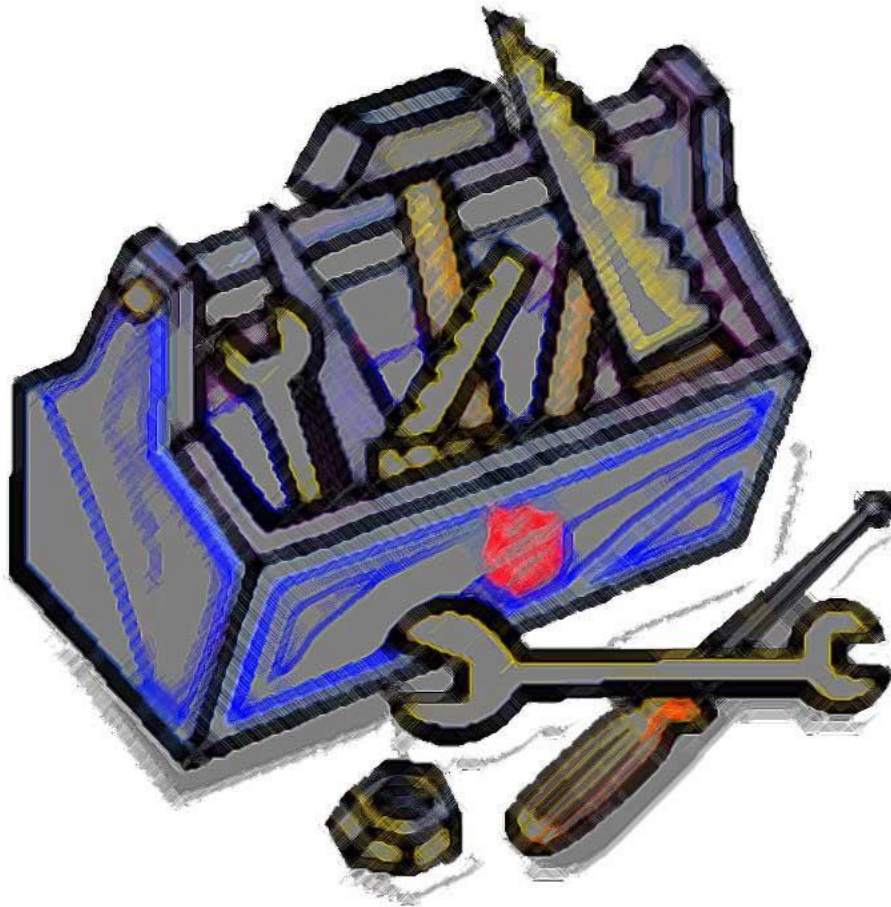


ADVISORY BOARD TOOL BOX



**Compiled By Northern Division
Development Department
2016**

PLEASE NOTE: This packet is not intended to be a manual. It is simply a collection of materials and ideas which can be used to supplement existing Salvation Army resources as needed and may be customized to meet the specific needs of each advisory board.



DOING THE
MOST GOOD



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SAMPLE ADVISORY BOARD JOB DESCRIPTIONS, FORMS & TIPS FOR A SUCCESSFUL BOARD

PLEASE NOTE: All advisory board functions are ultimately accountable to corps officer/administrator. Furthermore, inclusion of corps officer/administrator in all meetings, planning, communications and other activities connected with The Salvation Army and its advisory board is implicit.



ADVISORY BOARD TOOL BOX

ADVISORY BOARD JOB DESCRIPTION **ALL ADVISORY BOARD MEMBERS**

Term:

- Three years beginning ____ and ending _____

Time Expectations:

- Attend regularly scheduled advisory board meetings (____ per year), held on the _____ of every _____
- Participate actively in one or more committees of the board
- Attend scheduled advisory board retreats, planning meetings, workshops or other board development activities
- Attend, support and participate in special events

Obligations:

- Attend at least 75% of all advisory board meetings and related functions
- Serve on at least one advisory board committee
- Make a personal financial contribution to The Salvation Army
- Protect confidentiality of agency matters, avoid conflicts of interest and be loyal to the Salvation Army
- Understand, support and advocate The Salvation Army's mission/programs in the community
- Monitor, interpret and communicate (to the officer and advisory board) the community's pulse, character and needs
- Open doors, develop relationships and identify opportunities in the community
- Serve as a liaison between The Salvation Army and the community
- Maintain advisory board and corps direction, assure consistency and continuity of programs even in conjunction with leadership changes
- Provide focus and strategic vision to the corps and the advisory board
- Ask questions and regularly contribute to advisory board discussion by offering thoughtful insights and opinions
- Support advisory board decisions regardless of personal desires and/or opinions
- Study agenda and other materials distributed by the secretary prior to each advisory board meeting in preparation for meetings
- Review and question all minutes and reports submitted to the advisory board
- Support and assist the officer with solving administrative and operational matters
- Participate in developing the corps' strategic plan as appropriate
- Assist in meeting and measuring the corps' goals/initiatives as appropriate
- Participate in corps' financial development and fundraising efforts
- Review and approve proposed annual budget
- Conduct studies and performs research as necessary
- Be involved in process and controls that ensure corps' fiscal accountability
- Demonstrate initiative, enthusiasm and passion



ADVISORY BOARD JOB DESCRIPTION

ADVISORY BOARD CHAIRPERSON

Reports To: Corps Officer/Administrator

Obligations:

- Presides over, provides leadership to and facilitates at all meetings of the advisory board and the executive committee
- Participates as member ex officio of all committees, except for the nominating committee
- Provides input for the advisory board meeting agenda (assuming the corps officer/administrator initiates agenda)
- Provides input for advisory board annual planning sessions (assuming the corps officer/administrator initiates session)
- Ensures board member follow through on assignments
- Keeps advisory board meetings on track by providing focus and assurance that topics and discussions are appropriate for advisory board meeting venue
- Helps to guide and mediate advisory board discussions and actions to achieve unified consensus



ADVISORY BOARD TOOL BOX

ADVISORY BOARD JOB DESCRIPTION

VICE CHAIRPERSON

Reports To:

- Advisory Board Chairperson

Obligations:

- May be positioned as president-elect
- Performs the duties of the chairperson in his/her absence
- Performs such other duties as may be prescribed by the corps officer/administrator, chairperson, or board



ADVISORY BOARD TOOL BOX

ADVISORY BOARD JOB DESCRIPTION

SECRETARY

Reports To:

- Advisory Board Chairperson

Obligations:

- Provides information packet (includes: written notice of meeting, agenda and materials for board consideration) to all members of advisory board prior to meeting
- Attends and keeps records/minutes of all meetings of the advisory board and the executive committee
- Provides copies of advisory board meeting minutes to board members and divisional headquarters in a timely manner
- Regularly updates/maintains the advisory board membership list
- Prepares reports relating to the advisory board as necessary
- Performs such other duties as may be prescribed by the corps officer/administrator, chairperson, or board



ADVISORY BOARD TOOL BOX

ADVISORY BOARD JOB DESCRIPTION

TREASURER

Reports To:

- Advisory Board Chairperson

Obligations:

- Is well-acquainted with financial reports and monitors the financial viability of the local corps unit
- Assures consistency of financial reports
- May assist corps officer/administrator in facilitating corps' budgeting process
- Performs such other duties as may be prescribed by the corps officer/administrator, chairperson, or board



ADVISORY BOARD JOB DESCRIPTION

NOMINATING COMMITTEE

Reports To:

- Advisory Board Chairperson

Obligations:

- As a committee, assesses local talent to fill existing and forthcoming advisory board vacancies
- As a committee, identifies, interviews and proposes qualified advisory board candidates
- As a committee, monitors advisory board member wealth, experience, background, skills, community connections, as well as other considerations, to maintain diversity and balanced board composition

Sample initiatives:

- Facilitates advisory board member transition/succession process
- Assists corps officer/administrator in organizing and conducting orientation program for new advisory board members
- Identifies and implements recognition opportunities for advisory board members
- Assists corps officer/administrator and staff in developing advisory board profile which includes data on each member's business, education, special interests, religious affiliations and organizational connections



ADVISORY BOARD JOB DESCRIPTION

FINANCE COMMITTEE

Reports To:

- Treasurer

Obligations:

- Is well-acquainted with financial reports, monitors the financial viability of the local corps unit and advises the Corps officer/administrator as appropriate
- Assures consistency of financial reports
- Reviews budget and makes recommendations as appropriate
- Makes recommendations for appropriations
- Submits and presents proposed budgets to advisory board members for review and recommendation prior to final adoption
- Reviews monthly financial statements and helps interpret and communicate financial condition to advisory board members
- Reports, recommends actions and presents financial reports at advisory board meetings
- Helps present the corps budget to united appeals

Sample initiatives:

- As a committee, discusses and recommends the Christmas campaign goal to corps officer/administrator
- Assists corps officer/administrator in facilitating annual budget planning process
- Presents corps budget at United Way and other funding/grant request meetings



ADVISORY BOARD JOB DESCRIPTION

PROPERTY COMMITTEE

Reports To:

- Property Chairperson

Obligations:

- Assists corps officer/administrator in assuring all corps' facilities are maintained in good repair including property inspections, compliance with local ordinances, safety, security and helps maintain the Salvation Army's image as it relates to facilities
- Understands each facility's use and corps' needs
- Investigates, reviews and make recommendations to the corps officer/administrator and advisory board for all property issues

Sample initiatives:

- Anticipates upcoming corps property needs, obtains bids and participates in gathering information as required
- With programs committee and corps council, plans and provides oversight for a space utilization survey of the corps facility



ADVISORY BOARD JOB DESCRIPTION

PROGRAMS COMMITTEE

Reports To:

- Programs Chairperson

Obligations:

- Monitors effectiveness, quality and relevance of all corps' social programs including expansion, program discontinuations and major revisions and makes appropriate recommendations
- Monitors and recommends ideas for strengthening corps programs and services
- Explores and suggests potential new corps programs to meet critical community and human needs
- Works with community volunteers and staff

Sample initiatives:

- Assists corps officer/administrator in identifying ways to encourage and recognize staff and volunteers
- Investigates programs offered by other service organizations and advise the corps officer/administrator of potential project/program collaborations when appropriate



ADVISORY BOARD JOB DESCRIPTION

COMMUNITY RELATIONS COMMITTEE

Reports To:

- Community Relations Chairperson

Obligations:

- Promotes awareness of The Salvation Army's mission, programs and accomplishments to the community through various channels including the media
- Assists the corps officer/administrator with planning and execution of strategies for maintaining, managing and enhancing The Salvation Army's brand, image and perceptions in the community through marketing, public relations and outreach
- Builds and maintains effective relationships with all aspects of the community: individuals, corporations, civic and service organizations, the media, etc.
- With approval of corps officer/administrator, writes press releases and performs media relations
- Assists in planning for annual civic function and other special events

Sample initiatives:

- Publicizes one human interest story to the media per month
- With Development Committee, creates a speakers bureau, identifies groups (service organizations, churches, etc.) and offers to present The Salvation Army's story
- Writes letters to the editor with approval of the corps officer/administrator
- Partners with other groups to originate and plan events and carry out publicity in the community with approval of the corps officer/administrator
- Makes arrangements for corps officer/administrator to meet with community leaders to promote a new program



ADVISORY BOARD JOB DESCRIPTION

FINANCIAL DEVELOPMENT COMMITTEE

Reports To:

- Development Chairperson

Obligations:

- Identifies local funding sources
- Facilitates acquisition of adequate resources to fulfill the corps' mission
- Reviews and supports fundraising efforts and opportunities
- Builds and maintains effective relationships with all aspects of the community: individuals, corporations, civic and service organizations, the media, etc.

Sample initiatives:

- Reviews direct mail results on a quarterly basis
- Assists with the planning of future direct mail campaigns
- Personally thanks donors, in person or by telephone
- Invites donors to volunteer/attend corps programs
- With Community Relations Committee, creates a speakers bureau, identifies groups (service organizations, churches, etc.) and offers to present The Salvation Army's story



ADVISORY BOARD JOB DESCRIPTION

COMMUNITY RELATIONS & FINANCIAL DEVELOPMENT SUB-COMMITTEES

VOLUNTEER COMMITTEE

Reports To:

- Community Relations Chairperson

Obligations:

- Builds and expands volunteer opportunities
- Engages local businesses, churches, schools and universities in volunteer efforts

Sample initiatives:

- Identifies volunteer opportunities
- With approval of corps officer/administrator, recruits community volunteers
- Assesses volunteer experiences and encourages additional involvement
- Recommends ways to recognize volunteers to chairperson
- With approval of corps officer/administrator and advisory board, initiates Youth Advisory Council in area schools

KETTLE COMMITTEE

Reports To:

- Development Committee Chairperson

Obligations:

- Builds and expands kettle season through effective utilization of volunteer bell ringers as directed by corps officer/administrator and development committee
- Develops volunteer contacts, matching kettle funds and "Adopt-a-Kettle" Partners
- Meets with store managers as directed by corps officer/administrator and development committee
- Prepares kettles, stands, etc. for season as directed by corps officer/administrator and development committee



ADVISORY BOARD TOOL BOX

ADVISORY BOARD COMMITMENT LETTER

I, _____, hereby agree to serve as a member of The Salvation Army Advisory Board of _____. I understand that my term of office begins _____ and extends for _____ years, ending _____.

As a member of the Salvation Army Advisory Board, I agree to (check off each item below indicating you have read and understand each advisory board obligation):

- | | |
|--|---|
| <p>GENERAL BOARD OBLIGATIONS:</p> <ul style="list-style-type: none"> • Attend regularly scheduled advisory board meetings (____ per year), held on the _____ of every _____ • Attend scheduled advisory board retreats, planning meetings, workshops or other board development activities • Serve on at least one advisory board committee • Make a personal financial contribution to The Salvation Army • Protect confidentiality of agency matters, avoid conflicts of interest and be loyal to the Salvation Army • Support and advocate The Salvation Army's mission, programs and services in the community • Monitor, interpret and communicate (to the officer and advisory board) the community's pulse, character and needs • Open doors, develop relationships and identify opportunities in the community • Serve as a liaison between The Salvation Army and the community • Provide focus and strategic vision to the corps and the advisory board | <ul style="list-style-type: none"> • Maintain advisory board and corps direction, assures consistency and continuity of programs even in conjunction with leadership changes • Ask questions and regularly contribute to advisory board discussion by offering thoughtful insights and opinions • Support advisory board decisions regardless of personal desires and/or opinions • Study agenda and other materials distributed by the secretary prior to each advisory board meeting • Reviews all minutes and reports submitted to the advisory board • Support and assist the officer with solving administrative and operational matters • Participate in development of the corps' strategic plan • Assist in meeting and measuring the corps' goals/initiatives • Participate in corps' financial development and fundraising efforts • Review and approve annual budget • Demonstrate initiative, enthusiasm and passion |
|--|---|

I further agree that if, at any time, I am unable to fulfill my obligations and commitments as a member of The Salvation Army Advisory Board, I will give appropriate written notice of resignation to the Advisory Board Chairperson.

X _____ Date _____
Signature

Print name



**ADVISORY BOARD
CONFLICT OF INTEREST STATEMENT**

Conflicts of interest occur when an advisory board member acts in a position of authority on an issue in which they have an opportunity for personal gain, or where they have financial or other interests. When there is a dual interest, or the appearance of a dual interest for any board member, a potential conflict of interest exists.

The advisory board expects of itself and its members ethical and businesslike conduct. This commitment includes proper use of authority and appropriate decorum in group and individual behavior when acting as advisory board members.

Therefore,

- 1) I agree to promptly disclose and make a matter of record any existing, perceived or potential conflict of interest that may develop during my term of office on The Salvation Army advisory board.
- 2) I agree that I will not vote or use my personal influence on any matter, which might constitute an existing, potential or perceived conflict of interest. I ensure that the minutes of any Salvation Army advisory board meeting where this might occur will show that I have disclosed any existing, perceived or potential conflict of interest and have abstained from voting on these matters.
- 3) I understand that I may state my opinion or position on any matter described above, or answer pertinent questions to which I may lend my expertise, so long as I absent myself from a board vote on the matter.
- 4) As of this date (check one of the following),
 - I am **NOT** aware of any conflicts of interest;
 - I **MAY HAVE** a conflict of interest in the following area(s):

By signing below, I confirm that I have read, understand and agree to abide by the Conflict of Interest Statement above.

X _____ Date _____
Signature

Print name



ADVISORY BOARD TOOL BOX

ADVISORY BOARD APPLICATION FOR MEMBERSHIP AND MEMBER PROFILE

NAME: _____ BIRTHDAY: _____

Preferred contact method (check one): home business e-mail cell

Best time to reach me: _____

BUSINESS

Company Name: _____

Title: _____

Address: _____

Phone: _____ Fax: _____

Email: _____

HOME/FAMILY

Address: _____

Phone: _____ Cell: _____

Email: _____

Spouse name: _____

Children's names/ages: _____

RELIGIOUS AFFILIATION: _____

HOBBIES/INTERESTS: _____

EXPERIENCE(S) AS A MEMBER OF OTHER BOARDS: _____

EXPERIENCE(S) WITH OTHER NONPROFIT ASSOCIATIONS: _____

EXPERIENCE AND ASSETS I CAN CONTRIBUTE TO THE BOARD:

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> Accounting/Financial Expertise | <input type="checkbox"/> Social Work Experience | <input type="checkbox"/> Fundraising | <input type="checkbox"/> Access To Influential People |
| <input type="checkbox"/> Legal Expertise | <input type="checkbox"/> Nonprofit Experience | <input type="checkbox"/> Lobbying | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Education Expertise | <input type="checkbox"/> Public Speaking | <input type="checkbox"/> Strategic Planning | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Healthcare/Medical Industry Expertise | <input type="checkbox"/> Management | <input type="checkbox"/> Special Event Planning | |
| <input type="checkbox"/> Real Estate Expertise | <input type="checkbox"/> Marketing | <input type="checkbox"/> Problem Solving | |
| | <input type="checkbox"/> Public Relations | <input type="checkbox"/> Media Contacts | |

I HAVE SERVED ON THIS CORPS' ADVISORY BOARD SINCE (Current Board Members Only):

WHY I AM INTERESTED IN SERVING AS A MEMBER OF THE ADVISORY BOARD:

WHAT I HOPE TO GAIN FROM SERVING ON THE BOARD:



TIPS FOR RECRUITING STRONG ADVISORY BOARD MEMBERS

A board is strong when it is involved and informed. Such a board knows why it exists and what its role is in advising The Salvation Army organization. A strong board not only establishes standards of accountability, but also creates a good environment for producing creative solutions to problems. Yet, strong boards need strong advisory board members.

WHAT KIND OF PERSON MAKES A STRONG ADVISORY BOARD MEMBER?

- Leaders
- Professionals
- Experience and expertise
- Key community contacts
- Wealth
- People who are passionate about The Salvation Army's mission and success

WHERE TO LOOK

- Volunteers
- Donors (both large and small)
- Community leaders
- Community influencers
- Large businesses
- Professional associations
- Membership organizations (Chambers of Commerce, etc.)
- Religious organizations
- Service and fraternal organizations
- Colleges, universities
- Other

***"For what contribution should we hold you accountable once you are on our board?
What specific work will you take on?" Peter F. Drucker, The Nonprofit Quiet Revolution.***



**CHECK LIST: ADVISORY BOARD MEMBER
RECRUITMENT PACKET**

PACKET SHOULD INCLUDE (as approved by the corps officer/administrator):

- Brochure describing the scope and services of The Salvation Army
- The Salvation Army Mission Statement
- Recent copy of The Salvation Army's newsletter
- Recent copy of The Salvation Army's "Northern Highlights"
- Corps advisory board job description
- List of advisory board members
- Conflict of Interest Policy
- Advisory Board Commitment Letter
- Corps financial information
- Corps staff list and organizational chart
- Orientation schedule
- Calendar of upcoming and proposed Corp events and advisory board meetings
- Other materials that illustrate The Salvation Army's mission, programs and services



TIPS FOR BUILDING AN EFFECTIVE BOARD

ANNUAL ADVISORY BOARD RETREAT

Why?

- Leadership development
- Strategic planning
- Assess progress against goals
- Set new goals and plans
- Present information and update board members
- Affirm or reaffirm board roles and responsibilities
- Assess mission, vision and values
- Analyze strengths and weaknesses
- Identify obstacles
- Teambuilding
- Build camaraderie
- Regenerate ownership and recharge batteries

When?

- Annually
- At the beginning or end of fiscal year

Who should attend?

- Obligatory for all advisory board members
- Key staff

ADVISORY BOARD MEMBER SELF-EVALUATION (see sample)

- Provide regular feedback
- Assess advisory board member satisfaction
- Discover talents and potential

ALLOW ADVISORY BOARD MEMBERS TO RESIGN WITH DIGNITY



TIPS FOR BUILDING AN EFFECTIVE BOARD (continued)

RECOGNIZE ADVISORY BOARD MEMBERS (and other volunteers)

When?

- Year round
- Annual meeting
- Events

How?

- Usual: plaques, certificates, letters
- Unusual: photos, signatures
- Parties, special dinners
- Name something after someone
- Special training opportunities
- Letters on behalf of a board members
- Thank you letters from recipients

COMMITTEE WORK PLANS

- Ensures effective board committees
- Each board committee's reference to guide completion of their portion of the organization's strategic plan
- Should be closely aligned with achieving the strategic goals determined during strategic planning
Specifies the goals of the committee for the year
- Details strategies to meet the goals
- Includes timelines for completion of goals

BOARD ACTION CALENDAR

- Specifies yearly meetings, activities and timing
- Includes plan goals and benchmarks



TIPS FOR INCREASING ADVISORY BOARD ATTENDANCE, PARTICIPATION AND ACTION

- Remember enthusiasm is contagious – so is apathy.
- Ensure members have up-to-date job descriptions
- Ensure adequate advisory board orientation including description of the organization, its unique services, how the board members contribute to this mission, and a discussion of advisory board member expectations
- Remember that advisory board meetings deserve strong attendance and active participation. Set a standard for the best. Don't fall prey to the perspective that "We're lucky just get anyone."
- Have advisory board ground rules that encourage participation and attendance. Post ground rules on the bottom of agendas and revisit/discuss ground rules periodically.
- In advisory board meeting reports, include a list of who is present and who is absent.
- Along with advisory board minutes, record a list of meeting "action items" and who is responsible for each item.
- Develop and uphold an advisory board attendance policy that specifies the number of times a member can be absent in consecutive meetings and in total meetings per time period.
- Let advisory board members resign with dignity. An alternative to "voting someone off the board" might be to:
 - 1) Approach low-attendance members (in a non-threatening way) and let them know: "We missed you..." and "we need you..." Ask whether the low-attendance member has a conflict or too many other things going on to actively participate at the present time. If so, suggest that the low-attendance member consider resigning (now) and consider board membership later (when they have more time).
 - 2) Ask low-attendance members to consider becoming involved in some other form of service to the organization (and resign from the board).
- Let go of "dead wood."



ADVISORY BOARD SELF-EVALUATION

	Considerations	5 Excellent	4 Very Good	3 Average	2 Fair	1 Poor
1	Board has full and common understanding of its roles and responsibilities					
2	Board members understand the organization’s mission, its programs and services					
3	Structural pattern (advisory board officers/committees, Corps officer and staff) is clear					
4	Board has clear goals and actions resulting from relevant and realistic strategic planning					
5	Board attends to policy-related decisions which effectively guide operational activities of The Salvation Army					
6	Board receives regular reports on finances/budgets, financial development, program performance and other important matters					
7	Board members help set fundraising goals and are actively involved in fundraising					
8	Board effectively represents the organization to the community: geography, gender, age, ethnicity, etc.					
	Advisory board meetings are not dominated by one or two people					
9	Board meetings facilitate focus and progress on important organizational matters					
10	Board regularly monitors and evaluates progress toward strategic goals and program performance					
11	Each member of the board feels involved and interested in the board’s work					
12	Necessary skills, stakeholders and diversity are represented on the board					
13	Corps officer/administrator is receptive to Board recommendations and advice					
14	Board has easy access to Corps officer					
15	Corps officer provides Board members with regular recognition and appreciation					

Please list the three to five points on which you believe the board should focus its attention in the next year. Be as specific as possible in identifying these points.

1. _____
2. _____
3. _____
4. _____
5. _____



SALVATION ARMY TERMS



SALVATION ARMY DEFINITIONS

ADULT REHABILITATION CENTER (ARC) - A residential program for long-term work therapy and counseling for those trying to escape addiction to alcohol and/or drug abuse.

ARTICLES OF WAR - The statement of beliefs and promises that every senior soldier signs before enrollment (becoming a member.)

AUXILIARY-CAPTAIN - A mature Salvationist beyond the age limit for full officer-training, who holds a warrant of appointment as distinct from a commissioned rank. Will undertake work similar to that of a commissioned officer.

BLOOD AND FIRE - The Army's motto; it refers to the Blood of Jesus Christ and the Fire of the Holy Spirit.

COLLEGE FOR OFFICER TRAINING (CFOT) - A two year residential program of spiritual, administrative, social work and field training for those who have committed their lives to full time Christian service in The Salvation Army.

CORPS COMMUNITY CENTER - A Salvation Army facility that offers a variety of programs and services.

CORPS SERGEANT MAJOR (CSM) - The leading lay person in the Corps.

DIVISION - A geographical region served by The Salvation Army.

DIVISIONAL COMMANDER (DC) - An officer, the CEO of the division.

DIVISIONAL FINANCE SECRETARY (DFS) - The officer responsible for the financial aspects of the division.

DIVISIONAL FINANCE BOARD (DFB) - The decision making body of the division including the DC and all the department heads.

DIVISIONAL HEADQUARTERS (DHQ) - For the Northern Division, DHQ is located in Roseville, Minnesota.

DIVISIONAL SECRETARY (DS) - The third highest ranking officer in the division unless there is no GS.

DIVISIONAL YOUTH SECRETARY (DYS) - The officer responsible for all youth programs in the division.



SALVATION ARMY DEFINITIONS (continued)

ENVOY - A local officer in charge of a specific unit; similar to Auxiliary-Captain.

GENERAL SECRETARY (GS) - The second in command in the division.

HARBOR LIGHT CENTER – A Salvation Army facility that provides emergency shelter and food for homeless men, addiction counseling, life-skills classes, job training and job search assistance. Typically located in major metropolitan areas, such as Minneapolis.

JUNIOR SOLDIER - A boy or girl between the ages of 7 and 14 who becomes a Salvationist, a member of The Salvation Army, having professed conversion and signed the junior soldier's promise.

LEAGUE OF MERCY - A group of Salvation Army Volunteers who make periodic visits to prisons, hospitals and nursing/rest homes, shut ins, etc. distributing toiletries, magazines, Bibles and cheer.

LOCAL OFFICER - A soldier appointed to a position of leadership, responsibility and authority in the Corps. He/she carries out the duties of appointment in addition to their regular employment and without remuneration from The Salvation Army.

OFFICER - A Salvationist who is engaged in full-time Salvation Army service, having been trained and commissioned. He/she will hold a rank from Lieutenant to General (there is only one General.)

OFFICER RANKS –

- **LIEUTENANT**: Officer rank. Post held for 5-years.
- **CAPTAIN**: Officer rank. Post held for 10-years.
- **MAJOR**: Officer rank. Promotion given after 15-years of service.
- **LT. COLONEL**: Officer rank. Rank follows Major and is given based on assignment.
- **COLONEL**: Officer rank. Follows Lt. Colonel and is based on assignment.
- **COMMISSIONER**: Officer rank. Follows Colonel and is based upon assignment.
- **GENERAL** – Officer rank. There is only one general at any given time. The international leader of the Salvation Army. The only elected rank. Term of 3 to 5 years.

SALVATIONIST – An adherent and member of The Salvation Army church. Must be 14 years of age.

SERVICE EXTENSION UNITS - An extension of Salvation Army services and programs to a community where there are no resident Salvation Army officers. Committees, consisting of local volunteers, perform the services and programs of The Army.



SALVATION ARMY DEFINITIONS (continued)

SOLDIER - A person who has accepted Salvation (see above) and at least 14 years old who has been sworn-in as a member of The Salvation Army after signing the Articles of War and with the approval of the Corps leaders.

TERRITORY - A geographical grouping of Divisions.

TERRITORIAL HEADQUARTERS (THQ) - For the Central Territory, THQ is located in Des Plaines, Illinois.



FINANCIAL DEVELOPMENT & FUND RAISING



FUND RAISING 101: WHY?

*"We make a living by what we get, but we make a life by what we give."
Winston Churchill*

REASONS PEOPLE GIVE:

- ✓ Lets donor "give back" to society
- ✓ Spiritual need. Urge to do something for higher, unselfish reasons
- ✓ It feels good to donate
- ✓ Love of humankind. To help others
- ✓ Share with those who have less
- ✓ Support good, legitimate cause/needs
- ✓ Fill gaps left by government cuts
- ✓ Personal gratitude. Support a cause or an issue that reflects passionately held beliefs or personal experience, personalize the issue
- ✓ Giving (through payroll deductions, for example) is convenient
- ✓ Tax advantage: income tax benefit/tax deduction
- ✓ Creates a unique and lasting legacy
- ✓ Perpetuation of ideals, values and goals
- ✓ Preserves community values for the next generation
- ✓ Connection to the community
- ✓ Encourages more giving and sets an example for others
- ✓ Responsibility to share good fortune
- ✓ Recognition
- ✓ Pressure from peers



FUND RAISING 101: WHY NOT?

REASONS PEOPLE DON'T GIVE:

- ✓ Inadequate research on prospect before asking, premature solicitation.
- ✓ Failure to make a strong case for donation
- ✓ Failure to ask for gift
- ✓ Failure to ask for a specific amount
- ✓ Wrong solicitors
- ✓ Impersonal solicitation
- ✓ Failure to include donor's spouse participation
- ✓ Failure to suggest various methods of donation
- ✓ Failure to adequately follow up
- ✓ No powerful supporters



FUND RAISING 101: PREPARATION

"By failing to prepare, you are preparing to fail." Benjamin Franklin

MEETING WITH DONOR/PROSPECT

Be Prepared To Clearly Articulate The Salvation Army story from an organizational AND Corps perspective:

- History
- Major accomplishments and milestones
- Purpose, issues it addresses, needs it meets
- Client demographics
- Distinctions, differences vs. other agencies
- Illustrate values, vision and results
- Leadership credibility/accountability
- The Salvation Army does not have needs -- people do. Justify and validate the needs of the community with statistics, surveys and examples
- Convenience and methods of donating to The Salvation Army
- How donors contributions make a difference and how they will be used
- Tangible and intangible benefits donor will receive

Anticipate Potential Objections & Responses

Examples of objections:

- The Salvation Army duplicates the work of other agencies.
- Your goals are too high. The Salvation Army has not done its homework.
- This is not a good time to ask. The economy is bad.
- Why are you asking me for money? You should be asking local foundations.
- The Salvation Army perpetuates the cycle of homelessness by providing a revolving door for the destitute. It enables people to continue to be homeless.

Tips

- Bring written request/proposal for gift, including suggested amount
- Drop names of influential people who are already supporters
- Sell opportunities instead of needs



FUND RAISING 101: SEVEN TYPES OF PHILANTHROPISTS

According to charitable giving expert Russ Alan Prince and his coauthors, there are “seven faces of philanthropy.” Make certain your prospect presentation appeals to the needs/interests of each type. Please note, the percentages below reflect charitable giving in general and do not reflect The Salvation Army’s donor base.

SEVEN FACES OF PHILANTHROPY*

COMMUNITARIAN

26% of all donors
Doing good makes sense
Local history, roots and giving
Success tied to success of the community
Philanthropy is exchange

DEVOUT

21% of all donors
Doing good is God’s will
Proportionate giving
96% focuses on religion
Supports outreach and mission work
Act on faith in institutions

INVESTOR

15% of all donors
Doing good is good business
Gives carefully after investigation
Looks for measurable returns on investment
Philanthropy is a business relationship
Tax avoidance is high motivator

SOCIALITE

11% of all donors
Doing good is fun
Motivated by creative event planning
Fundraisers not donors
Philanthropy as social exchange

REPAYER

10% of all donors
Doing good in return
Response to life-changing event
Benefit first, then philanthropic response
Highly focused giving
Emphasis on results and beneficiaries

ALTRUIST

9% of all donors
Doing good feels right
Genuine selfless donor
Focused giving on social issues
Wealthy have greater obligation to give
Not influenced by others

DYNAST

8% of all donors
Doing good is a family tradition
Philanthropy is strong family value
Generational differences
Most careful and selective of all
Focus on core mission

*Source: Russ Alan Prince and Karen Maru File. 1994. The Seven Faces of Philanthropy. San Francisco, Calif.: Jossey-Bass Publishers, Inc.



DONOR CULTIVATION: WHY? WHEN?

Did you know that in today's fundraising environment between 90% and 95% of all a non-profit organization's contributions will be driven by 5% to 10% of its donors?*

It's true. What's more, these statistics reaffirm that it is more important than ever to establish, revive, cultivate and earn these priceless long-term relationships.

One of the key elements to a successful fundraising campaign (regardless of whether it is a capital campaign or simply an annual appeal) is the quality of the relationship you have built with existing donors **PRIOR** to the campaign.

Before "The Ask," one method of building a donor relationship is through a Donor Cultivation Interview.

The goal of the interview is to:

- Establish solid contact with the donor
- Thank the donor for past support
- Appeal to the donor's wisdom and/or business sense by asking for donor opinions and recommendations
- Discover how much, or how little, the donor knows about The Salvation Army
- Update the donor on current programs and services
- Uncover the donor's perceptions, interests and values

The donor feedback can be "the golden egg," building an informational foundation for successful future gift solicitations.

It's harder for a donor to later say "no" when they:

- Know you as a member of the community and representative of The Salvation Army
- Recognize that you and The Salvation Army values their wisdom and feedback
- Clearly see valuable examples of their past contributions in action in the community
- Distinctly visualize the significance of their potential future contributions

The following pages contain examples of donor interview materials, including invitations, phone script and the interview.

*Nonprofit organizations in general, not necessarily The Salvation Army.



FUND RAISING 101: CULTIVATING EXISTING DONORS

SAMPLE DONOR CULTIVATION LETTER (Long version)

Date

Name
Address

Dear _____:

When we need help, it is important to have friends we can go to for assistance. By all definitions, you are a special friend of The Salvation Army.

With this in mind, we are launching a (name for research project) research project that we believe is vital to The Salvation Army's ability to accomplish its mission in (city or county). This project will seek to learn how our core supporters feel about The Salvation Army and determine if there is any correlation between the way our friends feel about us and the way they make their decisions with respect to the distribution of their resources. We will be interviewing (number) of our closest friends prior to (date). We hope you will be able to participate and that we can learn from your life experience.

You will not be solicited for funds.

We are confident that your participation will be a comfortable and your candid responses to the interview will be vital to our mission and planning process.

One of our participating staff or volunteers will telephone you within the next few days to set up a mutually convenient time to visit.

Blessings,

(Corps Officer Name)

(Advisory Board Chairperson Name)



FUND RAISING 101: CULTIVATING EXISTING DONORS

SAMPLE DONOR CULTIVATION LETTER (Short version)

Date

Name
Address

Dear _____:

I have a personal favor to ask of you.

When we need help, it is important to have friends we can go to for assistance. By all definitions, you are one of The Salvation Army's most loyal and committed friends.

Here's the deal:

It is vital to The Salvation Army's mission and planning process that we invest time in listening to the opinions of a select group of our closest friends. With this in mind, we are launching a (name for research project) research project to learn how our closest friends feel about The Salvation Army. We also hope to determine if there is any correlation between the way our best friends feel about us and the way they make their decisions with respect to the distribution of their resources.

You will not be solicited for funds.

These visits are time sensitive as I hope to complete (number) of interviews by (date). I hope that you will be able to participate in this project and that The Salvation Army can benefit from your life experience.

I will phone you within the next few days to set up a mutually convenient time to visit.

Blessings,

(Corps Officer Name)

(Advisory Board Chairperson Name)



FUND RAISING 101: CULTIVATING EXISTING DONORS

SAMPLE INTERVIEW APPOINTMENT PHONE SCRIPT

Hello, this is (name) calling on behalf of The Salvation Army. I'm following up on the letter we sent you last week about interviewing you for our research project.

When would be the best time for us to visit?

(Settle on day first.)

Would morning, afternoon or evening be better for you?

Would (time1) or (time2) be better?

Good! I'll be looking forward to seeing you then.

By the way, just in case some emergency comes up, I'd like to leave you my telephone number. It is (phone number). We can always reschedule.

(If they are reluctant to visit, suggest the following:)

Oh, I'm disappointed because we're only asking an exclusive group to participate in the research project.

Would you be willing to spend some time on (day) around (time)?



FUND RAISING 101: CULTIVATING EXISTING DONORS

SAMPLE INTERVIEW

The purpose of this visit is to learn how our friends feel about The Salvation Army and to determine if there is a correlation between how they feel and the way they make decisions with respect to the use of their time, talent and financial resources.

I'm going to read the questions word for word to maintain constancy. If you feel uncomfortable with any of the questions, please feel free to pass or decline to answer.

Relationship with The Salvation Army

- What was your first exposure to The Salvation Army?
- Did you become involved then or later?
- What Salvation Army programs and services are you most acquainted with?
- What component of The Salvation Army's mission or programs has met the greatest need in your life, in the life of a loved one or another person you know personally?
- What components of The Salvation Army's mission or programs meet the greatest need in the community?
- What has motivated you to be so supportive, active and generous of The Salvation Army?
- Is there an area of special interest for you at The Salvation Army?

Family

- Tell me about your parents.
- Did one parent have a greater influence on you than the other?
- In what ways do you carry that influence with you today?
- Tell me about the rest of your family.
- As you reflect on your own personal values, what do you feel is the most important value or principle that you want to pass on to future generations?

Education/Professional Involvement

- Describe your educational, career and volunteer experience.
- As you reflect on your early life, was there any person or any event that had a great influence on you?



FUND RAISING 101: CULTIVATING EXISTING DONORS

SAMPLE INTERVIEW (Continued)

It is believed that how we make decisions about what we want to do with our resources is directly related to our feelings about family and values. The questions that follow are the heart of this visit. That is, whether a contributor's feelings for The Salvation Army have any influence on how we may want to distribute their resources.

General Charitable Giving Questions

- What are your top three reasons for giving to charitable/nonprofit organizations?
- What are your top three reasons you would choose NOT to give to a specific organization?
- What are the top three reasons you would decide to double your gift?
- What organization would you give it to?
- How would you expect to be asked for the gift?
- What would you expect after you made the gift?

Summarize what they have shared with you. Ask them how far off you were in your summary.

- Can you see yourself getting involved with us in some way?
- Do you know of any other people in the community who The Salvation Army could benefit from interviewing?



STRATEGIC PLANNING



STRATEGIC PLANNING: WHY?

WHY DO STRATEGIC PLANNING?

- Communicate shared vision of future to the team
- To provide clear purpose and direction to everyone involved
- To chart a balanced course

Illustrates:

- What you intend to accomplish
- Mission, goals, vision
- Role in community & the reason you exist
- Who you serve, your customers
- Kinds of programs and services offered
- Resources needed to succeed (people, money, expertise, relationships, facilities)
- How you will direct resources to accomplish goals

WHY DEVELOP A PLAN?

“Are we ‘movers and shakers’ or ‘shaken to move’?” Author Unknown

Benefits

Improves results:

- Contributes to a greater sense of purpose, action/movement and accountability

Provides Momentum & Focus:

- Helps avoid preoccupation with day to day operational pressures
- Forces future thinking
- Builds commitment
- Refocuses and reenergizes a drifting organization

Encourages Effective Problem Solving:

- Helps resolve interrelated issues or problems in an intentional, coordinated manner

Develops Solidarity:

- Builds teamwork among players
- Promotes learning
- Builds individual and group commitment
- Clear understanding of how activities mesh for everyone involved

Provides Sense of Control

- Provides greater influence over circumstances
- Power over just responding to unending series of problems



STRATEGIC PLANNING: WHY?

Limitations

Effective management of planning process is critical to keep it on track. There are no guarantees. The success of strategic planning can be curtailed by a variety of factors.

Cost vs. Benefits

- Consumes time and energy
- Planning can get off track
- People can get bogged down in trivia

Poor Plans

- Faulty assumptions about future
- Misconceptions about capabilities
- Weak group dynamics

Intuition & Creative Muddling

- Can bog down organization if not controlled

Timing

- Critical problems should be addressed before strategic planning begins

When implementation is unlikely

- Wrong players
- Inadequate financial support
- Goals are unrealistic



STRATEGIC PLANNING: READINESS

ARE WE READY TO DEVELOP A STRATEGIC PLAN?

"Don't plan a remodeling project while the house is still on fire." Author Unknown

Chaos & Conflict Considerations:

- What issues are we dealing with right now?
- What needs to be improved?
- What concerns us most?
- What is the staff spending too much time doing?
- What is the officer spending too much time doing?
- What is the board spending too much time doing?
- What are the barriers to getting people involved in the planning process?
- What will the reactions of the staff and board be to beginning a strategic planning process?
- What level of trust do people have for each other?
- What level of conflict is present?
- Are there hidden agendas that are creating conflict or taking us off task?

Put out the fires, then plan.



STRATEGIC PLANNING: DEVELOPING A PLAN

STEPS

Plan to Plan

- Get organized
- Assess readiness for planning
- Determine who should be involved and their roles
- Select someone to keep process on track
- Decide how to manage the process

Situational Analysis

- Provides internal and external context
- Review history and current situation
- Analyze organizational performance
- Identify future possibilities/choices
- Conduct a SWOT analysis: strengths, weaknesses, opportunities, threats
- Assess constraints, opportunities, resources and environment
- Evaluate client needs

Set Purpose & Direction

- Agree on mission, vision, guiding principles
- Where do we hope to go?

Draft Plan

Refine & Adopt Plan

Implement Plan

Measure Progress/Results

- Monitor the plan frequently
- Evaluate progress regularly

Adjust/Tweak plan

- Update plan on a regular basis

TIPS

- Elements of good planning:
 - ✓ Getting exceptional ideas on the table
 - ✓ Making effective decisions about how to proceed
 - ✓ Developing shared commitment to direction among team members
- Develop assessments and monitoring methods to measure progress/results simultaneously with initiatives
- Include staff. They can provide background, ensure realism and bring unique perspective



STRATEGIC PLANNING: STRUCTURE

PLAN COMPONENTS

Mission: WHY

- Why the organization exists
- Why the team is committed to supporting that existence
- Should be broad enough to accommodate flexibility and change, yet succinct enough to remember and understand
- Should be unifying, providing both direction and guidance

Vision: WHERE

- Where the organization wants to go, where it is headed
- Describes desirable future state
- Message should be direct and succinct
- Should be challenging, yet realistic
- Should create passion and be inspirational

Guiding Principles:

- Expresses core values, beliefs, code of conduct
- Should be succinct, clear and eliminate ambiguity
- Should be timeless and inspire pride

Strategies/Goals: WHAT

- Strategies: The “conceptual” what
- Goals: The “specific” what to illustrate/support strategy
- High level options to meet goals and fulfill mission
- What we need to do to get where we want to go
- Closes the gap between current reality and vision
- Accomplishments that allow or meet mission
- Consider the consequences of not addressing this issue

Objectives/Tactics: HOW, WHEN

- How and when we plan to get there
- Immediate and specific aims to be realized to meet long-term goals
- The tasks, action steps
- Details action steps that support objectives



STRATEGIC PLANNING: STRUCTURE

PLAN COMPONENTS (Continued)

Performance Measures

- What does the end product look like?
- How will we know when we meet our goals?
- Are the objectives/action steps measurable?
- Assess inputs: What resources are required to operate program? (Budget, staff, volunteers, equipment, facility space)
- Assess outputs: How many units of service are we delivering? (Statistics)
- Assess Outcomes: Are the goals of the program being met? (Statistics: satisfaction survey, return clients, etc.)
- Assess Impact: What unexpected or unintended impacts are occurring as a result of our program?