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Alexandria, Virginia 22314-1112

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10 West Algonquin Road
Des Plaines, Illinois 60016-6006

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

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Atlanta, Georgia 30329-2088

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Approved by the
Commissioners' Conference
February 2003



OFFICERS' ADVISORY ORGANIZATIONS TRAINING GUIDE



*Developing An Effective
Advisory Organization*



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

_____ Members are encouraged to visit other Salvation Army programs, events, and facilities to expand their perspective (*i.e* College for Officer Training and Commissioning of Cadets).

Operations

- _____ Members understand their role and the importance of their recommendations to the territorial administration.
- _____ The organization understands the administrative structure of The Salvation Army and the limit of authority relative to policies and procedures.
- _____ The organization has a strategic plan to guide its activities.
- _____ The organization fully understands the mission of The Salvation Army and its ministry to the whole person, spiritual and material.
- _____ Members are fully loyal to The Salvation Army and its mission, and serve as advocates whenever necessary.
- _____ The organization understands its role in the larger picture, and does not involve itself in micro-management or staff work.
- _____ Committees are active, function efficiently and have an annual work plan.
- _____ The organization chair is involved in meeting agenda preparation.
- _____ The meeting agendas are distributed in advance to the members for their information.
- _____ Meetings are productive and within the allotted time frame.
- _____ Agendas are based on prior committee activity and meetings are not spent doing committee work.
- _____ Meetings are not dominated by staff or staff reports, but by committee activity.
- _____ Meetings are not dominated by one or two persons. There is general participation and each member supports the decisions of the whole.
- _____ Committees include non-members where appropriate and allowed by manual.
- _____ Ten meetings are held annually (including one annual civic appreciation meeting).
- _____ Meetings achieve a least a 75% membership attendance rate.
- _____ Concise minutes are taken and distributed to the members prior to the next meeting.
- _____ The organization handles conflict capably and expeditiously.
- _____ The corps officer empowers or enables the organization to make decisions and take action.
- _____ All members give an annual personal financial contribution to The Salvation Army.

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- Advisory Organization Member Profile
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The principles in this document are designed to apply to all advisory organizations even though some references are to advisory boards.

ADVISORY BOARD IMPERATIVE

When Advisory Boards were first conceived, the idea was simply to help The Salvation Army do its job - a support group. There was a great deal of wisdom in this plan to involve community leadership in the mission of The Salvation Army. Today, and for the future, the need for advisory boards has moved beyond supportive to imperative. The Salvation Army is dependent upon committed volunteer boards to see it through the complex days ahead, and officers need to be equipped to work with them and relate to them.

Advisory Boards have become a motivating force in local communities. Members become The Salvation Army's advocates, advisors, negotiators, supporters and managers of its position in the community. It is the Advisory Board that brings continuity to the work of The Salvation Army, especially during transitions such as change of Salvation Army officers.

Because of periodic changes of officer personnel, Advisory Boards become increasingly important in helping new officers get up to speed quickly in a community, and make the officer's transition easier. The board can help the officer adjust to the needs, personality, political climate, demographics, culture, and other characteristics of a community.

Another key element, however, is support and direction for the corps officer. The first commitment of officers is to be ministers of the Gospel and pastors to those people placed within their care. Salvation Army officers may bring certain skills and education into their role, but with the complex operations of today there is no way an officer can possess expertise in every area of operation. Board members bring their own skills and gifts to the table, and the wise officer will take advantage of these skills to support the mission of The Salvation Army.

This manual is designed to help the officer define his relationship with the Advisory Board, underscore effective board operations, and emphasize the officer's role in board development. The officers must realize that working with boards is part of their ministry. They must also realize that an effective and progressive program in the community is dependent upon a strong effective Advisory Board. That board will only develop in correlation with the leadership and vision provided by the corps officer. Therefore, if they are to accomplish all that they hope to do in a community, they will need to devote significant time and focus to board operation and development.

**“Where no wise guidance is, the people fall, but
in the multitude of counselors there is safety.”**

Proverbs 11:14

ADVISORY ORGANIZATION PERFORMANCE ASSESSMENT

Unit Name

Advisory Organization: (Board, Council, Auxiliary)

The Executive Committee, Nominating Committee, or the advisory organization as a whole should conduct a performance assessment annually. The Salvation Army officer must be present for the evaluation.

Y = Full compliance; I = Improvement needed; Blank = not in compliance

Composition and Selection

- _____ Represents community demographics, including geography, gender, age, ethnicity, etc.
- _____ Balanced with younger and older members to ensure freshness and continuity of ideas.
- _____ There is a written job description for members.
- _____ The organization has a plan for identifying and developing its own leadership.
- _____ Nominating committee meets (at least 3x) to identify/cultivate prospective members.
- _____ Qualifications and expectations for members are clearly articulated to prospects.
- _____ Candidate selection is based on an objective stewardship process and not favoritism.
- _____ Candidates are interviewed by the corps officer and board or nominating chair before submitting the name into nomination.
- _____ Nominating committee fully understands its charge to solicit names and cultivate the top-level prospects for benefit to The Salvation Army.
- _____ Organization leadership and corps officer are aware of each member's skills and expertise and have successfully utilized them.

Orientation and Personal Involvement

- _____ A comprehensive orientation is conducted by staff and the organization for new members, creating a good comfort level of role early in their tenure.
- _____ Each member has received copy of the *Manual of Advisory Organizations*, which has been reviewed with them.
- _____ An ongoing education process is in place for all board members to update on programs, procedures, history, administration, etc.
- _____ All members are encouraged to participate as a volunteer in a selected program activity.
- _____ All members are encouraged to participate in a fundraising or seasonal solicitation.
- _____ Leadership attends or appoints representation at divisional, territorial, and national training opportunities.

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!

THE OFFICER AND THE ADVISORY BOARD

Building Relationships

As the corps officer and official Salvation Army representative in the community, you are the only person who can determine the quality of your relationship with your Advisory Board. It is your personal responsibility to cultivate and develop this relationship. Your success in your command will depend upon that relationship. The Salvation Army needs the Advisory Board, and you need the Advisory Board.

Many officers have testified of great friendships established with board members over the years. Yet, the chief dread that many officers have in their vocation is working with Advisory Boards. This is especially true of first appointments where officers may have limited training on the subject, and no experience.

Many officers, experienced and inexperienced, can be intimidated by the presence of board members. Many have never worked with community leaders at this level. Their wealth, class, or position overwhelms them. Suddenly, once a month, they find themselves in a room full of these people whom they perceive as being there only to conduct a critical analysis of their performance, and call it a board meeting. They may feel that the board's sole objective is to make the officer feel as inept as possible. The officer often responds by either becoming passive and failing to give any leadership, or overcompensating by becoming dictatorial and reducing the board to a puppet organization with little influence.

Some officers experience difficulties throughout their careers in working with boards. They never quite understand the roles that both the officer and the board members have, and how they relate to each other in furthering the Kingdom of God and The Salvation Army. Consequently, Advisory Boards, or some individual members, can often be stereotyped by the officer as deterrents to progress. At worst they are perceived as the ultimate roadblock, or at best, a necessary inconvenience.

Here are two testimonials of officers at different experience levels:

Younger officer: "I feel that working with an advisory board is one of the biggest challenges we face as officers. A major concern I have is that of feeling inadequate, that my sentence structure may not be correct, nor do I have the social refinement that board members have. When going to a new community, the fear of being accepted is a very real one."

Older officer: "After being commissioned as officers, we took up our first assignment with great fear and trepidation. In fact, we have gone to each of our subsequent appointments with much the same feelings of inadequacy and apprehension...Our early experiences with advisory board members in our first appointment are key to the confidence we now have in working with board members. It goes back to the wonderful way we were accepted, encouraged and supported by board members. They not only dealt with us as business associates, they welcomed us into their lives and homes. We came to realize that we did not have to pretend to know everything and we could ask for their help without fear of judgment. Officers' and board members' lives are enriched by such relationships. The Army work advances when we are committed to support each other as people."

ADVISORY BOARD COMPOSITE PROFILE

It is true that some individuals can be difficult to work with, both officers and board members, but we should not allow individual personalities to detract us from the ultimate goal. Both officers and board members are working toward the same purpose, and it is up to us to discover that common ground on which to accomplish that purpose.

Interviews with many board members bring a much different perspective. Most are shocked to think that a Salvation Army officer would be in awe of them. They almost always think the reverse and stand in awe of Salvation Army officers. They see the officers as committed to a lifestyle that they never had the courage to fulfill, and accomplishing things they only dream about. Serving on the board and supporting the officer is their method of making that contribution.

How can officers overcome some of their own misconceptions and establish a strong working relationship with their board?

- Overcome any adversarial or negative attitude. The first barrier to go must be yours. Most pressure felt about boards is often self-imposed. The board may not be as demanding or imposing as you imagine. They are often loyal beyond reason. In more than one occasion, The Salvation Army reputation has been salvaged in a difficult situation by a loyal Advisory Board.
- See them as divinely appointed just as the officer. While they may have come to the board through human instrumentality, they are here because God has brought them to this place.
- View them in terms of stewardship. They are people placed in your trust in the same manner as corps members and clients. You have a responsibility for their development as board members and as God's people. Value them as people as well as board members.
- Get to know them. Go to their office. Have lunch. Learn about their families and interests. Allow them to share their concerns. Minister to them.
- Share yourself with them. Allow them to get to know you. Allow yourself to be vulnerable when you need their help.
- Listen to them. They just may have something worthwhile to say.
- Empower them. Allow them to be a board. Don't just inform them, but involve them in the decision process.
- Be honest. They will always respect integrity. Don't hide things from them. They are committed to The Salvation Army. Be up front with them.

Member's Names <small>(By rotation class: place X where applicable:duplicate sheets as necessary)</small>						
DEMOGRAPHIC						
Age: 30-under						
Age: 31-45						
Age: 46-65						
Age: 66-over						
Gender: male						
Gender: female						
Race: Caucasian						
Race: African/ American						
Race: Hispanic						
Race: Asian						
Race: Other						
Socio-economic: middle (optional)						
Socio-economic: upper (optional)						
BUSINESS CATEGORIES						
Business owner						
Corporate management /executive						
Professional Services						
Sales / Marketing						
Government / Elected official						
Military						
Housewife						
Retired						
Other						
REPRESENTATION						
Service Organizations						
Rotary						
Kiwanis						
Lions						
Optimist						
Other						
Other boards						
United Way						
Other non-profit						
Church/ Faith						
Protestant						
Catholic						
Jewish						
Other						

ADVISORY ORGANIZATION MEMBER PROFILE

Member Name _____ Advisory Organization: Board, Council, Auxiliary

Address _____ City _____ Zip _____

Personal

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

Spouse _____ Birth Date _____

<u>Children</u>	<u>Age</u>	<u>Member's Hobbies / Interest</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Occupation / Business Affiliations

Business _____ Email _____

Business Address _____ City _____ Zip _____

Representation

Religious Affiliation _____
 Service Organization _____
 Other Non-Profit Boards _____
 Other Memberships _____

Awards / achievements

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) _____



- Appreciate them. Genuinely appreciate what each member brings to the table. They have skills and knowledge that can be invaluable. This is not their job. This is extra duty! They often devote themselves to The Salvation Army in such ways that require sacrifice of their own families and financial interests. When they know that what they have done has made a difference, they will respond again and again.
- Pray for them. Make them part of your flock, your ministry. Being prominent citizens does not make them immune to deep concerns. They will know when you really care about them and their families.

Board relationships can be very fulfilling and rewarding. Remember, they are not the enemy. They are people with great passion for The Salvation Army and its mission. If you love them, educate them and involve them, they will surround you with tremendous support and be your strongest advocates for the work.

“To profit from good advice requires more wisdom than to give it.”

John Churton Collins

THE EFFECTIVE ADVISORY BOARD

Understanding The Role of the Advisory Board

What constitutes an effective advisory board? It is strange, yet flattering, that many community leaders will agree to serve on Salvation Army boards without really knowing a great deal about the organization, its services, or most importantly, what is expected of them. It is important that both the board members and the corps officer understand their respective roles.

Partners In Mission

To join a Salvation Army Advisory Board is to become a partner in mission. Board members must first understand the clearly defined mission of The Salvation Army. The Salvation Army's motivation is spiritual, and its goal is to minister to the whole person, body and spirit. The Salvation Army finds these two components inseparable in its ministry. Understanding this, both board and officer should act carefully to ensure that its recommendations are consistent with that mission.

The Nature of "Advisory"

While Advisory Boards are not unique to The Salvation Army, there are times when the term "advisory" gets in the way of effectiveness in both operations and recruiting. Some board members have diminished their own effectiveness by saying, "I am only advisory." Unfortunately, some officers have also been known to "remind" their board that they are "only advisory." The term "advisory" should in no way imply diminished capacity to make decisions or effect an influence in the community.

The legal entity of The Salvation Army is the corporate, or territorial, headquarters. While the Advisory Board provides direction and advice to the local unit, the term advisory mainly applies to its relationship to the Board of Trustees of the corporation. The local board has no legal authority to make or change policy for the corporation, but it does have significant responsibility to determine direction and exert influence in the local community.

The territorial and divisional headquarters could not effectively manage every local operation without the guidance of the Advisory Board. These entities rely on the local boards to provide direction and recommendation for corporate action. With rare exception, there are no major transactions conducted by The Salvation Army in a local community without the support and recommendation of the Advisory Board as detailed in the official board minutes.

Therefore, the corps officer must keep this relationship in mind when conducting business and make sure the advisory board is well involved in the decision-making process.

Do not allow individuals to dominate discussion or leverage decisions their way. If there is a problem, involve the chair in helping to set those rules. Try to see that there is balanced discussion and that all members have opportunity for input.

Do not become frustrated with the "devil's advocate." Every board has one, or should. These are the persons who may oppose everything, but they do make you look at all sides of the issue. See this as a positive as long as they are not bringing progress to a halt.

**"We naturally admire the wisdom and good judgment
of those who come to us for advice."**

Credit not indicated.

Agenda Content

Again, there will be some items that are standard in every meeting. Do not take a great deal of time with consent items, that is, items needing technical approval but do not require any discussion.

If minutes are distributed in advance, consent approval can be given without taking much time.

Include an attendance report.

The best board meetings will be those that contain good committee reports. This, of course, means that the committees must be active. You only need include reports from those committees which have met since last meeting, or which have business to present. Be careful that board meetings don't become large committees doing committee work themselves, rather than taking action on committee work.

Include a finance report, but make it simple. Do not over detail. Reflect main lines of variance with explanation. It is best to have the treasurer make the report, but make sure they are well schooled. If they are active in the financial planning, they should have no problem.

Do not overload a program report with statistics. Refer to the numbers, but the members will be more interested in a specific case. If possible on occasion, invite a former client to give a short testimonial of the service given. Invite one of your youth or adult program participants as guest to tell something about the program.

From time to time you may want to invite a staff member to give a short update about a specific program. This helps keep the board informed about the activities.

Include a corps officer's or development minute as part of your ongoing orientation. Use this time to educate the members on some aspect of The Salvation Army - a point of history, unique terminology, Salvation Army procedure, the international Salvation Army, etc. This item can overlap with that in the program report.

Board meetings can be interesting, in addition to conducting the vital business of The Salvation Army. There should always be information, education, and determination (positive action).

Caution

Be careful of the following to help ensure good meetings.

Don't overload attendance with staff. All staff need not be at every meeting. Invite selected ones to attend to help them be aware of board activity, lend support on specific items as needed, or to make a specific report on a program area.

Specific Functions

What specifically are the day-to-day functions of the Advisory Board?

Administrative Support: The primary function is to support the corps officer. Carrying multiple roles, the corps officer must rely heavily on the expertise of the board to help manage the business and programs of The Salvation Army effectively. The officer will not only need business support, but friends to help through difficult situations. The officer cannot know all that is required to perform this tremendous balancing act of business executive and pastor. The wise officer will freely access the expertise of the board.

Community Relations: The board assumes a liaison role between The Salvation Army and the community. This often includes advocacy and negotiation. A strong board will enhance relationships with community and agency leadership such as United Way, business leadership, government, and other organizations. They will work to increase visibility of The Salvation Army and interaction with the community. It is incumbent upon the officer to operate at a high level of efficiency and accountability in order to ensure the board's ability to fulfill this role. The officer must make sure that his actions never leave the board defenseless.

Interpretation: To aid the board in their role as interpreters of The Salvation Army the officer will constantly need to make sure that the board is up to date on all programs and services. It is their job to interpret the community to The Salvation Army, and to interpret Salvation Army services to the community. They must consistently be made aware of all that is happening through The Salvation Army in their community.

Strategic Planning: The board must be active in developing goals and strategic plans for achieving these goals. There must be focus on direction to ensure that local vision is clear and relevant. The officer must provide visionary leadership in helping to define that plan for the future.

Fundraising and Fiscal Accountability: Board members are expected to support the organization with their own finances as well as through fundraising. This should be made clear to them in the recruitment process.

Along with fundraising comes fiscal accountability. Board members are more likely to help raise the funds when they have some voice in the accountability. They must be confident that funds are being spent appropriately. Officers must be honest in their financial appraisal and reporting. They should not be offended when board members ask questions regarding expenditures. It is their right as fundraisers and community liaisons.

Continuity: The Advisory Board is the chief stabilizing unit for the continuity of work. With the eventual change of officers, The Salvation Army relies on the board to maintain direction and continuity of program. Officers must involve boards in the long-range objectives, and incoming officers must be careful not to rush in and change the objectives without gaining support of the board. It is true that situations may change and thereby necessitate a change in direction, but adequate time and involvement of the board must be given before abruptly implementing new plans.

**“It takes a great man to give sound advice tactfully,
but a greater man to accept it graciously.”**

No credit indicated.

Just make sure they are in proper condition for this purpose, and that the location is well announced so that no one shows up at the wrong place.

Attendance

Stress attendance as part of the recruiting package. Help board members understand that their attendance and contribution is valuable. Make the attendance report part of the agenda to help stress its importance. If attendance falls off, the chair should take the initiative to discover why and to advise the members of the attendance requirements. Local boards have the latitude to create specific attendance requirements for continued membership. Note the previous attendance initiatives under the sections on Evaluation and Nomination.

Agenda Preparation

The agenda should be well prepared in advance of the meeting. The board chair should be involved in the preparation rather than handing them an agenda on the day of the meeting. It is best to meet with them a couple days prior to the meeting in order to review the finished agenda and give them time to become comfortable with it.

Some agenda items will be standard, but you may wish to have board members submit suggested items for the next meeting agenda. This should be done by a certain deadline and then work with the chair to determine what should be included.

Try to distribute the agenda to all board members over the chair's signature prior to the meeting. This will let them know that planning has been done and there are items needing their attention.

Assign a time limit to each agenda item and try to keep discussion within that time. This can be printed on the agenda so that everyone can see the time allotted.

Place the most important items on the agenda first, other than the consent items. Discuss new business first since old business has already had significant discussion. This will keep you from forcing important items into the closing moments and cheating the discussion.

Don't simply hand committee chairpersons a report to read as they come through the door. If there is a report you want them to make outside of committee action, meet with the committee chairs in advance to discuss the details and make sure they are comfortable with the report.

Do not have staff members make reports that should be made by a committee chairperson through work done in committee.

The board meeting is the place where the decisions are made and where the board will do the main part of its work. The nine regular meetings will usually last on the average of one hour, but not more than two. When you add committee work and any additional volunteer activity, the average board member gives around thirty hours a year in board service. Certainly there are exceptions, especially in times of capital campaigns or other exceptional activities. When you consider the limited time that the board is actually together it does seem to place a great deal of importance on making the board meeting as productive as possible. It matters what boards do when they come together. It additionally stresses the importance of good attendance at each meeting.

Board attendance can be a challenge, especially if board meetings are unorganized or unproductive. Meetings may provide information, but lack definitive action or progress. If board members are taking time from other personal or business duties to attend the meetings, their time should not be wasted.

These tips are designed to help you in your planning and preparation for the board meeting. This should not limit your creativity in making these meetings as informative, interesting, and productive as possible.

Relationship

The officer is normally the one who creates the agenda and organizes the meeting. The board chair is the facilitator and must see that the meeting is productive in practice. Working in tandem they carry the responsibility for ensuring productive meetings. Therefore, good board meetings are first dependent upon a strong working relationship between the corps officer and the advisory board chairman.

Meeting Schedule and Time

The meeting time should be that which is conducive to the total membership. Different times are favored in different communities. Most are conducted around lunch or some other meal function but some are not. Regardless, the time should be standard and structured to conduct business in a reasonable time frame. Make sure the time is sufficient and then stick to it. Do not include the meal as meeting time if business is not being conducted. Start on time and end on time. Do not delay the starting time for latecomers. Follow this rule, and it will give greater leverage in discouraging early departure from the meetings.

Set all meeting dates for the year. If it is always the first Tuesday, publish a calendar with the actual dates rather than confuse members with "first Tuesday." If they have the dates for the year, there will be less chance for conflicts in dates.

Location

Some boards will have meetings at the same place, and this may be fine. It is important to make sure the location is comfortable and conducive to a board meeting. In larger communities with multiple programs, you may wish to vary the location to give opportunity for the board to see your other facilities.

Of The Salvation Army

There are certain things that The Salvation Army seeks in recruiting board members, and consequently there are certain things that the corps officer should expect of the board. What are those expectations?

- A respect and appreciation for the purposes and objectives - the mission- of The Salvation Army.
- A willingness to learn about this multi-faceted organization and internalize its "case for support."
- To utilize their individual skills and gifts to further the interests of The Salvation Army.
- Loyalty to The Salvation Army. They should be advocates for the organization, and be careful of compromises that may endanger it. Many community leaders will serve on multiple boards, but they must be careful to avoid conflicts that compromise the interests of any group.
- Meeting attendance. The board meets once a month for ten months, nine regular and one annual meeting. These meetings are scheduled on a regular basis, and it is hoped that absences will be rare. Their input is important.
- Financial support. Every member should make a personal financial contribution. As a fundraiser and supporter of The Salvation Army, this credibility is crucial.
- Self-evaluation. Members should regularly evaluate their own performance.

Of the Advisory Board

Not only should The Salvation Army expect certain things from the board, but the board should also expect certain things from The Salvation Army, and in particular, the officer. What should they expect from you?

- Leadership and direction on Army issues. That's right! Although they are community leaders, they are looking to the officer for vision and direction.
- A clear definition of roles, responsibilities, and expectations, including time and financial support.
- Training and orientation. This process receives the least attention from Salvation Army leadership, yet

boards would appreciate more emphasis here. There is more on this subject in the section on development. A manual on board orientation is also available.

- Professionalism in your approach to your role as the official Salvation Army representative. While officers' skills may vary in certain areas of management, they must always conduct themselves as professionals in that field. Good English, good health habits, work ethic, energy, and enthusiasm all contribute to this positive image. You must dress, walk, and talk with confidence. The board is proud of the organization and they want to be proud of you.
- Communication. Keep the board aware of local issues and concerns. If you want them to be interpreters and advocates for The Salvation Army, you must keep them in the loop. Don't put them in an embarrassing situation of not knowing.
- Something worthwhile to do. The most valuable contribution your board will make is *time*. Do not waste *time* on the trivial. Most board members lose interest because they are not being used. Identify their skills and discover ways to use them effectively.
- Integrity. They want you to be honest in the highest sense of the word. They must be able to take your word to the bank. Don't think you are doing them a favor by hiding the bad news from them. Let them help you resolve it.
- Productive meetings and well-planned agendas.
- Loyalty. Just as you want them to be loyal to you and The Salvation Army, you must develop a loyalty to them.
- Appreciation. Don't take them for granted, and don't wait for special meetings to show appreciation. Find ways to do it regularly, both collectively and individually. Sometimes just calling to say "thank you" is better than the most expensive plaque.
- Ministry. This can't be said enough. Don't forget your part of the ministry. You have a responsibility to develop them as board members and as people. They have hurts and problems just like any other human being. Don't overlook them when they may need you most.

"The best advice is only as good as the use we make of it."

No credit indicated.

Building good relationships with the board is important, but having a strong relationship with the chair is critical. These two entities working together determine the direction and productivity of the board.

You will have no stronger ally on the board than the chairperson, and they in turn, will become an advocate for board development. This relationship will also set the tone for the relationship with the rest of the board.

What are the key elements in building this relationship?

- ❑ Trust: There must be a mutual trust. You must be able to confide in the chair, and feel comfortable expressing concerns and asking for advice. The chair must also be confident in your utmost integrity.
- ❑ Communication: This is the area that creates more problems than any other. Keep them well informed. Be in constant communication with the chair. Meet once a week for breakfast or lunch just to review and discuss. There may be times when there is no earth-shaking business, but it is just good practice to stay in touch and develop a relationship. It may be a weekly phone call, or some other form of routine contact even if it is not formally structured.
- ❑ Leadership: Provide leadership and direction. Establish the vision or platform from which the chair can operate. Don't leave them to flounder or guess what you want to do. Consultation on leadership goals will help them to rally the board around your dreams.
- ❑ Empowerment: Empower them to be the chairperson. Allow them to express their own leadership skills. Define the parameters of authority and then allow them the latitude to operate within those boundaries. This is often a difficult balance and is sometimes scary for officers. Officers don't want to lose control. Even though the board is advisory in character, the board and the chair must be empowered to act as a board. Establishing a strong relationship with the chair will still allow you to formulate vision and direction while at the same time making the chair a vital part of that process. Be careful that you do not minimize their importance or create a puppet leadership.
- ❑ Planning: Make them a part of the planning rather than just recipients of information. This is especially true in planning the board meeting agenda. Don't just inform them. Get their input and endorsement. Operate under the "no surprises" rule. Then allow as much as possible to go out over their signature whether it is last month's minutes or next month's agenda. Anything distributed to the board over the board chair's signature will carry more weight.
- ❑ Success: Nothing breeds good relationships like success. Help the chairperson to be successful. Provide all the tools needed to be productive leaders. A good and productive experience for the chairperson will make the position one that others are willing to accept or even aspire to.

2. It offers opportunity to recruit better balance to the board.
3. It brings fresh ideas and energy.
4. It broadens the base of friends in the community. Every time another person serves on the board they learn The Salvation Army from a first-hand perspective. Rotation broadens that education experience so that new life-long friends are constantly being added.
5. It gives board members a well-deserved rest. We always hate to lose good people, but sometimes they just need a break. Perhaps after a year's sabbatical they can be re-elected for another term for which they will return re-energized.

It is natural to become comfortable with our board relationships and not want to disrupt the *status quo*. We often think, in error, that there are no other board members out there as good as this one. When we do not rotate our membership adequately, there is the tendency to become too comfortable, to age out, to lose focus, and stagnate as a board.

The main objective of developing a strong board is to advance the purposes of The Salvation Army to its fullest potential. The equally important goal is to make it a board on which people are anxious to serve.

**"We give advice, but we cannot give the wisdom
to profit by it."**

Francois de La Rochefoucauld

What is your definition of a strong, effective Advisory Board? Affluence? Influence? Power? Prestige? Perhaps all of these! For The Salvation Army, it is a group of highly committed and motivated community leaders who possess such drive or influence as to position The Salvation Army in the community as a respected leader in service and human reclamation.

Salvation Army board members are people who are committed to the community and to the higher good of mankind. They have chosen to effect that influence through this vehicle known as The Salvation Army. However, there is that something that every board member and Salvation Army officer must come to grips with, and that is the Divine initiative.

You, as the officer, must recognize that no board member is here by accident. They may think that they are here because of their community involvement, influence, wealth, or just because someone approached them about participation. Regardless of the human instrumentality used, you must always view them as God-appointed. They are appointed to a special purpose through The Salvation Army. The board member should not disregard this fact, nor should Salvation Army personnel overlook it. Perceiving the board members in this way will do much to strengthen the relationships and to keep the operation mission-focused.

Principles of Board Development

You must be careful of limiting your work to the social and spiritual ministry of the corps to the exclusion of the Advisory Board. You must broaden your perspective to include the board and board development as a major part of your work. You should want to see growth in every aspect of your ministry, including the Advisory Board.

There are two key principles at work in the process of board development.

First, board development is an ongoing process. It does not happen in some one-time crisis action, such as bringing on just the right person, electing an outstanding chairperson, or having a superb orientation session. These are action steps in board development, but cannot in themselves create a strong board. Development is continual, and can often be a long and tedious process.

Second, board development is both collective and individual. The action steps can be applied to both the board as a unit and to the individual members. It is important for good collective development that all members continually attend to their own personal development. Only as the individual members expend effort to learn the organization, understand their role, and become involved in the mission can the board realize any real growth as a body.

Action Steps

There are four main action steps necessary to effectively apply the above principles. They are simply...Evaluation - Nomination - Orientation - Rotation.

Evaluation

In the process of collective board development, this process must take place before the other steps. You must fully understand the profile and personality of your board before you can pursue proper development. Formal evaluation can be done at any time, but every board should evaluate itself at least once a year. However, evaluation is also an ongoing process with progress observations being done at various intervals of activity. Again, evaluation should be done both collectively and individually.

It is important that a membership profile be completed for every board member. (A suggested form is included in the exhibits.) If you do not have such a tool already in place, the board chair should have each member complete the form. Each new member from now on should complete the form upon acceptance on the board. This profile provides simple personal and professional information about the member that will help you in your ministry.

It will also provide information about your board collectively as you begin to see a pattern of recruiting and community participation. More on this area is included in the section on Nomination.

Collective

Every good board will want to keep track of its growth and performance. (A suggested board evaluation form is included in the exhibits of this manual.) In the first evaluation, the board should look at itself with a critical eye.

The evaluation will include the hard questions?

- Are we operating in accordance with the *Manual of Advisory Organizations*?
- Is our nominating process bringing in fresh, strong, community leadership?
- Is our board membership balanced and reflective in community?
- Is there a strong relationship between the board and the Army administration?
- Is membership active and involved?
- Has The Salvation Army been positioned in the community as a visible, influential organization?
- Has The Salvation Army made significant advances with the leadership of the board?

Individual

The board, usually through the nomination committee, should conduct annual member evaluations. This process will either help restore members to active and productive status, or allow them the option to step down. This is important in the nominating and development process. Again this is addressed further in the section on Nomination.

Once there has been good initial evaluation, the objectives become more defined as you move into the next step of development.

3. Set aside an appropriate time, such as a full morning with lunch, or a couple hours on two or three different days.
4. Involve staff and board leadership in the process.
5. The time should include a review of the board manual, short history of the Army, organizational structure, introduction of staff and responsibilities, review of local programs, overview of financial operations, and a tour of the facilities.
6. Orientation must be ongoing as well. Take every opportunity to educate the members on The Salvation Army and its programs. A few moments at each board meeting for a new highlight is good.
7. Encourage members to attend special Salvation Army events and training opportunities, divisionally, territorially and nationally. It is usually difficult to get board members to invest in these opportunities, but they are always beneficial. It is worth your time investment to get them there.
8. Encourage members to visit other Salvation Army locations and facilities to enhance their view of the larger Army.

One of the great benefits of being on the board is to learn first hand what the majority of the populace only *think* they know about The Salvation Army. Orientation is a somewhat forgotten process, but it is time well invested for the development of the board members and, consequently, The Salvation Army.

Rotation

The most difficult part of the process to follow is that of rotation. Although it can be difficult to recruit good board members it can be just as difficult to move them off at the appropriate time. This is usually because they have made a great contribution and no one wants them to leave, or they have enjoyed their avenue of service and they don't want to leave. The other less attractive reason mentioned earlier is that it is the line of least resistance to simply re-nominate anyone who wants to stay.

The membership quota is authorized in a rotation of three so that each year one-third of the membership is rotated off the board or being re-elected for another term. There are certain members that you will want to re-elect for consecutive terms, but again, we must guard against wholesale re-nomination. Why is rotation important?

1. It is an automatic relief for members who have fulfilled their obligation and desire to move on to other avenues of service, or for members who have not been as active and wish to be replaced. The term limit of three years is sometimes a recruiting incentive.

boards will understand this expectation. The same goes for attendance at board meetings. Thank them for their time, and promise to approach them again when their schedule (and interest) allows for their full participation.

6. Make them aware that one of the expectations is to attend a formal orientation session.
7. Do not give up on refusals from those you really want. Continue to court them and nurture their interest. Send them regular information. Have the board chair call them on occasion to let them know they are still on your list. Invite them for a visit to see your programs. Invite them to your special events. Sometimes the hardest ones to recruit will become your best board members once they accept.

Orientation

It is not only important to develop the board through personnel, but to develop the personnel through good orientation. 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 that community leaders automatically know about The Salvation Army and about their responsibilities as Advisory Board members. We provide them a manual and expect them to read it and be fully ready for action. It is difficult to hold one accountable when he has never been properly oriented to the organization or his particular responsibilities.

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 grew up within its membership often take it for granted and expect that everyone else understands it equally well. Remember, The Salvation Army is America's favorite organization by reputation, not by knowledge. It must be fully understood that becoming truly familiar with the movement will be a continuing education process, but it is imperative that a good foundation be provided for new members.

More in-depth orientation materials are available, but the following will provide a simplified guide to the process.

1. When recruiting, make the prospective board members aware that an orientation system is in place and they will need to attend those sessions.
2. Be sure that you *do* have a good orientation system in place. This can be another function of the board development committee. Develop a system that covers the basics.

Nomination

Herein is the critical component in the process - getting the right people on the board. By "right people" we do not just mean wealthy or powerful, but people whose desires for the community and humankind parallel those of The Salvation Army. They are also people who are busy, energetic, and will fit into the personality of the board you are trying to develop.

This is the task of the nominating committee. (Note: Many boards have renamed this committee the Board Development Committee to be more reflective of its comprehensive responsibility. From hereon we will reference that term as well.) The misconception is that this committee need only meet once a year to replace out-going members. In fact, this committee, impressed with its important assignment, should meet at least two to four times a year to assess member activity, identify and cultivate candidates for membership, and make the formal recommendations for board approval.

The other key assignment of this committee is nomination of officers. Some boards will have a system in place where the vice chair automatically moves into the chair slot. This makes the consideration of this position quite important as well. On other boards, the position is filled from the board at large to help ensure the best possible person.

The board chair appoints the nominating (board development) committee, but it is the only committee on which he is not an ex-officio member. The Salvation Army officer is ex-officio for this and all committees. No board prospect should be invited to the board without review of the prospects by the corps officer and the board chair.

Each Advisory Board has a prescribed number for its membership which is authorized and fixed by the territorial commander. This membership is based on a rotation of three-year terms, and may not be decreased or increased without authorization of the territorial commander. As representatives of The Salvation Army within the community each membership slot is vitally important and should be occupied by community leaders of influence who demonstrate an expressed interest in community involvement. The best potential members may have to be convinced that they want to fulfill this service through The Salvation Army.

Member Profile/Survey

Although this is included in the listing below, it is important to give some special attention to the member profile, which was mentioned earlier, since it can have a prominent part in the board development process.

In addition to providing helpful personal information, a compilation of these profiles will reveal much about the composition of your board. It will reveal certain favored recruiting areas, such as a particular civic club, church, vocation, or socio-economic group. One such profile/survey revealed that the majority

of the board were members of the Rotary Club. Another showed that the membership had six housewives. Still another revealed that the general makeup of the board was retired persons.

Having a large number of Rotarians is not bad if they are the right people, but it may not be good if this is simply an easy recruiting field for friends and associates. It is fine to have a housewife, but only if she fits the other qualifications of board membership. Retired persons can bring tremendous experience to the decision-making process, but they still need to meet the other qualifications. Some boards will overload with this group because they are available and have plenty of time to give, but too many may weaken the active influence you are seeking in the community.

Those boards who conducted the profile/survey confessed their surprise at the findings. Each of these persons has value for the board, but the board leadership confessed in each case that they did not realize they were favoring certain groups rather than developing a balanced and effective board. The board development committee should guard against nominating members simply because they are likeable or available. It is important to *pursue* the best people, and this can take time.

Effective Board Development (Nominating) Committees

The following are some suggestions for effective board development:

1. Develop a board member job description for approval by the board. Clearly outline the expectations such as attendance, orientation, financial contribution, program involvement, and the overall role of the advisory board. This should be used in the recruitment process so that there are no misunderstandings about the expectations.
2. Consider the board evaluation and membership profile. Identify the areas of membership that need to be strengthened. Be careful of "easy" recruiting fields just for the sake of filling vacant positions. It is better to leave a position vacant for a time and wait for the right person rather than fill it with the wrong person.
3. Maintain a member assessment, which records attendance and participation. This should be done annually. If certain members are having a difficult time making attendance, or participating within the expectations of the board, offer them the opportunity to step off the board until such time as their circumstances improve and allow fuller participation. This inquiry into their ability to participate should come from the board chair. This approach will either encourage their improved involvement, or allow them a graceful way to step off the board. (A suggested assessment form is included in the exhibits.)
4. Develop a prospect list. This list should include all those you may wish to have on the board, even though they may not be available now. Some desired prospects might have to be courted for

some time. Some may not be available now, but are willing to serve later. Keep them involved and informed. Remember, we should not recruit based on whom we know, but whom we need.

5. There is a tendency to recruit certain occupations in order to access their skills or expertise. This is fine if, in fact, they are meeting all the board member qualifications, but you should not fill a valuable board position simply to access a particular skill. Board responsibilities go beyond that. For instance, you may want a real estate agent, architect, or contractor to help with property matters. If they do not fulfill all the qualifications of board membership, they can participate on the property committee without occupying a valuable board slot. Three members of each committee and the committee chair must be board members, but other persons may serve on committees as well. Attach them in this way, but not as board members.
6. Beware of re-nominating a full slate just because they are all willing to serve again. This is an easy way out for the board development committee, but is not in the best interest of the board or The Salvation Army. This leads to stagnant, aging membership, complacency, and worst of all, a perception of control. A board tends to become a club rather than a functioning, effective board. The rotation system must be in place.

Recruiting

Recruiting the best members goes beyond a simple telephone call. It can be a long process over a long period of time. Here are some suggested steps.

1. Create the prospect list as indicated above and prioritize the names based on the board needs.
2. Have good materials prepared for presentation. These can include pamphlets about local operations, the annual report, and a short video about The Salvation Army.
3. Identify the right person to make the initial contact to arrange an appointment. This person could be the board chair, a board development committee member, or some other member who is best suited for the contact.
4. The officer and the appropriate board member should go to see the prospect. Determine in advance the strategy as to who will present the information and ask the question.
5. Be honest in the expectations. Do not minimize their participation. It is expected that every board member will have some capability to contribute financially. If the prospect objects, thank them for their time and discontinue the meeting. Those persons knowledgeable of not-for-profit