CULTURE OF BELONGING TOOLKIT

JEWISH COMMUNITY FEDERATION & ENDOWMENT FUND

in partnership with

VARDA Institute for Community Building

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LET'S BUILD A CULTURE OF BELONGING

We All Yearn for Connection and a Sense That We Matter…

A Culture of Belonging ensures everyone in a group or organization feels seen, valued, and part of something bigger. It helps us build strong, inclusive communities, support each other through hard times, find meaning in our rich Jewish traditions, and create a better future.

Belonging for a few happens by chance; belonging for many requires intentional design and new habits and norms embedded in the DNA of organizations and groups at every level, from board to staff to volunteers to members to those who feel "outside." The Jewish Community Federation and Endowment Fund's Culture of Belonging framework is based on the teaching and inspiration of Dr. Sara Shadmi-Wortman, Co-Founder and CEO of the Varda Institute for Community Building, and Federation board member Varda Rabin. It offers a methodology, language, principles, and step-by-step guidance to drive this change.

Culture change is a process that requires active assessment, design, and iteration. This digital toolkit is one resource to support that work, with hands-on strategies to start your journey or ideas for strengthening belonging and community in your organization.

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10 Principles for a Culture of Belonging

1. **Start with belonging as a goal.** Design anything from meetings and events to job descriptions with the intention to increase belonging, connection, and trust.

2. **Build structured practices** into group activities. Don't rely on random chance or a friendly person to ensure that everyone feels included. Instead agree on group practices that define how we meet, celebrate, and take care of each other.

3. **Establish rituals** that build confidence and group identity through repeated, shared customs.

4. **Define common purpose** so each person plays a role in shaping and sustaining the group's larger mission.

5. **Prioritize face-to-face interaction.** Meeting in person enables multi-dimensional connection that can't be replicated through technology.

6. **Create fixed small groups** that gather regularly and help individuals connect to each other and the larger organization on a deeper level.

7. **Encourage multi-dimensional sharing and doing.** Structure activities for people to get to know each other on multiple levels and experience different aspects of life together.

8. **Focus on assets over needs.** Ask "what does each person have to offer?" and give each a role to play, based on their unique talents, identities, and contributions.

9. **Shift from delivering services to inviting ownership** by treating people as partners rather than customers.

10. **Cultivate group identity and pride.** Explore ways to express the group's uniqueness. By creating a sense of pride and celebrating milestones.

The Culture of Belonging Toolkit was developed by Wendy Verba, Culture of Belonging Lead at the Federation, and Maia Tchetchik Sharir, Culture of Belonging Consultant at the Federation and Head of Organizational Success at the Varda Institute for Community Building.

To learn more, visit our website, or contact FedCultureofBelonging@sfjcf.org

BELONGING GOALS

What is a Belonging Goal?

A belonging goal is a specific goal focused on designing events and programs more intentionally to ensure that a sense of belonging occurs. Setting the goal is an important and sometimes difficult step in the design process. The first of our Culture of Belonging Principles is to always start with belonging as a goal.

Start by intentionally designing gatherings to generate authentic, meaningful connections for more people. Set specific, observable, or measurable goals for your event or program and measure: not how many people attend, but who attends, how they interact with one another and the quality of those interactions (authentic rather than superficial), what they do with those connections, is it a one-time meeting or a new relationship (follow-up).

Ask yourself: What do we want participants to feel, know or do as a result of showing up?

What are the underlying assumptions that we have when we set belonging goals?

- **People want to feel that their presence matters.** It is not the logistics or decorations that move people or make them feel they belong (although these definitely can be designed to contribute to the sense of belonging), but instead, it's how people feel, that their presence truly matters.

- **Being remembered and seen goes a long way to building a culture of connection and belonging.** Never underestimate the powerful effect of remembering others – being remembered builds trust, and is a sign that someone else sees us as valued individuals whose presence matters.

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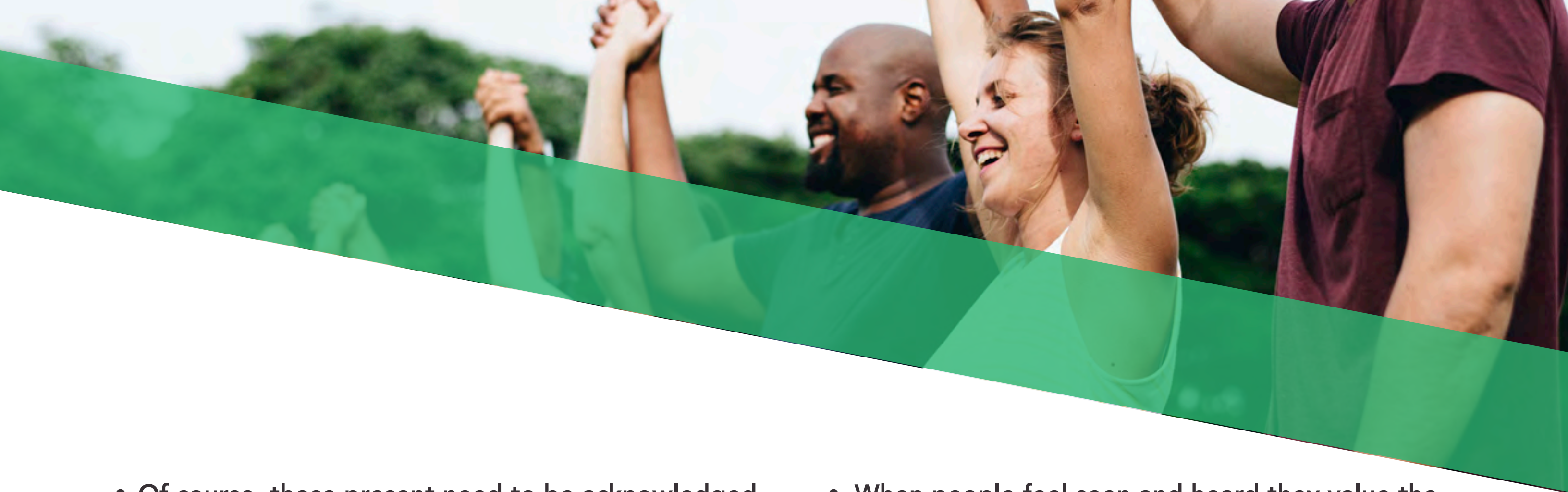

- **Of course, those present need to be acknowledged, but no less important is acknowledging those who aren't present.** People need to know that their absence is noted and they are missed. Setting a regular practice of connecting with people who couldn't be there sends a powerful message throughout the group that each person, present or not, matters.
- **When people feel seen and heard they value the space they are in and contribute to it.** Assuming people will just make their own connections when thrown in a room can backfire and undermine a sense of community. When people have a structured opportunity to be heard, they are more likely to feel they belong and are part of something.

What Types of Belonging Goals are There?

When you set Belonging Goals, clarify what you are trying to achieve and what will success look like.

Types of Belonging Goals include how people:

- Connect with each other
- Contribute/help lead
- Feel they matter and belong
- Feel valued/seen for their unique assets

How Can You Achieve your Belonging Goals?

- Structure the chairs in the room in a way that promotes connection – where everyone sees each other or sits around small round tables, or perhaps get rid of the tables altogether.
- Eliminate random seating at luncheons/dinners – assigned seating is an opportunity to help people make new connections.
- Regularly open up with an Opening Ritual prompt to deepen acquaintance and enable others to learn something meaningful about someone else (see Opening and Closing Ritual Guide).
- Have people work in small groups to enable connection and an opportunity to talk.
- Ask others to take part in the design and leadership of an event or program; set up committees in which people can contribute their time and skills.
- Incorporate activities that identify similarities and encourage deeper connection.
- Support staff and volunteers to identify and encourage guests to connect.
- Recognize first-time participants or significant events that have happened in people's lives.

This practice is a mindset shift that requires building new habits, discipline, and skills. It's like putting on "belonging glasses," once you wear them, nothing will look the same again.

What are some examples of Belonging Goals?

- Increase the number of participants involved in the design and planning of the event
- Each participant has at least one opportunity to share or speak up during the meeting
- Every participant makes at least one new connection
- Participants learn something meaningful or personal about someone else
- Participants are recognized for their unique selves
- Participants return and bring their friends

CUSTOMER TO PARTNER CONTINUUM ASSESSMENT TOOL

From Transactional to Transformative

What is the Customer to Partner Tool?
A core principle of Culture of Belonging is shifting from customer to owner/partner, from a service delivery, transactional model to a participant-owned and led culture. This assessment was designed to help you assess if your organization has a transactional relationship with its constituents, or is truly engaged with people as partners.

Why use this assessment?
We all work hard at running welcoming, inclusive places, but many of the challenges organizations experience stem from constituents feeling like customers rather than equal owners despite our best intentions. Culture of Belonging offers concrete tools to shift that dynamic, but first, we have to assess where our organizations are falling short and where they are succeeding in building partner relationships.

When should one use this assessment?
This assessment can be used when rethinking an existing program or meeting or designing a new one. This assessment can also be used to generate an organizational discussion about shifting to a Culture of Belonging and identifying areas to work on.

How to use this assessment?

- Decide on what you are assessing: The organization? A specific event? Or a meeting?
- Review the 8 questions below. For each question:
  - Assess where the organization, event or meeting is on the continuum and ask yourselves why this is.
  - Assess where the organization, event or meeting should be on the continuum and think and discuss what might support this shift.

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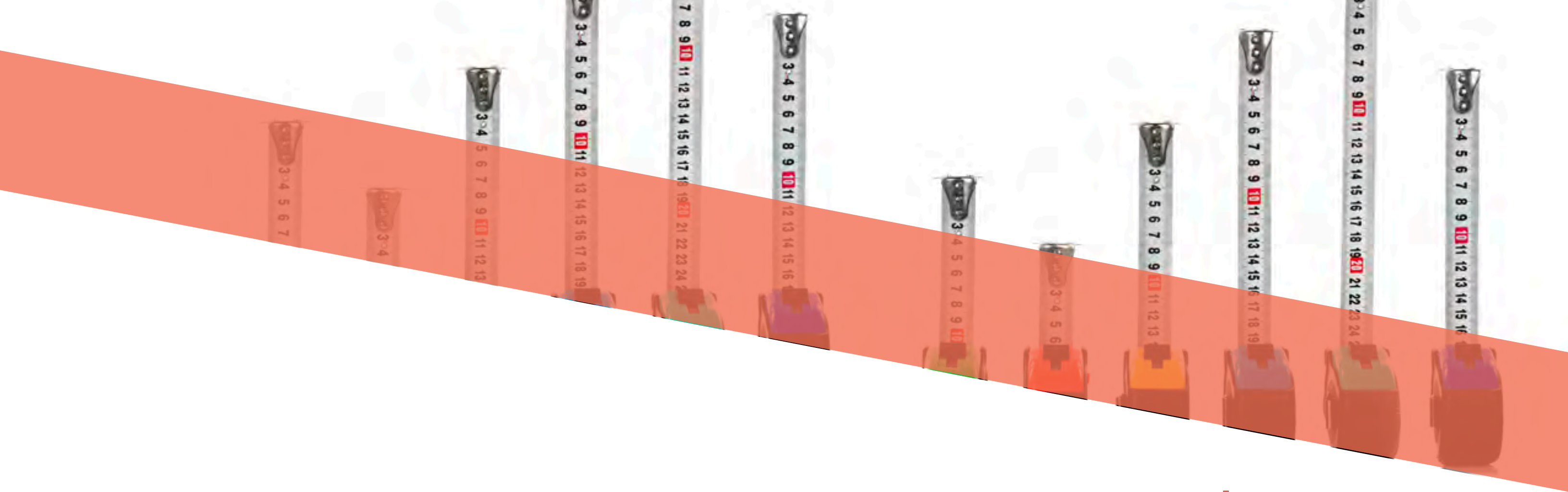


Customer to Partner Continuum – Assessment Tool

The organization / event / meeting that you are evaluating: ______________________________

We focus on the needs/wants of our constituents and tailor solutions to those needs/wants.

We build on the unique assets that each person brings so that each can contribute and play a role.

Customer ⟷ Partner

We strive to deliver excellent content/service to ensure people get their money's worth and stay or come back.

People stay and come back because they feel a sense of ownership and help drive the content with us.

Customer ⟷ Partner

We continuously recruit volunteers and assign them tasks based on what needs to be done.

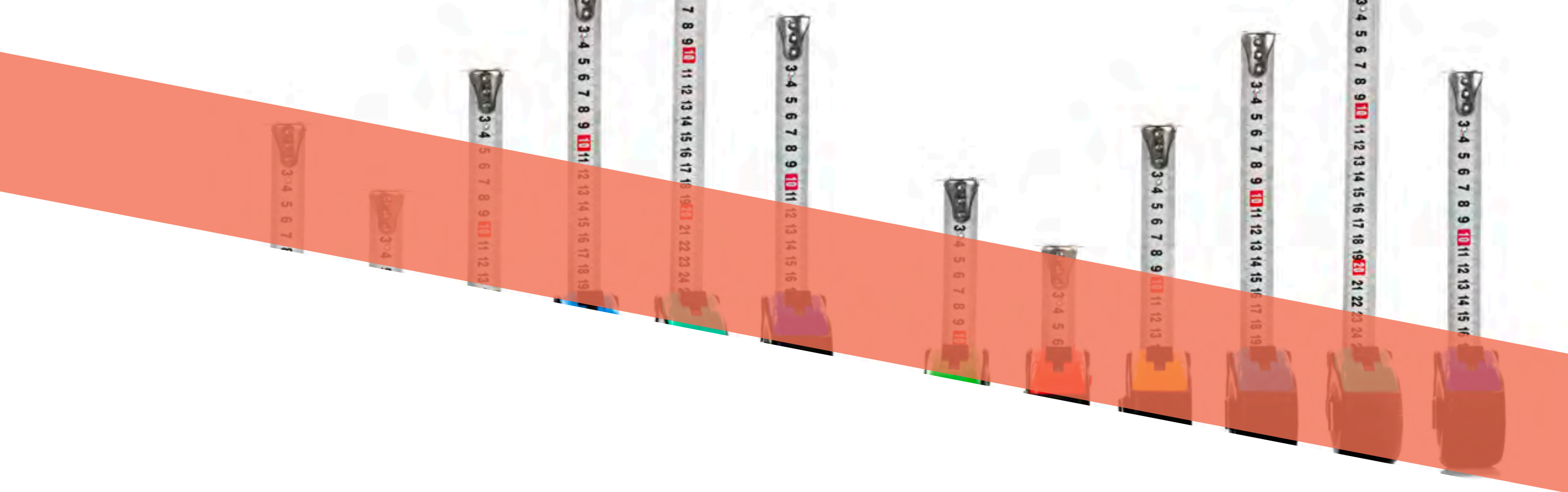
We understand the assets of our community and invite people to contribute based on their unique strengths and skills

Customer ⟷ Partner

We rarely use volunteers.

Volunteers are deeply engaged and empowered by professionals to play an active role in the organization.

Customer ⟷ Partner



Customer to Partner Continuum – Assessment Tool *(cont.)*

We achieve our goals (enrollment, membership, fundraising, etc.) by devoting significant resources to marketing, selling and recruiting.

We achieve our goals (enrollment, membership, fundraising, etc) by strengthening the networks between people (social capital) and building belonging.

Customer | Partner

We measure success by attendance numbers and satisfaction surveys.

We measure success by new relationships formed, people bringing others, increased retention, and willingness to take ownership.

Customer | Partner

We have a culture of complaining; people demand that we solve their problems, or they vote with their feet and leave.

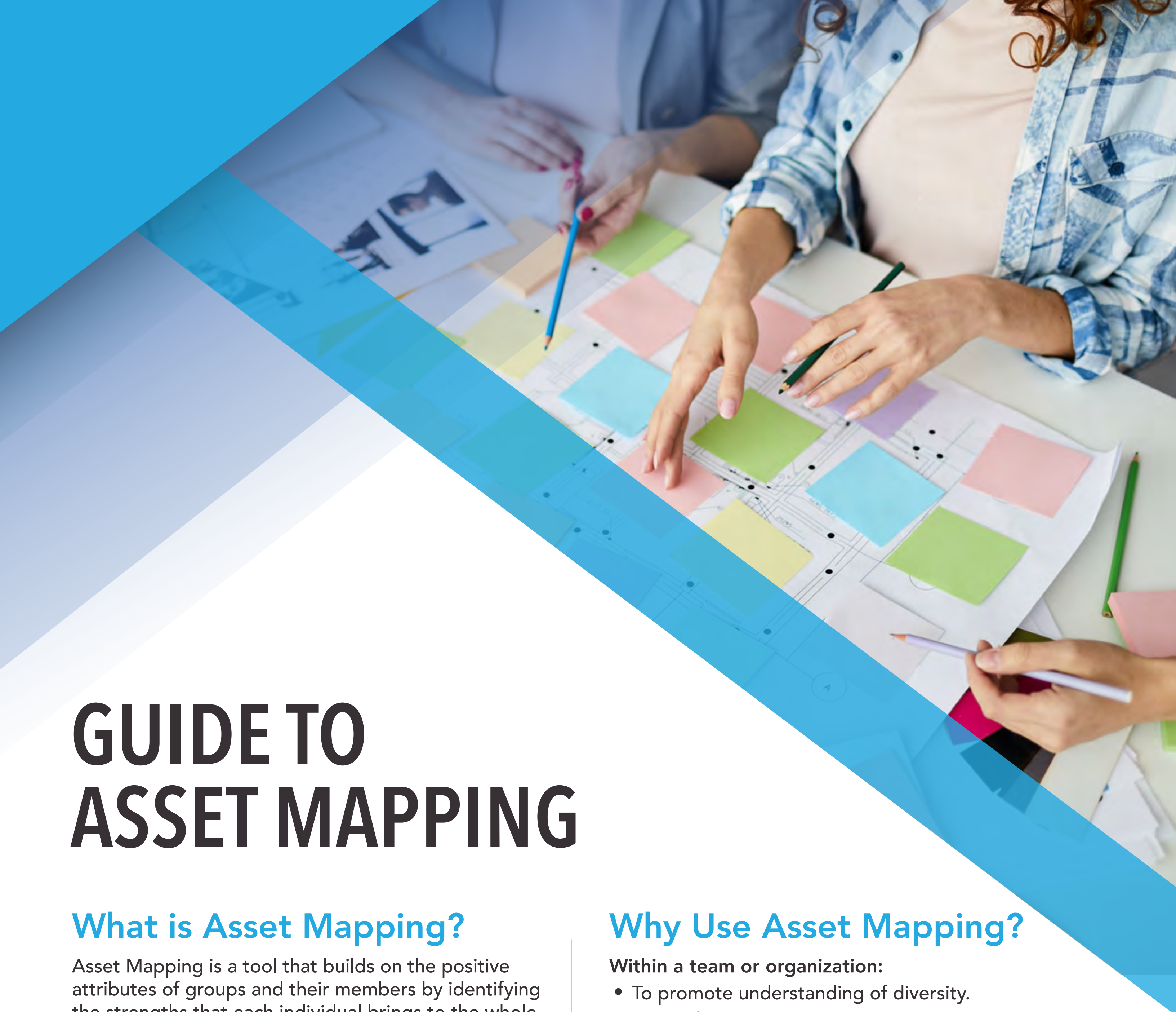
People see themselves as part of the solution and take responsibility for solving problems. Stronger relationships result in less complaining.

Customer | Partner

Activities are initiated from the top down (by professionals, or a small leadership group) with few opportunities for meaningful involvement.

People are included in authentic, meaningful ways at all phases of planning so they feel valued and invested.

Customer | Partner



GUIDE TO ASSET MAPPING

What is Asset Mapping?

Asset Mapping is a tool that builds on the positive attributes of groups and their members by identifying the strengths that each individual brings to the whole. Mapping those strengths builds a stronger sense of community and belonging, encourages collaboration, and fosters more effective teamwork. Emphasizing assets instead of needs shifts the focus from transactional relationships, services, or programs to shared ownership.

Mapping can

- Make it easier to build upon existing assets to strengthen the group.
- Reveal the aggregated skills, strengths, and gaps of an entire team or community.
- Highlight the interconnections among its members

Why Use Asset Mapping?

Within a team or organization:

- To promote understanding of diversity.
- To clarify roles and responsibilities.
- To define and identify strengths and gaps in the team's abilities and what it has to offer as well as indicate the multiple relationships between organizations, etc.
- To deepen connection and build trust amongst team members.
- To understand and value each member's unique gifts and draw on those assets to advance the team's goals and support each other.
- To show interconnectedness across groups, (for example: when engaging in collaborative projects or dividing up responsibilities between groups)

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Mapping Individual Assets - Step by Step

Before you start:

- Define your goal – why are you doing this and what do you hope to achieve by conducting this process?
- Define who or what are you mapping:
  - – Individuals
  - – Teams
- Define what you want to do with the information collected
  - – Improve collaboration
  - – Define roles and responsibilities
  - – Allocate resources for greatest impact
  - – Identify what assets you are missing
  - – Encourage individuals to help each other or ask for help

The process itself:

1. On individual sticky notes, have each person in the group write down their assets (you can color code the sticky notes):
   a. Knowledge
   b. Skills
   c. Unique experiences
2. Based on the identified assets and the goals of the session, ask each participant to share:
   a. What they might be able to contribute to the team
   b. What knowledge or skill they might be missing and would like to acquire
   c. What essential skills/knowledge are needed for individual or team success
3. On a flip chart, post the sticky notes in five groups: knowledge, skills, unique experiences, what you can contribute, what you are seeking. As sticky notes are posted, the facilitator can group similar answers together.
4. Ask:
   a. What stands out most to you? Are there any surprises?
   b. What are you curious about? Where do you want to dive deeper?
   c. What are our team strengths? What might we be missing?
   d. How might we use this information (specific plans and steps related to the initial goal)?

Individual Assets

AN ASSET – is anything that improves the quality of a team or organizational life. For our purposes we will categorize and map assets according to the following:

KNOWLEDGE – a field or subject area that you have expertise or knowledge in (i.e local Jewish history, the admissions process at a school, etc…)

SKILL – A skill used in your current role, or something you do often that you excel in (i.e. fundraising, grant writing, marketing, relationship building)

SPECIAL EXPERIENCE OR TALENT – A personal experience or ability not obviously connected to your role, but which may enhance your participation on the team (i.e. you lived in Israel, attended Jewish camp for many years, you bake challah, etc…)

Mapping Community Assets – Step by Step

When we focus on community assets (what we have), vs. our needs (what is missing), we are able to make connections between different parts of the community or organization, rather than provide services; create partnerships, rather than customer relationships; and ensure that people, not programs, are the solution to our challenges.

There are times when we want to map the strengths of an organization or network, not just the assets of the individuals that comprise a group. There are several reasons to do this:

- To clarify roles and build collaboration.
- To engage multiple actors and resources to address community-wide challenges.
- To build resilience in responding to change.

Before you start:

Define and share your goal – why are you doing this and what do you want to get out of it?

The process itself:

1. Divide into smaller groups (2 -5 people)
2. Hand out large sticky notes and markers
3. Ask each participant to generate a list of the organization's assets (you may want to have each small group focus on different types of assets: physical, organizational, social, etc.) and write each asset on a different sticky note.
4. Each participant shares with their group the assets they came up with, and the group discusses the assets and adds any others.
5. Each small group populates their section of a community map (See below)
6. All the participants come together to look at the map that was formed and asks themselves:
   a. What stands out most to you?
   b. Are there any surprises?
   c. What are you curious about? Where do you want to dive deeper?
   d. What are our strengths? What might we be missing?
   e. How might we use this information (specific plans and steps related to the initial goal)?
   f. How can the map help us position ourselves within the community?

Organizational Assets

In mapping the assets and resources of an organization or ecosystem (for example a single synagogue or network of Jewish social service agencies), we may look at these categories:

PHYSICAL CAPITAL – financial resources, buildings, infrastructures and environment

ORGANIZATIONAL CAPITAL – group culture, values and traditions

HUMAN CAPITAL – skills, knowledge, and qualifications aggregated across all members

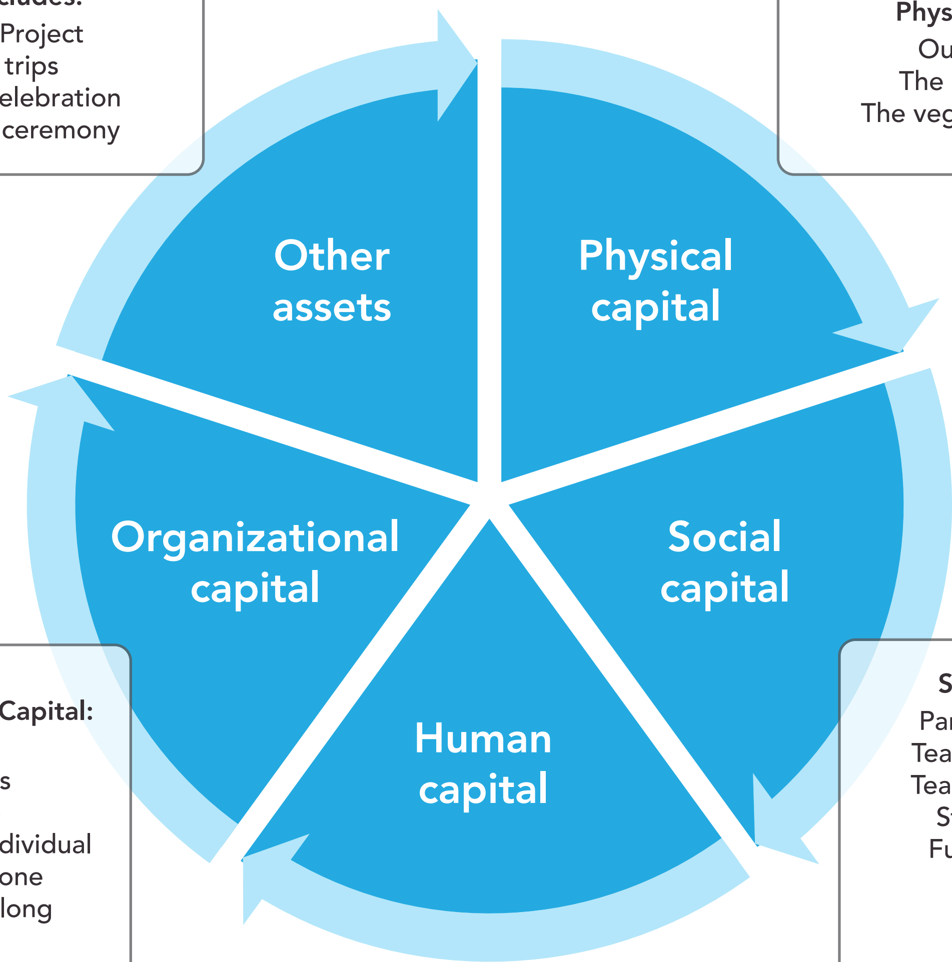
SOCIAL CAPITAL – interpersonal relationships and the extent to which they are leveraged

Asset Map – School Example

Goal/Central question: How might we attract potential new students?
There are many ways to map out community assets, here is just one example (of a school):

Other includes:
Tzedaka Project
School trips
Our Purim celebration
End of year ceremony

Physical capital:
Our building
The playground
The vegetable garden



Organizational Capital:
Diverse
Openness
Creative
Respect each individual
Make everyone feel they belong

Social capital:
Parent – teachers
Teacher – teachers
Teacher – students
Staff – parents
Future students
Alumni
PTO
Board

Human capital
Hebrew program
Accreditation

A GUIDE TO TRANSFORMATIVE MEETINGS

What Are Transformative Meetings?

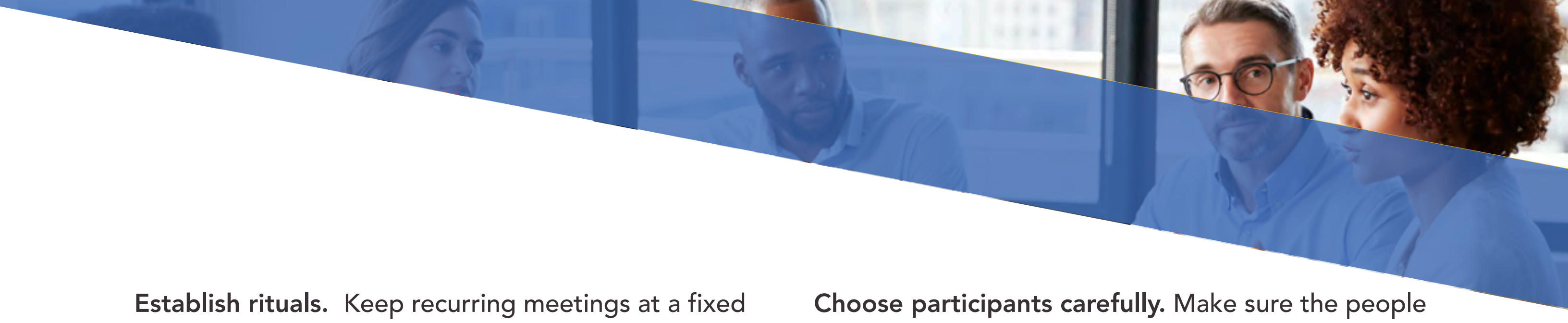
Transformative meetings are designed to help people feel valued and part of a larger goal; to build mutual trust and strengthen relationships; and to encourage openness and feedback. They increase creativity, risk-taking, ownership, efficiency, and effective teamwork.

- How does one lead transformative meetings?
- How can we make people feel seen and heard during meetings?
- How can we get more out of meetings and better achieve our goals?

What to Consider Before a Meeting.

Articulate clear and specific goals—including both work outcomes and belonging goals. What would a successful meeting look like? What do we need to accomplish? What do we want people to feel, know, or do as a result? "Belonging" goals relate to people's relationship to each other and the group.

For example: "Everyone will make a meaningful new connection, have an opportunity to contribute to the discussion, be valued for their unique skills, or be able to step up and help lead." Once defined, design the meeting by not just listing topics, but rather format for each agenda item to accomplish the meeting goals.



Establish rituals. Keep recurring meetings at a fixed time, structure and length. Try not to move the meeting—regular meetings create a feeling of safety for group members. Furthermore, embed rituals into meetings.

Examples of meeting rituals: birthday celebrations, opening and closing activities, and other group-led "traditions."

Choose participants carefully. Make sure the people who attend the meeting are the "necessary" people. The better you define who needs to be at the meeting, the more likely they will feel they belong and are needed there.

Design the "setting." Decide on room set-up to support the goal of the meeting, determine the best time of day, and identify ground rules. All these effect the outcome of the meeting.

During a Meeting

Cultivate ownership by inviting participants to play a role at the meeting based on their unique skills and traits, encouraging them to plan and/or lead different parts of the meeting.

Find the balance between the agenda and the immediate, unplanned issues that arise.

Encourage interaction by structuring opportunities for people to share with each other or play a role during meetings to build connections and ensure that participants feel heard and valued; include opportunities for building relationships and trust.

Let others talk, practice active listening, reflect on what's said, make connections and build on comments.

Don't end on a logistical note. End by bringing people back to reflecting and sharing. Keep the momentum going. Make sure that action items are clear and agreed upon. And of course, use humor and laugh often!

After a Meeting

Summarize and share outcomes. Send a summary after meetings to ensure that everyone is on the same page and next steps are clear. Remember to include everyone, as well as those who had to leave early or could do not attend.

Making people feel valued during a meeting is also your goal!

Involve others:

- Invite people to lead different parts of the meetings
- Share ownership
- Fewer updates and presentations, much more sharing, reflecting, problem solving

Acknowledge that what people say matters:

- Make eye contact
- Listen attentively
- Acknowledge ideas (even if you don't adopt them)
- Give credit to those who deserve it

Create a safe space for the group by being vulnerable yourself and leading by example.

Honor people's presence even when they are absent:

- Put a chair out for them
- Share with others where they are (if it's not confidential)
- Establish a practice of inviting participants to reach out to someone who was absent to let them know they were missed and bring them up to speed
- Acknowledge their presence when they return

Create strong shared experiences that build connections and trust.

Other opportunities for sharing such as breakout sessions; work in pairs or small groups.


Participants feeling that they matter
An opportunity to create bonds and connection
Results
Strengthen community and team identity
Improved outcomes

THE OPENING AND CLOSING RITUALS OF A GATHERING

What Are Opening and Closing Rituals?

Together, the opening and closing ritual are the bonding and connecting “bookends” for any gathering, intended as a regular practice for groups that come together one time or repeatedly.

Building trust, shared purpose and group identity

The goals of an opening ritual activity are to build trust, to create connections among the participants and on an interpersonal level allowing for each person to be seen and known in a multi-dimensional way (i.e. I am not only a Marketing Manager, but also an avid hiker). A closing ritual ensures that the meeting leaves everyone feeling more connected to each other and the purpose of the group.

Designing Opening and Closing Rituals

An Opening RItual is a simple prompt question, asked at the beginning of a gathering, that invites personal sharing related to the goals or context of the gathering.

Opening and Closing Rituals are best used for groups that meet repeatedly as a bonding ritual to build trust, safety and a higher common purpose. However, they can also be incorporated into stand-alone events to cultivate connection.

To decide whether and how to use an Opening and Closing Ritual, it's important to articulate clear goals for your gathering (more on this can be found in our tool for Transformative Meetings).

Ask yourself:

- What do you need to accomplish?
- Who will be there and what do you want people to experience and do?
- What's the culture and purpose of this group?
- What would success look like?

Depending on the size of the group and timing, this can be done in the full group, small groups or pairs. You may want to give a minute for people to think and jot down their thoughts before opening up for sharing so they can actively listen.

Sometimes structured activities can set a more playful, energetic tone – for example asking people to stand up, step in or stand along a line to identify common characteristics or differences along a spectrum; inviting small groups to find one thing they have in common; or moving around a room to find new partners to answer a prompt together.

What Are the Key Principles of an Opening Ritual?

Choose topics and activities that fit the group

- Keep in mind the size, previous acquaintance and your goals.
- For example, if people don't know each other well or you're in a formal work setting, choose less personal topics; if it's a bonded group that has built trust over time, you can go deeper.

Connect to the topic of the meeting or event:

- Services for seniors, you might ask participants to talk about an older person who inspired them.
- Building a work plan, ask for one thing you are excited about for the coming year.

Focus on something larger going on in the organization (changes, big launch, etc.):

- Challenges in internal communication, ask them to think of an excellent communicator and share why they are so effective.
- Building relationships with donors, you might ask participants to share a significant relationship they had with a donor.
- Survey results, you might ask, if you had a magic wand and could change anything in the organization, what would it be?

Create a prompt that encourages a deeper acquaintance (assuming that supports the goal of the meeting).

- What's rocking your world this month? What do you give a damn about? Can you share one thing about you that no one here knows?
- Where is your happy place? Share a picture (from your phone) of a moment that brings you joy?

Relate to the time of year (big event, an upcoming holiday, season, etc.).

- Before Rosh Hashana / New Years – something you are happy to leave behind for the year, something you look forward to next year.

Delegate ownership – involve group members in designing and leading these rituals.

Additional Opening prompts…

- Share a time when you felt you didn't belong, felt excluded or just different.
- What's the best lesson you've ever been taught and by whom?
- Who can you call when you need encouragement?
- Describe a moment of kindness.
- Describe an experience of loss that left you changed. How are you different as a result?
- What do you dream for your community?
- When did you feel most free in your life, and most constrained?
- What would your best friend say about who you are and what makes you tick?

What Are the Key Principles of a Closing Ritual?

A Closing Ritual should be simpler and shorter than an Opening Ritual – the goal is to give space at the end for participants to reflect on and hear each others' personal responses to the group and gathering. A quick go-around in just one minute can unify and connect the group before departing. For example, ask for one word or a short sentence in response to a question like:

- One thing I'm taking away from today
- I now know…I now feel…
- An "aha" moment. Something I will do differently from now on
- Thank one person who changed your thinking today

Most people find setting aside time for these activities pays off immediately and over time. Opening and Closing Rituals should be calibrated and designed for the goals and culture of your group (see below) and for this reason they are different from simple "ice breakers." They don't just "warm up" a group before moving to the real purpose, they further the purpose of the group.

Not everyone will be comfortable with Opening and Closing Rituals – and that's ok. You can and should take people a little (but not too far) beyond their habits and comfort zones to build trust and openness.

CULTURE OF BELONGING MAKEOVER GUIDE

What is a Culture of Belonging Makeover?

A culture of belonging makeover is a structured process for groups to analyze a challenge, design creative solutions, and reflect on existing programs or processes using a Culture of Belonging lens. For example, we might harness the power of the group through this process to explore how might we:

- Reach new people?
- Engage more families?
- Design a gathering for a more meaningful experience?
- Encourage people to come back, stay or bring others?
- Build a more cohesive, effective team or board?

Why Conduct a Makeover?

This process enables the group to:

- Think more deeply about a dilemma or opportunity, challenge their assumptions, and rethink some aspect of their practices.
- Contribute and influence the outcomes of any situation.
- Gain multiple perspectives while using a structured format.

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How to Conduct a Makeover - Step By Step Guide

Makeovers work best in small groups of 3-5 people, with one facilitator to lead and time the process. The specific structure can be adapted or simplified, but it must follow a strictly timed format with clear instructions for each component. One group member is the presenter, bringing a carefully framed challenge or question for the group to work on—the more specific the better. The presenter should consider what they hope to gain from the process, and how to define the issue and context.

1. Presenter shares the question, challenge or opportunity (5 min)

- What is the current situation? What is the desired outcome?
- What is preventing you from getting there? How is it impacting the organization?
- Why is this an issue? Who is involved?

2. The group asks clarifying questions and gives brief/factual answers (4 min)

- Is this what you said...? Did I hear you say...?
- Did I understand you when you said...? What's another way you might...?
- Did I paraphrase what you said correctly? I'd be interested in hearing more about...
- If you'd give me an example of...so I can be sure I understand?
- So, are you suggesting that...? Tell me what you mean when you say...
- Tell me how that idea is like/different from...

3. The group asks powerful questions to clarify and expands the thinking about the issue (6 min)

- Why do you think this is the case?
- What would you have to change in order for...?
- What do you feel is right in your heart?
- What do you wish...?
- What is another way you might...?
- How was... different from...?
- When have you done/experienced something like this before? What happened then?
- What do you assume to be true about...?
- Why is this a dilemma for you?
- How might your assumptions about... have influenced how you are thinking about...?
- What if time, money, etc. were not an issue?
- Who (else) could help you with this? How? Why?
- What is the best outcome in this situation?

4. Discussion – group with the presenter listening but not speaking, talks about the challenge and REFRAINS from solutions! (7 min)

- What did we hear that might be relevant?
- What assumptions seem to be operating?
- What questions does the challenge raise for us?
- What do we think about the challenge?
- What might we do or try if faced with a similar issue? What have we done in similar situations?

5. Suggestions and reflections – group offers ideas to try; presenter listens and takes notes but doesn't speak or respond (6 min)

6. Presenter summarizes and reflects on what they heard, what they might adopt (4 min)

7. Group shares: How is this relevant to me? Each one shares from his\her own experiences (7 min)

Things to keep in mind:

- The question you present and are trying to solve should be very clear.
- Keep an open mind—refrain from judgments or speculations of any kind.
- Make sure everyone's voice is heard—it's easy for a few people to dominate
- Listen with intent. Remain in a listening mode.
- Don't jump to the solutions. Take time to understand the question and assumptions.

PUTTING BELONGING TO WORK ON OUR BOARDS

Is your board working at its highest potential to fulfill your organization's mission? Are diverse voices included and valued in its processes? Are your meetings generative and interactive, with each board member contributing, or do they consist mostly of frontal presentations and approvals? Does your board solve problems together effectively? Do members disagree constructively and respectfully? How well do board members know and trust each other?

Most boards would land somewhere along a continuum for any of these measures of excellence, but two things can be said for all boards:

1. There is always room for improvement—and in many cases, quite a lot!
2. None of these elements of board culture will shift without intention, design, and sustained effort.

The Culture of Belonging framework offers a set of principles and a toolkit for building stronger, more effective boards by bringing the best of each board member in advancing the organization's mission together. Furthermore, boards play a critical culture-setting role, and the changes they start can cascade across their organizations.

Why Invest Time Designing for Belonging Culture on Boards?

A Boardable report[1] which studies board engagement found that:

- Only 10.9% of board members say their boards encourage every member to speak during a meeting.
- 60% say they have no interaction or communication between members outside of the meeting.

Boards that Prioritize Belonging

In May 2021, as part of the Federation's 473K Culture of Belonging Conference, we gathered a group of leaders from high-performing Jewish boards to share their wisdom on building inclusive and cohesive board cultures. What happens when a board prioritizes and designs for belonging? Here's what they reported:[2]

- Transformative conversations among board trustees on meaningful topics that they wouldn't discuss otherwise, ultimately deepening their relationship to the organization and each other.
- A diverse pipeline of leaders increasing the breadth of perspectives and skills, along with policies and practices that prioritize equity.
- Open dialogue and dissent within board discussions so that all voices are valued, and the organization can question assumptions, hear new ideas, and stretch beyond old patterns of thinking.
- A culture and environment that brings each member's best skills and talents in service of the board's mission with the result that members are participating more actively and passionately as ambassadors, donors, and leaders.
- Each member feels connected to the mission of the board and to each other. They each have meaningful roles to play and, as a result, they feel seen, valued, and motivated to work together and over come difficulties to advance the board's shared goals.
- A board that accomplishes more as a group makes a deeper impact and better decisions, and spreads Culture of Belonging approaches to the rest of the organization.

Board Diversity and Belonging

Many North American Jewish organizations are belatedly coming to terms with the lack of racial, ethnic, gender, cultural, socio-economic, and other types of diversity within their leadership and communities, and are seeking to build boards that reflect our richly diverse population. The most successful of these are not only recruiting new board members but adapting board culture to ensure belonging for all members while addressing the biases and structural inequities that have marginalized so many in mainstream Jewish institutions.

Through Diversity, Equity & Inclusion (DEI) work, we can build awareness of patterns of oppression, privilege, gender discrimination, bias, and white supremacy. We can learn skills like empathy, resilience, and accountability for mistakes, and change organizational policies and practices. The Culture of Belonging framework adds a critical next step, creating a sustainable environment for all board members to show up as their full selves with equal voices to forge a common mission together.

[1] *"Third Annual Nonprofit Board Engagement Survey Report, Boardable, 2020"*

[2] *473K 2021 - Putting Belonging Back on Our Boards Design Studio*

How Might a Board Adopt a Belonging Mindset?

Changing your board belonging culture has the potential of affecting your entire organization and community and takes a planning and implementation process.

This tool can get you started.

Build Shared Purpose

Connecting board members to the purpose of the board and organization goes deeper than simply reminding them of the mission statement or approving strategic goals. It's really about helping board members link their own values, passions, and purpose, with each other's and with the organization's mission, to feel a sense of ownership and partnership - "This is mine and we are in this together!" It doesn't just happen - it's an active, intentional process.

- Facilitate opportunities to connect individual values with the board's mission as an opportunity to clarify roles and build cohesive purpose. Board policy or planning discussions can begin with a prompt, inviting members to share their own values related to the topic, for example.
- Setting group norms through an inclusive process will also elevate shared values, allowing each member to see themselves and their beliefs in the shared rules of conduct.
- Build board unity and cohesiveness, not around members' common traits, but by defining shared values and unified purpose, and by developing relationships and trust over time. For example, by providing opportunities for board members to work with each other in small groups.
- When we over-emphasize common traits, we risk excluding people who are different. Boards should cultivate and celebrate differences among members - diverse identities and different opinions and backgrounds. Focusing on commonalities (like playing "Jewish geography" or assuming everyone has similar Jewish backgrounds) can reinforce outsider status of those who feel different.

Set Belonging Goals

Think of your desired outcomes related to belonging and ask: What do we want participants to feel, know or do as part of this board? What outcomes do we hope to see as a result of greater belonging, commitment, collaboration, and cohesion?

- Set concrete, measurable belonging goals for how members participate (for example, everyone participates in discussions and decisions, or disagreement is openly aired), how they interact together and deepen connections, collaborate, volunteer, lead, give, and bring their networks.
- Be prepared to measure belonging goals. You can survey board members (ask: do they feel seen and valued, can they bring their full selves, are they building trusted relationships with peers?); observe behavior and track outcomes like progress on goals, recruitment, and engagement.
- Include belonging goals that address diversity and equity. For example, board members of all identities feel like equal partners on the board, and board members are trained in DEI skills and awareness.

Once you identify specific, measurable "Belonging Goals" for how board members will feel and participate, and how the board should function as a group, it's easier to design tactics (and metrics for success) that will bring those goals to life, using the Ten Culture of Belonging Principles as a roadmap.

Design Participatory Meetings

Since meetings are the primary way boards conduct business, it's imperative that board meetings are designed to maximize belonging, inclusivity, commitment, and participation.

- Incorporate rituals with care to make them inclusive, keeping in mind all the diverse identities on your board.
- Intentionally plan opportunities for personal sharing.
- Enable small group work.
- Invite members to help design or play roles at meetings.
- Set up the room to support interaction.
- Curate video meetings that keep people actively engaged with different modalities.

These tactics are not an "add-on" to the "real work" of the board; they should be integrated into how the board conducts its work. As a result, members will be motivated to bring their full selves, with all their gifts and talents, to work together towards the board's shared mission. See our Transformative Meetings tool for more ideas and Liberating Structures for formats that foster inclu-sive group facilitation.

Tap Members' Best Assets

When we limit board roles to the same few tasks we "need" (like giving at a certain level, voting on actions, or promoting the organization as ambassadors), we miss out on the full range of talents and perspectives board members could be contributing, and they may feel invisible and unappreciated for their unique gifts. An "unseen" board member is less likely to contribute their thoughts, time, or money to the cause.

- Map members' assets. Asset mapping reveals the strengths and resources on your board, not only helping members to know each other more fully, but also to mobilize these strengths in support of your shared mission and community. There are many ways to do this - we offer a mapping tool you can adapt for your board.
- Invite board members to bring their unique talents to the board and organization. You might be surprised how creatively a poet, a challah baker, a financial advisor, or a people-networker can contribute their skills, and how doing so not only makes them feel seen but shifts them from passive members to active partners of the group.

"Come for the 'What,' Stay for the 'Who'" [3] - Strengthen Relationships, Empathy, and Trust

Many boards make the mistake of focusing entirely on business (the "what") and fail to systematically build the relationships (the "who") among board members that lead to a more cohesive, collaborative, and ultimately effective board culture. Relationships on most boards evolve randomly and without intention and are therefore inconsistent across the board. While there is no intention that board members will become best friends, the unique relationships that can be formed on the board promote not only the board's mission but a sense of pride and cohesiveness among its members.

[3] *Dr. Sara Shadmi-Wortman, Co-Founder and CEO Varda Institute for Community Building*

Each board meeting can include structured opportunities for members to share something about themselves, tailored to the purpose, timeframe, and attendees (how well they already know each other, the different backgrounds and identities of the members). Deeper relationships and trust also come from the space between meetings—the experiences you share and the way you can count on each other for support when needed. See appendix for several prompts that are particularly suited to boards.

- Incorporate multi-dimensional sharing (opportunities to get to know other aspects of each other, aside from your role as board members) to deepen relationships among board members. This guide to Opening and Closing Rituals can help you design the right relationship-building moments for your group.
- Design personal sharing activities with care and intention, adjusting to the size and diversity of the group, the group's familiarity and acquaintance, and the setting and purpose of the gathering. Prompts should feel accessible, inclusive, and safe to all, related to the purpose of the meeting, and deep enough to bring out authentic glimpses of each other.
- Build experiences outside the boardroom (or Zoom screen) that bring members into shared moments of meaning together, whether an offsite retreat, home-hosted dinner, family picnic, trip to Israel, or even virtual gatherings that take people out of their usual setting.
- Create practices for caring and supporting each other (for example, calling members who miss a meeting to fill them in, or showing up for losses and milestones) to foster an atmosphere of trust and safety.

Connect People Through Small Groups

Small groups are key to connecting people to each other and to something bigger —whether a board, its mission, or the larger organization. This is especially important for onboarding new board members and bridging differences among generations, wealth, race, ethnicity, and other identities. People build relationships more readily in small groups, speak up and participate more actively, and connect to the larger board or organization with greater confidence.

Small groups are the most effective structure for getting things done and achieving change (which is why most board work happens in committees!)

- Within meetings, use small group structures (breakouts), as a way to encourage deeper individual and collective participation.
- Draw on Culture of Belonging principles to design more bonded and effective board committees.
- Facilitate formation of interest/identity-based affinity groups so that members can feel anchored and supported by peers, and show up in the larger board with confidence in their full identities.
- Affinity groups can also lead change on the board (for example, around anti-racism).
- Assign each board member to a peer-led small group as an anchor within the larger board.

When Arthur Slepian began his tenure as board chair of the San Francisco based Jewish Community Federation and Endowment Fund at the beginning of the COVID-19 pandemic, one of his first moves was to assign each board member to a peer-led small group, which met by Zoom in between board meetings. Arthur recruited group leaders who were natural people-connectors and also familiar with Culture of Belonging principles. The groups (which are re-assigned each year) provide a platform for board members to know each other more deeply and to process complex issues on the formal board agenda.

The results (measured through board surveys and board participation) have exceeded expectations: board members report stronger relationships, trust, and connection to each other; empathy and understanding across differences; feeling that they matter and are seen and valued on the board. Newcomers and those who might have felt marginalized speak up more readily and openly, and all board members demonstrate increased initiative and collaboration. As the Federation board recruited more people of color and embarked on a major equity and racial justice initiative, the board small groups were a critical tool for building a board culture where all members could feel they belong with their full identities, and could contribute their best selves.

Conclusion:

The outcomes of a Culture of Belonging on the board start with individual members and cascade across the organization. When board members feel seen, heard, and valued for their full identities, they are energized and motivated to give their best to each other and to the organization's mission. The relationships, trust, and sense of shared purpose they develop together result in a more cohesive, effective board. By modeling belonging mindsets and approaches, the board sets values and priorities that can ripple among the professional team and the broader community, multiplying the impact.

Appendix:

Sample Prompts for Board Sharing:

1. Share a time when you made a deep impact as a leader or board member - what made it so?
2. Share a time when you collaborated with others that was meaningful to you.
3. How have you personally felt you made a difference with a cause or organization?
4. Share something you've learned about yourself or a strength you've discovered in the last year.
5. Share a talent or personal quality you bring (or want to bring) to your board work.
6. Share one thing you want/need from your fellow board members to help you participate as your best self
7. Share a seed (idea, connection) you've planted that has blossomed and made you proud.

Belonging Indicators

The following are indicators of belonging on a board that can be used or adapted to assess the health of your board at points along the culture change process.

On a scale of 1-3 (Yes, No, Somewhat):

1. Do board members know each other in multi-dimensional ways (beyond board roles)?
2. Does everyone participate actively in meetings?
3. Does everyone contribute or engage with others between meetings?
4. Do members feel comfortable disagreeing and sharing dissenting opinions?
5. Do you solve problems together well?
6. Do you know what skills, talents, and networks each member brings, and are we tapping into them? Does the board see and tap your best skills, talents, and abilities?
7. Do you celebrate personal achievements / take notice of bereavements? Do you take care of each other when needed?
8. Do you have rituals in place to celebrate board achievements and milestones?
9. Do you share additional aspects of life together with other board members?
10. Does the board reflect the organization/community it serves?
11. Do board members feel visible and embraced for all their identities and comfortable sharing their full selves?