



E CHELON
MOBILIZING THE NEXT GENERATION

ECHELON START-UP STRATEGY GUIDE

THE SALVATION ARMY NATIONAL HEADQUARTERS

NOVEMBER 2021 EDITION

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MISSION



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 to meet human needs in His name without discrimination.



ECHELON

MOBILIZING THE NEXT GENERATION

Echelon seeks to mobilize the next generation for The Salvation Army by providing opportunities for young adults to engage with the organization through fellowship and networking, donations and fundraising, and service and volunteering.

INTRODUCTION

This guide is an internal resource designed to help a local Salvation Army command strategize and launch a successful Echelon chapter. Engaging with the American public is not what it used to be. The Army used to be able to mass produce a single letter of request, dump the note into every mailbox in a community, and then be filled with reasonable expectations that donations would return en masse. We could easily lament that these days are over. The nonprofit world is now a jungle in which, seemingly, only the cutthroat agencies survive. It is fairly common knowledge amongst Army development circles that our best supporters, World War II veterans, are dying off. Do we have to wait for the next epic opportunity to find a way to inspire the American public's altruism for the next 60 years?

No, thank God we do not have to settle and simply wait for another epic opportunity! The Salvation Army is confronted with unique challenges today. If we confront the challenges with faith and perseverance, we can trust that God will bless us with wisdom and strength to do His good will. Early Salvationists won the hearts of the Silent Generation because of sacrificial service. In this day and age, we can win the hearts of the Millennial Generation and beyond.

The Salvation Army has discovered a viable model to engage this demographic and mobilize them in a valuable partnership through meaningful service, fundraising, and networking opportunities. This brief is designed to help local Salvation Army commands strategically plan and implement a professional young adult auxiliary called "Echelon." It will take the user on a six-step planning regimen and introduce the pertinent documentation to officially launch an Echelon chapter. Included in this guide you will find worksheets and templates that have been developed to help you implement the outlined strategy as it relates to your specific locality.

As is true in any strategy, the global blueprint needs to be customized to the local reality. The ideas and templates contained within this resource are abstractions based upon the previous experiences of the first Echelon chapter in Dallas in 2011 and many subsequent chapters developed since. Thus, there must be great trust placed upon the prospective local command to imaginatively make this plan their own.

As you read through this brief and carefully consider Echelon in your command, we pray that God will richly bless you. We pray that your strength will not only be renewed, but that you will have wisdom to engage emerging generations in the United States today.

NEW CHAPTER FRAMEWORK

You are about to begin an exciting process to develop an Echelon chapter in your community. While the impact of this effort begins early on, we ask that upcoming chapters meet the following benchmarks before applying for their official charter:



ECHELON
MOBILIZING THE NEXT GENERATION

Membership Target: the developing chapter must target emerging professionals.

Plan of Events: the developing chapter must include a strategic plan and schedule for events (networking, fundraising, service).

Membership Requirement: the chapter must indicate the standards of membership commitment (paying dues or participating in Echelon activities).

Membership Count: the chapter must have minimum of 10 committed members.

Echelon Board Requirements: the chapter has a board of at least 5 Echelon leaders.

This guide will provide guidance for your team on how to reach these goals, though personal dedication and local creativity will be essential. Once you have met the benchmarks above, the chartering application (included as an appendix to this guide) should be completed as a collaborative effort between the key stakeholders involved in the chapter formation process. Further instructions on how to submit this application are discussed in Stage Six: Chartering Application.

STRATEGY TIMELINE

Stage One: Initiating Agreement

1-3 Months

Stage Two: Investigation

1-3 Months

Stage Three: Strategic Formation

2-4 Months

Stage Four: Strategic Implementation

1-3 Months

Stage Five Finalizing the Structure

1-3 Months



Stage Six: Charter Application

STAGE 1

INITIATING AGREEMENT



OBJECTIVES

- Guiding Vision
- Steering Committee
- Guiding Process

STAGE 1

INITIATING AGREEMENT

Every great endeavor has to start with someone, something, and at some place. In The Salvation Army, great endeavors usually start with a mandated approval! In starting Echelon, the practical first step is securing buy-in from the key local Salvation Army decision makers. Yet, far more importantly, there must be a steering committee comprised of highly motivated individuals. Without official local approval and strong-willed individuals, the Echelon endeavor will not be successful. Therefore, the first step in the Echelon Strategy is ensuring that the proper conditions are in place and that there is strong agreement to pursue the creation of Echelon.

The Initiating Agreement step will take the form of focused and candid meetings between The Salvation Army Command Head, key leaders from the local Advisory Board, and whoever is the sponsor championing the idea of Echelon. In many cases, that sponsor may be the Command Head or a member of the Advisory Board. The purpose of the initial meeting between these key stakeholders is to answer the questions: “Should Echelon exist in our city?” and “Are we reasonably positioned to enact a plan to establish it?” The first question is meant to constructively challenge the basic assumptions of the local Salvation Army’s mission effectiveness (see the mission statement included at the beginning of this document) and the second tests the readiness of the command. Obtaining early internal buy-in from key stakeholders is essential in not only starting a new chapter, but ensuring it will be sustainable and successful. If both questions are answered positively, the command is positioned to begin the crucial work of chartering the guiding tools.

GUIDING VISION

Mission and vision statements typically function to govern the decisions of management and express the organization’s aspirations. Yet, the best visions transcend the typical. A guiding vision can liberate and energize individuals and groups to achieve excellence. Sound visions have an organic simplicity. In this beginning stage, it is crucial that someone, however informal the writing may be, craft a simple Guiding Vision for creating Echelon.

Crafting a Guiding Vision will not magically happen in one meeting. The important factor is that the vision is living in the present and gets embedded within the minds of key decision-makers and, ultimately, potential Echelon recruits.

GUIDING VISION EXAMPLES

Echelon (National)

Echelon is a community of diverse young adults collectively rising up to serve The Salvation Army through fellowship and networking, donations and fundraising, and service and volunteering



Echelon Milwaukee (MKE)

Echelon Milwaukee's goal is to end homelessness in Milwaukee County.



Echelon Leadership Council

The Echelon Leadership Council is to provide a network of support and guidance for Echelon chapters across the United States.



Smithsonian

Shaping the future by preserving our heritage, discovering new knowledge, and sharing our resources with the world



Smithsonian

Alzheimer's Association

A world without Alzheimer's disease.



LinkedIn

Create economic opportunity for every member of the global workforce.



INITIATING AGREEMENT (CONT.)

STEERING COMMITTEE

Since the time of Jim Collins' renowned book "Good to Great" and John Kotter's eight-step change strategy, it has become common practice to start strategy with positioning the right people to enact the plan. In the Echelon Strategy, this practice takes the form of creating a steering committee.

The exact title of this team is negotiable, but its functions are set nationally. The primary purpose of the committee is to guide the process of starting Echelon and carrying out the work. The functions and objectives of this committee are universal:

STEERING COMMITTEE CRITERIA

1. The Committee has the capability to network with individuals and groups within the young adult demographic.
2. At least one member demonstrates credibility and social influence in the local young adult demographic.
3. At least one member can act as a liaison between the future Echelon chapter and The Salvation Army.

The membership of the steering committee will depend on the local context of the Army and the community. Ideally, the local Command Head or another local Salvation Army officer, any future staff liaisons, and key advisory board champions should be included in this group.

However, it is recommended that key individuals considered potential future Echelon leaders be included in the steering committee if possible.

It may take some for the committee's membership to be solidified with these identified individuals. In fact, the starting steering committee may need to begin some of the work outlined in the Investigate Stage to fully complete its membership. However, ensuring the chapter is developed with the input and buy-in of some of its eventual leaders will go far in ensuring the prospect of membership is attractive to future recruits.

STAGE 1

INITIATING AGREEMENT (CONT.)

GUIDING PROCESS

With a dedicated group guided by the compelling vision as described in objective 1 of stage 1, the last item of stage one is about coming to a consensus on the planning procedures moving forward. The formalized role of the steering committee, how young adults will be recruited, the use of Army resources, and the nature of progress reports will all need to be agreed upon. The strategy timeline at the beginning of this guide maps out the strategic planning process in broad strokes. As mentioned earlier, the plan and the map are guidelines that require the local ingenuity of enthusiastic leaders.

DO WE HAVE A GREEN LIGHT?

One might ask - what is the litmus test to move forward? We could suggest a matrix of check off boxes to measure the quality of staffing, financial backing, and already established community relations. If these items are in favorable positions, it certainly will not hurt the Echelon endeavor, but they are not critical. The critical issue is passionate commitment from a team and their belief in Echelon.



What's Next?

Once you've completed stage one of initiating agreement, you're ready to put your new steering committee to work! Stage Two: Investigate will outline your Committee's next steps.

STAGE 2

INVESTIGATE



OBJECTIVES

- Assess the Stakeholders
- Audit Salvation Army Assets
- Analyze the Local Environment

STAGE 2

INVESTIGATE

Immediately following the commitment to establish an Echelon chapter, the Steering Committee must tackle the timeless responsibility of doing simple homework. Taking the form of research and interviews, the Steering Committee will need to conduct an internal audit of the local Salvation Army's assets, strengths, and culture, as well as scan the environment of the local community. Teams may choose to use a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis or other similar strategic tools to begin the investigation phase.

Whatever tool is used, the most important goal is to emerge from the Investigate stage having accomplished the following objectives:

1. Identify a pool of potential Echelon members
2. Determine the best messaging to convince target young adults to join the chapter.

The first step in accomplishing these goals is assessing the stakeholders.

ASSESS THE STAKEHOLDERS

Make no mistake, a stakeholder analysis may be the most critical tool in the entire strategy. Nonprofit guru strategist John Bryson defines it as a "methodical tool for leaders to immerse themselves in the networks and circumstances of the organization." On the next page you will find suggestions for developing a list and analysis of stakeholders. Assessing stakeholders will require creative thinking and committing to a process of dialogue.

At the first meeting to discuss stakeholders, a relatively long list of potential Echelon members can feasibly be attained. Ideally, the Steering Committee will want to first produce a list of potential young adults with community connections that could serve as leaders on the Echelon Board. As the Steering Committee moves through the strategy process, finding early young adult adopters will be critical. Finding them, and providing them with a space for leadership right away will make a big difference in the end. The discussion about expectations and discovering the reasons for joining will require extended thought and exploration.

ECHELON STAKEHOLDER ASSESSMENT

STEP 1

Identify potential young adults who could serve as leaders on the Echelon Board that can make a claim on The Salvation Army's attention, decisions, outputs, and resources.

STEP 2

Discover each stakeholder's definition of success. Consider if these definitions align with The Salvation Army's values and definition of missional success.

STEP 3

Determine how the The Salvation Army is performing against stakeholders' criteria to evaluate whether the potential stakeholder is a reasonable fit for Echelon involvement.

STEP 4

Investigate every lead for potential Echelon members. Check with local Salvation Army volunteers (individuals and groups), soldiers, key leaders from the local Advisory Board or Auxiliary groups (they may have family and employee connections), or existing corporate and community partners.

ECHELON STAKEHOLDER ASSESSMENT

In concert with the Steering Committee and identified key stakeholders, discuss the following questions:

STEP 5

Discuss what expectations do young adults in this particular community have for a meaningful network of young professionals.

STEP 6

How can The Salvation Army earn credibility and justify the interest of young adults in joining Echelon?

BEST PRACTICE RECOMMENDATION DIVERSE RECRUITMENT POOLS

Starting with existing connections such as your local advisory board or current community partners is a great way to begin recruiting early Echelon members. However, just as your development team wants to find varied funding streams, tapping into a diverse network of possible recruitment pools is essential to the success and sustainability of your Echelon chapter.

Echelon could help create new connections for your local command. Consider reaching out to local business groups or professional affiliate networks that target a varied demographic of professionals in your community. An Echelon chapter with a membership that is diverse in experience and skillsets will result in increased innovation and ideas and will provide you with multiple streams of potential new members in the future.

STAGE 2

INVESTIGATE (CONT.)

Assessing stakeholders will require creative thinking and committing to a process of dialogue. At the first meeting to discuss stakeholders, a relatively long list of potential social influencers and potential Echelon members can feasibly be attained. Ideally, the Steering Committee will want to first produce a list of potential young adults who could serve as leaders on the Echelon Board. As the Steering Committee moves through the strategy process, finding early young adult adopters will be critical. Finding them, and providing them with a space for leadership right away will make a big difference in the end. The discussion about expectations and discovering the reasons for joining will require extended thought and the use of the next templates.

Perhaps the easiest part of the Investigation Stage is auditing the internal circumstances of the local Army. Knowing the assets, strengths, and culture of the local Army is directly connected to answering the second cluster of stakeholder questions.

When Stage Three is reached, a suggested strategic move is to weave a connection between assets, social influencers, and communications to persuade young adults to join Echelon. The genesis of the strategy starts with the audit. There are many techniques and practices available for conducting an evaluative audit - the snow card brainstorming technique is an example. The next page offers practical suggestions to help the Steering Committee get started.

CONDUCTING YOUR INTERNAL AUDIT

1. Generate a list of all local Salvation Army programs and services (i.e., service programs, worship services, youth programs, etc.)

2. As defined by the local command, generate a list of victories and successes the local Salvation Army has enjoyed in its short-and long-term history.

3. Inventory the unique skills and talents of individuals working and/or volunteering within the local Army.

4. Assess the quality of the local Army's facilities and resources.

5. Interview key personnel (officers, employees, board members, volunteers, soldiers, etc.) within the Army to discover possible partnerships between the Army and the potential Echelon group.

INVESTIGATE (CONT.)

ANALYZE THE LOCAL ENVIRONMENT

As the Steering Committee takes a hard look at the inside makeup of the local Army, simultaneously, it must also take stock of the trends and culture of the local environment.

You may not have the benefit of a marketing firm to ascertain the intricacies of the political, economic, social, educational, and cultural forces. The good news is that utilizing a firm is not necessary. Utilizing and researching the local newspaper, local directory, Chamber of Commerce, and an Internet search engine can provide a wealth of information.

Since each community has a distinct identity, the tools employed to understand its uniqueness will vary. The old adage, “the more information, the better,” is certainly applicable; however, it is not absolutely necessary. There are three objectives the committee should reach in studying the environment.

OBJECTIVE ONE: DISCOVER WHAT ELSE EXISTS

If a young professionals network already exists in the locality, its very existence will either be a community asset, or it will be a liability.

OBJECTIVE TWO: ASSESS LOCAL CULTURE

While looking at published research and sociological data regarding younger generations, knowing the national mega trends will only provide you with so much relevant information. The Steering Committee must also investigate the local flavor of the young adult culture. There are a variety of techniques to accomplish this objective: interviews with young people, conducting focus discussion groups, and simply observing community events.

OBJECTIVE THREE: DETERMINE THE ECONOMIC INDUSTRY

It is important to consider the economic forces that shape the young adults in a given area. Having this information will help create better messages, and it will help decision-making in crafting events. Understanding the industrial sector will also help in long-range forecasting for not only Echelon, but also for the local Advisory Board.

ANALYZE THE LOCAL ENVIRONMENT



DISCOVER WHAT EXISTS



ASSESS LOCAL CULTURE



DETERMINE THE ECONOMIC INDUSTRY



What's Next?

With your initial analysis completed, you're ready to begin putting together a concrete plan of action as you enter stage three – the strategic formation phase.

STAGE 3

STRATEGIC FORMATION



OBJECTIVES

- Weave Strategy
- Create a Strategy Map
- Develop Communications

STRATEGIC FORMATION

Depending upon the availability of time and space, the stages of Initiating Agreement and Investigation can take anywhere from one to four months to complete. If the committee has a dedicated Salvation Army staffer, progress can be made more quickly. When it comes to Stage Three: Strategic Formation, we advise deliberately thinking longer to ensure decisive actions.

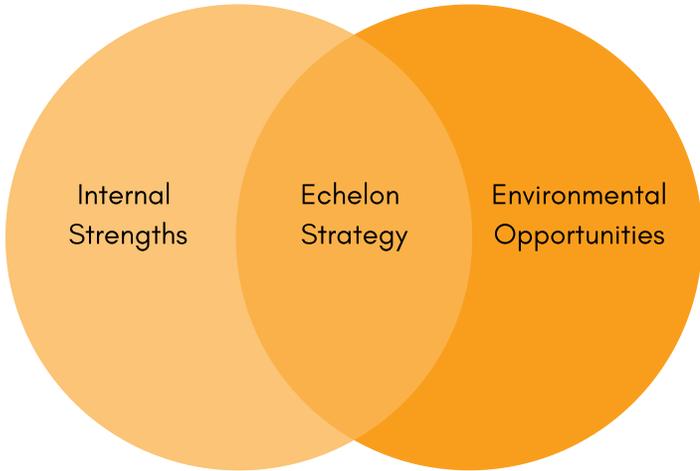
The strategic formation stage is akin to creating a blueprint, or a plan of action for moving forward. Charting a course of action certainly requires the standard leadership qualities of courage and passion, but more importantly, the Steering Committee will require synthesis. By synthesis, we mean having the wisdom of integrated understanding. It means combining the results of the internal audit, the external scanning, and imaginatively forming unique connections to fulfill the vision. With this end in mind, there are three key objectives to assist the Steering Committee in fulfilling the Strategic Formation: Weave Strategy, Create a Young Adult Strategy Map, and Develop Communications.

WEAVE STRATEGY

As a weaver interlaces reeds into a basket, a “weave strategy” attempts the same outcome by making interrelated connections amongst the organization’s strengths and finding pathways to further connect those strengths with external opportunities. Each local command should identify unique connection opportunities for Echelon based on its local offerings (service centers, Kroc Centers, ARCs, corps, etc.).

One example comes from Dallas where the Army is blessed with a vast social service operation called the Carr P. Collins Social Service Center. The Social Center and local Echelon chapter have strategically partnered to bless clients by providing job coaching, resume building, and volunteering.

WEAVE STRATEGY



The weave process starts with identifying an internal strength of the local Army, and then brainstorming possible ways an Echelon could partner with it.

Look back at the internal audit and external environment analysis from stage 2 and begin weaving together the strengths of the local Salvation Army with environmental opportunities.

STRENGTH:	OPPORTUNITY:

STRATEGIC FORMATION (CONT.)

CREATE A STRATEGY MAP

The stakeholder analysis is not meant to be static; it should be an evolving document. Ultimately, it should become an action Strategy Map. The map should have a logical flow and contain elements from the Investigation Stage. The example above lays out the basic components of the strategy map.

The map contains an exhaustive list of young adults, classified as the Young Adult Pool. Directly conjoined to the Young Adult Pool is a consortium of events. The logic of the map is to get as many young adults to the right meeting, social gathering, or volunteer event as possible. The map ends with feedback functionality. After each event, the Steering Committee needs to have deliberate tactics to designate young adults as potential Echelon leadership or membership, and perform the follow-up work of connecting with them for future events.

As mentioned previously, the Strategy Map should be the consequence of a stakeholder analysis. The stakeholder analysis should not only provide a pool of young adults, but it should also dynamically tell you more about the hopes and expectations of the young adults on the list. Knowing their names and some descriptive information is the first item.

On page 23 you will find a strategy map template that you can use to outline your local analysis. The map provides the big picture plan for how to transform a pool of young adults into an Echelon. The process of planning great events such as meetings, social gatherings, and volunteer experiences is the second item.

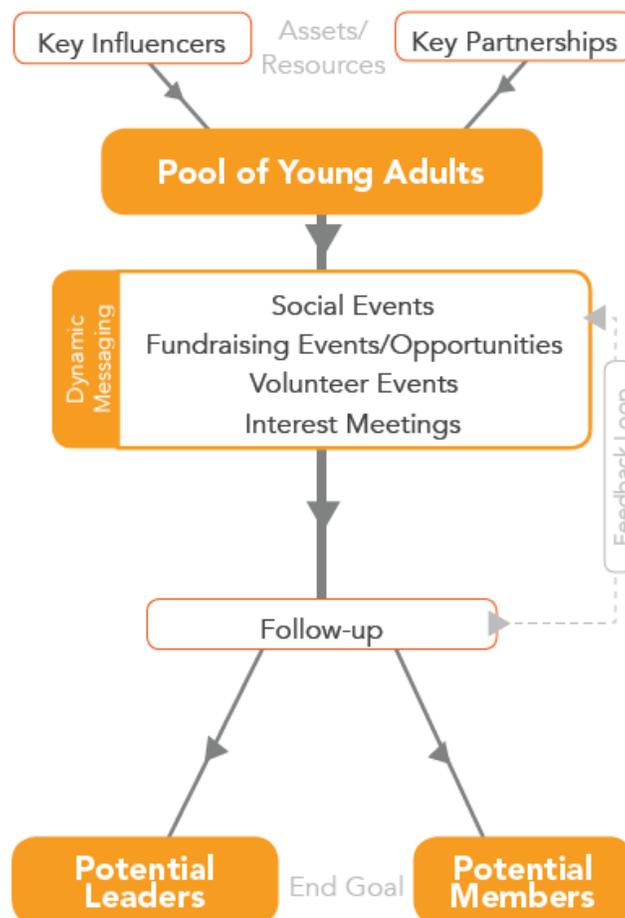
As the Committee develops the Strategy Map, it is important to sequence the events in a rational order. While starting with an in-depth volunteer opportunity can showcase the wonderful aspects of the Army's mission, it may not be the best first step. Typically, it is better to start with focused meetings with smaller groups of young adults who could become Echelon board leadership. The reasoning is simple: Echelon will only take off if young adults own it, and they will only truly own it once they have decision-making input.

STAGE 3

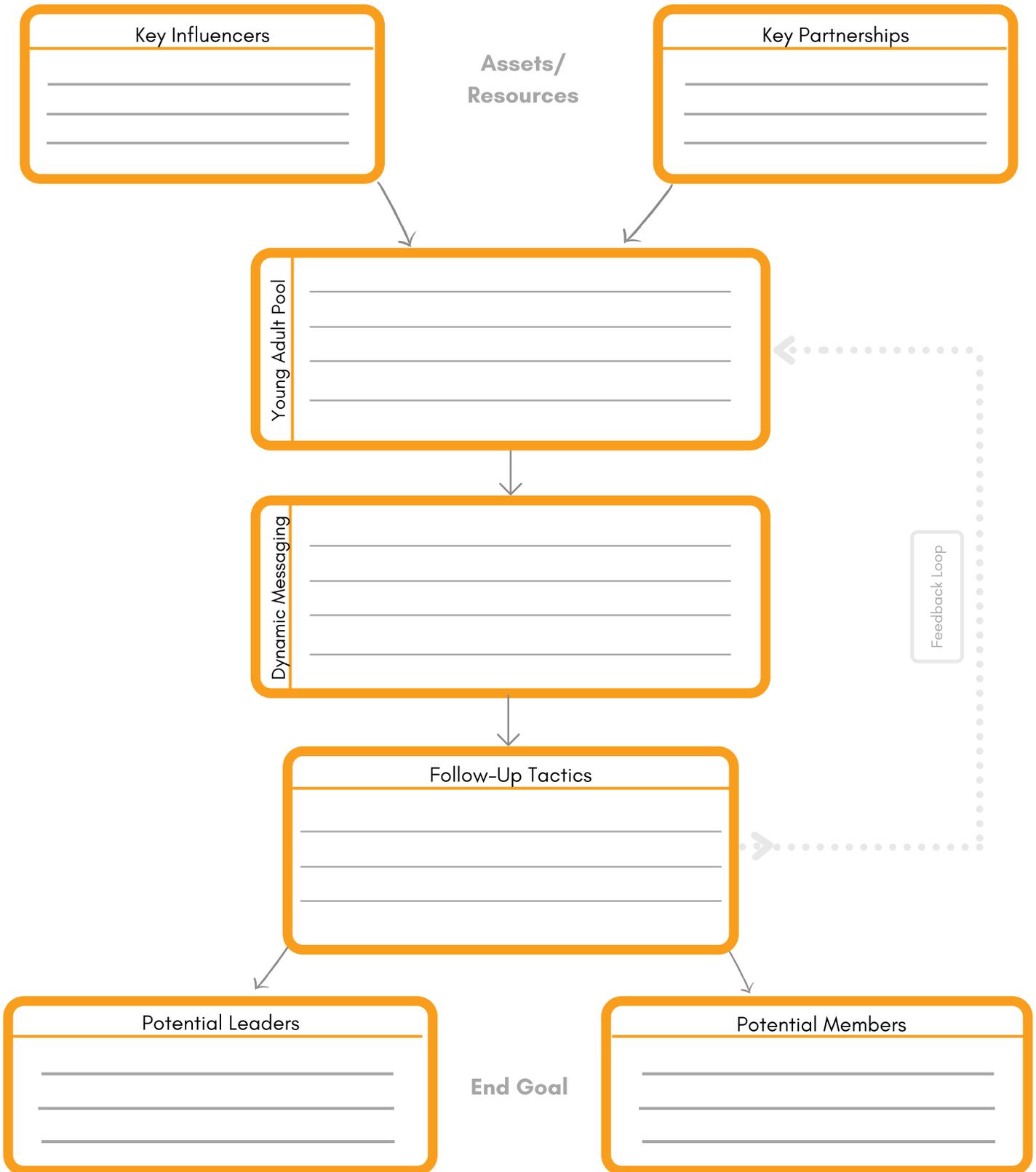
STRATEGIC FORMATION (CONT.)

Once there is reasonable progress in developing an Echelon leadership team, consider events that allow potential members to socialize and get to know one another. Hosting initial events at venues that are known to young professionals in the community such as restaurants or parks can often make it more appealing for new recruits to attend. However, as you begin to gauge higher levels of interest from potential recruits, it can be very impactful to host a meeting or volunteer event onsite at a local Salvation Army facility. Allowing recruits to witness they could have as an Echelon member first hand can go far in establishing their commitment to the mission of The Salvation Army.

Use the template on the next page to develop a Strategy Map localized to your community and developing Echelon chapter.



CREATING A STRATEGY MAP



STRATEGIC FORMATION (CONT.)

DEVELOP COMMUNICATIONS

The thrust of the Strategy Formation hinges upon quality events, but developing an Echelon also requires good communication. It is absolutely essential that every single meeting, social gathering, or volunteer moment is paired with an impactful message. The individuals who are attending meetings and events on a volunteer basis want to clearly understand the purpose and impact of their involvement.

DESIGNATE SPOKESPERSON(S)

Since Aristotle's Rhetoric, the key quality of a spokesperson is ethos. In other words, does the speaker have credibility with the audience? In selecting the spokesperson for events and meetings, the committee should be concerned with this question: "Who among us can speak The Salvation Army's vision for Echelon into life and has the highest credibility among young adults?" This is a high standard, but not impossible to reach. It may take time to find the right person to speak to an external audience, which will mean that the Steering Committee will need to approach and vet several individuals. Bearing in mind that perfection is not the requirement, it is still better to wait and be comfortable with a good choice than to rush ahead with a risky choice. Also, it may be more appropriate to have a team of communicators than rely on a single individual. Depending upon the setting, it may be more appropriate for a Salvation Army representative to share the message, or the case may call for a young adult to speak.

POTENTIAL SPOKESPERSON(S)

STRATEGIC FORMATION (CONT.)

DEVELOP INTERNAL & EXTERNAL MESSAGING

After the spokesperson(s) is/are selected, the Steering Committee should not neglect the step of helping the spokesperson design impactful messages.

Additionally, the Steering Committee should ensure that the designated spokesperson(s) - and ideally every member of the Steering Committee - has a consistent and concise answer to the questions "What is Echelon and why should I join?". If the early leaders of an Echelon chapter cannot concisely and authentically communicate the value of partnering with The Salvation Army through Echelon, effective recruitment will be all but impossible.

LEVERAGING SOCIAL MEDIA

As events get planned, the developing chapter should establish a social media presence. The local group can determine which platforms are most connected to their target audience, but most chapters choose to utilize Instagram, with more beginning to explore LinkedIn as well. These are good platforms for event promotion and keeping would-be members in the loop.

Whenever there is an event or meeting, three messages usually accompany it: an invitational message before, the message within the event, and then the post-event communications. Utilizing social media platforms can be a convenient way to string these three messages together.

There are also sample Echelon posts available for chapters to utilize as needed for more generic content. Email Echelon@usn.salvationarmy.org to request access to these shared resources.

BRANDING CONSIDERATIONS

With any communications materials, it is important to follow the required branding guidelines for both Echelon and The Salvation Army. More information on the history of the Echelon name and brand and other guidelines can be found in Appendix A. Echelon logos and other branding materials can be provided upon request to Echelon@usn.salvationarmy.org.

SPECIAL NOTE

ECHELON EVENT POLICY

As you are working through Stage 3, you are likely beginning to think of potential event ideas for the chapter. When doing so, it is important to keep the Echelon Event Policy in mind.

The Echelon Event Policy, approved by The Salvation Army's National Commissioners Conference in 2018, states that alcohol is allowed at certain Echelon events. However there are restrictions - alcohol can not be purchased with Echelon/Salvation Army funds and can not be served on Salvation Army property. For many chapters, this means finding a third-party sponsor who is willing to independently cover the expenses for any alcohol at the event or offering a cash bar option.

Additionally, alcohol should never be the focus of an event, both in title and function. For example, consider hosting an Echelon Social Hour or Meet and Greet as opposed to an Echelon Happy Hour or Wine Tasting.

Further, the chapter should ensure that any alcohol made available during an event is consumed responsibly and respectfully as it relates to the larger mission and brand reputation of The Salvation Army. Every possible precaution should be taken by the local chapter to ensure no individual is over-served during an event. Please do not place Salvation Army branding on the bar, have attendees take pictures with drinks in hand in front of a Salvation Army branded step-and-repeat, etc.



What's Next?

You have come a long way on your chapter development journey. Now that you have a clearly established strategy, it's time to put it to work in Stage 4: Strategic Implementation.

STAGE 4

STRATEGIC IMPLEMENTATION

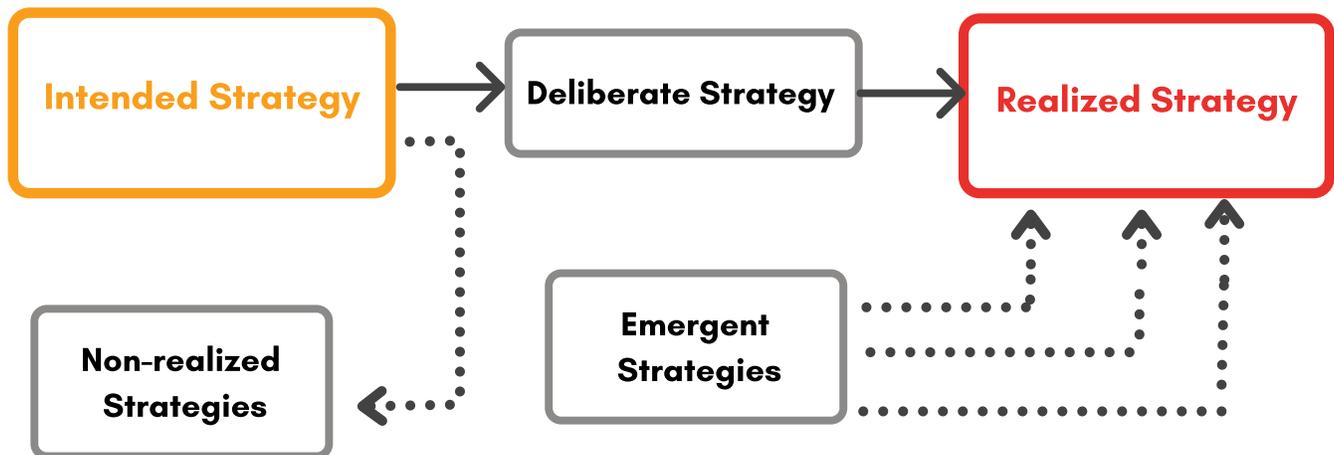


OBJECTIVES

- Realized Strategy
- Feedback and Followup

STRATEGIC IMPLEMENTATION

REALIZED STRATEGY



One of Henry Mintzberg's classic ideas is the differentiation between what is planned and what actually happens. Planning stages one through four can be considered Intended Strategy. This means that the forecasted decisions are based on reasonable observations of the present and the desired envisioned future. The first preference is that the intended strategy works flawlessly and the desired vision is fulfilled. Yet, in many instances, the rationale, analysis, and plan of action will not be perfect. The plan will have to contend with the reality of unforeseen scenarios. When the intended collides with reality, leaders are confronted with a fork in the road: either the plan will not be realized, or it will evolve and merge with the reality. The second road is referred to as the Realized Strategy - it is a hybrid of what is intended and what actually emerges from reality.

As the Steering Committee starts the work, we suggest they be comfortable with the ambiguity of the emergent. It could be the case that tactics will need to change, and the Strategy Map will need to be revised. The important factor is to realize this truth early so the Steering Committee will operate with sound management tools, and more importantly, be adaptable as the situation changes.

STAGE 4

STRATEGIC IMPLEMENTATION (CONT.)

FEEDBACK & FOLLOWUP

The last process of the Strategy Map is a feedback mechanism. This can take the form of electronic surveys, personal interviews, or even a more sophisticated form like an open forum. Even if the plan is moving forward as intended, getting data on young adults' opinions is well worth the trouble. Such survey data can help guide future events and assist communications by honing in on what truly matters.

The management of the plan means that someone will have to prioritize intentionally and diligently meeting with young adults through follow-up. This type of intentional relationship building requires energy and perseverance. Designating committee members or potentially even one individual to have the sole responsibility of following up via phone calls or meetings over coffee can be quite valuable to prospective members looking to build a connection. However, it cannot be overstated just how important it is within the entire strategy. It could be argued that this may be even more important than pulling off successful events and meaningful communications. Events and messaging alone cannot sustain a chapter without young leaders who feel personally connected and invested in the local chapter and Salvation Army,

QUESTIONS TO CONSIDER

1. What feedback mechanisms will we use to gather data?
2. How will feedback be analyzed and shared?
3. Who will take on the primary responsibility of following up with potential members?

STAGE 5

FINALIZING THE STRUCTURE



OBJECTIVES

- Chapter Leadership Structure
- Standards of Membership
- Financial Considerations
- Articles of Organization

FINALIZING THE STRUCTURE

As the Strategy Map works its course, the Steering Committee should have young adults who want to be a part of Echelon, and there should be young adults who want to be the leaders of Echelon. The final stage of setting the Echelon structure is in place. During the stage, the group will formalize the chapter structure and operations expectations and prepare to submit their formal application for official chartering. Once this goal has been met, then the Steering Committee has served its purpose and can be disbanded.

CHAPTER LEADERSHIP STRUCTURE

It is now time to develop the formal structure of the chapter's leadership team (the Board) and the larger membership. Some Echelon chapters may choose to consider every member of their chapter part of the Echelon board with a specific role or committee assignment while others may choose to have a separate board of leaders with specific roles with a general membership base comprising the remainder of the chapter. The decision on structure is up to the local group to determine what makes the most sense for their chapter.

A list of sample board roles and descriptions is included in Appendix B. Each chapter will need to evaluate their goals and the assets of their leadership team to determine which roles are the most appropriate for their chapter.

It is important to remember that the structure of the chapter may change and adapt over time, as it should. While the chapter may begin with a relatively small leadership team, as growth it occurs it may be necessary to add new board roles or implement function-based or project-specific committees.

SPECIAL NOTE: CO-CHAIRS

Some chapters tend to utilize a co-chair model for some or all board positions. It is a local decision as to whether a chapter chooses to structure their board this way. This structure can be helpful in mitigating burnout of chapter leaders and establish a system for future leadership cultivation within the chapter.

BEST PRACTICE RECOMMENDATION

Echelon aims to cultivate the development of emerging leaders for The Salvation Army. The goal is that our local Echelon members will go on to become local advisory board members and/or community partners. For this reason, we recommend making your Echelon President (or Co-Presidents) ex-officio members of the local advisory board, if possible.

CHAPTER LEADERSHIP STRUCTURE



You will find a list of possible Echelon board roles and descriptions in Appendix B. Use this page to map out the roles and basic functions of your starting Echelon board.

As stated in the New Chapter Framework, a minimum of 5 board roles is required for chartering, but feel free to add more as needed.

BOARD ROLE:

BOARD ROLE:

BOARD ROLE:

BOARD ROLE:

BOARD ROLE:

FINALIZING THE STRUCTURE (CONT.)

STANDARDS OF MEMBERSHIP

In conjunction with developing the leadership structure, the group will also need to determine the general standards of membership for the chapter. What does it mean for someone to be come a member of Echelon in your community? This is up to the local leadership team to decide. There are a number of examples along the spectrum of Echelon chapter models that may be helpful in providing ideas.

Open Model

Some chapters have what we have termed an open membership model. A dues payment or event admission ticket inclusive of annual dues may provide an individual member status for a year. There is no limit on how many members can join the chapter, but the general membership base is separate from the Echelon Board. Members are considered active if their dues have been paid.

Closed Model

Some chapters opt for what we call a closed membership model. In these chapter, members may or may not be required to pay dues but are subject to more rigorous time and involvement commitments. Chapter membership may be capped at a certain number and could require an application process to join. Members are expected to attend a certain percentage of meetings and events and serve on a committee or take a specific role within the chapter. If a member fails to fulfill these requirements, their membership may be terminated.

Hybrid Model

Most chapters end up developing a hybrid model that is a combination of the open and closed approaches. This often includes a modest dues payment in addition to a basic commitment to attend a certain number of meetings/events. Chapter membership is not usually capped and the chapter may feature a separate Echelon Board or leadership team with increased commitment for participation.

FINALIZING THE STRUCTURE (CONT.)

Optional: Charter Member Agreements

Recently, some developing chapters have started utilizing charter member agreements. These agreements have been used to outline slightly different membership requirements for the chapter's founding members with the understanding that additional requirements may be added once the chapter is fully operational. For instance, a chapter may not ask its charter members to pay dues immediately while the chapter base and activities are still being established but may instead ask them to emphasize recruitment and bringing new potential candidates to meetings and events. A sample charter membership agreement from Echelon Greater Cleveland is included below as an example.



2021 Charter Member Commitment

As a charter member of Echelon, I want to give back to my community through my support of The Salvation Army of Greater Cleveland.

With that in mind, I commit to the following for 2021:

- Participate in at least two service events
 - Invite at least two others to participate in networking and social events
 - Make a financial donation that is meaningful to me
 - Represent The Salvation Army and Echelon honorably
-

STANDARDS OF MEMBERSHIP WORKSHEET

- 1. Is there a dues requirement for members?**
There is no national standard regarding dues requirements for Echelon membership. It is up to the local chapter to determine if they would like to make dues a requirement for membership.
- 02. If so, how much?**
The amount for membership dues is set by the local chapter. Think about what is reasonable for young adults in your community and what benefits you will offer to members who join.
- 03. What is the time commitment expected of members?**
Do members need to attend a certain percentage of meetings or events throughout the year?
- 04. What differentiates the Echelon board members from the general membership?**
Are all members of the chapter expected to hold some sort of leadership role or committee membership? Does holding a role on the Echelon board require additional terms of commitment different from that of general members?
- 05. Is membership capped?**
Will your chapter utilize a closed model, open model, or something else?

NOTES

FINALIZING THE STRUCTURE (CONT.)

FINANCIAL CONSIDERATIONS

One thing you will not find in this guide is a nationally mandated budget for Echelon. Chapters can operate at a variety of funding levels dependent upon the local context, available resources, and goals of the chapter. It is helpful for the chapter to have some sort of start-up funding available to them at the outset to allow new Echelon leaders to focus on recruitment and engagement as the chapter is getting started.

A common question for new chapters is how Echelon financial accounts should be established. National Echelon leadership recommends chapters have their own bank account (still owned and managed by The Salvation Army), similar to a Women's Auxiliary group. This makes it easier for chapter to keep track of their expenses and revenue as well provides more flexibility for utilizing digital payment options for events and projects.

Not all chapters operate this way. Some choose to integrate Echelon finances into existing Salvation Army departmental budgets. Whatever method is chosen, the most important considerations are to ensure the chapter is able to accomplish the following:

- Easily track chapter expenses and revenue
- Designate specific chapter funds to be donated back to The Salvation Army
- Have access to digital payment options for events and other chapter functions
- Ensure that any balance in the chapters account is preserved and not reallocated at the end of each fiscal year

There should be transparency for chapter leadership regarding their financial accounts. If the chapter chooses to have a Treasurer on their board, this individual should be able to provide accurate and up-to-date reports regarding the group's financial standings. However, The Salvation Army should still maintain oversight of the account and clearly communicate relevant finance policies and approval processes to the chapter from the start.

STAGE 5

FINALIZING THE STRUCTURE (CONT.)

ARTICLES OF ORGANIZATION

In addition to establishing a leadership structure and standards of membership, the group also needs to formalize the articles of organization (also known as bylaws) for the new chapter. Chapters have the ability to localize their articles of organization, but certain expectations for membership behavior and functioning are national Echelon standards shared by all chapters. The chapter's local officer and staff liaisons should be included in the Articles of Organization creation process. An articles of organization creation template is included in the appendix of this guide to assist in this process.

NEW CHAPTER FRAMEWORK

Now is the time to look back at the New Chapter Framework on page 3 of this guide. Once your group has achieved all of the benchmarks outlined there, you are officially ready to move on to the final stage of launching your new Echelon chapter.

If you haven't quite gotten there yet, that's okay. It can take time to put all of the pieces together for your new Echelon chapter. Keep working through Stages 1-5 as needed to ensure your strategy is being implemented effectively. Don't give up!



What's Next?

Congratulations! Take a moment to appreciate all you have accomplished in setting the foundations for a new Echelon chapter. Now it's time to officially launch your chapter and apply for your official charter in Stage Six – Chartering Application.

STAGE 6

CHARTERING APPLICATION



OBJECTIVES

- Application Process
- What's Next?

APPLICATION

Once you have completed stages 1-5 and met all benchmarks outlined in the New Chapter Framework on page 3, it's time to submit your application for official chartering. The charter is the official recognition by your Salvation Army Territory (and subsequently, National Headquarters), of your groups official status as an active Echelon chapter.

The application is a summary of all the work you have done to create your new chapter and paints a picture of the maintenance and development plans for the chapter moving forward. The new Echelon board representatives should work together with local Salvation Army liaisons to complete the application. Once complete, the application should be submitted to the local command's division for the first layer of approvals.

Following divisional approval, the application should then be sent to your Territorial Chief's office with a copy to National Headquarters. The Territory will provide final approval and chartering of the new chapter.

Once you receive notice of your official charter - Celebrate! You and your team have worked very hard to get to this point, and it is no small feat. Though sustained effort and commitment will be required to maintain a successful Echelon chapter, know you will not be alone. You are part of a national network of Echelon chapters and members ready to support and encourage you.

What's Next?

You may be wondering what happens after your chapter receives their official charter. This is a very exciting time, though there is still work ahead as the chapter continues to grow and develop. But don't fear -you are not alone!

Shortly after you receive your official charter, National Headquarters will contact the chapter directly with chapter onboarding information including how to establish a new website on the national Echelon platform. You will also receive important information to help connect the chapter with other supports and resources.

CONGRATULATIONS!

Making through the Echelon start-up process is no easy feat. We are excited to get to know your new Echelon chapter and see the impact they will have in your community and beyond.

Please remember, you are not in this alone. There is a network of Echelon supporters eager to help you at every turn. If you have questions about anything in this start-up strategy guide or beyond, please do not hesitate to reach out. You can contact Echelon@usn.salvationarmy.org for all of your Echelon related questions and comments.

Also be sure to follow Echelon on Instagram, Facebook, and LinkedIn to stay up to date on the latest national Echelon news (@salvationarmyechelon) and check out our website (www.salvationarmyechelon.org) for more information.

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APPENDIX



CONTENTS

- Echelon Branding Guide
- Examples Board Roles and Descriptions
- Articles of Organization Creation Template
- Echelon New Charter Application

ECHELON BRANDING GUIDE

Echelon represents a community of young professionals who seek to better the world around them. By uniting under one banner, these members embody an effort to mobilize the next generation of world-changers and community leaders for The Salvation Army.

This Style Guide is designed to provide brand consistency for Echelon across all mediums and each chapter, providing the brand with the professionalism and prestige to complement its hard work across the United States. All Echelon chapters should familiarize themselves with Echelon brand standards. These guidelines are mandatory for all chapters to follow and are not eligible for local customization.

Copy tone refers to how a brand's personality is conveyed through written words, and like every other aspect of Echelon's brand, the copy tone must be consistent. Echelon's copy tone, like The Salvation Army, should always be passionate, uplifting, and positive, but unique to Echelon; it should always convey energy and speak to a younger adult generation.

•Unlike The Salvation Army, not all of Echelon's communication will offer a call to action for the audience to donate, volunteer, etc. When the communication is, for instance, an invitation to a social event, it should still convey a sense of that the audience's mere attendance and participation is, essentially, "doing the most good" because it's "mobilizing the next generation." A larger purpose for the social event should always be expressed.

COPY TONE



Copy tone refers to how a brand's personality is conveyed through written words, and like every other aspect of Echelon's brand, the copy tone must be consistent. Echelon's copy tone, like The Salvation Army, should always be passionate, uplifting, and positive. Additionally Echelon specific copy should be energetic, inviting, purposeful and appeal to younger generations.



FONTS

Echelon's logo is in Gotham font ("Echelon") and Trajan Pro font ("Mobilizing the Next Generation"). Trajan Pro is The Salvation Army's official multi-use font for both headers and body. Echelon utilizes this font whenever possible and especially for events explicitly tied to The Salvation Army's own events or projects. Gotham is a great choice for a secondary font after Trajan Pro.

When using online tools such as Canva that may provide access to these fonts, try to choose fonts that mimic the style of Gotham or Trajan Pro as much as possible.



BRAND COLORS



LOGOS



Communications coming from or in any way involving Echelon should incorporate the official Echelon logo. The word “Echelon” should never stand alone without its logo unless it is written within a header, sentence, or the body of a paragraph.

The ombre logo with Echelon’s tagline and incorporating The Salvation Army shield is the preferred logo and should be used whenever possible. In any circumstance where the ombre cannot be used, the Echelon logo in solid red (with gray tagline) should be used, incorporating The Salvation Army shield.

The logos incorporating The Salvation Army shield should be used whenever possible. It should not be used when printing in black and white because the shield should never be printed in any hue other than red. The tagline (Mobilizing The Next Generation) should never be cropped out of Echelon’s logo.

The Echelon shield icon can be used on Echelon communications, but should not be used a replacement for the official Echelon logo. Messaging featuring the Echelon shield should also include the full Echelon logo elsewhere if possible.

There is also an all white version of the logo. This option can be used, but should be used sparingly and only when placed over other brand-approved colors.

Approved logos are shown below. Email Echelon@usn.salvationarmy.org to request copies of official logo files.



SAMPLE BOARD ROLES AND DESCRIPTIONS



The below positions and descriptions are only examples. The local chapter should customize the board roles and descriptions that best fit the chapter's local reality.

PRESIDENT (OR CO-PRESIDENTS)

Echelon's president(s) oversees the entire Echelon Executive Board, delegating various tasks to ensure that objectives are being met and the organization's mission and bylaws are upheld. The president(s) is charged with making executive decisions pertaining to events, service opportunities, public relations initiatives, fundraising, et al. The president(s) will conduct Executive Board meetings as necessary, as well as meetings with board members individually, to accomplish the organization's long- and short-term goals. The president(s) is the chief ambassadors of Echelon, willing and capable of speaking on behalf of the organization to large audiences. Echelon co-presidents also serve as ex-officio members of The Salvation Army's local Advisory Board.

VICE PRESIDENT(S)

Echelon's vice president(s) will work closely with the president(s) in decision-making and delegating. The vice president(s) serve as liaisons between new chapters and The Salvation Army for purposes of Echelon expansion. The vice president(s) is expected to assume responsibilities of the President(s) in the case of unforeseen absence or resignation.

COMMUNICATIONS CHAIR(S)

Echelon's communications chair(s) is responsible for internal and external chapter communications. The communications chair(s) will create and disseminate content to membership when deemed necessary by the Executive Board through approved channels (website, email, social media, etc.). The communications chair(s) will also be responsible for maintaining the chapter's website and social media channels. The communications chair(s) will create a plan for communicating appropriately and in a timely manner to membership and will seek assistance from other board members to supplement messaging when necessary.

SAMPLE BOARD ROLES AND DESCRIPTIONS



EVENTS CHAIR(S)

Echelon's events chair(s) manage all of the organization's social and networking events. The chair(s) of events is responsible for setting annual event calendars, designating various chairs and host committees when necessary, scouting and securing venues, logistical details, etc. The event chair(s) serve as primary contacts for event vendors, caterers, host committees, etc.

SERVICE CHAIR(S)

Echelon's service chair(s) is the liaison to local Salvation Army service centers and works directly with Salvation Army officers and staff to plan volunteer opportunities for all Echelon members. The service chair(s) will plan service opportunities relevant to Salvation Army client needs and wishes and will lead the effort to encourage membership volunteerism.

FUNDRAISING CHAIR(S)

Echelon's fundraising chair(s) is responsible for ensuring that all events are being utilized as give-back or fundraising opportunities. The fundraising chair(s) will work closely with the event chair(s) to design social and networking events wherein The Salvation Army is benefitted, whether financially, via item donation, or volunteer recruitment. The fundraising chair(s) are charged with organizing in-event fundraising activities when applicable and will support the membership chair(s) in encouraging membership renewal.

MEMBERSHIP CHAIR(S)

Echelon's membership chair(s) are charged with updating and maintaining an accurate membership database. The membership chair(s) will work closely with the communications chair(s) to encourage membership renewal, while also actively seeking new members. The membership chair(s) is responsible for recruiting new members during Echelon social and networking events, demonstrating the utmost knowledge of the organization and membership perks.

SECRETARY

Echelon's secretary will be responsible for the organizational needs of the Executive Board, including keeping the minutes of all meetings and preparing and distributing meeting agendas and other materials.

SAMPLE BOARD ROLES AND DESCRIPTIONS



TREASURER

Echelon's treasurer manages the organization's finances. The treasurer is responsible for maintaining the organization's budget, presenting updates to the Executive Board, receiving and processing reimbursements, tracking membership dues payments, and ensuring payments are received by vendors as needed for events.

DEVELOPMENT CHAIR(S)

Echelon's development chair(s) is responsible for maintaining the organization's bylaws and any official or historical documentation. The development chair(s) will create and maintain an organizational system wherein various Echelon documents are stored, including curriculum objectives, strategic plan documents, and leadership rosters. The co-chairpersons of development will work closely with Board leadership to support and assist in new chapter expansion, and will ensure Echelon is growing in an organized, well-documented fashion.

SOCIAL MEDIA CHAIR(S)

Echelon's social media chair(s) will be responsible for maintaining all of Echelon's social media accounts. The social media chair(s) will work closely with the communications and public relations chairs to ensure social media posts are timely, relevant, and consistent with the board's communications plan.

PUBLIC RELATIONS CHAIR(S)

Echelon's PR chair(s) is charged with fostering a positive public image of the organization, as well as heightening awareness of the organization's accomplishments and contributions to the community by serving as the liaisons to credentialed media. The PR chair(s) will proactively seek media exposure for Echelon events and service projects when deemed appropriate by the board, and they will be responsible for creating, maintaining, and presenting to the board an ongoing communications plan.

CHAPLAIN(S)

Echelon's chaplain(s) serves as the organization's spiritual counselors. The chaplain(s) will offer encouragement at the start of each Board meeting, or at larger membership events when necessary, and will offer members opportunities for spiritual growth (e.g. through instituting a regular Bible study).

SAMPLE BOARD ROLES AND DESCRIPTIONS



CORPORATE RELATIONS CHAIR(S)

Echelon's corporate relations chair(s) is responsible for developing corporate partnerships and sponsorships for Echelon events and programs, as well as developing a strategy for engaging companies that have a large Echelon membership or potential membership, in accordance with The Salvation Army's larger corporate relations efforts. Echelon's corporate relations chair(s) will maintain regular communication with The Salvation Army's corporate relations team, helping companies meet their philanthropic or corporate social responsibility goals, benefitting Echelon and The Salvation Army.

ARTICLES OF ORGANIZATION TEMPLATE

This template is designed to help a developing Echelon chapter establish their initial articles of organization (aka bylaws). The following pages contain explanations and examples for every section of a chapter's articles of organization. You will see some national standards that are required for all chapters, however the ability for local customization remains a key component of Echelon's success. The local Echelon chapter has the freedom to tailor the structure of the Echelon leadership board by adding or subtracting positions and committees. This ensures that the local Echelon is congruent to the local setting.

The following pages contain an overview of the main sections of chapter bylaws and sample text for each topic. In some cases, the sample text can be used verbatim but other sections will require further edits/additions/customizations by the local chapter. The are italicized notes designating areas where particular attention should be given by the local Echelon leadership team (including Board members, staff, officers and Advisory Board liaisons) to establish clear guidelines and processes. Once a developing chapter believes they have completed creating the chapter's bylaws, they should be officially adopted by the Echelon Board and shared with the full membership.

FOREWORD, MISSION STATEMENT AND VISION STATEMENT

Foreword: The foreword should briefly state the name of your chapter and outline a basic explanation of the relationship between Echelon and The Salvation Army.

Mission Statement: Your articles of organization should include The Salvation Army's international mission statement and Echelon's national mission statement. It is not necessary to develop a mission statement specific to your chapter unless you want to. Using Echelon's national mission statement is sufficient. If you do develop a local mission statement for your chapter, you should still include Echelon's national mission statement in your articles of organization as well.

Vision Statement: Similarly to a mission statement, your chapter should develop a local vision statement. The national vision statement for Echelon should be included in your bylaws even if a local vision is developed.

ARTICLES OF ORGANIZATION TEMPLATE

SAMPLE TEXT

Foreword

As the National Young Adult Auxiliary of The Salvation Army – the organization committed to mobilizing the next generation of Salvation Army supporters – Echelon members are to uphold the highest standards of The Salvation Army and revere its official core values. Members will respect The Salvation Army’s foundation as an evangelical Christian organization and embody its mission to meet human needs without discrimination.

Mission Statement

Echelon seeks to mobilize the next generation for The Salvation Army by providing opportunities for young adults to engage with the organization through fellowship and networking, donations and fundraising, and service and volunteering.

(National Mission Statement – required)

Add local chapter mission statement if applicable

Vision Statement

Echelon is a community of diverse young adults collectively rising up to serve The Salvation Army through fellowship and networking, donations and fundraising, and service and volunteering.

(National Vision Statement – required)

Add local chapter vision statement if applicable

MEMBERSHIP REQUIREMENTS AND BEHAVIOR

I. Member Bylaws and Expectations – A chapter’s bylaws should clearly articulate the standards of membership for the chapter including membership requirements, expected member behavior, expectations for brand representation and a process for member dismissal should it be deemed necessary.

ARTICLES OF ORGANIZATION TEMPLATE

MEMBERSHIP REQUIREMENTS AND BEHAVIOR (Cont.)

a. Membership Requirements: As discussed in the Echelon Start-Up Strategy guide, one of the requirements in the Echelon Framework for New Chapter Chartering is establishing your chapter's standards of membership. What is required to become an official member – dues, attendance requirements, some combination of those? These local standards of membership are up to the local chapter to determine but should be clearly articulated in the bylaws.

b. Membership Behavior: Even though they are not employees, Echelon members are a representative of Echelon and The Salvation Army within their communities. Bylaws should clearly explain the behavior expectations for Echelon members, particularly when it comes to expected conduct at Echelon events and when interacting with Salvation Army clients. The local chapter should work with The Salvation Army's local command and Advisory Board to see what existing policies and procedures may already be in place as it relates to these topics. These can serve as a great starting point for outlining expected member behavior. The sample text below includes basic expectations all chapters should adopt, but others may be added based on local considerations.

c. Member Dismissal: A chapter's bylaws should clearly state the consequences a member will face if they do not abide by the standards of membership behavior outlined in the bylaws.

SAMPLE TEXT

I. MEMBERSHIP REQUIREMENTS

a. Members must *[pay annual dues]* as mandated by the Board in order to be considered in good standing and thus eligible to attend and participate in member-exclusive events.

b. Members are expected to *[attend 75% of Echelon member events and meetings throughout the year]*. If a member is unable to fulfill these requirements, they should contact the Chapter President directly to discuss their situation.

ARTICLES OF ORGANIZATION TEMPLATE

MEMBERSHIP REQUIREMENTS AND BEHAVIOR (Cont.)

SAMPLE TEXT

II. MEMBERSHIP BEHAVIOR

[The following standards should be contained in the articles of organization for every chapter. The local group can choose to add additional standards if desired.]

- a. Members will reflect the highest standards of The Salvation Army by engaging in the following behaviors:
 - i. Representing The Salvation Army and Echelon honorably and favorably through any social media or traditional media engagement;
 - ii. Refraining from intoxication or disruptiveness during any Salvation Army or Echelon event;
 - iii. Adhering to The Salvation Army's mission to accept and serve others without bias or discrimination, particularly when on site at any Salvation Army service center or shelter;
 - iv. Acting in accordance with the desires and directives of any Salvation Army officer or staff member allied with the Echelon chapter; and
 - v. If requested, members will sign and obey a confidentiality agreement designed to protect the personal and organizational information they are privy to during service projects and events.
- b. Members will not fraternize with any Salvation Army clients they may come into contact with through Echelon service projects or events.

ARTICLES OF ORGANIZATION TEMPLATE

MEMBERSHIP REQUIREMENTS AND BEHAVIOR (Cont.)

SAMPLE TEXT

III. MEMBER DISMISSAL

- c. Any member who blatantly fails to meet the guidelines and expectations outlined in Section II above is subject to dismissal from the Echelon organization and/or prohibition from Echelon events by the Board.

IV. BRAND REPRESENTATION

- d. Members are restricted from using the Echelon logo unless for purposes approved by the Board.
- e. Members must follow the official Echelon Brand Standards Guide in promoting or disseminating any organizational materials, all of which is subject to Executive Board approval.

BOARD MEMBER EXPECTATIONS AND PROCEDURES

II. Executive Board Member Expectations and Procedures – A chapter’s Board may be subject to increased expectations which should be outlined in the articles of organization. In addition, articles of organization should clearly state the role of each Board position, attendance requirements, election process, and other Board Member considerations. This is another area where consultation with your local Salvation Army Advisory Board may be helpful in determining useful board positions, election processes, and board governance procedures.

ARTICLES OF ORGANIZATION TEMPLATE

BOARD MEMBER EXPECTATIONS AND PROCEDURES (Cont.)

a. Outline of Board Member Positions: Your bylaws should list the titles and descriptions of Board member positions.

b. Elections and Terms of Office: The steering committee establishing the chapter should determine how often Echelon Board elections will occur and the manner of elections. Consideration should be given to term limits, whether members apply or are nominated, eligibility for holding office, etc.

c. Board Meetings: Determine how regularly your board will meet. The bare minimum for maintaining Echelon chapter status is quarterly, however monthly meetings are strongly recommended. Boards can also consider if virtual meetings using Zoom, Teams, or similar options are appropriate for their group. If the board determines virtual meetings are appropriate, efforts should still be made to hold in-person meetings (when it is safe to do so) on a quarterly basis.

d. Board Member Behavior: In addition to general member behavior expectations, board members may be asked to adhere to additional requirements. This could include responsibilities related to recruitment, leadership development within the chapter, event attendance or others.

e. Association with The Salvation Army: The Board will be the main representatives between the local Chapter and local Salvation Army staff/officers. Articles of organization should detail this relationships and outline any mutually agreed upon local guidelines related to this relationship.

ARTICLES OF ORGANIZATION TEMPLATE

BOARD MEMBER EXPECTATIONS AND PROCEDURES (Cont.)

SAMPLE TEXT

V. OUTLINE OF EXECUTIVE BOARD MEMBER POSITIONS

a. The following positions hereby constitute the Echelon Board:

[insert relevant board roles and descriptions here]

b. The Executive Board may alter the descriptions of, add, or remove board positions at any time with a simple majority vote.

VI. ELECTIONS AND TERMS OF OFFICE

[This entire section should be localized and approved by the local chapter Board and Salvation Army liaisons. The text below is just one example.]

- a. All Echelon members are eligible to serve on the Echelon Board. The process for nominations and elections, with the exception of the positions of co-president and co-executive vice president, is as follows:
- i. In the event of a Board member position vacancy, members, including Board members, may submit formal nominations to the co-presidents.
 - ii. The outgoing Board member who is seceding their position is strongly encouraged to formally nominate their predecessor.
 - iii. The co-presidents will present nominee(s) to the Board during the next scheduled board meeting and facilitate discussion. Strong consideration will be given to the nominee of the outgoing Board member.
 - iv. The Board will vote for nominated candidates for each role via secret ballot. In the event of a tie, a second secret ballot vote between the top candidates will be conducted.

ARTICLES OF ORGANIZATION TEMPLATE

BOARD MEMBER EXPECTATIONS AND PROCEDURES (Cont.)

SAMPLE TEXT

VI. ELECTIONS AND TERMS OF OFFICE (cont.)

- v. The co-presidents and co-executive vice presidents, and if appropriate, the outgoing Executive Board member, are responsible for properly installing the incoming Executive Board member in their position.

- b. All Echelon members are eligible to serve as co-president or co-vice president of the Board; however, a full term of experience serving the Board through other positions is highly encouraged. The process for filling the positions of co-president and co-vice president is as follows:
 - i. When a co-president elects to step down from their position, they may nominate their successor to be agreed upon by their remaining co-president counterpart and approved by the Board with a simple majority vote.
 - ii. When a newly elected co-president is installed, they have the right to select their co-vice president. Particularly in the event of a former co-executive vice president assuming the position of co-president, their successor need only be mutually agreed upon by their co-president counterpart as well as the remaining co-vice president.

- c. Board members are strongly encouraged to serve at least a full term in their positions.
 - i. A full term is defined as one program year beginning at the August Board meeting and concluding at the end of the May Board meeting.
[These dates can be changed and should be based upon the local chapter's calendar]
 - ii. The summer months will be considered a break for Echelon activation; however, Board member planning, evaluation, and turnover should take place during this period.

- d. The adding or removing of a Board member position is a matter to be discussed and approved by a simple majority vote by Board members.

ARTICLES OF ORGANIZATION TEMPLATE

BOARD MEMBER EXPECTATIONS AND PROCEDURES (Cont.)

SAMPLE TEXT

VII. BOARD MEETINGS

[This entire section should be localized and approved by the local chapter Board and Salvation Army liaisons. The text below is just one example.]

- a. Board meetings will be held monthly unless deemed otherwise by the co-presidents, or in exception to the summer months.
- b. Board members are expected to attend all meetings, but when an absence is unavoidable, Board members are expected to notify co-presidents.
- c. It is the responsibility of the co-presidents to address excessive absences and, when necessary, re-evaluate an Executive Board member's position.

VIII. BOARD MEMBER BEHAVIOR

- a. Members of the Board are to uphold the standards and rules applied to all Echelon members, but to an even higher degree. Board members are to be the most visible and respectable representations of the Echelon organization by:
 - i. Adhering to the all-member articles of organization and expectations as outlined above
 - ii. Demonstrating knowledge and enthusiasm for both the Echelon and The Salvation Army

[This following items should be localized and approved by the local chapter and Salvation Army liaisons. The text below is just one example.]

- iii. Pledging to volunteer for a minimum amount of service projects agreed upon by all Board members
- iv. Actively engaging and encouraging non-Board members to be the most involved and invested members they can be

ARTICLES OF ORGANIZATION TEMPLATE

BOARD MEMBER EXPECTATIONS AND PROCEDURES (Cont.)

SAMPLE TEXT

VIII. BOARD MEMBER BEHAVIOR

[The following items should be localized and approved by the local chapter Board and Salvation Army liaisons. The text below is just one example.]

- v. Actively seeking non-Echelon members to join the organization and embrace the cause of The Salvation Army.

- b. Any Board member who fails to meet these behavioral expectations is eligible to be dismissed from the Board.

IX. Association with The Salvation Army

- a. The Board is responsible for acting as the liaison between Echelon and The Salvation Army. Board members are expected to maintain communication and cooperation with Salvation Army officers and staff members.
- b. The Board will ensure Echelon's brand standards are maintained, as well as those of The Salvation Army.
- c. The Board must request approval from the appropriate Salvation Army parties before distributing any materials with The Salvation Army/Echelon logos.

BUDGET, EXPENSES AND FUNDING

Budget, Expenses, and Funding: Chapter bylaws should outline reporting expectations and finance processes for the chapters budget processes. The chapter should work closely with The local Salvation Army command to determine these procedures and guidelines. Ideally, the local chapter will have a bank account established through The Salvation Army similar to how a Women's Auxiliary group's financial accounts are set up. This allows the local chapter to monitor their expenses and income, have an account that can accept online payments/donations (with Salvation Army assistance and approval), and pay for chapter event and project expenses.

ARTICLES OF ORGANIZATION TEMPLATE

BUDGET, EXPENSES, AND FUNDING (Cont.)

SAMPLE TEXT

X. BUDGET, EXPENSES, AND FUNDING (cont.)

[The following items should be localized and approved by the local chapter Board and Salvation Army liaisons. The text below is just one example.]

- a. The treasurer of the Board will be expected to provide a budget update at every Board meeting. If absent, the treasurer is responsible for sending a status report to the Board via the co-presidents.
- b. The proposal, approval, and spending of Echelon's funds should proceed in the following manner:
 - i. A Board member may request the allocation of funds to a project or program benefitting The Salvation Army at any time, with the exception of the summer months.
 - ii. The request must be submitted to the co-presidents, who will then permit or deny the request or the opportunity to present the proposal to the entire Board.
 - iii. Upon presenting the proposal to the Board, the co-presidents will facilitate discussion and designate the time and manner in which voting amongst Board members will take place.
 - iv. For fund requests exceeding \$500, the vote must take place via a regularly scheduled Executive Board meeting.
 - v. All Executive Board members must cast a vote for fund requests exceeding \$500.
 - vi. A 2/3 majority vote is required for the proposal to pass, with the exception of fund requests less than \$500, in which case a simple majority vote may approve the proposal.
 - vii. If approved by the Echelon Board, the co-Presidents will then work with the Salvation Army staff and/or officer liaisons to obtain formal approval from The Salvation Army and complete all required finance processes.

ARTICLES OF ORGANIZATION TEMPLATE

BUDGET, EXPENSES, AND FUNDING (Cont.)

SAMPLE TEXT

X. BUDGET, EXPENSES, AND FUNDING (cont.)

[The following items should be localized and approved by the local chapter Board and Salvation Army liaisons. The text below is just one example.]

- c. Each year, the Board will work closely with Salvation Army staff and/or officer liaisons to review the chapter's financials and formalize the budget for the upcoming year.
- d. Board members must stay within their specified budget for each project, event, etc., spending with integrity and being mindful of the purpose of their funds. Board members granted a budget will be expected to give regular status reports to both the co-presidents and the treasurer.
- e. An Echelon member who requires a reimbursement may request such by the following procedure:
 - i. Email an original copy of the receipt directly to the treasurer, along with an explanation of the expense, the date on which the transaction occurred, and the name of the person/organization for which the reimbursement check is being requested.

RATIFICATION

Ratification: Chapter articles of organization should include a detailing when the articles were ratified and the process for making future changes.

ARTICLES OF ORGANIZATION TEMPLATE

RATIFICATION (Cont.)

SAMPLE TEXT

XI. RATIFICATION (cont.)

[The following items should be localized and approved by the local chapter Board and Salvation Army liaisons. The text below is just one example.]

- a. These articles of organization were approved by the Echelon Board on [insert date] and will be ratified pending the approval of the local Salvation Army staff and officer liaisons. Future changes or additions to these bylaws can be made by obtaining a majority vote of the Echelon Board and necessary approvals from Salvation Army liaisons.



NEW CHARTER APPLICATION

Proposed Echelon Charter Location:

Sponsoring Salvation Army Command:

Salvation Army Officer Chapter Liaison:

Name:

Email:

Role Description:

(How will the liaison interface with the Echelon chapter? Examples include attending meetings, supporting communication efforts, providing administrative support, processing formal chapter requests, etc.)

Salvation Army Staff Chapter Liaison:

Name:

Email:

Role Description:

(How will the liaison interface with the Echelon chapter? Examples include attending meetings, supporting communication efforts, providing administrative support, processing formal chapter requests, etc.)



NEW CHARTER APPLICATION

Salvation Army Advisory Board Chapter Liaison:

Name:

Email:

Role Description:

(How will the liaison interface with the Echelon chapter? Examples include attending meetings, supporting communication efforts, providing administrative support, processing formal chapter requests, etc.)

Divisional Support Contact:

Name:

Email:

Territorial Support Contact:

Name:

Email:



NEW CHARTER APPLICATION

Echelon Board Roles:

Board Role 1:

Name:

Email:

Board Role 2:

Name:

Email:

Board Role 3:

Name:

Email:



NEW CHARTER APPLICATION

Echelon Board Roles:

Board Role 4:

Name:

Email:

Board Role 5:

Name:

Email:

Please attach more pages as needed for additional board roles.

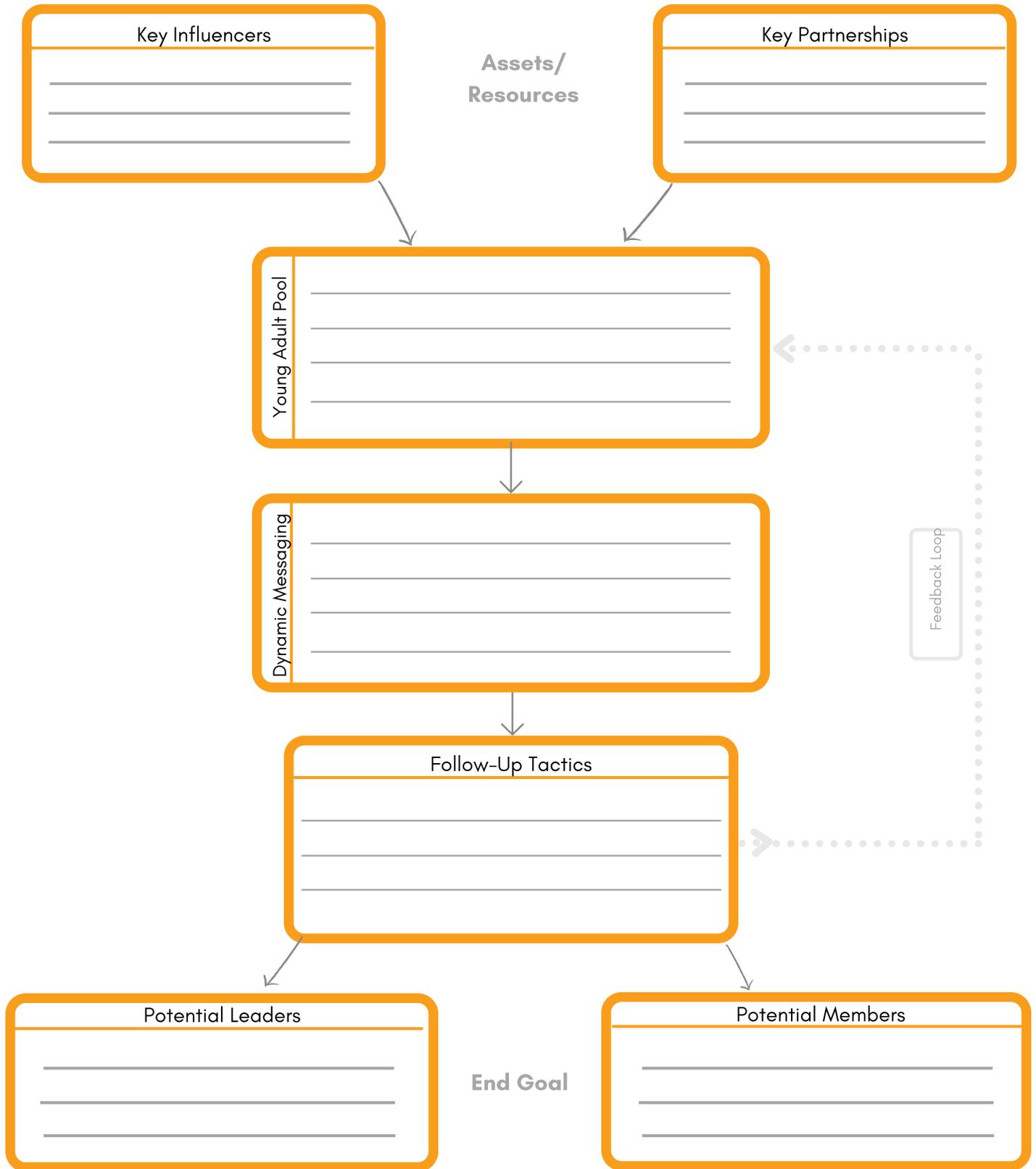
New Chapter Strategy

Strategy Narrative:

Please provide a brief narrative regarding your chapter's identified key influencers/partnerships, event and engagement plans, recruitment pools and membership cultivation strategies, and any additional information relevant to the chapter's plan for sustainable growth.



CHAPTER STRATEGY MAP





NEW CHARTER APPLICATION

Is there a dues requirement for members?

If so, how much?

What is the time commitment expected of members?

What differentiates the Echelon board members from the general membership?

Is membership capped?

Additional Comments:



NEW CHARTER APPLICATION

Please provide a summary of how the chapter envisions its growth in both membership and board leadership.

Please provide a timeline and overview of planned events and meetings (include board meetings, networking/recruitment, volunteer, and fundraising activities).

What is the guiding vision for this chapter?

Anything else you'd like to share?

Divisional Approval

Territorial Approval