of a variety of ways they can become involved and respond to their neighbors in need.

**Provide up-to-date statistics of how *Faith in Action* is benefiting the community.** As the *Faith in Action* program becomes more involved in responding to needs in the community, it acquires a significant database of individuals and families served and also has stories and statistics to

share with congregations to let them know how their resources have contributed to meeting needs in the community. This data can provide them with tangible evidence of their having met outreach missions goals while helping to relieve community organizations of burdens and concerns about the limits of their own finite resources.

**Learn the specific outreach mission goals of the faith groups in your community.** Staying involved requires knowing precisely which organizations and missions are already active, who is involved in them, when they meet, what they do and how to work together with them in mutually beneficial ways so that services are not duplicated nor are there “gaps.”

**Understand the congregational hierarchy.** Most of the time planning is a top down process in which a clergy member is the initial contact. Once the clergy becomes an advocate for developing a relationship with *Faith in Action*, he/she may assemble other persons and groups within the congregation to become involved in the decision about forming a partnership. With the endorsement from the top, securing a commitment will still take weeks and months, but tends to have the best outcome. The middle through approach means that a lay leader, who may be the head of an outreach or mission committee, is the initial contact. The lay person helps to navigate the process of developing a relationship with *Faith in Action* through all the channels and committees of the congregation. In this case the lay leader usually has “influential power” in the congregation and is able to bring the appropriate people to the table and help shepherd the planning process. The bottom up approach usually is initiated by a volunteer who has become involved in *Faith in Action* and wants more people in their congregation to become involved.

**Become a member of community service organizations.** Your becoming a member of community service organizations and/or personally attending their meetings is a helpful strategy for staying aware of the larger picture and also of continually and informally educating these groups of the many ways in which *Faith in Action* may become a partner.

**Get leaders from the interfaith community on your board.** Having key community leaders on your *Faith in Action* board is another way to both acquire the “big picture” and to communicate with others.

**Hold meetings for coalition members.** Having coalition members meet together regularly helps them know what part they have in the broader scope of a partnership with *Faith in Action* and further provides an opportunity to create ways of working together.

## **APPLICATION OF SELECTED STRATEGIES: CASE EXAMPLES OF SUCCESSFULLY DEEPENING COMMITMENT FROM CONGREGATIONS**

**Case Example 1—The value of cultivating relationships with key contact persons.** Initially, the associate pastor of a relatively large congregation was called upon to discuss partnering with *Faith in Action*. The pastor was interested but wanted appropriate committee members to

be in on further exploring the involvement of the congregation. He told the program director that he would talk to the committee chairs and have the topic put on the agenda of their next meeting. (This is a typical, guarded response from clergy of large congregations, regardless of denomination.) The congregation already had a program for outreach and one for ministry to homebound members; the pastor talked with each of them about *Faith in Action*. In the meantime, he appointed a member of the congregation to serve as a *Faith in Action* board member.

The appointed *Faith in Action* board member began to distribute information about program development and the potential benefit of a partnership with *Faith in Action* to key persons in the congregation. Several months passed, and then the program director of *Faith in Action* was invited both to speak with these committee members and to present at a luncheon. Again several months went by, until an invitation was issued for a display booth at the congregation's ministry fair, promptly followed by an agreement with the church to host a volunteer training session. Evidently pleased and impressed, the outreach committee (which met quarterly) decided to include *Faith in Action* among its regular mission programs, approximately six months after the initial contact with the associate pastor. The congregation was next asked to become a full-fledged coalition member and to financially support *Faith in Action* on a line-item budget basis, and they agreed to do so.

In this case, the progressively deeper level of involvement by the congregation was greatly facilitated by the board member who was also a member of the congregation and by regular follow-up contacts from the *Faith in Action* program director. Most mid- to large-size congregations will have internal committees that the clergy will want included in this process and may also have external governance bodies that need to be directly involved in congregational decisions, particularly financial commitments and in-kind donations. Building relationships takes time. It is not uncommon for this process to take six to twelve months. Be patient.

**Case Example 2 - The value of understanding the congregational hierarchy.** In this case example, a combination of a top down and middle through approach was used. A large, prominent congregation had supported the formation of the local *Faith in Action* program. The relationship with *Faith in Action* began to deepen due to the influence of a lay leader who was part of a "senior team" within the congregation responsible for planning and developing programs for older adults. After the initial contact the lay leader was sent information about *Faith in Action*, including resources from the Extranet on benefits of a partnership and information about the local program (e.g., its coalition, board members, program activities, services to individuals and groups in the community, Della Reese video, and video made of the local program).

Several weeks later a meeting with the senior pastor, *Faith in Action* board chair and executive director was arranged to learn more about the congregation's needs and the pastor's vision of

what he wanted to accomplish. The *Faith in Action* board chair and executive director answered his questions about the *Faith in Action* program and ways in which the partnership could evolve. It was helpful to have the board chair present because he and the senior pastor were significantly involved in interfaith activities, and the board chair, who is also a clergyman, was able to advocate for partnering with *Faith in Action* because his own congregation was deeply involved. As a senior pastor himself he was able to discuss the benefits of the program from an administrator's point of view.

At the end of the meeting the senior pastor said that he wanted the appropriate people and committees to become involved. Another information gathering and giving meeting was held with the senior team. The *Faith in Action* director learned about the senior team's role in the congregation and the previous year's extensive planning process of determining the needs of their older members. They had even begun to consider the resources needed to implement programs to meet the needs. At this point they wanted to know more about *Faith in Action*, seeing it as a potential resource for meeting the needs of older members and a resource for their ministries to older adults. The *Faith in Action* director explained the program's training of volunteers, matching them with care receivers, how it monitors the services and serves as a link to other community resources and described the benefits to congregations of a partnership with *Faith in Action*. Mutual expectations of *Faith in Action* and the congregation were also discussed.

It is perhaps obvious, but probably good to state, how important the activity of listening is in these initial meetings. It allows for shared learning and helps guide the approach to developing a relationship for achieving mutual goals.

Several weeks later, the associate pastor and a member of the senior team were invited to become involved in a *Faith in Action* volunteer training so they could learn more in-depth about the *Faith in Action* program. At the training the *Faith in Action* executive director and board chair, who co-led the training session, had an opportunity to answer more questions and give concrete examples of how the program works. They further discussed the ways in which a "decentralized model" or partnership with a congregation works and the roles and expectations of each. Upon completion of the training the associate pastor met with the *Faith in Action* executive director to discuss implementing a partnership. The governing body of the congregation approved a commitment to partner with *Faith in Action* and to financially support the program. Dates were set for a volunteer training of congregational members and plans for communicating to the congregation about the partnership were formed. These included the presence of *Faith in Action* at the mission fair of the church to precede the volunteer training and announcements in the church newsletter, in service bulletins and from the pulpit. The associate pastor and the lay leader expressed the desire for a long-term relationship.

## **BENEFITS OF THE PARTNERSHIP TO BOTH THE *FAITH IN ACTION* PROGRAM AND THE CONGREGATIONS IN THE COALITION**

In the previous chapter of this guide several questions were addressed, among them: Has the *Faith in Action* program been an asset to the congregations in helping meet the needs of their members and the community? Has the *Faith in Action* program been provided with what was promised? Was adequate volunteer training provided to the congregations? Were the congregations consulted on important decisions that affected them? It is always helpful to review the ongoing relationship between the program staff and the congregations with their leadership and members. Most relationships will eventually fail if expectations are not adequately met.

### **What are some potential payoffs to the congregations for participating with *Faith in Action*?**

There are numerous benefits to the faith congregations that are members of your coalition, among them:

- Opportunities to fulfill their call to service
- Occasions to have an impact on meeting the needs of their congregants and neighbors
- Connections to the community at large and to other faith groups through an interfaith commitment to caregiving
- Services and referrals for neighbors, congregants and constituents
- Opportunities to lead and serve as role models
- Visibility through special events and monthly newsletters
- Education on special populations, caregiving or community resources

### **What are some potential payoffs to the *Faith in Action* program for involving congregations?**

Some benefits to your *Faith in Action* program are:

Bringing more knowledge of *Faith in Action* to the congregation deepens involvement; members then become more committed to the program.

Involving all congregations means including people of all ages, which is a positive action, as some of the older shut-ins/homebound do not have families nearby who can come visit them. It may also bring a wider variety of volunteers to your program, as each person has a special gift, and some of those gifts may be offered in a younger or older and softer form.

Increasing awareness opens up many new doors, getting people involved in serving on the board, recruiting volunteers, helping with fundraisers, and advertising by word of mouth.

### **Warning Signs**

Some events, such as changes in key contact persons or clergy, the emergence of or decline in social services or macro level changes (e.g., economic downturns), might lead you to be concerned about the health of the relationship between your *Faith in Action* program and a congregation that is a coalition member. Among these warning signs are:

Changes in the leadership of the congregation. Will the new leader feel as deeply about the program as did the last?

The permanent closing of some of the smaller congregations in more rural areas. Will the congregation merge or move in with a larger one, and will you have the same support as you did from the one that closed?

Many smaller congregations encounter financial difficulties of their own and struggle to keep their own heads above water; they may not have the resources to contribute, at least financially.

Some congregations struggle internally with differing views as to who should be helped and who can make it on their own. These different factions are why it is so important to keep both viewpoints abreast of what your program does for that congregation and how important they both are to your program's success and sustainability.

## **DEEPENING THE COMMITMENT OF NONFAITH GROUPS**

**Low Commitment:** Non-faith members of your coalition with a low level of commitment may be characterized as follows:

Will be involved only once or occasionally in the functions and special events of your *Faith in Action* program.

Will want to help only when it will primarily benefit their own group, perhaps in a public relations way.

Will allow you to post information about the program in their break rooms and/or on bulletin boards, or they may allow you to advertise upcoming events in their circulars and newsletters.

**Moderate Commitment:** Non-faith groups in your coalition with a moderate level of commitment are those who:

Will allow you to come in and speak to the employees, committees or board of directors so that they may gain more knowledge about the program they are supporting.

Will allow you some space in their monthly/quarterly newsletter, which may reach out to more than just the local community, especially if involved with the business/corporation and/or the healthcare/social service sectors, as they may have both regional and national offices.

In the healthcare/social service areas, these groups may provide individuals who will help train your volunteers; but it is important to recognize them in some form of formal "thank you."

**High Commitment:** Non-faith groups in your coalition with a high level of commitment will include those who:

Will "claim ownership" of a particular, perhaps annual, event that they want to host or sponsor, thereby creating good public relations. Always include them in any decisions to alter significant aspects of the events they "own." They may well have the resources to help you with these events, whether it is providing materials, financial support or volunteers.

Will be involved in the creation of new materials for the advancement of your program, such as sponsoring a full-size newspaper ad with pictures of their employees volunteering with your care receivers or helping with a fundraising event. This is also good advertising for them.

Will consider your ideas on how to better involve their people and the surrounding community in “sharing the joy” that your program has to offer; willing to be your recruiters and your “ears” in the community; willing to do some referrals on whom and what the needs of the community are.

### **What are some potential payoffs for your non-faith coalition members?**

Some benefits for community service or civic groups are:

Many community organizations may gain by being recognized as a company/agency that is willing to “lend a helping hand” whenever the need arises, always a potential source of good advertising.

Organizations are often willing to become training sites; this may help their community profile, and there will always be mutually beneficial outcomes. For example, *Faith in Action* volunteers may help support the services of the community organization, which in turn can provide a wide range of in-kind donations.

Many organizations welcome your input because they recognize they need to be made more aware of the community and the unmet needs; they want to involve themselves in a variety of different activities.

Working together always makes it easier to achieve mutual goals, such as collaborating for funding, sharing expertise and gaining additional referrals/clients/customers.

Corporate groups may be able to write grants and secure resources for use by your program and themselves, whether monetary or in-kind donations.

Employee volunteers may see the added benefit of greater closeness within their own work group. Volunteering may boost the self-esteem of employees to know that they are helping others in a meaningful way.

Businesses or agencies may themselves have employees who might some day need your program’s services, such as transportation to work, whether as the result of an accident or a disability.

Many organizations have experts who are largely untapped. For example, a *Faith in Action* board member who is the director of the Aging Services for the local government is aware of all the resources for eldercare in the community, knows key contact persons, and has a lot of personal influence. There are many others in these groups with expertise in numerous areas related to the goals of *Faith in Action* programs.

### **Warning Signs**

Certain events, whether local or national, may lead you to be concerned about changes in the level of commitment to your *Faith in Action* program of the coalition’s non-faith members.

Among these warning signs are:



- A dramatic change in the economy that may cause a large layoff and the unexpected closing of that business or local corporate office.
- Community service or civic groups experiencing a sharp decline in their membership.
- The rising cost of insurance for healthcare facilities and the lack of insurance coverage for a significant segment of the community might cause that facility to close its doors.
- Whenever there is a massive layoff in a small community, local social services will be inundated with people needing assistance; eventually the funding for their programs begins to run out. These now unemployed people, in turn, will have exhausted all of their own personal resources and will be unable to offer help outside of their own circle of family and closest friends.

### **Selected Strategies Which Apply to Non-faith Groups**

What specific strategies can you use with non-faith groups?

Public relations and media events are excellent venues for helping non-faith coalition members appreciate the positive impact of their involvement with *Faith in Action*. Newspaper stories, television programs, or radio broadcasts with the theme of “neighbors helping neighbors in need” makes it real in a very tangible way.

Statistics about the numbers of persons served, volunteer hours, monetary value of the volunteer services and savings to the community and families can be another public way in which “the big picture” is shared with non-faith groups. (The *Faith in Action* fact sheet and/or your program fact sheet are a good tool for sharing this information.) This exposure for your program is likely to result in calls by interested people and offers to help. For example, one program received over 20 calls from persons wanting to volunteer after simply reading a news article.

The leadership of *Faith in Action* can often help mobilize significant volunteer resources to meet needs that government agencies and other non-faith organizations are unable to meet on their own.

### **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

Certificate of Appreciation  
 Collaboration Handouts—Working with Organizations  
 Congregation Appeal Letter  
 Congregation Survey for Planning  
 Creative Coalition Fund Raising  
 Faith Based Marketing Cycle  
 Faith-Based Outreach Tool Kit Guide  
 FIA Support for Coalition Member  
 Letter from Clergy  
 Memorandum of Understanding  
 Preparing a One Pager/Fact Sheet  
 Preparing for Your Meeting: Knowing What to Ask For  
 Presentation to Civic Groups

Program Benchmarks and Planning Tool  
Sample One Pager/Fact Sheet  
Ways Coalition Congregations Can Help

## **OTHER RESOURCES**

Clingan, D. *Aging Persons in the Community of Faith*, new revised edition. Indianapolis: Institute on Religion and Aging and the Indiana Commission on Aging and Aged, 1980.  
Genstzler, R. *Designing an Older Adult Ministry*. Nashville: Discipleship Resources, 2000.  
Genstzler, R. and Clingan, D. *God's Challenge to the Church and Synagogue*. Nashville: Discipleship Resources, 1996.

# 6

## Enlisting Coalition Support to Recruit Volunteers

Laura Gilliam & Gail Hurst

### INTRODUCTION

*Faith in Action* program directors are often asked, “What do you need most for your program to be successful?” The answer usually fluctuates between “more money” and “more volunteers.” In this section, we will look at strategies for addressing the ongoing need of “more volunteers.” And while it is important for program staff to be involved in actively recruiting volunteers, your coalition can, and should, play an important role in this process. The more involved the members of your coalition become in recruiting volunteers, the more they feel an ownership of the *Faith in Action* program, an identification which leads to a deepening of their commitment to your program services.

### STRATEGIES FOR ENLISTING THE SUPPORT OF FAITH CONGREGATIONS

This chapter includes numerous strategies for enlisting the help of coalition members in your volunteer recruitment efforts. The most effective way to recruit volunteers is to ask, and your coalition members provide more voices to help ask more people to get involved as volunteers. In the study conducted by Public/Private Ventures (P/PV), it was determined that approximately two-thirds of a program’s volunteers were recruited through congregations. Successful programs rely heavily on congregations for volunteers. A wise program director will cultivate relationships with all segments of the community and seek to enlist their help with volunteer recruitment.

Every volunteer recruited should be carefully screened and trained in accordance with your program policies and procedures. You will want to be sure that your coalition members understand and abide by the policies in place.

The chart below outlines the strategies for recruiting volunteers at the various levels of congregational commitment. Each one will be discussed in detail and will be addressed in reverse order, from the lowest to the highest. In the second part of this chapter, non-faith coalition members and their strategies will be examined. Refer to chapter one for tips on reading the grid for moving up the commitment level of your coalition members.

#### Volunteer Recruitment through Faith Congregations

Level of Commitment	Strategies for Enlisting Support
High	12. Commissioning and recognition services 11. Congregational coordinator 10. Working with congregation’s paid staff

<b>Moderate</b>	<ul style="list-style-type: none"> <li>9. Time and talent surveys</li> <li>8. Affirmation from the pulpit</li> <li>7. Continuing education training</li> <li>6. Board member representative</li> <li>5. Group projects</li> <li>4. Events/training</li> </ul>
<b>Low</b>	<ul style="list-style-type: none"> <li>3. Presentations</li> <li>2. Program announcements</li> <li>1. <i>Faith in Action</i> publications</li> </ul>

### **1. Faith in Action Publications**

Community awareness is a huge component of volunteer recruitment and providing the official *Faith in Action* publications can be an excellent first step. Your *Faith in Action* program should make available to as many congregations as possible, regardless of their commitment level or size, a variety of printed material for them to display and/or distribute. These materials should clearly identify volunteer opportunities and how potential new volunteers can get involved. This material may include brochures, newsletters, a list of care receiver needs, a flyer about your program, *Faith in Action* posters, and so forth. Brochures and flyers should be eye-catching: do not overwhelm the eye with too much “text-based” information. Check periodically to make sure that the congregation has not run out of this material, hand delivering it whenever possible. Refer to samples of a brochure, newsletter and flyer, as well as the *Faith in Action* poster, available on the Extranet.

### **2. Program Announcements**

Make sure all area congregations, not just those that are active in your coalition, are on your mailing list. Inform them of your volunteer training sessions in a timely fashion. A good way to communicate this information is to provide flyers and bulletin or newsletter inserts with information regarding the day, time and location of the training. Individuals seeking additional information about your volunteer opportunities may call and/or attend the training to learn more.

### **3. Presentations**

Presentations are important methods of volunteer recruitment. They offer heart-warming stories as well as facts and figures about your services. Presentations may be made either to the entire congregation during worship services or to smaller groups within the congregation. Find out who the appropriate individual is to approach about speaking, whether it be the congregational leader, another staff member, or the chair of the missions or outreach committee.

Remember that during your presentation you have the chance to “tell the story” of *Faith in Action*. Make sure you have presentations that vary in length. You or a board member may be given the opportunity to give the sermon, a “Minute for Mission,” or to speak to a committee

within the congregation. Share this important responsibility with members of your board and staff. Make sure they are prepared by providing them with “talking points” or a sample presentation.

Volunteers themselves can be some of your best recruiters of other volunteers. Identify one or two people from the congregation who are passionate about their work with *Faith in Action* and are willing to share their personal experiences. Provide talking points if the volunteer would like them. Perhaps you could attend the meeting or worship service when the volunteer is to speak and be available to answer questions afterwards.

#### **4. Events/Training**

Congregations of all sizes generally are very good about allowing groups to use their space. Consider rotating a regular *Faith in Action* event, such as the volunteer recognition dinner, from one congregation to another in your community. It is good public relations for the members to see your *Faith in Action* program using their facilities. It helps create a sense of ownership of the program by the congregation, which often leads to a deeper commitment.

If appropriate, also move training sites from one congregation to another. Members may more readily attend the training if it is held in their own building, as opposed to another in the community that may be less familiar to them.

There are several types of events that the congregation can initiate and/or host that focus on volunteer recruitment, for example, a mission fair, a volunteer fair or a recruitment drive/sign-up drive. One way that potential volunteers can learn more specifics of your services and “get their feet wet” is to have them “shadow” existing volunteers while providing service to their care receivers. This pairing can be an excellent recruitment and training technique, but remember to get permission from the care receiver first and to strictly observe your confidentiality policies. Encourage the congregation to use its imagination and be creative in determining the best way to promote *Faith in Action* among its members, while recruiting new volunteers for your program.

#### **5. Group Projects**

Some congregations will more readily become involved as volunteers if the request for assistance involves a group. Providing regular or one-time jobs that are suitable for groups to perform, such as yard work or minor home repairs, can be less intimidating to those people who might be uncomfortable working one-on-one with care receivers and provides a fun and productive social opportunity for group members. This offers potential recruits the chance to get a taste of what your program does. Groups that you should consider targeting are ladies’ circles, youth groups, religious schools, men’s groups and Sunday school classes. These groups may continue to volunteer over time, or it might lead to many new people willing to try one-on-

one volunteering. Once a group within a congregation is dedicated to your mission, it typically becomes easier to gain a stronger commitment from the congregation.

## **6. Board Member Representative**

A congregation may increase its involvement if the congregational leader or an active member is asked to serve on your board of directors or advisory committee. Sometimes members of a faith community are much more likely to become involved with the ministry if “one of their own” is involved in its leadership. Remember to follow the policies you have established for board selection, such as using a nominating committee. The individual selected should be someone who will be an active advocate of *Faith in Action* in his/her congregation and the community. If the person is not ready to become involved at the board level, ask him/her to consider serving on a working committee.

## **7. Continuing Education Training**

Find ways to continually educate volunteers. It is crucial that individuals receive adequate training before they volunteer. It is also important to find ways to constantly improve the skills and knowledge they need for their caregiving work. Having well prepared and trained volunteers increases your program’s credibility. Involve congregations by asking their members as well as staff from other local organizations, such as the Alzheimer’s Association or Hospice, to facilitate or lead the trainings or selected portions. Congregations will appreciate being recognized for contributions to this aspect of your program. Individuals who are considering becoming a volunteer will be reassured to know that sound additional training will be available. Existing volunteers will feel more comfortable in their work.

## **8. Affirmation from the Pulpit**

While it is not imperative that the congregational leader be actively involved in the program, it is important that he/she periodically affirms the *Faith in Action* program’s mission. The program director may give him/her a set of “talking points” or a *Faith in Action* fact sheet to encourage the leader(s) to speak to the benefits of volunteering and helping neighbors in need. There is always a certain positive amount of “validating” the worth of the ministry that occurs when the religious leader speaks warmly and knowingly about *Faith in Action*. This is an important strategy to employ with all sizes of congregations, but may be more difficult to implement with a larger congregation because of the logistics of contacting the leader.

## **9. Time and Talent Surveys**

A large congregation usually has a wealth of human resources within its membership. Consider opportunities to involve congregational members in unique ways. To get an accurate profile of the makeup of the members, the congregation may conduct a “time and talent” survey that covers skill sets appropriate for your *Faith in Action* program. The congregation can then tally the results and share that information with you. This survey will be helpful in working with

the congregation to identify potential volunteers and to further build your program. (Visit the Extranet for a sample survey.) Enlisting the help of a congregation in this manner helps to strengthen group and individual faith journeys.

### **10. Working with Congregational Paid Staff**

Larger congregations generally have paid staff with very specific duties, such as Youth Pastor, Older Adults Pastor, Visitation Pastor or Parish Nurse. Try to work closely with these individuals to find out how their duties could fit into your *Faith in Action* program. Try to determine how their service groups can provide volunteer or in-kind support to *Faith in Action* and its staff. Make sure to focus on ways that both *Faith in Action* and these congregational ministries can mutually benefit from such a partnership.

### **11. Congregational Coordinator**

A highly committed congregation is one in which one or more individuals are dedicated to serve as a liaison with your *Faith in Action* program. One of the most effective and efficient ways to recruit volunteers is to identify and train a coordinator from within the congregation. He/she knows the members of the congregation well and will have a good feel for likely persons to target as volunteers. This individual will make sure that training information is distributed and that good potential volunteers are asked to participate. Larger congregations probably will need co-coordinators. It is important at the outset to work closely with the congregational leader to identify the key person(s).

As the congregation's commitment grows, work closely with the membership to develop the program more fully. The congregational coordinator can recruit and train volunteers, identify the needs of members and match care receivers and volunteers. The program director is then free to act as back-up and support in the event of problems and to review the coordinator's reports.

### **12. Commissioning and Recognition Services**

Recognizing the important work of *Faith in Action* volunteers is a vital component of your plan for retaining existing volunteers, and it can also serve as a means of recruiting new ones. Encourage the congregations in your coalition to have a "commissioning" service, as selected individuals in the congregation formally become *Faith in Action* volunteers. A commissioning service is a wonderful way of affirming the dedication of the volunteers as well as your program's mission. A "caregivers' recognition" service is another meaningful way of celebrating the work of all caregivers, including volunteers. Provide congregational leaders with material that they may choose to use for these special services.

## Tips for Success in Working with Faith Congregations

- Remember to focus on how partnering with *Faith in Action* will benefit the congregation, its members and the community.
- Keep volunteer opportunities flexible to encourage a broad range of people to participate.
- Regularly acknowledge the contributions of the congregations. Send personal thank-you notes.
- Publicly acknowledge the work of the volunteers and provide materials to the leadership so they, too, may recognize the good work of their members.
- As you are able, become involved in the special events of the congregations in your coalition. Gladly support their services and activities as you expect support from them.
- As the program director, it is important that the community see you volunteering from time to time. It is evidence of the value you place on volunteering.

## STRATEGIES FOR ENLISTING THE SUPPORT OF NON-FAITH GROUPS

The chart below outlines the strategies that are evident at the various levels of commitment of non-faith coalition members. Many of the strategies are the same or similar as those used with faith congregations. As in the previous section on faith congregations, each one will be discussed in detail and will be addressed in reverse order, from the lowest to the highest.

### Volunteer Recruitment through Non-faith Groups

Level of Commitment	Strategies for Enlisting Support
<b>High</b>	9. Provide employees time to volunteer 8. Donate professional services to care receivers 7. Group projects 6. Professionals to help with training
<b>Moderate</b>	5. Representative to serve on board 4. Booth at health fairs 3. Help with fund-raising activity/event 2. Help with public awareness/public relations
<b>Low</b>	1. <i>Faith in Action</i> publications

### 1. *Faith in Action* Publications

An effective way for involving non-faith groups with the recruitment of volunteers is by simply making available to employees, and/or their constituents, printed materials about your *Faith in Action* program. This material can include brochures, flyers and newsletters. You can choose to use the same material that you provide to faith groups, or you may want to develop materials specific to non-faith groups. Specially tailored and targeted materials are more effective and reasonably easy to create. (See the *Faith in Action* Extranet for samples.) These groups can display the materials on racks or tables in break-rooms; distribute them in regular mailings to members or constituents; or make them available at meetings.



Health care and social service organizations may keep on hand copies of care receiver applications for referral purposes. Also encourage them to keep a supply of volunteer applications. Make sure that these non-faith groups are on your mailing list to receive new volunteer training announcements.

## **2. Help with Community Awareness**

Non-faith groups can assist you with volunteer recruitment by helping to build awareness. In addition to distributing your *Faith in Action* publications, they can include information about volunteer opportunities and training in their own newsletters, paychecks and bills and on bulletin boards. In addition, individuals can be encouraged to write letters to the editor focusing on the need to volunteer. The staff of health care and social service organizations can speak from the perspective of a referring agency that regularly witnesses the need for informal caregiving services for their clients. Businesses can write from the perspective of an employer seeking resources for employees who juggle being productive at work and home, while trying to raise a family and care for aging parents.

## **3. Help with Fund-Raising Event**

In addition to conducting fund-raising events for you, such as silent auctions and rummage sales, non-faith groups can provide the human resources you need to hold your own event. Consider enlisting their help with both small and large fund-raising events, giving them an opportunity to publicize their involvement in and support of your mission. Fund-raising activities require a tremendous number of volunteers for planning and assisting during the event. Working these events is a relatively easy, fun and short-term way for non-faith organizations to help by providing volunteers. In return, the organization benefits from the positive community attention.

## **4. Booth at Health Fairs**

A great way to get the word out about volunteer opportunities with your program is by setting up a table at area health fairs and expos; however, these can be time-consuming. For programs with limited staff, it can mean leaving the office unmanned for extended periods, which can hinder productivity. Non-faith groups can help by providing volunteers who take shifts to work at your *Faith in Action* booth. You can provide them with *Faith in Action* pins and/or *Faith in Action* t-shirts to wear while they work.

## **5. Serve on Board of Directors or Advisory Committee**

Your *Faith in Action* program needs to have a diverse board of directors or advisory committee. Representatives from these non-faith groups can be included as members. They will bring a perspective and resources that others on your board cannot and often bring professional talents to benefit your program. Many, if not most, will have a faith connection, as well. Because of

their involvement with your program at this higher level, these representatives are more likely to encourage their fellow congregational members and co-workers/staff to volunteer.

## **6. Professionals to Help with Training**

Health care and social service organizations and businesses always have individuals with a wealth of knowledge and skills in a variety of areas. Work with these groups to identify what type of training these persons could provide for volunteers and staff. In most cases, if you have worked to develop a close relationship with these groups, they are happy to provide professional workshops free of charge as a means of supporting your program (for example, nurses who can provide training on wheelchair transfers or CPR). Try to think of ways that your *Faith in Action* program can help them in return, to make this a mutually beneficial partnership. For instance, a representative of your *Faith in Action* program could provide a workshop on a caregiving issue or facilitate or assist with a caregiver's support group.

## **7. Group Projects**

While individuals associated with these non-faith groups may volunteer on their own, some may be more likely to become involved with your program if you provide them with short-term projects that require group work, because this is a less intimidating way of becoming involved. Additionally, it gives them the opportunity to build on teamwork concepts that many of these groups like to foster. Examples of group projects include building wheelchair ramps, painting, "spring cleaning," yard work or helping a care receiver to relocate. Helping you with your newsletter by collating, labeling and preparing it for bulk mailing is an example of a group project that is usually done on a monthly basis. Civic and community service groups and businesses may be more likely to participate in these sorts of projects; however, do not fail to approach the health care and social service agencies, as well.

## **8. Donate Professional Services to Care Receivers**

Committed, community-focused businesses often are willing to donate selected professional services to some of your care receivers. Many times, businesses are more than willing to lend a helping hand, but they need some reassurance that their help is getting to those who truly need it. Your *Faith in Action* program can "screen" appropriate care receivers to ensure that this is the case. For example, an attorney may donate his/her time to write a will for an elderly care receiver, one whose true needs have been identified by your program.

## **9. Provide Employees Time to Volunteer**

Businesses like to be seen as community-minded. Work with employers in your area to find a way for their employees to more easily volunteer. Businesses may designate a certain amount of company time that may be used by employees to volunteer; it may build in flex-time for volunteering; or, in the case of a business that does a large amount of work on the telephone, workers might be allowed to make reassurance calls during down times. This is an instance

where you and the employer need to work together creatively to address the possible “gaps” in your program’s ability to meet the requests of care receivers, while also providing an opportunity for employees to feel good about giving back to their community.

### **Tips for Success with Non-faith Groups**

- Constantly look for the way these partnerships are “win-win” for both you and the organization.
- Participate in meetings, gatherings and networking opportunities that put you into contact with non-faith groups on a regular basis.
- Be creative. It is not always immediately obvious how these groups can help your program.
- Remember that many of the individuals who become involved with your *Faith in Action* program through their civic organization or business belong to faith groups in the community. These individuals may bring in congregations that are not already members of your coalition.
- Remember to write thank-you notes, and to publicly recognize, either by way of a thank-you letter to the local newspaper or recognition in your newsletter, these groups that partner with you.
- Join one or more civic organizations and provide your own support to that group.

### **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

3 R's of Volunteer Management

ABC's of Volunteer Management

Advantages of Support Team Model

Certificate of Appreciation

Congregational Coordinator Position Description

Creative Ways to Recognize Volunteers

FAQ's for Support Teams

Newsletter Tips

Pitch Planning Worksheet

Preparing a One Pager

Presentation to Civic Groups

Template for Newsletter

*Trends, Tips and Tools for Volunteer Management: A Complete Guide to Building and Enhancing Your Faith in Action Program*

Volunteer Caregiver Position Description

Volunteer Recognition Ideas

Volunteer Recruitment Brochure

Volunteer Recruitment Flyer

Volunteer Recruitment Presentation

**OTHER RESOURCES**

Connors, T.D., ed. *The Non-profit Handbook: Management*, Third Edition. New York: John Wiley and Sons, 2001.

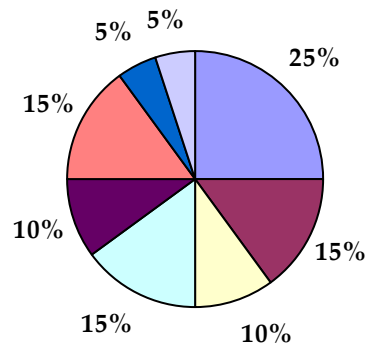
# 7

## Enlisting Coalition Support to Raise Funds

*Pam Determan, Julie Glawe & Michelle Hardy*

### INTRODUCTION

Many of us have heard the old saying, “To make a friend, you must first be a friend.” Friend raising and fund raising require very similar skills. Important to both tasks are extending honor, respect and gratitude and taking the time to learn about the unique challenges faced by the other. Good friendships and fund-raising relationships don’t just happen overnight. A mature, well managed *Faith in Action* program will receive funding from a variety of sources. Overdependence on any single source of income can mean disaster for a program should that stream dry up. The pie chart included here provides a visual example of the diversified funding necessary to support and sustain a strong and effective program.



Funding Sources

Private Donations - 25%	Faith Congregations - 15%
Special Events/Direct Mail - 10%	Government (City/County/State) - 15%
Foundations - 10%	Local Agencies - 15%
Corporations/Businesses - 5%	Memorials - 5%

Despite the visibility that your *Faith in Action* program may earn for its good work in the community, building a strong base of financial support from your coalition will still take a tremendous amount of time, effort and vigilance. May you therefore find great satisfaction in watching your efforts bear wonderful fruit in the lives of the care receivers counting on you for the precious gift of independence!

## STRATEGIES FOR ENLISTING THE SUPPORT OF FAITH CONGREGATIONS

The simple *Faith in Action* message of helping your neighbor in need encompasses every religious creed. Do all that you can to be on good terms with each congregation in your coalition. Watch for ways that you can help them to live out their call to be of service to others. Financial support from local faith communities is an essential component of a diversified *Faith in Action* fund-raising plan. To be successful, it is imperative to clearly understand and respect the values of each congregation in your coalition. Your *Faith in Action* program must be very careful, for example, about the choices made regarding serving alcohol at events or in decisions about what types of fund-raising activities to sponsor. Something seemingly as harmless as a quilt raffle can be offensive to a congregation with strong beliefs against gambling. Make every effort not to offend anyone in your fund-raising efforts. Since “not all money is good money,” your *Faith in Action* program should have sound policies in place regarding the funds you will accept. The decision to accept financial support from a certain business or individual could possibly do serious damage to your image in the eyes of certain congregations in your coalition.

This chapter contains numerous strategies, reflecting the types of financial support and in-kind support that can be expected from faith congregations and non-faith groups in your coalition at various levels of commitment. Each type of support will be discussed in detail and will be addressed in reverse order, from the lowest to the highest. Refer to chapter one, “Creating A *Faith in Action* Coalition for Long-Term Program Sustainability.”

### Financial Support through Faith Congregations

Level of Commitment	Strategies for Enlisting Support
High	7. Budget line item 6. Congregation encourages individual donations
Moderate	5. Denominational funding sources 4. Regular special event/offering 3. Congregation initiates fund-raising activity
Low	2. Donor appeal 1. Occasional donations

#### 1. Occasional Donations

An opening financial or in-kind gift, of any size, from a congregation is an unspoken invitation to deepen your relationship. This first-time financial gift may come to your *Faith in Action* program without any solicitation on your part. A personalized thank-you letter signed by the program director should be mailed promptly. The wise director will follow up the letter with a personal phone call to the congregation’s spiritual and/or administrative leader expressing thanks and requesting an opportunity to visit informally about an ongoing partnership.

A congregation may offer an occasional donation in a variety of ways. They may give a little every now and then, making a gift to the *Faith in Action* program in honor of their members

who volunteer or taking up an annual collection/donation, such as on your coalition's anniversary. Some congregations choose to help by designating an "every 5<sup>th</sup> Sunday offering" or by taking up a "noisy collection" (using a metal bucket to collect pocket change from worshippers). Regardless of how the donation comes, you need to ask congregations personally to make a financial contribution to your program. Consider the list of talking points (available on the *Faith in Action* Extranet) when approaching a congregation to make a financial contribution.

## **2. Donor Appeal**

Congregations can help their members contribute to your *Faith in Action* program by agreeing to periodically insert your program's donation envelope into a newsletter or bulletin. Envelopes and cards may also be left in a lobby or information area of the congregation. This "low-tech" approach will not yield overnight success, but often this ongoing "ask" for support yields results. *Faith in Action* board members can help the program director to make the right contacts in their respective congregations to request such support.

## **3. Congregation Initiates Fund-raising Activity**

Congregations of varying sizes and commitments will sometimes initiate a fund-raising activity entirely on their own. It is a pleasant surprise when a program director opens the mail and discovers a check from a congregation with a note explaining that these funds were raised for the *Faith in Action* program. It is important to make sure that congregations understand that this is a great way to support your program, and is particularly appreciated if the congregation's own financial resources are limited. Whatever the commitment level of the congregation, a designated fund raiser is a window of opportunity to deepen a relationship.

## **4. Regular Special Event/Offering**

Regular offerings of cash from congregations can benefit not only your budget but also help build congregational "ownership" for *Faith in Action*. Often these regularly designated gifts will begin after you have had the opportunity to meet in person with a small group from that congregation. A congregation will often respond favorably when approached for funding for a specific need, such as lumber for a ramp for a member who is homebound. Regular support can follow when a congregation sees firsthand the value of your service.

Enlisting the support of a specific congregational group that believes in your work can be invaluable; for example, a women's group that each year chooses to donate the proceeds of a bake sale or auction to your program. If at all possible, *Faith in Action* staff and board members should attend the event and offer their assistance (selling tickets, helping with clean-up, etc.) to assure its success. Make sure to bring along brochures and other promotional materials as appropriate.

## **5. Congregation and Denominational Funding Sources**

Congregations often have access to other funding sources from within their denomination and/or membership. A relatively easy way to multiply the amount of congregational gifts is to work together with members to secure matching dollars. Groups such as Thrivent for Lutherans can provide both financial and volunteer support to enhance the impact of *Faith in Action* fund-raising projects. To obtain these additional funds, congregational members who carry an insurance policy with this company need only to document their involvement with the project.

Congregations in your community may have established endowment funds that are designated for charitable purposes, for example, a congregation in Iowa established an endowment fund from a very large bequest. Each year, the endowment board selects a local organization to receive the interest from these funds. Take time to learn if similar untapped resources may exist in the congregations in your service area.

Some denominations also have grant programs available through their national, state or district offices. The social concern or health committee from a local congregation may be willing to write a letter of support to help you access these funds if your program's mission matches the requirements of the grant.

## **6. Congregation Encourages Individual Donations**

A highly committed congregation will encourage individual members to donate and support your program over and above the congregation's support, making sure that their members know enough about your work to make meaningful donations or bequests. It is helpful if you provide the congregation with materials that address the various types of donations individuals can make, from memorial gifts to methods of planned giving.

## **7. Budget Line Item**

Obtaining designation as an ongoing, line item in a congregation's budget is perhaps the best way to be assured of regular financial support. In order to more clearly understand the giving patterns of an individual congregation, it is helpful to obtain a copy of their Annual Report. These are often freely available in the lobby or from a volunteer or board member who is affiliated with the congregation. *Faith in Action* programs, after educating themselves about the financial status and priorities of a congregation, often write a letter to the religious leader and/or finance committee during budgeting time to request consideration in the coming year's budget. This type of a letter should always be followed up by a personal phone call and should only be sent if your *Faith in Action* program is already somewhat known to the congregation.



## In-Kind Support through Faith Congregations

Level of Commitment	Strategies for Enlisting Support
High	5. Provides office space 4. Provides office support/service or use of vehicle 3. Provides professional support
Moderate	2. Regular donation of supplies and equipment
Low	1. Occasional donation of supplies/space

### 1. Occasional Donation of Supplies/Space

By asking a congregation for use of their space for a meeting, training or volunteer appreciation luncheon, you will increase your program's visibility and open the door to the possibility of additional cash and in-kind gifts. If asked, congregations may also help with your newsletter copying, office supply donation and other valuable office supplies and support.

### 2. Regular Donation of Supplies/Equipment

As commitment deepens, a significant amount of in-kind congregational support may be provided to your *Faith in Action* program. Since most congregations own audio visual equipment, the donation of their facility for a benefit concert or event can be a valuable in-kind gift. Their kitchen and dining room can be a wonderful venue for a fund-raising dinner. Once a relationship is successfully cultivated, coalition member congregations may respond favorably to your request for regular donations of office supplies.

### 3. Provides Professional Support

Highly committed congregations intentionally educate their members on ways that they can offer both financial and human resources to support *Faith in Action* programs. Congregations frequently are comprised of members with an array of professional talents and skills that can be useful to you and your program. Often a simple inquiry can lead you to accountants, computer technicians, graphic artists, writers, carpenters and a host of other highly gifted people. If the spiritual leader is willing to contact a member with a needed skill on your behalf, your chances of engaging his/her services are often enhanced.

### 4. Provides Office Support/Service/Use of Vehicle

Committed congregations of any size may designate some of their own staff resources to assist your program with secretarial support, bookkeeping or parish nurse assessments. You might be able to receive help with your newsletters and mailing list management from talented support staff working in congregations.

The use of a congregation's van and driver may be a great resource for your program and your care receivers. Before using the transportation resources of a congregation, be proactive in researching insurance liability issues to assure the protection of everyone. It is very important

that your program determine what other transportation resources are already available in your community. *Faith in Action* services are often at their best when delivered as part of a one-to-one relationship with a care receiver.

### **5. Provides Office Space**

Committed, community-focused congregations also may provide the donation of office space, telephone, copying, use of supplies, and so forth. This type of arrangement can provide significant cost savings to a *Faith in Action* program. To minimize the possibility of being viewed merely as an extension of that congregation, it is imperative for the *Faith in Action* program to become regularly and highly visible to other congregations in the coalition. Conducting trainings and recognition events in other locations will minimize the perception of being aligned too closely with any one faith tradition. When considering free office space, the availability of designated outside signage and a private access door to the street should be seriously considered.

### **Tips for Success with Faith Congregations**

- Familiarize yourself with the beliefs, terminology and values of each faith group in your community. If you are not acquainted with them, call the pastor or other religious leader and schedule a time to visit and ask questions. They will respect you for this effort.
- Learn about the unique challenges that the congregation faces and determine ways that you can assist them. The time you invest in teaching an adult forum, organizing a youth service project or caring for a member in especially difficult circumstances will generally reap a benefit for your *Faith in Action* program.
- Make yourself available on evenings and weekends when requested. Enlist the help of board members, other staff or trusted volunteers when you can not personally represent your *Faith in Action* program at congregational speaking engagements or events.
- Extend gratitude immediately and often for whatever that congregation does for you, both verbally and in writing.

### **STRATEGIES FOR ENLISTING THE SUPPORT OF NON-FAITH GROUPS**

Secular and workplace organizations comprise a broad range of people, some who worship regularly in faith congregations and others with no formal religious affiliation. A wise *Faith in Action* director is keenly aware that, whatever their makeup, civic groups, health and social service organizations and businesses can provide ongoing financial and in-kind support. By taking the simple first step of asking permission to place program information in a company newsletter and/or magazine rack and a donation jar in a break room, you can often develop a strong relationship that will help promote the mission of helping neighbors in need. Creating and sending a monthly *Faith in Action* e-newsletter to businesses and community groups can also be very helpful. A simple one pager that will keep your organization visible in the workplace and the community also will serve as a reminder both to donate and to help recruit participation in your service and fund-raising events. Make sure that businesses, civic groups

and organizations in your community receive your *Faith in Action* program’s newsletter, annual appeal letter and annual report. As often as your time allows, become involved in a service club or your local Chamber of Commerce.

**Financial Support through Non-faith Groups**

Level of Commitment	Strategies for Enlisting Support
<b>High</b>	9. Budget line item 8. Contracts 7. Funding from corporate foundations 6. Make regular donations and sponsor a fund-raising events
<b>Moderate</b>	5. Employee donations 4. Purchase equipment or materials. 3. Assist with fund-raising event
<b>Low</b>	2. Occasional donation 1. One-time donation

**1. One-Time Donation**

Community and civic groups often are in need of speakers for their regular meetings. Besides providing a great opening for you to explain your work, a small honorarium is usually given to your program. When presenting to this captive audience, use the opportunity to request their help at a fund-raising event that your program is sponsoring.

**2. Occasional Donation**

Once the needs of your *Faith in Action* program are made known to a community or civic group, you may be selected to be the recipient of occasional financial support. Take the time to learn more about the occasional donor. Their gifts, when received gratefully, can grow into much more regular and significant support.

**3. Assist with Fund-Raising Events**

Engage the assistance of a board member, family member or volunteer to organize a team from their workplace to help at your fund-raising event. Besides providing short-term volunteers, an employee group may approach their employer for prizes, donations and even matching funds to support the event. Full-time employees often appreciate the opportunity to fit a bit of meaningful, short-term volunteerism into their busy schedules.

**4. Purchase Equipment/Materials**

Often civic and community groups like to see their funds assisting a special project or needed item. Perhaps your program is in need of a trailer for hauling tools for home repairs or an

overhead projector for volunteer training sessions. A community group may be the perfect place to request help in purchasing these non-budgeted, but necessary items. Make sure that you agree to place a photo of the donors, along with the equipment, in your newsletter and possibly in the local newspaper. More gifts may soon follow from other groups who read about these special donations.

## **5. Employee Donations**

As relationships are developed between *Faith in Action* and local businesses, health care and social service organizations, new giving possibilities arise. A committed CEO can arrange for your materials to be included with payroll checks and in employee break rooms. Once staff members learn about the impact of *Faith in Action*, other donation streams can emerge from the work place. For example, the library staff at a large state university contacted the local *Faith in Action* program about conducting a designated fund-raiser. This link was forged after the library director chose to donate memorials from his father's funeral in gratitude for the services his family had received.

## **6. Regular Donations and Designated Fund-raisers**

Regular donations and coalition member-sponsored fund-raising events can further evolve over time as a result of intentional relationship building on your part. Committed health and social service organizations can host fund-raising events for your program. Businesses and corporations can become valuable, long-term *Faith in Action* funding partners. They often have the capacity to be a high profile sponsor for your event, donating not only cash but food, t-shirts, publicity and other promotional materials. Consider publicly acknowledging their ongoing commitment by awarding them a plaque or attractive signage which designates them as a "Proud Sponsor of *Faith in Action*." This designation, hung in their lobby or window, will bring additional positive publicity to your organization.

## **7. Funding From Foundations Associated with Corporations in Your Community**

A strong community impact must be demonstrated by your *Faith in Action* program in order to access corporate foundation funds. Generally, a foundation board established by the corporation reviews and then endorses the funding of your proposal. By visiting the Web site of a corporation in your community, you can learn about their funding priorities, guidelines and deadlines. An endorsement by an employee is often required.

## **8. Contracts**

As *Faith in Action* programs grow, they may benefit from contractual relationships with health care or social service organizations. For example, a program may receive funding for a staff position and mileage reimbursement for volunteer drivers in exchange for agreeing to transport selected clients to their medical appointments.

A *Faith in Action* program with a strong relationship between state and county human service departments may broker contracts to provide assistance to income-eligible people who qualify for public programs. Through these contracts, programs can receive compensation for providing transportation, chore assistance and respite care. It is essential that *Faith in Action* programs maintain the core value of “no fee for service.”

**9. Budget Line Item**

Being designated as a line item in the budget of a business or community organization is generally considered the grand prize by a *Faith in Action* program! This designation may be granted to your program when an individual member of a civic organization benefits from your work and/or is a volunteer and champions your cause. The program director can encourage this process by learning where the adult children of your care receivers work and then enlisting their help to secure ongoing funding. Before approaching a family member, however, make sure that you understand and respect the confidentiality wishes of their loved ones. Take the time to learn about the interests and other affiliations of your volunteers and care receivers’ families. This knowledge can pay off well for your program’s budget.

**In-Kind Support through Non-faith Groups**

Level of Commitment	Strategies for Enlisting Support
<b>High</b>	8. Provides office space 7. Provides operational support or staff benefits 6. Provides professional support 5. Helps obtain valuable equipment/services
<b>Moderate</b>	4. Donates supplies/services
<b>Low</b>	3. Disseminates information and promotes events 2. Occasional donation of space 1. Provides letter of support

**1. Provides Letter of Support**

Health and social service organizations can help by writing letters of support, or even partner with your *Faith in Action* program, to obtain grants from funding sources you might be too small to access on your own. Funders look positively on interagency collaboration.

**2. Occasional Donation of Space**

The free use of a conference room or even an auditorium for a *Faith in Action* event can be very helpful. Don’t forget to inquire about donated space from local government agencies or the school district. Remind them that *Faith in Action* services are an important asset to the entire community.

### **3. Disseminates Information and Promotes Events**

Businesses have many promotional resources readily available. Request that they promote your events on their outdoor marquees and in-house newsletters. They may gladly provide health promotion brochures, imprinted pens and small office supplies for *Faith in Action* volunteer events. These inexpensive and easily provided gifts will often lead to much greater support as an organization sees the value of having their name associated with yours.

### **4. Donates Supplies/Services**

Your lively imagination and creative marketing skills can lead to donations of almost anything. When you find yourself in need of a piece of equipment, a service or a supply, think about how you can get it for free. Go to the yellow pages and see who is selling what you need and then consider the best way to ask them to donate it. A program director who is successful at procuring donated items also knows that you increase your chances of getting free items if your program purchases from that company now and then. A business that you frequent personally, such as a beauty salon or car service center, because of their business relationship with you, may be more willing to donate gift certificates or needed products for *Faith in Action*. The local cab company or mobility van may agree to provide one free ride a day to a care receiver in exchange for favorable mention in your newsletter.

When made aware of your need, a local service club might raise funds to help you purchase a portable microphone to enable care receivers with hearing impairments to more fully engage in a support group your program sponsors. Although health and social service organizations may not have the same ability as businesses do to donate specific items, they can provide other valuable help to your *Faith in Action* program. Often with their in-house printing capabilities, they can print training manuals, brochures or other program materials. Make sure you enlist the help of well-connected board members when making requests for donations and in-kind services.

### **5. Help Obtain Equipment/Service**

*Faith in Action*-friendly businesses, organizations or civic groups can sponsor your newsletter, donate the hosting of your Web site or provide cell phones for your program, along with many other types of services and materials. Strong partnerships can even result in the use of vehicles and the underwriting of the cost of a needed product, such as a video production for your *Faith in Action* program. The value of these in-kind gifts needs to be acknowledged in appropriate ways; for example, you might include the donor's logo on your Web site and in your regular publications. The business donor of a vehicle would benefit from attached signage recognizing the gift. Remember that gifts of this type are often provided to you from a business as a marketing tool. They should be acknowledged with the appropriate level of grateful recognition.

## **6. Provides Professional Support**

*Faith in Action* boards benefit from the perspective of professionals trained to watch over areas crucial to the successful management of your program. A CPA firm may provide your audit at little or no cost. An attorney might agree to review your by-laws and other legally binding forms and contracts, while he/she, in turn, benefits from having their name publicized as a staunch supporter of *Faith in Action*.

## **7. Provides Operational Support or Staff Benefits**

Health care organizations may often designate a high level staff member to serve on your board of directors or advisory committee. They may provide further help with volunteer training, grant writing and other technical support. These organizations may have the capacity to provide health-related benefits to *Faith in Action* staff members.

## **8. Provides Office Space**

Coalition members may provide office space and the use of their equipment for a *Faith in Action* program. The great value of this gift, however, must always be weighed against public perception. Before accepting free office space, the *Faith in Action* board or advisory committee must discern if locating within one certain organization or provider would hinder your acceptance by the community as a whole. Often times, office space, especially if provided by a valued civic group, can be a wonderful donation to your program.

## **Tips for Success with Non-faith Groups**

- As often as possible, try to find ways that you can share your resources (limited as they may seem at times) with coalition groups. Taking the time to teach a class on family caregiver resources, perhaps, during a lunch-time seminar at a local business may actually increase employee productivity.
- Try to arrange volunteer opportunities to accommodate the busy schedules of full-time employees. A successful firsthand experience as a volunteer could reap long-term funding benefits for your program.
- Receiving public recognition for their generous contributions is an important motivating factor for most civic groups, businesses and corporations. Find as many ways as possible to make the community aware of the help that they have provided to you.
- Hold businesses, community and civic organizations in equal esteem with the faith congregations in your coalition. Each one has an important role to play in the establishment of a strong, ongoing base of support for your *Faith in Action* program.

## **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

- Alternative Gift Catalog
- Bulletin Insert from VINE
- Creative Fund-Raising Strategies
- Donations Envelope

- Donor Letter
- Donor/Prospect Profile and Contact Sheet
- Financial Support Ideas for Faith Communities
- Fund-Raising Resources
- Gift of Independence Appeal Letter
- Joan Flanagan's Best Bets
- Letter from Clergy
- Memorandum of Understanding
- Monthly Pledge
- Planned Giving
- Planned Giving with Bequests
- Solicitation letter from board member
- *Special Event Fund-Raising Cookbook for Faith in Action Programs: Neighbors Swapping Recipes for Success*
- Talking Points for Coalition Building
- Ways Coalition Congregations Can Help

#### **OTHER RESOURCES**

- Brinckerhoff, P. C. *Nonprofit Stewardship: A Better Way to Lead Your Mission Based Organization*. Saint Paul, MN: Amherst H. Wilder Foundation, 2004.
- Connors, T. D., ed. *The Non-profit Handbook: Management*, Third Edition. New York: John Wiley and Sons, 2001.



# 8

## Enlisting Coalition Support to Increase Community Awareness

Laura Gilliam & Julie Glawe

### INTRODUCTION

It is essential that you continuously inform the community about your *Faith in Action* program and services. A successful campaign for building and strengthening community awareness can help establish your *Faith in Action* program as a credible volunteer agency and service provider. This section offers an overview for enlisting your coalition members in your community awareness efforts. The strategies discussed will help you attract two key resources—volunteers and funds. The more involved your coalition is with increasing your community awareness, the more people will know and understand your mission, thus creating greater opportunities for your program. Implementing the strategies discussed below improves communication with congregations and will deepen the coalition membership. Businesses, health care and social service organizations, and community service and civic groups can be valuable partners as well. In dealing with this aspect of your program, the goal should be to create a heightened awareness of *Faith in Action* among both employees and voluntary members of these groups, which hopefully will translate into support through financial, in-kind and volunteer resources. It is important to keep in mind as you communicate with the public and your coalition that you present clear, consistent messages about who you are, what you do and how you do it. (An excellent reference tool is the Style Guide that was produced by the *Faith in Action* National Office and is available on the *Faith in Action* Extranet.)

### STRATEGIES FOR ENLISTING THE SUPPORT OF FAITH CONGREGATIONS

Numerous strategies for strengthening your community awareness activities with the help of coalition members are described below. When coalition members invest their time and resources in your publicity efforts, they take greater ownership of your success. Including various perspectives also helps to ensure your materials and messages are appealing to your targeted audiences. A short monthly e-newsletter designed specifically for congregations can be an effective means of educating, promoting events and enlisting the support of the faith groups with which you work. Always make sure to include an anecdote about how a congregation has provided support to your *Faith in Action* program and your care receivers.

This chapter contains two charts, reflecting the types of community awareness strategies that are evident in faith congregations and non-faith groups in your coalition at various levels of commitment. As in previous chapters, each strategy will be discussed in detail and will be addressed in reverse order, from the lowest to the highest. Refer to chapter one, “Creating A *Faith in Action* Coalition for Long-Term Program Sustainability.”

## Community Awareness through Faith Congregations

Level of Commitment	Strategies for Enlisting Support
High	7. Web site
Moderate	6. Donation of space 5. Endorsements 4. Presentations
Low	3. Bulletin or newsletter inserts 2. Congregational leaders attend <i>Faith in Action</i> meetings 1. <i>Faith in Action</i> publications

### 1. *Faith in Action* Publications

Congregations of all sizes and commitment levels will benefit from receiving a range of *Faith in Action* publications. Make sure that you have as complete a listing as possible of local congregations on your mailing list. You may, of course, mail your publications, but it is important to hand deliver them periodically. These publications, which may include brochures, newsletters, flyers and your annual report, help to "put a face" on your program. Your relationship with the clergy and staff will deepen as the director or someone from the *Faith in Action* public relations committee personally delivers these materials. Use an index card to maintain accurate information on each congregation. Remember it is always better to make personal visits than contact via phone or mail. Directors should plan on follow-up visits, whenever possible, to replenish supplies of *Faith in Action* publications, though this is also a great task for the public relations committee to include in its list of committee responsibilities.

You may consider hosting an event, such as a pastor's breakfast/luncheon, or prayer breakfast, for distribution of your annual report, a vital document that should capture fully the pertinent information about your program. Large donors are often very interested in this report; it is an excellent tool for keeping track of your history and growth as well. The annual report does not need to be professionally printed if you have access to high quality copy equipment. In addition to presenting good information in an attractive format, it is important to be a good steward of your resources. Elements of an annual report should minimally include:

- **Cover Sheet:** List the program's name, address, telephone and fax numbers, fiscal year and the name of the preparer and/or contact person on the cover sheet.
- **History:** Relate the history of *Faith in Action* nationally, the year your particular program began, as well as some brief information as to your program's structure (agency-sponsored or independent).
- **Mission Statement:** Include a complete description of your mission statement. Be sure to present a clear vision of what is in store for your program as well. People want to be a part of an organization that is creatively addressing community needs versus those remaining at status quo.

- **Board of Directors or Advisory Committee:** Identify by full name the members of your board of directors or advisory committee. Explain the terms of office and job responsibilities for those members.
- **Subcommittees** - If you have subcommittees, describe the responsibilities of each and the chairpersons:
  - **Finance** - Provide a report on the breakdown of donations by congregation, care receivers, memorials, community, grants and fund-raising events.
  - **Special Events** - Review in depth the fund-raising events that took place last year.
  - **Public Relations** - Include the number of presentations made to congregations and civic organizations. Provide information about your newsletter distribution. Include here the number of events at which you set up displays.
- **Accomplishments of the Faith in Action Volunteers:** Share the number of requests for each type of service. If your volunteers have done something extraordinary, be sure to include it in detail (for example, “volunteers have built fourteen ramps in six months” or “fourteen volunteers painted a home in three hours”). Include the total number of volunteer hours and convert that into a dollar amount of free service. (The “going rate” can be found on the Independent Sector’s Web site, [www.independentsector.org](http://www.independentsector.org).) You may also include the total miles driven, converting how much fuel has been donated as well. Acknowledge any awards that the volunteers received the previous year, such as Daily Points of Light, Governor's Award or AARP award.
- **Care Receivers:** Share the number of care receivers you have helped and the geographic areas represented.
- **Volunteer Caregivers:** Include the number of volunteer caregivers that participated in your program. It is further helpful to provide such demographics as age range, marital status and congregations represented.
- **Education:** Identify who conducts training. If this individual is the program director, you may identify those professionals in the community who assisted with training. Report on the number of orientations held that year and who hosted them. In-services or special programs sponsored by *Faith in Action* for the community should also be included.

## 2. Leaders Attend *Faith in Action* Meetings

The ability of clergy leaders to commit their time to *Faith in Action* will vary greatly, particularly with congregational size. Invite leaders to sit in on a board meeting to learn more about your *Faith in Action* program. Sometimes voluntary leaders in small congregations work other jobs and are unable to commit to outside activities. Offer them the opportunity to freely attend meetings without expecting any additional commitment. This affords them an enhanced understanding of *Faith in Action* and will help them to more accurately communicate with others. The more they know, the greater the likelihood they will remain dedicated to your mission.

## 3. Bulletin/Newsletter Inserts

Generously supply bulletin or newsletter inserts to area congregations. They should be tailored to the congregation that is distributing the material, eye appealing and simple to read. Offer inserts bi-annually, or more frequently, if possible. Inserts can provide either general information (as well as specifics related to the congregation) about the *Faith in Action* ministry or specific program information regarding training, volunteer recruitment and so forth.

#### **4. Presentations**

Lively presentations of varied lengths are usually welcomed by congregations of all sizes. Regularly send a prepared “mission moment” to be shared by the congregational coordinator or by the congregational leader. Prepare a more detailed statement for the volunteer coordinator to share with his/her congregation on a monthly basis.

Offer to give a presentation personally about *Faith in Action* to the congregation or a smaller group within it. The presentation should include statistical information, a brief history, the number of care receivers, the number of volunteer caregivers, the number of volunteer hours and an overview of services offered by your program. End with a heartwarming story and an “ask” (volunteers, financial, or some other need). You will want to share stories involving members from that congregation (providing names only with permission) as well as the number of volunteers and the total number of service hours, and the number of people helped from the congregation. This information helps the congregation feel ownership of your success.

Develop an “in-house” speaker's bureau. This bureau may include volunteers, care receivers and/or board members who are passionate about *Faith in Action*. Provide them with talking points and/or consider training the members of the speaker's bureau to ensure that consistent information is being disseminated. They must be able to articulate clearly and present the program well. Utilizing speakers from the congregation is a preferred approach.

#### **5. Endorsements**

Endorsements are an important part of affirming the value of *Faith in Action* in the life of the community. They are valued by the community when coming from clergy and/or others in the congregation. Congregational leaders can provide formal endorsements in a variety of ways, such as writing a letter of support to other congregations in the community, or by making a public announcement about *Faith in Action*. The director can develop a one-page report for clergy to share *Faith in Action* information at other meetings or organizations. This report should be concise and to the point.

Others in the congregation can be important links to providing an endorsement and publicizing the ministry, as can care receivers and family members. Ask a qualified care receiver or family member to write a letter to the editor or to provide some other type of informal endorsement with which they are comfortable.

Work with the congregational leaders to coordinate services for *Faith in Action* Sabbath/Sunday. Send a letter to religious leaders, along with written materials they can reference in preparing this type of service.

Other methods of endorsement might include putting the congregation's name (with permission) on printed *Faith in Action* material, encouraging leaders or staff to use reprints from the *Faith in Action* newsletter in their own publications, encouraging the congregational leader to decorate a bulletin board exclusively for *Faith in Action*; you can supply pictures, applications and examples for this bulletin board.

## **6. Donation of Space**

Congregational leaders enjoy showing off their facilities. Arrange to use their buildings for training, in-services, fund-raising events or celebration luncheons/dinners. In general, congregational leaders are very open to hosting a *Faith in Action* board meeting or orientation, as it helps to put their names in front of the community.

## **7. Web Site Linkage**

A moderate to large-size congregation may have its own Web site. Ask the pastor if *Faith in Action* could be listed as a program or ministry that the congregation supports. Consider asking local congregations to include your Web site as a link on theirs. If you do not have a Web site, you are encouraged to develop one. Remember to take into account that it will have to be continuously maintained and updated. Will this be the responsibility of existing staff, or is there someone in the coalition who can assist in this area?

## **Tips for Success with Faith Congregations**

- Become familiar with the congregations with which you communicate. Learn how their denomination or religion is structured and the role of the congregation in the larger structure. How does the congregation see itself ministering to the community?
- Make sure that material you send to congregations is interfaith in nature with respect to terminology, symbols, and pictures/clip art.
- Maintain regular contact with congregations, providing them with information about training, events and other activities. Make it easy for them to duplicate material by providing a camera-ready master copy. If you have the resources, you can give them material that you have duplicated and folded (i.e., brochures or newsletters).
- Be flexible with your schedule. There will be times you need to make presentations in the evenings, on weekends or during what might be your own regular worship time.
- After a presentation or meeting, promptly send a thank-you note.
- Provide each of your volunteers with a *Faith in Action* lapel pin and encourage them to wear the pins. This can be a visible way for congregations to easily identify supporters of your program.

- Consider involving congregational leaders, congregational coordinators and volunteers in writing their own bulletin announcements. Gently coach them into telling their success stories in their own words, featuring their own members.

**STRATEGIES FOR ENLISTING THE SUPPORT OF NON-FAITH GROUPS**

A successful *Faith in Action* program will involve both faith and non-faith groups in their community awareness activities. Enlisting the help of secular groups, such as civic, health and social service agencies and businesses and corporations, ensures that a broad range of people learn about your services as well as opportunities for volunteering and financially supporting your *Faith in Action* program. A wise program director will reciprocate and learn as much as possible about area non-faith groups and look for ways to promote their services as well.

**Community Awareness through Non-faith Groups**

Level of Commitment	Strategies for Enlisting Support
<b>High</b>	6. Participation 5. Endorsements
<b>Moderate</b>	4. Web site linkage 3. Presentations
<b>Low</b>	2. <i>Faith in Action</i> publications 1. Meetings

**1. Meetings**

One-on-one meetings with leaders of non-faith groups are as essential as they are with clergy leadership. It is vital that you communicate that *Faith in Action* is an enhancement of the work that these secular groups do and in no way an infringement of the services they provide, as is sometimes the interpretation of social service or health care organizations. Community agencies are usually eager to learn about available services such as those provided by your *Faith in Action* program.

**2. Faith in Action Publications**

After your initial meeting, be prepared to supply each group with your brochures to be shared with agency staff and visitors/clients from the community. Ask permission to include them on your mailing list. Check back in with the organization periodically to restock brochures or other printed material such as newsletters, as needed.

**3. Presentations**

It is helpful to have in mind exactly what you want to achieve with your presentation to non-faith groups and to tailor your speech to each group’s needs and resources. Consider these opportunities:

Collaborate with a **business or corporation** and offer a free seminar, such as family care giving, for their employees. You may want to consider expanding your presentation's reach by having the host sponsor the seminar for the greater community as well, with both parties gaining positive recognition within the community. Collaborating with a business and providing a service for their employees usually results in a greater commitment to your program and possibly a financial contribution.

Offer to give a presentation to **healthcare or social service agencies**. Agencies are always eager to learn about and network with other programs in the community. In turn, extend the invitation for the healthcare or social service agency to give a presentation at a *Faith in Action* volunteer in-service. In many communities, there are monthly interagency meetings. In these instances, it is important that someone very capable be selected to represent your program. By partnering with healthcare or social service agencies, both *Faith in Action* and the healthcare/social service agencies will be strengthened and be better able to deliver services to their mutual care receivers.

Presentations are always welcomed to inform **community service or civic groups** about your activities within the community. When you give your presentation, be sure to mention how *Faith in Action* fits in with their group's mission. For example, Rotary reaches out to seniors and Lions reach out to those with vision problems. At the end of the presentation, be prepared to challenge the organizations to determine how they can become more closely involved with *Faith in Action*. Individuals interested in volunteering on their own or with a group will inevitably emerge. Establish in your presentation the pressing need for "community ownership" of *Faith in Action*. Often, these groups will provide financial support as well.

#### **4. Web Site Linkage**

Ask these organizations and groups to put a link to *Faith in Action* on their Web sites. If you do not have a Web site, seek out someone associated with these non-faith groups who can help you develop a simple, informational one. A group at the local high school or community college is one to consider for help in creating a Web site.

#### **5. Endorsements**

Each non-faith group can provide endorsements for your program based on their role in the community. Endorsements from management and staff are important ways to communicate the worth and value of the program. Encourage representatives of these organizations to write letters to the editor or to include a letter or article in their local, statewide or regional newsletter. As your program becomes better known, area groups will be pleased to partner with you because it makes them look good, too!

#### **6. Participation in *Faith in Action* Activities**

Businesses and civic organizations are often untapped reservoirs of social capital. Always try to keep a list of organizational needs/wants at hand, as well as those of your care receivers. If

asked, "What can we do to help?" you want to be well prepared and not allow the opportunity to slip away.

Find a special niche for the business to fill with respect to your program. For example, a bank could sponsor a bill paying program by providing employees to volunteer. If they have an employee newsletter, make sure that you regularly provide articles for it. Develop a brochure-size, single page check stuffer. This can include brief information about your program with contact information for volunteer and donor opportunities.

Develop a good rapport with healthcare organizations. Offer their professional staff the opportunity to speak at one of your volunteer in-services. This will give them the chance to get to know you and your volunteers and to learn more about your program. Some groups to approach are Alzheimer's Association, Hospice, Caregivers Support Group Leader, Low Vision Persons, DHS and so forth.

### **Tips for Success with Non-faith Groups**

- Be intimately familiar with the mission or purpose of the group. When speaking to these groups, align *Faith in Action* with their mission whenever possible.
- Recognize that non-faith groups may be territorial. If your program is not yet well-established, give yourself some time to build credibility within the community. Persevere in establishing that good relationship.
- Always be gracious and follow up with a personal note after speaking with someone one-on-one or within a group, or even provide a framed certificate of gratitude.
- Be FAT!
  - Faithful – always promoting *Faith in Action* when possible
  - Available - available to speak at their meetings or provide them with a *Faith in Action* speaker
  - Teachable - ready to learn about other organizations/agencies and consider how you may network together
- Be creative in finding ways to publicly honor your hardworking volunteers, whether at the local, state or national level. Examples of national recognition for volunteers include awards from Daily Points of Light, Governors Home Town Award and J.C. Penney's.
- Participate personally in the activities of these groups.

### **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

- Annual Report Sample
- Bulletin Insert
- Certificate of Appreciation
- Coalition Brochure
- Congregation Information Card
- Della Reese - Resources



- Mayoral Proclamation
- News Releases
- Newsletter Tips
- Preparing Your One Pager
- Presentation to Civic Groups
- Speakers' Bureau Training
- Suggestions for Communicating with the Public
- Template Newsletter
- Tips for Using the *Faith in Action* Trademark
- Volunteer Recruitment Brochure
- Volunteer Recruitment Flyer
- Volunteer Recruitment Presentation
- What's in a Name?

#### **OTHER RESOURCES**

- Brinckerhoff, Peter C. *Mission Based Marketing*. Hoboken, NJ: John Wiley and Sons, 2003.
- Koestler, F.A. *Your annual report: How to plan, produce, package and promote it*. Los Angeles: The Grantsmanship Center, 1980.
- *Marketing & Publicity: Creating a Communications Plan*. Winston-Salem, NC: Wake Forest University Health Sciences, 2003.

# 9

## Resolving Conflict

Elizabeth Liska, Lisa Carmalt & Peggy Preston

### INTRODUCTION

“Conflict” may be broadly defined as any difference between two or more persons that creates some level of tension between them; or it may be more narrowly construed as distinct differences of belief, opinion, preference, expectation, need, behavior or personality attributes that create tensions and problems between individuals and/or groups. Beyond these categories, miscommunication and everyday misunderstanding may unwittingly create conflict in your *Faith in Action* program. In this section, common difficult situations are outlined with successful strategies for resolving the conflicts with your coalition and board members.

In attempting to manage conflict, the first step always is to keep a cool head; do not respond with your initial impulse. First, hear all the facts; then restate what you think you heard and listen carefully for the response. If it is truly a crisis, you may need outside help. (Refer to the document on the *Faith in Action* Extranet titled, “Handling a Crisis.”) Have a plan in place on how to handle a real crisis and review it every year. Both staff and board members should be familiar with your plan. Most “everyday conflict,” however, can be managed if you take a series of simple steps, outlined below.

### STEPS TO TAKE IN MANAGING CONFLICT

The following steps should be taken when attempting to resolve conflict in your *Faith in Action* program:

- Assess the situation—ask what, when, how, who, why.
- Discover, insofar as possible, the facts of the situation—what led up to it, what occurred, or what people did when the event occurred, what factors seemed to influence their reactions.
- Check assumptions—what possible unfounded assumptions are being made by the various parties involved.
- Identify underlying values and core beliefs and how they may be influencing adverse reactions.
- Determine if the conflict is primarily between persons, primarily due to a situation, or primarily due to an interaction of persons and a situation.
- Involve broad representation in your coalition; diverse perspectives can often help defuse situations of conflict.
- Decide who should be involved in an intervention, if needed, and to what extent.
- Determine the timing and method(s) of the intervention.
- Carry out the intervention and then reassess the situation. Was it successful? Does more need to be done?

From the outset, all coalition participants, including congregations, agencies, community organizations, businesses, volunteers and staff, should receive a copy of both your *Faith in Action* program's mission statement and all policies; furthermore, they must become aware of how central these statements are to providing services and, indeed, all that occurs in the organization. These documents are your program guidelines; they define the proper responses to any conflicts that may arise. They should be discussed in volunteer training, and any changes should be given out to all program participants: coalition members, volunteers and care receivers. Basic themes around the issue of shared values should be spelled out in brochures, newsletters and other materials.

### **SUCCESSFUL STRATEGIES FOR CONFLICT MANAGEMENT: COMMON QUESTIONS AND ANSWERS**

Some problematic issues around behavioral, role and communication expectations will be addressed in this chapter, including:

- Embracing, respecting and including all faith communities in the program area
- Antidiscrimination regarding age, socio-economic standing, gender, lifestyle, religious beliefs or any other reason
- Proselytizing
- Receiving and meeting requests for care
- Flow of information from board to staff
- Program communications
- Termination policies for volunteers and staff in personnel policies

### **How do we answer faith communities that do not want to participate because some coalition members do not have the same belief system that they do?**

- It is important to adhere to the national *Faith in Action* policy to embrace and respect all faiths.
- Remember that all faith communities have strong central beliefs and values that are part of who they are. Emphasize that each participating member is an equal partner, that each joins the coalition with their unique perspective and will not be asked to change or to sign statements of belief.
- Emphasize the shared call to serve that allows all faith communities to work together as part of the coalition.
- Focus on the central ground of common values that all the participants hold. The so-called "Golden Rule" shared by many religious groups, that of loving, respecting and valuing your neighbor, is an example of "common ground" yet free of doctrine.
- "A Neighbor's Independence Depends on You" is a good example of common understanding that is not tied to any one particular faith.
- Promote the value of focusing on and learning about those similarities that can end up drawing everyone closer and enabling outreach to diverse neighbors in need. Learning

more about our differences and learning to celebrate them will have the same effect: everyone involved can learn to demonstrate respect and value for each religious expression.

- Provide a public forum featuring information about community faith groups and also about how they successfully collaborate with *Faith in Action*.
- The *Faith in Action* program director and/or a board member should talk with the reluctant coalition member, listening to and discussing the issue respectfully with the concerned party.
- Ask specific religious leaders already participating in the coalition to speak privately with the religious leader or organization that has questions and/or concerns.

### **What assurance can we give to an organization that believes that the informal care of *Faith in Action* will lead to liability issues that might impact the organization?**

- When coalition members or representatives disagree with *Faith in Action* policies, it is essential for the program director to meet with the member representative for discussion and clarification. Usually what becomes apparent is that there is a misunderstanding around the precise meaning of the wording and that the policy itself is not the real issue.
- Clarify the voluntary, informal status of *Faith in Action*, which allows the program to provide care not otherwise available in the community. National and local program policy may simply have been misinterpreted and/or misunderstood.
- Promote the understanding that each partner comes to the coalition “as they are,” with their own governance, policies and rules. Participation in the coalition does not change the coalition member’s identity in any way, but all coalition members must completely support approved policies of *Faith in Action*.
- Assure them that when your *Faith in Action* program refers a care receiver to a formal service provider, such as a home care agency, that agency will provide care under its own guidelines.
- Assure them that your *Faith in Action* program is not only insured, but also that additional coverage is typically provided by the state’s “Good Samaritan Law.”
- Suggest that *Faith in Action* be added to the organization’s information-release form.
- If, after respectful discussion and careful listening, there is still intractable disagreement, it may be helpful to take the conflict issue to the board for additional discussion and clarification.
- Some organizations may be philosophically moving in a direction that you cannot easily follow. It is not a failure to conclude that the coalition link is not right for you or them at this time.

### **What is the response to a coalition member who opposes policies to serve all persons without discrimination?**

- Make it clear that *Faith in Action* does not discriminate regarding age, race, socio-economic standing, gender, lifestyle, religious beliefs or for any other reason. This is a national *Faith in Action* policy, and your program’s policy, as well. The services requested of *Faith in Action*

volunteers are freely offered to all people and can help to keep them as independent as possible for as long as possible, no matter their background.

- Explain that *Faith in Action* is positioned in the community to provide informal care to persons in their homes, an informal program patterned after care provided by religious communities for their memberships and in their neighborhoods. Volunteers are also free to select where they feel most comfortable and confident in answering a request.
- Informal care in home/from home is usually the “gap” in services provided to the community and frequently cannot be met in any other way.
- *Faith in Action* will refer only those persons appropriate for receiving care from coalition members; care receivers are as carefully screened as volunteers.

### **How do we handle discrimination if it happens?**

- Make follow-up calls to care receivers being sure they are comfortable with the care given and that they understand they can contact your program office or a congregational coordinator if they are unhappy with the manner in which care is being given.
- If a care receiver has personally experienced suspected discrimination, personally assure the care receiver that he/she will be provided appropriate care with respect and kindness in the future. Express your genuine concern for and sincere regret that he/she was not treated with respect.
- Address the issue with the problematic volunteer to reinforce the non-discrimination policy and to attempt to confirm strict adherence to this policy. If the volunteer seems reluctant to adhere to the policy, he/she may need to be terminated, or it may be determined that the volunteer can be placed in other matches more suitable for his/her particular gifts. However, this volunteer may not verbally and actively express non-inclusive views.
- If all volunteers from a congregation are found to be discriminating against any particular care receivers then you may: discuss the issue with the religious leader; reinforce the reason for the policy; provide a special training session for the volunteers to address their issues directly. If the volunteers still refuse to adhere to your policy, they may not be able to participate in your program at all.

### **How do we make sure that our volunteers are not proselytizing, or that all of the volunteers from one faith community are not proselytizing?**

- Clarify for everyone the definition of proselytizing: “actively seeking to convert to a particular faith group,” but also including any negative comments about the care receivers lack of relationship with a faith community or belief system, and/or attempts to convince the care receiver to attend the volunteer’s faith services.
- Stress the difference between “sharing faith” and proselytizing, and that sharing is exclusively at the request of the care receiver. For instance, the care receiver may ask what motivated the volunteer to provide transportation for him/her. The conversation ends when the care receiver is satisfied with the answer and asks no further questions or offers no further comment. Promote the understanding that the care itself that is provided is “putting

one's faith into action," which "speaks volumes" to faith motivation and requires no further commentary.

- Cover this issue in depth in volunteer training. Include role-playing exercises on how to respectfully respond to questions about the motivation of the volunteer to provide care to (perhaps) a stranger; how to respond to a request by a care receiver to pray with them; and how these responses differ from proselytizing.
- Insert this policy in the information packets for care receivers and further explain it in your assessment visits. Care receivers should understand that they can freely express any concerns they may have to the congregational coordinator or the *Faith in Action* staff.
- Make a follow-up call after the initial volunteer visit and additional follow-up calls to care receivers as needed to determine if there is a suspected or potential problem. Encourage them to speak freely and honestly.
- Meet privately with volunteers from a congregation that has proselytized in the past to clarify the need for their adherence to policy.
- If the volunteer(s) cannot or will not comply with your policy, they must be suspended from working directly with care receivers.

**What should we do when we are unable to meet a referral request for assistance made by a coalition member for a care receiver?**

- Determine if the request is, in fact, appropriate for a *Faith in Action* volunteer and in keeping with the program mission of providing informal assistance. Determine if the time required is appropriate and if greater independence is a possible outcome.
- Ensure the mutual understanding that every person's needs are important and will be met to the best ability of the program, but that every person in need is not necessarily a "good match" for *Faith in Action*.
- If the coalition member continues to press for a positive response, meet with the referral source and invite that person to offer solutions and become an active partner in seeking a resolution.
- Determine if the referral has been for a need that the coalition member has been unable to meet successfully for some time. Be sure that other agencies/programs are not using your coalition member to "turf out" needs that are not possible to meet, a strategy that might require another intervention better suited to the need. Provide materials for referral sources.
- Have other similar requests been received and not met? Do you have documentation? Are volunteers being sought if it is a service within the mission of the *Faith in Action* program? Has sufficient time been given to find a volunteer appropriate to the request?
- At times, the demand for services will exceed your program's ability to provide them. A workable system must be developed to handle this volatile issue, and great care must be taken to administer requests in the order received so that you may avoid serious problems, such as accusations of discrimination and/or favoritism.

### **What can be done when a board member is disruptive and impedes progress?**

- All concerns about a particular board member are the responsibility of the entire board, and should be handled by the board members themselves.
- Determine if the board member is seeking attention and if channeling energy his/her way might solve the annoying problem.
- The board chair could also meet privately with the disruptive member to revisit board training/requirement steps, making sure, however, to point out contributions made by said member and jointly seeking solutions to any identified problems.
- It may be necessary to “disinvite” this member in the election process (if the member is available for re-election).
- If together the personnel committee and the board find that termination is unavoidable, the board chair should discuss the conflict issues with the disruptive member and confirm his/her decision in a written letter.
- Make sure each new board candidate is well qualified for the task, thereby heading off potential conflict. If there are doubts, it is vital for the nominating committee and board to discuss them before recommending a candidate for board membership. If they are unsure, you might try the person on a committee first to see how he/she interacts with the committee membership before making a final decision.
- Make sure all board members are strictly held to accomplishing the requirements and expectations of their role, that is: to miss no more than three meetings; to attend all fund-raisers or a minimum of four fund-raisers; to chair a committee or serve as an active member of a committee; to make a monetary donation; to identify at least one funding source; and so forth.

### **Are we allowed to terminate a volunteer who is not working well with other volunteers, with care receivers or with program staff?**

- The program director should keep detailed written records whenever there are concerns regarding volunteer (or staff) performance. Job descriptions with clear expectations are absolutely necessary.
- Consult your policy manual and seek the guidance and support of other key members of the program and/or a person with experience in terminating volunteers to gain insight on how best to handle this touchy issue.
- It may be that the volunteer can be successfully redirected toward another area of service either within the congregation or within your program.
- If dismissal becomes necessary, have your facts and reasoning ready. Announce your decision, do not argue or apologize, make small talk or avoid the issue. Be quick and direct. Do not counsel; trying to make the person feel better may lead to confusion.
- Follow up in writing. Without going over the messy details, reinforce the point that this person is no longer a volunteer (or staff member) with the program.
- Remember that prayer works and is helpful in times such as this.

**The program director receives conflicting information, which is potentially harmful to the efforts of the program to establish good public relations, from a committee chair and/or other board members. How can this miscommunication be prevented in the future?**

- Develop a plan which indicates the proper channels for flow of information between the board of directors and the program director. The program director should always be ready to clarify and elucidate any information that is received outside the established protocol.
- Establish monthly executive committee meetings to include the program director.
- All minutes from committee meetings are to be recorded and then shared with the board members.

**What is the best way to handle the dissemination of incorrect and damaging information, such as “improper funding use;” “people not being provided the services requested;” “staff is not qualified;” “volunteers are not adequately trained;” “care is not being provided for certain faith communities?”**

- You, as the program director, must participate both broadly and deeply in the life of the community to build trust and to be able to speak with authority to such issues when they arise.
- The structure of your program, materials and policies should reflect an impeccable sense of accountability.
- You should regularly publish information pertinent to accountability and trustworthiness in a monthly newsletter.
- Speak with the person(s), if known, who are spreading these rumors, to try to correct the misinformation being given. Without identifying the source, further address the misinformation in a newsletter and in talking with others. Unless the problem is well known in the community, do not address the conflict issues directly; instead, write the article as informational only.

## **CONCLUSION**

No matter how well known your program is within the community or how well your volunteers provide services, all programs will experience conflict at some point. Conflict can be managed successfully. In many instances, a conflict or crisis situation—though difficult at the time—sometimes can be a “turning point” for your *Faith in Action* program. How the program’s leadership handles the situation will determine whether the program will recover from the potential damage. It can be an opportunity to educate the coalition about your program’s mission and policies. And, by coming together to support your efforts, the coalition can often be strengthened through commitment to the shared goal of helping people with long-term health needs in the community.

## **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

- 3 R's of Volunteer Management
- Board of Directors Committee Descriptions



- Board of Directors/Advisory Committee Member Job Description
  - Board/Advisory Member Selection Tips
  - Board Member Statement of Understanding
  - Crisis Plan
  - Memorandum of Understanding
  - Project Director Job Description
  - Quotes from Various Cultures and Faith Traditions
- Trends, Tips and Tools for Volunteer Management: A Complete Guide to Building and Enhancing Your Faith in Action Program*

## **OTHER RESOURCES**

- Brinckerhoff, P.C. *Faith Based Management*. New York: John Wiley and Sons, 1999.
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- Combs, D. *The Way of Conflict: Elemental Wisdom for Resolving Disputes and Transcending Differences*. New World Library, 2004.
- *Dealing with Difficult People (The Results Driven Manager Series)*, by Harvard Business School Press, 2005.
- Fisher, R., Ury, W., & Patton, B. *Getting to Yes: Negotiating Agreement Without Giving In*. Penguin Books, 1983.
- Patterson, K., Grenny, J., McMillan, R. & Switzler, A. *Crucial Confrontations: Tools for Resolving Broken Promises, Violated Expectations and Bad Behavior*. McGraw Hill, 2005.
- Stoesz, E. *Meditations for Meetings*. Intercourse, PA: Good Books, 1999.
- Tannen, D. *That's Not What I Meant: How Conversational Style Makes or Breaks Relationships*. Ballantine Books, 1986.

# 10

## Meeting Common Challenges

*Elizabeth Liska & Doris Rubinsky*

### INTRODUCTION

Change and challenge will be two inevitable occurrences for those involved in developing and sustaining *Faith in Action* coalitions. This chapter discusses numerous frequently asked questions and strategies for meeting challenges common with community coalitions. The wise program director will not wait until a challenge becomes a major obstacle, but rather will seek help as soon as the challenge is identified. There is a wealth of knowledge and experience available through the *Faith in Action* network and other program directors. Be sure to utilize the resources available on the *Faith in Action* Extranet and take advantage of the knowledge of the staff members at the *Faith in Action* National Office.

### STEPS TO TAKE IN MEETING CHALLENGES

The following foundational elements will assist you in facing common challenges of maintaining and sustaining a strong *Faith in Action* coalition.

- Many challenges can be easily met if a proper infrastructure, including by-laws, job descriptions, and policies and procedures, is in place. Review these important elements regularly to clarify and revise them as well as to identify new areas in need of development. Sound structure produces strength in the coalition, governing body and staff.
- Make sure your program maintains the *Faith in Action* model. Seek the assistance of the *Faith in Action* network, or a planning facilitator who has a proven ability to facilitate, to hold a strategic planning meeting or retreat if your program has drifted away from a clear understanding of the *Faith in Action* model and the importance of an actively involved board of directors or advisory committee in sustaining a strong coalition.
- Assure that all organizations and individuals involved in the coalition clearly understand the *Faith in Action* model, receive program information, including pertinent policies and materials, on an ongoing basis and that they attend required training. All coalition members should receive your monthly newsletters.
- Develop and follow a recruitment plan to regularly add new coalition members and a funding plan which identifies sources, assigns tasks and contains a timeline. This funding plan should include resources for adding staff.
- Spend time in the community promoting your program and identifying funding resources in order to fully develop the potential of your program.
- Demonstrate your strength and credibility by becoming a leader in the community.

## **SUCCESSFUL STRATEGIES FOR MEETING CHALLENGES:**

### **COMMON QUESTIONS AND ANSWERS**

**What is the coalition's role in guaranteeing the board of directors or advisory committee is strong, viable, committed, well-structured and active?**

- Ownership of the program by the coalition, including taking part in determining the direction of the program, understanding what gifts each member brings and receives, is essential whether your program stands alone or is under the umbrella of a sponsoring organization.
- Delineate clearly the relationship between the coalition staff and board of directors or advisory committee, and separate out the responsibilities of each. Develop or strengthen job descriptions for the board of directors or advisory board, staff and volunteers.
- Develop or strengthen board committees to share responsibilities and to increase ownership of the program through the coalition. Executive, personnel, funding, finance, nominating, volunteer recruitment and training committees are essential. Review committee descriptions annually and revise as needed.
- Identify and elect board or advisory committee members to accurately reflect and represent congregations, volunteers, agencies, related community organizations and businesses. Consider geographic areas, ages, ethnic background and skills of nominees in making your choices. The board should broadly represent the composition of your community.
- Identify specific skills and connections needed when nominating new board of directors or advisory committee members. Tell these potential candidates exactly why they have been selected, what gifts they will bring to the board and what benefits they will receive from this involvement. Provide them with a packet containing by-laws, board job descriptions, your mission statement, the history of *Faith in Action*, the history of your local program, brochures, a sample newsletter, the annual report and any other materials that will help the candidate to know if it would be mutually advantageous to accept the invitation to be a nominee. Offer to call or stop by to answer questions. If it will not be possible for the candidate to become a part of the board, ask for recommendations of others in the community who may have the same skills or connections. Board candidates may be suggested through the coalition. Allow a substantial period of time for the nominating process, that is, no less than two or three months.
- Have specific requirements built into the board of directors or advisory committee job description. For example, a board member must: attend board training, have fewer than three unexcused absences, identify at least one funding source; make a personal monetary contribution; participate in at least four program fund-raisers; identify at least one prospective board member; become a member of, or chair, at least one committee, and so forth. Candidates should be made aware of these requirements before their actual nomination. The board secretary must keep these records. The board president notifies the elected board member of his/her achievement (or non-achievement) at the end of the year.
- The program director and board of directors or advisory committee should regularly evaluate the *Faith in Action* program regarding: identification of persons with

caregiving needs; identification of caregiving and other volunteers; board representation and involvement; what is working/what is not; skills needed on the board and in the program; adequately meeting the needs that the community is demonstrating.

### **How can the coalition help increase staff capacity to assist the program director?**

1. Recruit part-time volunteer(s) through the coalition to make it possible for the program director to spend time enlarging and strengthening the coalition and program. Make this need known through the monthly newsletter, speaking with religious leaders and speaking to the staffing need in community network meetings.
2. With appropriate committees and the board, add a new position as a line item to your next budget. Add the position to your funding plan and identify possible sources for funding. You might add only a part-time position initially. Develop a job description to complement the director's role; for example, "person needed to answer phones; refer requests to congregations/volunteers; format our newsletter; arrange for volunteers to prepare newsletter for mailing" and others as you identify them. Increase the position to full-time as soon as possible.
3. Continue to alter, as needed, and utilize the plan to add new positions as the program grows in numbers of coalition members, volunteers and care receivers. Approximately each 100 volunteers can warrant one additional half-time employee.
4. Spend time in the community promoting your growing program and identifying new funding sources.

### **How do we handle sensitive information to appropriately match a care receiver with a volunteer?**

1. Relationship building in the community is vital for building trust in the *Faith in Action* program and staff.
2. Your *Faith in Action* program staff must ask for any details that may affect the match positively or negatively. Explain to the care receiver the need for accurate information to match him/her with the most appropriate volunteer, and that care will be delayed if the best volunteer is not successfully matched with the care receiver. Potential volunteers need accurate information in order to decide where they can best serve. Develop a set of questions if necessary. Educate the referral agencies to know and to have ready needed information, such as if a person is currently a member of a specific congregation, or if he/she has a background in a particular faith. This process will help to match the person in need with a volunteer of somewhat common background, thus helping both volunteer and care receiver to feel more comfortable.
3. Provide an information sheet for referral staff from agencies.
4. Partial information may be given by the referring agency; more complete information can be obtained from the person needing care.

5. Ask agencies or community programs to include *Faith in Action* on their consent forms to prevent confidentiality issues from becoming a barrier to service. Remember that many formal service agencies have clearly defined restrictions on information exchange.
6. Agencies may give the *Faith in Action* phone number to a potential care receiver, or even make the call themselves during an appointment, allowing the person in need to speak directly with *Faith in Action* staff.
7. Include confidentiality issues in training for staff and volunteers.

### **How do we deal with inappropriate requests for service by coalition members?**

1. When meeting with potential referral sources, such as congregations, agencies and community organizations, provide them with materials about your program that outline both services provided and also a description of appropriate and inappropriate service requests or referrals.
2. Provide a brief information sheet on this topic for all employees, committees and coalition members, so they can use it for quick reference.
3. Provide additional training for coalition members or provide training bringing all coalition members together to discuss potentially inappropriate service requests.
4. If a call is made by a person to your program seeking inappropriate services, assure the individual you will help him/her to find appropriate services that are needed. If possible, offer other services that *Faith in Action* provides.

### **If congregations are providing services similar to ours, why should they participate in our coalition?**

1. Discuss with them the value of collaboration with coalition members:
  - It is more economical through shared resources.
  - More people needing services will be identified.
  - More volunteers may be recruited from a broad community coalition.
  - Informal services will be offered at no charge, thus enhancing formal care.
  - In-home and from-home services which are otherwise not available may be accessed.
  - More referrals to appropriate services will occur.

They can be a part of creating both a sense of independence and a better quality of life for their neighbors with long-term health needs, as well as offering the opportunity for people of faith to answer their call to serve.
2. Each participating coalition member has contact with different segments of the community, a unique way of reaching out to the community, a special view of the care receiver, and its own particular access to certain community resources. The overall effectiveness of community services is richly multiplied by the number of coalition members in your coalition.
3. Present examples of “added value” to the care programs: shared training; a wider network of support; a closer connection to a broader body of services; and the ability to plan on a community-wide basis for better care and services for everyone.

4. Stress that *Faith in Action* does not duplicate existing services, but provides “bridges” to fill the gaps. While an agency may, indeed, offer companion or visiting services—often at a fee—they may have a long waiting list. *Faith in Action* volunteers can quickly address the needs of people on the waiting list.
5. Your coalition will offer all the agencies a much greater ability to access funding. Cost-conscious funding sources are always looking for community collaborations to more efficiently serve greater numbers of people.
6. You, as the program director, must be active in the community, making *Faith in Action* well known and promoting even more collaboration with congregations, agencies, community organizations and businesses. The better the community can get to know the program director, the better understanding they will have of *Faith in Action* and its immense value in the community.

### **How can we encourage shared stewardship in the community?**

1. *Faith in Action* coalition members can pool their knowledge-base to form a network of possible funding collaborators, including congregations, agencies, local governments and any others your coalition may identify.
2. Be aware that individuals give more money than any other source; more people give money to or through their religious organizations than in any other way; and people want to see the best possible use of their donations.
3. Develop an e-mail tree through which any network member may distribute information about a Request for Proposals in which they are interested; they may ask for collaborators or pass along information regarding funding sources that may not be suited to them but may be for others. If this request seems promising, then schedule a meeting with potential partners for a particular funding source, establish a timeline and divide up responsibilities for preparing for submission.
4. Be visible in the community to make *Faith in Action* well known, letting the community know you are always looking for broad funding support and are willing to collaborate with any appropriate coalition member.

### **How can we manage reluctance in the coalition to accept government funds?**

Emphasize to the religious community, from whence these objections usually arise, that the only government requirement for any faith-based program is “not proselytizing,” also a rule for all *Faith in Action* programs. Discuss the importance of not proselytizing out of respect for care receivers’ beliefs and your program’s desire to provide care for all persons, regardless of their personal beliefs.

Explain in detail that many government agencies have, in fact, the same goals as *Faith in Action*: to provide more people with better access to health care; to help people with long-term health needs remain independent for as long as possible and to receive care in their homes; and to promote the availability of volunteer services in the community.

Enlist the help of a representative from the government funding source to discuss the issue with your board. Invite anyone from your participating congregations to attend. Note that many government representatives themselves are also members of faith groups.

Clarify the differences in language used by government and *Faith in Action*. The government will use formal, legalistic language, such as “clients.” *Faith in Action* will use informal, more personalized language, such as “care receivers.”

Many government sources are more than happy to fund informal, faith-based programs since they involve volunteers and have a low “unit of service” cost.

Remind doubters that most *Faith in Action* programs apply for and accept local, state and federal funding. Encourage the understanding that government funding should be part of any successful broad-based funding plan.

Continue to encourage congregations to provide ever-increasing funding to keep your program rooted in the religious community as an ongoing, informal ministry.

Become acutely aware of the reporting requirements of government funding such as payment reimbursement schedules.

### **How should we deal with a coalition member's shift in priorities?**

Perhaps a congregation or agency has identified a new area of concern or unmet need and feels that their energy needs to be shifted. Since the *Faith in Action* coalition itself is devoted to identifying and meeting care needs, it may be that this new concern also affects the population currently being served by your program; or it may prove to be a new direction for the coalition.

The *Faith in Action* coalition may already include the resources that need to be brought together to focus on these concerns; at the least, the religious community and its resources will be brought to the table, which may make it possible to successfully reach the targeted population.

Communicate and demonstrate the value of connection to the *Faith in Action* program and resources to coalition members. Emphasize that different concerns speak to different people’s hearts depending on their life experience.

### **What if our sponsoring organization experiences a shift in its priorities?**

If your program was developed beneath the umbrella of a sponsoring organization, you should already be giving some thought to the possibility of independence in the future. This subject should be revisited in strategic planning sessions over time.

The *Faith in Action* staff and advisory committee need to be actively involved with the development department of your sponsor in identifying new funding sources and helping to access funds.

Develop a broad coalition with ownership; put in a strong advisory committee, one that can become a governing body if necessary. Participate in developing the budget and with the advisory committee treasurer closely monitor expenditures through records kept in the

program office and monthly reports provided by the sponsor's financial officer. Develop the ability to raise funds specifically for *Faith in Action*.

If the sponsor decides to phase out the *Faith in Action* program, work with the sponsor to allow enough time to move your program into the community. It would be ideal to have enough funds to support the program for six months to a year.

Work to enlarge, nurture and strengthen the *Faith in Action* coalition. This coalition is the source from which all resources ultimately come.

A governing board of directors made up of representatives from congregations, agencies, community organizations and businesses most closely involved with the *Faith in Action* program needs to be quickly identified and trained to take over from the advisory committee. As your program progresses and the number of coalition members grows, there will be a larger body of resources available to you.

### **What is the most effective way to deal with differences between urban and rural congregations and communities? How does the size and history of each play into the mix?**

Rural congregations tend to have a deep-rooted history, and their congregants have often been members for a long time. Urban congregations may be new, but some have a long history in the community, as well.

The communications system in rural congregations tends to be informal but very effective and is often centered around the clergy. In an urban congregation, the system may be more formally organized, but dissemination of information may take more time, owing to the size of the congregation.

Financial support from rural congregations may be smaller, but the percentage of those giving may be higher. It may be easier to engage a smaller rural congregation in a fundraiser or to ask them to hold a benefit such as a dinner or love offering, or even to be included on the budget. Urban congregations may have organized processes for funding with proposals or applications, or possibly a requirement to meet with a stewardship committee. Groups within both rural and urban congregations can also be contacted directly for donations.

Rural congregations may comprise a smaller number of people, but with a long history of responding to need, they therefore may quickly find many volunteers. Urban congregations, by contrast, may have many diverse programs to administer and may take some time to see how *Faith in Action* will fit into their structure. However, they may draw upon the resource of many more people to volunteer.

Rural congregations with smaller numbers may be able to more quickly determine how your program could be implemented within the membership and identify a coordinator. Urban congregations may take several months to integrate your program into their mission and identify a coordinator, but their organized structure may more efficiently serve your program in the long run.

Rural congregants tend to know each other and their neighbors well; they are connected to their community in a deep but informal way. Urban congregants may be less likely to know



all their members and neighbors, but often have excellent connections to a range of people in the community for recruits to the coalition and board.

Due to the closeness of the community, rural congregations have the ability to quickly gather the community, and there usually are a smaller number of congregations. It may take a longer time for urban areas to gather the community, but they have a larger number of congregations and service agencies from which to draw.

In a rural area, it may be possible to make a connection by simply contacting the clergy person. While you may be referred to a member for the actual implementation, it may be fairly easy to secure a date to make a presentation to the members through the clergy alone. In urban areas, it may take some time to simply arrange an appointment to meet with clergy; the consideration may be tasked to a committee; and it may take some more time to successfully schedule a presentation.

### **What is the best way to open a meeting or event with prayer when the majority is Christian and the minority is non-Christian?**

Diligently attempt to include all faith groups that are present in the community and to provide slots on the board of directors to faithfully represent these groups.

Appoint a small committee to look into how prayers can be made inclusive. This committee should include those persons who have already expressed concerns.

Collect a notebook full of prayers and meditations that all can agree upon. Pass the notebook around at meetings and appoint someone to select a prayer to read. Continue to add to the notebook.

End all prayers with: "We ask this in Your name."

If there is significant religious diversity, have each meeting opened by individuals from the various faiths, in turn, in their own manner, so all participants may experience the richness of this diversity. Also include prayers which are nonspecific to any one faith tradition.

### **How can we best meet the challenge to include a particular reluctant congregation or denomination?**

The key to involving any congregation or faith community is the support of the clergy. If the religious leader is simply not interested, it will be difficult, if not impossible, to reach the membership.

Sometimes, however, an individual member becomes personally involved and is instrumental in winning over the religious leader and thereby, the congregation.

Ownership of the *Faith in Action* ministry depends on full adoption of the program by the religious leader and the congregation. Since most religious leaders move on eventually, the people themselves must embrace the mission to make it viable.

If a respected congregation of the resistant faith community becomes involved, others are more likely to participate.

Seek invitations to speak to a group of lay leaders and/or selected religious leaders from the reluctant faith group. Make your case to them as persuasively as possible. (Refer to chapter

five, “Deepening the Commitment of Coalition Members,” to review the benefits of participation.)

Decide to concentrate your efforts on congregations that want to be committed, and do not spend an inordinate amount of time trying to involve the reluctant denomination no matter how prevalent or prominent it is in the community. Adopt an “attitude of survival” first, and expect that the faith group may become more interested over time, as it has the opportunity to see the value of your program and services.

### **How will we be able to maintain our program in the event of an economic downturn? Where will the funding come from?**

Focus on strengthening the broad spectrum of the coalition.

Remember that individuals give more money by far than any other source and give to or through their religious community.

Evaluate the business community. Are some large companies leaving? Are there a greater number of small businesses? Develop a plan to approach the business community in a realistic way. What businesses are related to your work? Do they serve the same population?

Identify how you can find local funding sources; develop a plan for collaboration with agencies providing formal services in your area.

Is the faith community changing? Is there more diversity due to immigration? How will you plan to involve these diverse congregations in your coalition? How will they be able to contribute to your program?

Remember the importance of developing and following a funding plan with definite strategies, assignments and timelines. This funding plan may require additions or alterations during the year.

### **CONCLUSION**

Every *Faith in Action* program, at some point, will face challenges with their interfaith coalition. How one responds to challenges is important. No one solution fits all programs; review the recommendations and strategies presented and adapt these to your specific situation. The wise director will seek input from the program leadership—your board and your coalition—in addressing challenges, from fund raising to policy, as they arise. Do not be tempted to “disband” your coalition at the first sign of an obstacle or conflict. Often a program will grow stronger through the process of meeting challenges. A strong community coalition will be one of your program’s greatest assets for ensuring your long-term sustainability.

### **APPLICABLE TOOLS AVAILABLE ON THE FAITH IN ACTION EXTRANET**

Board of Directors/Advisory Committee Member Job Description

Collaboration handouts

Monthly Management Report

P/PV Sustainability Study

Project Director Job Description  
Program Benchmarks and Planning Tool  
Quick Start Guide for Program Directors New to *Faith in Action*

## **OTHER RESOURCES**

Angelica, E. and Hyman, V. *Coping with Cutbacks: The Nonprofit Guide to Success When Times Are Tight*. Saint Paul: Amherst H. Wilder Foundation, 1997.

Connors, T. D., ed. *The Non-profit Handbook: Management*, Third Edition. New York: John Wiley and Sons, 2001.

Do you struggle to gain the commitment of your community coalition in your quest for achieving long-term sustainability? With this resource as your guide, explore many easy-to-use, practical insights and proven strategies for involving your interfaith coalition to help ensure the long-term survival of your *Faith in Action* program. Going beyond the basics of building an interfaith community coalition, this guide offers ideas that both new and well-established programs can implement to increase the support of coalition members in the never-ending work of volunteer recruitment, fund raising and community relations and awareness.

