

**THE SALVATION ARMY**  
**NATIONAL HEADQUARTERS**  
615 Slaters Lane  
Alexandria, Virginia 22314-1112

**CENTRAL TERRITORY**  
10 West Algonquin Road  
Des Plaines, Illinois 60016-6006

**EASTERN TERRITORY**  
440 West Nyack Road  
West Nyack, New York 10994-1739

**SOUTHERN TERRITORY**  
1424 Northeast Expressway  
Atlanta, Georgia 30329-2088

**WESTERN TERRITORY**  
180 East Ocean Blvd.  
Long Beach, California 90802-4713

Approved by the  
Commissioners' Conference  
February 2003



## **ADVISORY ORGANIZATIONS ORIENTATION GUIDE**



*Beginning Strong*



## MISSION STATEMENT

The Salvation Army, an international movement, is an evangelical part of the universal Christian church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and meet human needs in His name without discrimination.

Approved by the  
Commissioners' Conference, U.S.A  
May 1991

# ADVISORY ORGANIZATION MEMBER EVALUATION

This may also be provided as a self-evaluation.

Member Name \_\_\_\_\_ Advisory Organization: (Board, Council, Auxiliary) \_\_\_\_\_

1-2= Needs Improvement, 3-4= Meets Expectations, 5= Exceeds Expectations

The alternate version is to use abbreviations for judgment ratings as follows:  
I= Needs Improvement, M= Meets Expectations, E= Exceeds Expectations

- \_\_\_\_\_ Demonstrates a clear understanding of the mission of The Salvation Army.
- \_\_\_\_\_ Demonstrates a clear understanding of the local vision and strategic plan.
- \_\_\_\_\_ Has at least a 75% attendance rate at Advisory Organization meetings.
- \_\_\_\_\_ Attended annual civic meeting.
- \_\_\_\_\_ Serves actively on at least one committee.
- \_\_\_\_\_ Contributes to board discussion and offers thoughtful opinions.
- \_\_\_\_\_ Supports majority decisions of the board.
- \_\_\_\_\_ Accepts assignments and follows through.
- \_\_\_\_\_ Willing to take a leadership role when asked.
- \_\_\_\_\_ Is willing to make contacts for fundraising.
- \_\_\_\_\_ Freely offers skills, talents, and knowledge for the benefit of The Salvation Army mission.
- \_\_\_\_\_ Makes an annual financial contribution to The Salvation Army.
- \_\_\_\_\_ Volunteers in at least one program activity.
- \_\_\_\_\_ Participates in seasonal activities (*i.e.*, bell-ringer).
- \_\_\_\_\_ Works cooperatively with commanding officer and other board members.
- \_\_\_\_\_ Demonstrates keen loyalty to The Salvation Army.
- \_\_\_\_\_ Shows initiative in self-development as a board member.
- \_\_\_\_\_ Pursues opportunities to increase knowledge about The Salvation Army.
- \_\_\_\_\_ Is an ambassador for The Salvation Army in competitive or difficult situations.
- \_\_\_\_\_ Is enthusiastic about the work and mission of The Salvation Army.
- \_\_\_\_\_ Visited a Salvation Army church service.
- \_\_\_\_\_ \*Attended the Advisory Organizations retreat (if applicable).
- \_\_\_\_\_ \*Takes opportunity to attend Salvation Army conferences and training seminars.
- \_\_\_\_\_ \*Visited another Salvation Army location or facility.
- \_\_\_\_\_ \*Attended a Salvation Army program-related divisional or territorial special event.
- \_\_\_\_\_ TOTAL points

\* These functions may not be provided or may not take place annually. They are not calculated toward the low end of the rating ranges, but do provide a bonus toward the high end of the ranges when these opportunities are available.

Composite Totals indicate the following:

1-69 = Needs Improvement, 70-95 = Meets Expectations, 96-115 = Exceeds Expectations  
Above 115 = Get them a uniform!

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# ORIENTATION

## The Importance of A Good Beginning

It is always rewarding, flattering, and sometimes surprising at the quality of community leaders who agree to serve on Salvation Army advisory boards. This institutional humility can also be deceptive and create a flaw in the board development system. While some knowledge of the organization may be relayed during the recruiting process, most prospects will eventually join the board because of the urging of a strong peer or because of The Salvation Army's reputation. The Salvation Army is touted as America's favorite charity by reputation, not by knowledge. Most people support the organization because of what they *think* about it and not what they *know* about it. While the Army is grateful for its good reputation, reputation alone does not create good advisory board members.

The Salvation Army is a complex organization with various levels of administration and multiple programs. Many who have served in its ranks for years or have grown up within its membership often take it for granted and expect that everyone else understands it equally well. It must be fully understood that becoming truly familiar with the movement is a continuing education process.

It is important to develop the board through personnel, and to develop the personnel through good orientation. One of the worst assumptions that can be made is that a person's position in the community automatically equips them for service on the board. In a survey conducted by *Nonprofit Governance Index* only 40% of those board members surveyed said they had ever received any formal orientation since joining the board. In another survey, 68% said they wanted more training on board operations. The fact is, we often think community leaders come ready made for board service. We provide them a manual and expect them to read it and be fully ready for action. It is difficult to hold them accountable when they have never been properly oriented to the organization or their particular responsibilities.

Training by osmosis is a long and tedious process, as well as a most uncomfortable one, for board members. They may indeed learn a great deal about The Salvation Army through their own initiative and participation, but it is a difficult way to get acclimated to the board and their role. They are well into their term before they are ever comfortable with their role or make any meaningful contribution.

The goal of a good orientation process is that new board members will be up to speed on the organization, board process, and key issues before they ever attend their first meeting. If they can go into that meeting with the comfort level of somewhat seasoned board members, you have conducted a successful orientation.

This guide is designed to help the officer and the board leadership to conduct such an orientation. It will stimulate the thought processes and encourage the orientation effort. It will be worth the time investment for both the organization and the board member.

# ADVISORY ORGANIZATION MEMBER PROFILE

Member Name \_\_\_\_\_ Advisory Organization: Board, Council, Auxiliary \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

### Personal

Birth Date \_\_\_\_\_ Cauc., Af/Am., Asian, Other \_\_\_\_\_ 30- under 31-45 46-65 66-over \_\_\_\_\_  
 Race (circle) \_\_\_\_\_ Age Range (optional) \_\_\_\_\_

Spouse \_\_\_\_\_ Birth Date \_\_\_\_\_

Children \_\_\_\_\_ Age \_\_\_\_\_ Member's Hobbies / Interest \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### Occupation / Business Affiliations

Business \_\_\_\_\_ Email \_\_\_\_\_

Business Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

### Representation

### Awards / achievements

Religious Affiliation \_\_\_\_\_  
 Service Organization \_\_\_\_\_  
 Other Non-Profit Boards \_\_\_\_\_  
 Other Memberships \_\_\_\_\_

### Advisory Board Participation

Date installed \_\_\_\_\_ Years on Board: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

Leadership Position \_\_\_\_\_ Dates \_\_\_\_\_  
 (Past & Present) \_\_\_\_\_

Committees \_\_\_\_\_  
 (Current) \_\_\_\_\_

## Video Tapes

### *Salvation Army 101*

A great introduction to the history of The Salvation Army. Good for the history presentation of the orientation.

Time: 44 minutes

### *Building a Great Advisory Board*

An interview by Commissioner Kenneth Hodder of several National Advisory Board Members. Covers topics of recruitment, nomination committee, strategic planning and more.

Time: 20 minutes

### *It Takes You*

Designed for use in recruitment, contains a short history and current program information.

Time: 15 minutes

### *Hope for Today - Help for Tomorrow*

Designed by the Southern Community Relations Department as a short, concise program presentation. For use in general education, recruitment, orientation, donor solicitation.

Time: 11 minutes. Available in CD.

## Literature

There is virtually unlimited reading material available through The Salvation Army Supplies and Purchasing Department. You may wish to supply a catalogue as part of the resource notebook.

Both of the following are must reading for new board members.

### *In Darkest England and the Way Out*

An interesting and insightful look at the foundation of The Salvation Army social service ministry.

### *Marching to Glory*

A wonderful and intriguing look at the history of The Salvation Army in the United States. Written by Dr. Edward McKinley of Asbury College. Now in its second edition.

- Rule 1:** Orientation is absolutely necessary!
  
- Rule 2:** Orientation and education are a continuing process.
  
- Rule 3:** Orientation is a shared responsibility between the officer and the board leadership.
  
- Rule 4:** Don't assume that *anyone* fully understands the organization or their role as an advisory board member.
  
- Rule 5:** Don't assume that the board member remembers the information provided during recruitment.
  
- Rule 6:** Orientation must educate, but not overwhelm.
  
- Rule 7:** New board members must achieve a comfort level prior to attending their first board meeting.

### A Continual Process

Board orientation is both an event and a process. It begins during recruitment and continues throughout the tenure of the membership. Every opportunity should be taken to educate and inform the board membership.

### Date and Time

While an elementary point, finding a time convenient to all new members and participants may be difficult. However, if this time requirement was pointed out appropriately during the recruitment process, this should ease the burden. It is best to have the board chair make the contact or send the written notification.

Do not shortchange the time requirements to simply go through the motions. It is appropriate to express appreciation for the new member's time, but you should not be apologetic nor de-emphasize the importance of this orientation. This should be understood as a condition of membership. Consider that a day or several hours of good orientation is a relatively short time commitment to establish a foundation for three years of service.

If there is a larger number of new members, making it difficult to get them all together at one time, you may need to conduct a shortened private orientation with one or two, but the orientation must be conducted. If this is suggested in this way, the new member may adjust his schedule, if at all possible, rather than create the burden of a private session.

The format which establishes the time frame should be determined by the officer and board chair relative to the time commitments of the new members. You may want to take the better part of a full day and complete the entire orientation, or you may want to break it into natural components spreading the sessions over several days. For instance, you may want to do classroom work on one day, and do the tours on another. However, it may be easier to get everyone together for one long session, rather than several shorter ones.

### Materials

Make sure all materials are available and that presenters are familiar with their segments. You will want to order Salvation Army literature for distribution. Some advanced planning is necessary.

It is a good idea to have a notebook to contain all the orientation materials. This tool can be used throughout the member's tenure to hold all their advisory board information. A suggested list of items to include is listed below:

- Manual of Advisory Organizations
- Advisory Organizations Training Manual
- Board member job description
- Advisory Board roster and officers by rotation

The following materials may be helpful for board orientation as well as ongoing development.

**Board Source** (formerly National Center for Nonprofit Boards) is a good resource for materials and information. A membership is required. Catalogues and updates are sent regularly. While the material mainly focuses on governance boards, the principles can be adapted to advisory boards. The presentation on orientation includes a CD, which contains a Power Point presentation on orientation. This section may be modified to include your local information.

They also include information on committee work, relationships, board operations, board involvement in fundraising and much more.

Board Source  
Suite 900  
1828 L Street, NW  
Washington, DC 20036-5114  
202-452-6262  
202-452-6299 FAX  
ncb@ncnb.org  
www.ncb.org

The Office of Media Ministries (OMM) in Dallas, Texas is operated by the Texas Division and is located in the Texas divisional headquarters. A catalogue of videotapes is available.

Office of Media Ministries  
6500 Harry Hines Blvd.  
Dallas, Texas 75235  
214-350-4557  
214-353-9597 FAX

### Audio Tapes

Produced by the National Advisory Board, these tapes are designed for distribution to each new board member and are available through your divisional headquarters or Community Relations and Development Department at territorial headquarters.

*A Brief History of The Salvation Army*

*The International Salvation Army*

10:50 Social Service and Rehabilitation Programs Staff

**About the Advisory Board**

11:15 Local Board Operations Board Chair  
(Meeting information, calendar, board roster and overview, committee assignments, current board issues, etc.)

11:30 Board Member Role and Expectations Board Chair  
(*Advisory Organization Training Manual*, pages 10-13; 16-17)

11:45 Board Development Process Nomination Chair  
(*Advisory Organization Training Manual*, pages 14-15)

12:15 Lunch

12:30 Member personal profiles and expectations  
Note: Give each member two minutes to tell some of the personal information and expectations they completed in the first session.

**LOCAL OPERATIONS**  
(Can also be presented at lunch)

12:45 Local Administration Corps Officer/Staff

1:15 Tour of Facilities Corps Officer/Staff

- Board committee list
- Salvation Army staff and organization chart
- Corps schedule of activities
- List of Salvation Army properties and addresses
- List of social service programs and contact information
- Member self-evaluation form

**Participants**

You will need to determine who will participate and make sure there is a clear understanding of who will present the respective material.

The participants should include the following:

- ❖ The corps officer will be a significant participant.
- ❖ You will normally want the board chair or vice chair to participate in some leadership capacity.
- ❖ If orientation comes under the job description of the nominating (or board development) committee, they will, of course, be involved. The corps officer in setting up the sessions should give them close guidance. (Note: In many not-for-profit circles the term “board development committee” has replaced “nominating committee” to include the comprehensive responsibilities of this committee.
- ❖ Key staff will be introduced or make program presentations.
- ❖ It may be that the chair will want to assign a board member to each new member as a sponsor or mentor. This person could be there as support.
- ❖ Perhaps you will want to invite another key board member or two just to be present and establish a familiarity so that there are more familiar faces at the first meeting.
- ❖ Another possibility is to schedule various board members to attend different sessions just to meet the new members. Each current member would commit to be present for one hour during the orientation to make the acquaintance.

# MEETING CONTENT

What to Include

It is not possible to tell new people everything you know or want them to know in this relatively short timeframe. Cover the key areas of all the main components, but you will only be able to give an overview without a great deal of detail. Orientation should give the new members a strong foundation. Apply Rules 4 and 6 on page two and find the right balance. Start from the assumption that no one knows very much about the organization, but do not overwhelm them with too much heavy information.

## **Breaking the Ice**

Have the board chair or board development chair introduce the new members, or you may have the new members introduce themselves. Give them each a minute to tell something about themselves, their families, their personal interests, and their business. This may be a good time and place to give each member five minutes to complete the Board Member Profile. A copy is included in this book.

Have the new members take three minutes to write their perceptions of The Salvation Army and their expectations of membership on this board. You can then give each member a minute to relate these expectations. An alternate to this for best use of time is to have them complete the profile and expectations now, but give them opportunity to present them during lunch.

Part of the process should be to review the *Manual of Advisory Organizations* and the *Advisory Organizations Training Manual*. You will need to decide whether to review these straight through, or to use them as resources when you discuss the individual components below.

## **ABOUT THE SALVATION ARMY**

### **History**

Cromwell said, "I would have my son know a little history." You cannot give the full history of The Salvation Army, but it is important that they have a thumbnail sketch to give some idea from whence the organization came. A short historical review is included in this manual. There are also a number of video and audio tapes that can be used for this segment. Refer to the Resource section on pages 12-13 of this manual.

### **Organizational Structure**

Give an overview of the organizational structure, levels of administration, and delegation of authority. Explain the concept of the corporation/territory and how the Board of Trustees and its officers parallel other corporations. Explain the relationship of the advisory board to the corporation. See the sample orientation outline on pages 10-11 for page references to the manuals referenced above.

In addition to explaining the local unit's relationship to the divisional and territorial administrations, also show the local unit's organizational structure. You should have a local organizational chart showing how the departments or personnel relate to each other. Include the advisory board as a dotted line to the corps officer.

# ORIENTATION OUTLINE

Sample

8:30	Call to Order & Welcome	Board Chair
8:32	Invocation	Board Member
8:33	Introduction of new members (Breaking the Ice, <i>Orientation Guide</i> , page 5) Complete member profile, 5 minutes Write expectations, 3 minutes Note: Have members present this information during the lunch session.	Nominating Chair

## **About The Salvation Army**

8:48	History	Corps Officer
9:35	Introduction of Materials (Notebook, <i>Manual of Advisory Organizations - Advisory Boards</i> , <i>Advisory Organizations Training Manual</i> , etc.)	Board Chair
9:45	Organizational Structure ( <i>Manual of Advisory Organizations-Advisory Boards</i> , pages 5-6; <i>Training Manual</i> , pages 2-4)	Corps Officer
10:00	Introduction of Staff	Corps Officer
10:15	Break	

## **Programs and Services**

10:30	Church and Character-building Activities ( <i>Advisory Organizations Training Manual</i> , page 5)	Corps Officer
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- Introduce the Adult Rehabilitation Program, how it works, and how it can benefit men from your own community.
- Tell them about the College for Officer Training. Show them some photos and tell something of the recruitment, candidate and training process.

You will see by this format that there should never be a month that you don't have something new to teach your advisory board members.

### **Special Events**

It is often hard to get board members to attend special events such as seminars and conferences, but these can be invaluable to their development as good board members. This often tests the leadership skills of the officer. The better the relationship with the board, the easier it will be to enlist their support for these events. The officer must impress upon the board, through the board chair if possible, the importance of these events to their ongoing service. There are often divisional, territorial, and national seminars or conferences designed just for advisory organizations. The National Advisory Organization Conference, held every four years, is an outstanding opportunity for board members. You would be hard pressed to find a board member who has ever been disappointed in attending this event.

Board members are often overlooked when enlisting delegates for major Salvation Army events such as the commissioning of officers, or other territorial congresses and celebrations. These are tremendous venues for enlarging the vision and perspective of the board members.

The advice to one board chairman by his father, a former board member, was that he needed to get out of the local community and visit other Salvation Army locations and events in order to enlarge his vision and see the larger army.

Education does not end with the orientation. The perception of board education and development must be expanded beyond the local community.

This may also be the time that you want to introduce your key staff and tell something about their responsibilities.

## **PROGRAMS AND SERVICES**

### **Worship and Character-building Activities**

Here is where you explain how The Salvation Army is like, yet very different from, other churches. Explain the spiritual motivation behind all the Army does, and its ministry to the whole man. Make them aware that every Salvation Army officer is an ordained minister as well as an administrator. Provide them a schedule of church activities. Perhaps have one or two local officers give a five-minute overview of a couple of your successful character-building programs. Bring in one or two of the participants in a Sunbeam or Adventure Corps uniform as they tell about the program. They should know that there is a full schedule of weekly church activities. Be sure to stress that although participation in the church is not a condition of receiving client services, these additional activities are available to all the unchurched.

The Mission of The Salvation Army and its spiritual motivation is clearly defined in the *Advisory Organizations Training Manual*, page 2.

### **Social Service and Rehabilitation Programs**

Give a brief background of The Salvation Army's outgrowth of social programs. You may wish to give each new member a copy of *In Darkest England and the Way Out* as a historical background. This can be a very helpful tool for those who take time to read it.

Give a brief overview of the basic casework services performed in every Salvation Army unit. Perhaps you will want your caseworker to give this overview, but importantly, you should give a couple specific case examples indicating the types of situations clients bring with them. If possible, it is also good to share a success story, or even have the client share a testimonial.

If you have many programs, such as senior residence or day care, child day care, domestic violence, transitional housing, etc., you should have the program staff come and give a quick overview of their respective programs. Be specific on the time allotted.

## **ABOUT THE ADVISORY BOARD**

This is a good time to review the remainder of the *Advisory Board Training Manual* that has not previously been referenced. This includes the role and expectations of the board member and the responsibilities for personal and board development. Introduce the self-evaluation form as a reference for monitoring performance. The following are other areas to be covered and could be handled by the board chair:

- ❖ Introduce the board roster. Identify the board leadership and tell something about the board makeup.
- ❖ Present the committee list and point out the committees to which the chair has assigned each new member. A committee job description should be given as well.
- ❖ Provide a board calendar with the meeting dates and other special events. The chair should emphasize the importance of attendance. The calendar should also include board training opportunities such as divisional, territorial, or national board seminars, and attendance should be encouraged as tremendous opportunities for learning and development.
- ❖ Define the fixed membership number as authorized by territorial headquarters, and refer to the rotation system based on thirds.
- ❖ Have the chair bring the members up to date on current issues being addressed by the board.
- ❖ The chair should reinforce certain expectations such as giving an annual contribution within their budgetary means, loyalty to the organization, and taking advantage of opportunities for personal development.
- ❖ Tell about other hands-on board involvement such as helping with the Christmas toyshop, or taking a day at the kettles.
- ❖ Give an update on future projects such as a potential capital campaign or new programs being considered.

## LOCAL ADMINISTRATION

Discuss local operations and relationships. These can include the following:

- ❖ Give an overview of a simplified annual budget.
- ❖ Explain the support services system.
- ❖ Review income sources such as United Way, thrift stores, grants, direct mail, etc., and how the board is involved in fundraising.
- ❖ Review relationships with other agencies or cooperative agreements. Discuss the relationship with United Way, the national *Working Together Agreement*, any restrictions or difficulties being addressed, and percentage of income to total budget.

## TOUR OF FACILITIES

This may not be difficult if your operation is conducted from one facility. If you have multiple program facilities, this must be carefully coordinated. If program staff are conducting the tour, make sure they are aware of time constraints so that they do not try to show every detail of the facility or program. In major metropolitan areas it may be that you will show photos of some facilities and select one or two major program facilities to tour.

## THE CONTINUING PROCESS

Orientation as an event is designed to give a working foundation, or a familiarity, with the organization and responsibilities. The education and development process, however, should always be seen as a continuing responsibility. The Salvation Army is too complex to learn in one sitting and therefore the officer should use every opportunity to present additional information.

### The Board Retreat

Many boards conduct an annual board retreat at a camp or other community facility. Some boards will make it a weekend and others will make it an all day outing on a Saturday. The object is to get the board together for fellowship, relaxation and education. This setting should not be used for heavy discussion on business matters, but some time should be given to board development and Salvation Army education. This time can be used to view new videos on Army services, or introduce a new Salvation Army book or other literature.

### The Board Meeting

There should always be a time on the regular board meeting agenda each month for the officer to make a short presentation. This time can be used to explain or reveal something new to the entire board. It can be anything from a program to explaining one of the doctrines. For instance:

- Invite a Sunbeam or Boys' and Girls' Club member as a visual aid, and then tell something about the program. Don't tell about the whole boys' club program, but only one aspect of the program such as the soccer league, hygiene or wellness program, tutoring, etc.
- Explain something about the finance procedures. Don't try to explain the whole financial operation, just one line item. Give some insight to support or statewide service, property and auto replacement reserves, or how the officer's allowance is structured.
- Give an overview of one of the doctrines.
- Give an interesting, little known historical tidbit.