



ECHELON

MOBILIZING THE NEXT GENERATION

# ECHELON START-UP STRATEGY

NATIONAL HEADQUARTERS



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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.

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## INTRODUCTION

This brief is 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.

The Salvation Army has discovered a viable model to engage this demographic and mobilize them in a valuable partnership. 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 five-step planning regimen and introduce the pertinent documentation to officially launch an Echelon chapter. As is true in any strategy, the global blueprint needs to be customized to the local reality. The ideas and templates contained within the brief are abstractions based upon the previous experiences of the founding chapter in Dallas, and the establishment of new chapters thereafter. Thus, there must be great trust placed upon the prospective local command to imaginatively make this plan their own.

There are two specific items of business the local command must decide upon. First, this strategic plan suggests the use of a steering committee to plan and carry out the work. The exact make-up of the committee will arise from the context and available people. This also entails the tactical work of the committee; the committee may do all the work in concert together, or most of the work could fall to specified individuals. Second, the strategic plan is open-ended with budgeting. To get a successful Echelon off the ground does not require significant upfront capital. But, it will require some investment. Whatever the local command can afford is the right amount to get started.

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 the Millennial demographic in the United States today.





## STAGE ONE: 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 decisionmakers. 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, and the second tests the readiness of the command. 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 and *raison d’être*. Yet, the best visions transcend the typical; a great vision can inspire. A guiding vision can liberate and energize individuals and groups to achieve excellence. The mystery of a powerful guiding vision is that it does not have to be complicated and it does not need to compete with the canon of Shakespeare. 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.

### VISION STATEMENT TIPS

1. Formulating a vision statement is both an individual and a team sport.
2. It is usually best if an individual takes the responsibility of creating a rough draft.
3. Answer the questions:
  - a. What difference will Echelon make for our Salvation Army?
  - b. What difference will Echelon make in our city?
  - c. What future will now be possible thanks to Echelon?
  - d. Is there a concrete picture that can summarize our hoped future?

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. The aim is that, by Stage Three, the Guiding Vision will be translated into specific messages for multiple audiences.

## GUIDING COALITION

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 guiding coalition, also known as 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. Since creating Echelon is the sole goal, this Guiding Coalition can be considered a metaphorical team of midwives.

The membership of the Guiding Coalition will depend on the local context of the Army and the community. However, the functions of the team and the objectives are universal:

### GUIDING COALITION CRITERIA

1. The Coalition 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.

## GUIDING PROCESS

With a dedicated group guided by a compelling vision, the last item of stage one is about coming to a consensus on the planning procedures moving forward. The formalized role of the Guiding Coalition, 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 chart to the right 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.

## TIMELINE OF EVENTS





## STAGE TWO: 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. In common business practice, this research is known as SWOT (Strengths, Weaknesses, Opportunities, Threats).

The Echelon Strategy modifies this leadership tool to fulfill its unique purposes for two explicit reasons. Generally, researchers explore the unknown to discover new information and opportunities. Discovery can certainly be a side effect of pursuing the right questions, but the immediate objectives of the investigation is to discover a pool of potential Echelon members and determine the best rhetoric to persuade young adults to join the chapter. The following templates will help accomplish this task.

### 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. Bryson offers the following suggestions for developing a list and analysis of stakeholders:

#### TIPS FOR STAKEHOLDER ANALYSIS

1. Identify single individuals and groups that can make a claim on the organization's attention, decisions, outputs, and resources.
2. Discover each stakeholder's definition of success.
3. Determine how the organization is performing against stakeholders' criteria.

#### ECHELON-SPECIFIC STAKEHOLDER ANALYSIS

4. Investigate every lead for potential young adult Echelon members.
  - a. Check with local Salvation Army volunteers – both individuals and groups.
  - b. Speak with key leaders in the local Advisory Board and already established Auxiliary Groups.
    - i. Advisory and Auxiliary members will have employees and family connections to young adults.
  - c. If local command already has strategic partnerships with corporate sponsors, then informally explore these with corporate liaison(s).
5. In concert with the Steering Committee and key stakeholders, discuss the following questions:
  - a. What expectations do young adults in this particular community have for a meaningful network of young professionals?
6. How can The Salvation Army win credibility and justify the interest of young adults in joining Echelon?

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.

## AUDIT THE SALVATION ARMY ASSETS

Perhaps the easiest part of the Investigation Stage is auditing the internal circumstances of the local Army. This task hinges upon the traditional philosophy of “know thyself,” but there is a more subtle reason why it is important. 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 template below offers practical suggestions to help the Steering Committee get started.

### WISDOM FOR CONDUCTING INTERNAL AUDITS

1. Generate a list of all local programs and services.
2. Generate a list of victories and successes the local Army has enjoyed in its short- and long-term history.
3. Inventory the unique skills and talents of individuals working within the local Army.
4. Assess the quality of the local Army’s facilities and resources.
5. Interview key personnel within the Army to discover possible partnerships between the Army and the potential Echelon group.

## 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:

### RESEARCH OBJECTIVE 1: 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.

### RESEARCH OBJECTIVE 2: ASSESS LOCAL YOUNG ADULT CULTURE

There are a variety of sources in academia and the public that sociologically study the Millennial demographic. One example is the Pew Research Firm, which periodically publishes reports on the this population (<http://tinyurl.com/h4c473e>). Yet, knowing the national megatrends 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.

### RESEARCH OBJECTIVE 3: DETERMINE THE ECONOMIC INDUSTRY

It is important to consider the economic forces that shape the young adults in a given area. There are a number of reasons why the Committee will need to know this. Having this information will help create better messages, and it will help decision-making in crafting events. Furthermore, understanding the industrial sector will help in long-range forecasting for not only Echelon, but also for the local Advisory Board.





## STAGE THREE: 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. If the committee has a dedicated Salvation Army staffer, progress can be made more quickly. But, when it comes to Stage Three: Strategic Formation, we advise deliberately thinking longer to ensure decisive actions. There is a very simple reason for the suggestion. Henry Mintzberg said it best: “Just because you have a lot of analysis, it doesn’t mean you have synthesis, and therefore, you still don’t know exactly what to do.”

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 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. In the Echelon strategic plan, that vision is a robust picture of a freshly established Echelon meaningfully impacting the work of The Salvation Army. Thus, the synthesis is really having the wisdom to know where the Army stands today, and constructing the bridge that leads to the desirable future.

With this end in mind, there are key objectives to assist the Steering Committee in fulfilling the Strategic Formation:

### WEAVE STRATEGY

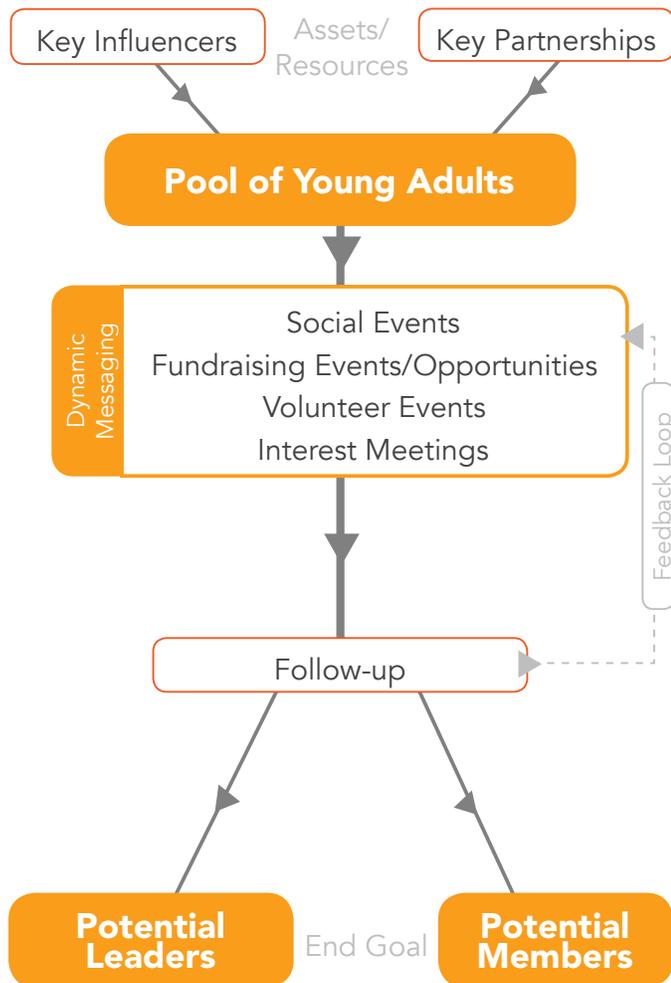
As a weaver interlaces reeds into a basket, a “weave strategy” attempts the same outcome by making interrelated connections amongst the organization’s strengths and finding pathways to further connect those strengths with external opportunities. One of the best examples comes from the Dallas Echelon experience. In the Dallas Fort-Worth Command, the Army is blessed with a vast social service operation called the Carr P. Collins Social Service Center. Each year, the center helps multitudes of individuals and families. The Social Center and Echelon have strategically partnered to bless its beneficiaries. Echelon has helped its clients by job coaching, resume building, and volunteering.

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

### CREATE A YOUNG ADULT 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. In the example on the next page, 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. 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.

Once there is reasonable progress in developing an Echelon leadership team, the next event should be a social gathering. The Committee should be as creative as possible to ensure that the social gathering is fun for young adults who attend. For example, in Dallas, the first social gathering was a Tailgate Party at a Cowboy’s game; in Portland, Oregon, it was an Ugly Sweater Party during the Christmas season.

## 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.

### 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 Echelon vision into life and has the highest credibility among young adults?” This is a high standard, but not impossible to reach. Neither Jimmy Fallon nor Tim Tebow are prerequisite spokespersons. It may take time to find the right person to speak to an external audience, which will mean that the 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.

### DEVELOPING INTERNAL & EXTERNAL MESSAGES

After the spokesperson(s) is/are selected, the Committee should not neglect the step of helping the spokesperson design impactful messages. The speaking messages are the most important type of communication, but not by much. The Committee will need to concern itself with emails, invitations, internal reports, and social media posts as well.



## LEVERAGING SOCIAL MEDIA

As events get planned, a Facebook page, Instagram, and Twitter handle will need to be developed. These are good platforms for event promotion and keeping would-be members in the loop. The Echelon website has a back door filled with graphics and logos to help the Committee create sharp-looking Facebook groups. This brief assumes that the local committee is fully capable of making these correspondences and messages. One word of advice would be to make the concerted effort to include the messaging as integrated into the young adult Strategy Map. 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.



# ECHELON NAMING BRIEF

The following is a memorandum from Flying Start, a division of The Richards Group, the PR and brand management agency of The Salvation Army. It details how and why “Echelon” was chosen as the name of this organization.

**From Flying Start, A Division Of The Richards Group**

**Contact: Robin Ayres**

**Naming Creative Brief**

**Salvation Army Young Adult Auxiliary**

## WHAT ARE WE NAMING?

We are naming a coed young adult group focused on volunteer opportunities and fundraising for The Salvation Army. This group will allow and encourage this generation to become involved in the work of The Salvation Army and impact their communities.

This group began as a young women’s organization growing out of The Salvation Army’s Women’s Auxiliary, but has expanded to become coed. It has grown out of a young adult initiative, titled “A 21st Century Salvation Army,” aimed at engaging more young Americans in the work of The Salvation Army.

We are naming the Dallas group, but the name should be able to be used for a national group with chapters in many different cities.

This organization is involved in Salvation Army outreach and service, such as:

- Ring the Bell (Holiday Season) – Volunteers will “ring the bell” in shifts at an assigned Salvation Army holiday donation collection station.
- New Year Cheer (January) – Host an event at a local Salvation Army center to celebrate the New Year.
- Valentine’s Day Dessert Party (February) – Women members bake/decorate Valentine’s Day themed desserts at a local Salvation Army women’s shelter.
- “Spring Cleaning” Donation Drive (April) – Members clean out their closets/homes and gather donations for the Salvation Army thrift store.
- Field Day (May) – Organize and implement a Field Day for local Salvation Army children.
- Summer Service Project (July) – Volunteer at a local Salvation Army shelter or thrift store, according to immediate needs.
- Summer Bible Studies (June-August) – There is a Women’s Bible Study to be organized by the women’s chaplain for members and a Men’s Bible study to be organized by the men’s chaplain for members.

- “Backyard Barbecue” – Male members are to host a barbecue for men from a local Salvation Army shelter.
- Pumpkin Party (October) – Paint pumpkins with local Salvation Army children.
- Project Thanksgiving (November) – Gather Thanksgiving food items to donate to a local Salvation Army shelter.

They also plan social opportunities, such as:

- “Ring the Bell” Ball (December) – Formal fundraiser and member recruitment/networking event
- Spring Social (March) – Member recruitment/networking event
- “Cookout for a Cause” (September) – Casual fundraiser and member recruitment/networking event

There is a strong emphasis on engagement with those helped by the Salvation Army, not just social and networking for members.

## **TO WHOM ARE WE TALKING?**

This is for both men and women ages 21-35. It is for young professional and young family persons, e.g. stay-at-home parents and individuals.

## **WHAT DO THEY CURRENTLY THINK?**

Most people in our target audience have a lack of awareness of The Salvation Army, their mission, and opportunities for engagement among the young adult population. However, recent focus groups also highlighted that young adults became more interested in The Salvation Army the more they learned about their breadth of service to America and efficiency as stewards of contributed funds.

## **WHAT WOULD WE LIKE THEM TO THINK?**

This Salvation Army group is the coed group to belong to. It is a fun way to support all of the work of The Salvation Army and to get acquainted with others in the community.

## **WHAT IS THE COMPETITIVE LANDSCAPE?**

There are many other groups vying for our target audience’s time and commitment:

- Brighter Dallas – political group
- Calyx Club
- Club Red – American Red Cross of Dallas
- Cotillion Club
- Dallas CASA Young Professionals
- Dervish Club
- Friends of the Ronald McDonald House
- Idlewild Club
- Junior Associates Circle – Dallas Museum of Art
- Junior League of Dallas
- Maverick PAC – political group
- Meridian: Global Young Professionals – World Affairs Council of Dallas/Forth Worth



- Round Table – Young Professionals of the North Texas Food Bank
- Slipper Club
- SMU Young Alumni
- Terpsichorean Club
- Texas Young Professionals (TYP)
- The Junior Group – Dallas Symphony Orchestra League
- The One Society – Children’s Medical Center of Dallas
- Think Ahead Group (TAG) – Center for BrainHealth
- Young Guns – The Real Estate Council
- Young Professional Group – Dallas Safari Club
- Young Professionals (YP) – Dallas Regional Chamber
- Young Professionals in Finance
- Young Republicans of Dallas – political group
- YP214 – Greater Dallas Hispanic Chamber of Commerce

Some are service clubs. Some are linked to arts organizations. Some are career- or politics-related.

### **WHAT ARE THE KEY WORDS, PHRASES, ADJECTIVES, AND DESCRIPTORS?**

- Engaged
- Involved
- Plugged in
- Community
- Life-changing
- Compassion
- Dedication to the less fortunate
- Hands-on
- Become a part of the cause

### **ARE THERE ANY CREATIVE GUIDELINES?**

No “Texas” or “Dallas” names. The name must work on a national level.

Do not use the words “junior” or “young.” Do not use the word “professionals” as in “young professionals,” as this is too limiting to the types of people who are involved in this group.

The best examples of this type of targeted marketing to a younger group are in retailing and fashion:

- Donna Karan has DKNY.
- Limited has Limited 2 and Express.
- Neiman Marcus has Cusp stores targeted to this audience.

Explore the concept and words “Red Kettle.” They have played with the name “Friends of the Red Kettle.”

Avoid acronyms, as they lose all meaning as soon as they are separated from the full name. The only way an acronym would work is if the shortened name would work on its own regardless of the basis of the acronym.

The Salvation Army tagline is “Doing the Most Good.” It is very active and compassionate. This organization name should align with all of that.

## CONCLUSION: ECHELON

It relates to the Salvation ARMY by using a military term meaning a body of troops arranged in a line.

Echelon is the name for a group of people/soldiers, so it works well to describe an organization of people supporting the Salvation Army.

**Echelon – 1. a.** ‘A formation of troops in which the successive divisions are placed parallel to one another, but no two on the same alignment, each division having its front clear of that in advance’ (Stocqueler). Also attrib. in echelon (also French en échelon): drawn up in this manner. direct echelon, oblique echelon: see quot. 18321. echelon-lens: see lens n.

**b.** Each of the subdivisions in the rear of the main supply service for troops in warfare.

**c.** N.Z. (See quot. 1941.)

**2.** Used for: One of the divisions of an army marching in echelon.

**3. transf.** A grade or rank in any (esp. civil) administration or profession. orig. U.S. Source: Oxford English Dictionary

*Connotations – forward echelon, upper echelon*

## LOGO AND MOTTO

**From Rbmm, A Division Of The Richards Group**

**Contact: Yvette Wheeler**

**Echelon Brand Standards**

Vice President of Development Holly Hilburn created the Echelon brand standards document based on the proposed name and logo memorandum from The Richards Group’s Flying Start while also applying the principles outlined in The Salvation Army National Brand Standards Guide.

## 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, 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.

## VISUAL TONE

The overall look and feel of The Salvation Army is stated to be clean, efficient, stately, institutional, classical, and timeless—yet current, modern, and relevant. Echelon should strive to achieve the same feel in its own visual tone as it becomes a more established organization.

## LOGO USAGE

- Any and all communication coming from or in any way involving Echelon should always 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.



- Echelon’s logo is in Gotham font (“Echelon”) and Trajan Pro font (“Mobilizing the Next Generation”).
- 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 or distributed in any hue other than red.
- The tagline (Mobilizing The Next Generation) should never be cropped out of Echelon’s logo.
- Refer to the following list for first preferred to least preferred logos:

**Preferred Logo #1:**



**Preferred Logo #4:**



**Preferred Logo #2:**



**Preferred Logo #5:**



**Preferred Logo #3:**



**Preferred Logo #6:**



**WEBSITE STANDARDS**

- Echelon maintains the same brand standards on the Web as it does in written or printed correspondence. Proper implementation of copy tone and visual tone and usage of logo is all the more crucial in online communication.
- All Echelon chapter websites should have the same basic wireframe, making mission and vision statements and links to the national Salvation Army site easily accessible.

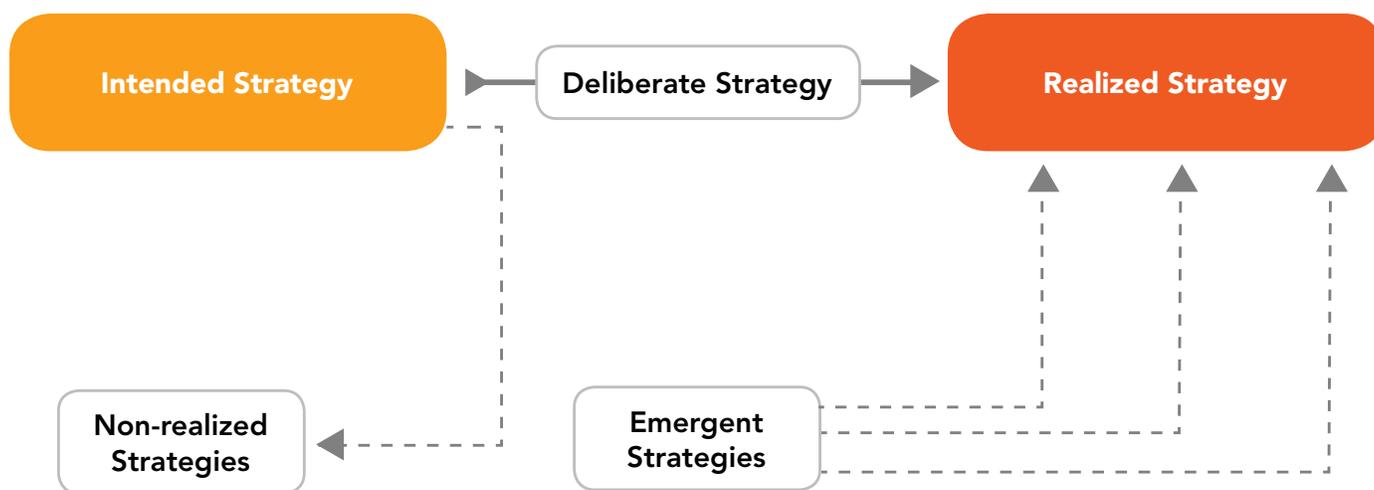
**SOCIAL MEDIA STANDARDS**

- Rules for proper copy tone also apply for social media outlets. All social media communication should reflect high standards of The Salvation Army and Echelon, while also conveying energy and engaging the young adult demographic.
- Chapters should be mindful of the proper Salvation Army Twitter accounts and Facebook pages and mention/tag these accounts when appropriate.



## STAGE FOUR: STRATEGIC IMPLEMENTATION

If a path is set, then it is time to take the journey. As the actual work of preparing events and delivering impactful communication begins, we encourage the Committee to be reminded of the simple truth of all strategy – do not be afraid of the emergent.



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 flawlessly works 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 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 Committee will operate with sound management tools, and more importantly, be adaptable as the situation changes.

To help the Committee in managing the work, there is a wealth of tools, dashboards, and systems readily available. The tools the Committee employs depend greatly on personal preferences. As the Committee decides on the way it will manage, we offer two points for consideration:



## FEEDBACK

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.

## HUSTLE

The management of the plan means that someone will have to hustle to meet with young adults through follow-up. Designating committee members to do phone calls or meetings over coffee can be quite valuable to young adults. Hustle requires energy and perseverance. It cannot be overstated just how important hustle is within the entire strategy. It could be argued that hustle may be even more important than pulling off successful events and meaningful communications. Therefore, assigning someone to be the "grinder" and to hustle it out should not be neglected.



## STAGE FIVE: FINALIZING THE STRUCTURE

As the Strategy Map works its course, the 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. Once this goal has been met, then the Committee has served its purpose and can be disbanded.

Through the leadership of the Young Adult Task Force and the founding Echelon in Dallas, there are three guiding documents that set the criteria for officially launching a new Echelon.

### OFFICIAL PROCEDURES

To ensure that the Committee has properly pulled together an Echelon chapter, the following protocol must be satisfied.



## ECHELON FRAMEWORK FOR NEW CHAPTER CHARTERING

To become officially chartered, the chapter must submit an application that addresses the following items:

1. Membership Count: the chapter must have minimum of 20 committed members.
2. Membership Requirement: the chapter must indicate the standards of membership commitment (paying dues or participating in Echelon activities).
3. Echelon Board Requirements: the chapter has a board of 5-6 Echelon leaders.
4. Membership Target: the developing chapter must target emerging professionals.
5. Plan of Events: the developing chapter must include a strategic plan and schedule for events (networking, fundraising, service).

The application must be submitted through the following approval process:

1. Applying Echelon chapter secures Divisional Approval
2. Application must be emailed to the Territorial Chief Secretary & National Headquarters ([usn.echelon@usn.salvationarmy.org](mailto:usn.echelon@usn.salvationarmy.org)).

After Territorial approval, National Headquarters will coordinate website on-boarding. Please note that all applications will be shared with the Echelon Leaders Council, for supportive purposes.





The new chapter must identify the following connections with The Salvation Army to ensure coordination of activities, information, and support:

1. Local Salvation Army Liaison (examples include Divisional Commander, Area Commander, Corps Officer, etc.)
2. Local Salvation Army Development Support Staff (examples include CRD Director, Volunteer Coordinator, etc.)
3. Local Advisory Board Sponsor
4. Divisional Staff Support



## ADOPTING ECHELON BYLAWS AND BRANDING

As mentioned in the protocols, the bylaws and branding standards must be adopted by the local chapter. The local Echelon does have 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. When it comes to branding standards, the local Echelon does not have permission to change the branding or logos.



# MEMBER AND EXECUTIVE BOARD MEMBER BYLAWS AND EXPECTATIONS

## 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 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.

## 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.

## MEMBER BYLAWS AND EXPECTATIONS

### I. Membership Requirements

- a. Members must pay annual dues as mandated by the Executive Board in order to be considered in good standing and thus eligible to attend and participate in member-exclusive events.
- b. Members will not be required to perform service projects; however, participation in both volunteer and social events is strongly encouraged.

### II. Membership Behavior

- 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. Members will sign and obey a Confidentiality Clause designed to protect the personal and organizational information they are privy to during service projects and events.
- b. Members will heed the Fraternalization Policy which forbids the mingling of males and females at any Salvation Army shelter location.

### III. Member Dismissal

- a. 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 Executive Board.

### IV. Brand Representation

- a. Members are restricted from using the Echelon logo unless for purposes approved by the Executive Board.
- b. 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.

## EXECUTIVE BOARD MEMBER BYLAWS, EXPECTATIONS, AND PROCEDURES

### I. Outline of Executive Board Member Positions

- a. The following positions hereby constitute the Echelon Executive Board:
  - i. Co-Presidents – Echelon's co-presidents oversee the entire Echelon Executive Board, delegating various tasks to ensure that curriculum objectives are being met and the organization's mission and bylaws are upheld. The co-presidents are charged with making executive decisions pertaining to events, service opportunities, public relations initiatives, fundraising, et al. Co-presidents 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. Co-presidents are the chief ambassadors of Echelon, willing and capable of speaking on behalf of the organization to large audiences.



- ii. Co-Executive Vice Presidents – Echelon’s co-executive vice presidents will work closely with the co-presidents in decisionmaking and delegating. The co-executive vice presidents serve as liaisons between new chapters and The Salvation Army for purposes of Echelon expansion. Co-executive vice presidents are expected to assume responsibilities of the co-presidents in the case of unforeseen absence or resignation.
- iii. Co-Chairpersons of Public Relations – Echelon’s co-chairpersons of public relations are 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 co-chairpersons of public relations will proactively seek media exposure for Echelon events and service projects when deemed appropriate by the Executive Board, and they will be responsible for creating, maintaining, and presenting to the Executive Board an ongoing communications plan.
- iv. Co-Chairpersons of Development – Echelon’s co-chairpersons of development are responsible for maintaining the organization’s bylaws and any official or historical documentation. The co-chairpersons of development 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 the co-executive vice presidents to support and assist in new chapter expansion, and will ensure Echelon is growing in an organized, well-documented fashion.
- v. Co-Chairpersons of Fundraising – Echelon’s co-chairpersons of fundraising are responsible for ensuring that all events are being utilized as give-back or fundraising opportunities. The co-chairpersons of fundraising will work closely with the co-chairpersons of events to design social and networking events wherein The Salvation Army is benefitted, whether financially, via item donation, or volunteer recruitment. The co-chairpersons of fundraising are charged with organizing auction or raffle items when applicable and will support the co-chairpersons of membership in encouraging membership renewal.
- vi. Co-Chairpersons of Service – Echelon’s co-chairpersons of service are the liaisons to local Salvation Army service centers and work directly with Salvation Army officers and staff to plan volunteer opportunities for male and female Echelon members. The co-chairpersons of service will plan monthly service opportunities relevant to Salvation Army client needs and wishes and will lead the effort to encourage membership volunteerism.
- vii. Co-Chairpersons of Events – Echelon’s co-chairpersons of events manage all of the organization’s social and networking events. The co-chairpersons of events are responsible for setting annual event calendars, designating various chairs and host committees when necessary, scouting and securing venues, logistical details, etc. The co-chairpersons of events serve as primary contacts for event vendors, caterers, host committees, etc.
- viii. Co-Chairpersons of Membership – Echelon’s co-chairpersons of membership are charged with updating and maintaining an accurate membership database. The co-chairpersons of membership will work closely with the co-chairpersons of communications to encourage membership renewal, while also actively seeking new members. The co-chairperson of membership are responsible for recruiting new members during Echelon social and networking events, demonstrating the utmost knowledge of the organization and membership perks.
- ix. Co-Chaplains – Echelon’s co-chaplains serve as the organization’s spiritual counselors. The co-chaplains will offer encouragement at the start of each Executive 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).
- x. Treasurer – Echelon’s treasurer – one individual, male or female – 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 and holding the organization’s credit card, credit card information, checks and cash, as well as that of members.

- xi. Secretary – Echelon’s secretary – one individual, male or female – 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.
  - xii. Chairperson of Social Media – Echelon’s chairperson of social media – one individual, male or female – will be responsible for maintaining all of Echelon’s social media accounts, including Twitter, Facebook, and Instagram. The chairperson of social media will work closely with the co-chairpersons of public relations and the co-chairperson of communications to ensure social media posts are timely, relevant, and consistent with the board’s communications plan.
  - xiii. Chairperson of Communications – Echelon’s chairperson of communications is responsible for internal communication to the larger Echelon membership. The chairperson of communications will create and disseminate content to membership when deemed necessary by the Executive Board through the organization’s website and will be responsible for communication to the website’s technician for site improvements or technical glitches. The chairperson of communications will create a plan for communicating appropriately and in a timely manner to membership and will seek assistance from the chairperson of social media to supplement messaging when necessary.
  - xiv. Chairperson of Corporate Relations – Echelon’s chairperson of corporate relations 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 chairperson of corporate relations 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.
- b. The Executive Board may alter the descriptions of, add, or remove board positions at any time with a simple majority vote.

## **II. Elections and Terms of Office**

- a. All Echelon members are eligible to serve on the Echelon Executive 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 an Executive Board member position vacancy, members, including Executive Board members, may submit formal nominations to the co-presidents.
  - 1. The outgoing Executive Board member who is seceding their position is strongly encouraged to formally nominate their predecessor.
  - ii. The co-presidents will present nominee(s) to the Executive Board during the next scheduled board meeting and facilitate discussion. Strong consideration will be given to the nominee of the outgoing Executive Board member. Following the Executive Board meeting, the co-presidents and co-executive vice presidents will select the candidate to fulfill the Executive Board member position and inform the Executive Board of their choice.
  - iii. If an Executive Board member wishes to appeal the co-presidents’ and co-executive vice presidents’ candidate selection, they must notify the co-presidents and co-executive vice presidents within 48 hours. At the following Executive Board meeting:
    - 1. A motion to reopen the discussion of nominees may be granted with a simple majority vote; and
    - 2. A 2/3 majority vote will override the choice of the co-presidents.
  - iv. 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-executive vice president of the Executive Board; however, a full term of experience serving the Executive Board through other positions is highly encouraged. The process for filling the positions of co-president and co-executive 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 Executive Board with a simple majority vote.
  - ii. When a newly elected co-president is installed, they have the right to select their co-executive 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-executive vice president.
- c. Executive Board members are strongly encouraged, but not required, to serve at least a full term in their positions.
  - i. A full term is defined as August or early fall to the following May or early summer, or at the conclusion of Echelon's 30M Gala, which is considered Echelon's end-of-year event.
  - ii. The summer months will be considered a break for Echelon activation; however, Executive Board member planning, evaluation, and turnover should take place during this period.
- d. The adding or removing of an Executive Board member position is a matter to be discussed and approved by a simple majority vote by Executive Board members.

### **III. Executive Board Meetings**

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

### **IV. Executive Board Member Behavior**

- a. Members of the Executive Board are to uphold the standards and rules applied to all Echelon members, but to an even higher degree. Executive Board members are to be the most visible and respectable representations of the Echelon organization by:
  - i. Adhering to the all-member bylaws and expectations as outlined above;
  - ii. Demonstrating knowledge and enthusiasm for both the Echelon and The Salvation Army organizations;
  - iii. Pledging to volunteer for a minimum amount of service projects agreed upon by all Executive Board members;
  - iv. Actively engaging and encouraging non-Executive Board members to be the most involved and invested members they can be; and
  - v. Actively seeking non-Echelon members to join the organization and embrace the cause of The Salvation Army.
- b. Any Executive Board member who fails to meet these behavioral expectations is eligible to be dismissed from the Executive Board.

### **V. Association with The Salvation Army**

- a. The Executive Board is responsible for acting as the liaison between Echelon and The Salvation Army. Executive Board members are expected to maintain communication and cooperation with Salvation Army officers and staff members.

- b. The Executive Board will ensure Echelon’s brand standards are maintained, as well as those of The Salvation Army.
- c. The Executive Board must request approval from the appropriate Salvation Army parties before distributing any materials with The Salvation Army/Echelon logos.
  - i. The Salvation Army National Guidelines will be the Executive Board’s primary reference.

**VI. Budget, Expenses, and Funding**

- a. The treasurer of the Executive Board will be expected to provide a budget update at every Executive Board meeting. In the case of his or her absence, the treasurer is responsible for sending a status report to the Executive Board via the co-presidents.
- b. The proposal, approval, and spending of Echelon’s funds should proceed in the following manner:
  - i. An Executive 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 requestor the opportunity to present the proposal to the entire Executive Board.
  - iii. Upon presenting the proposal to the Executive Board, the co-presidents will facilitate discussion and designate the time and manner in which voting amongst Executive Board members will take place.
    - 1. For fund requests exceeding \$500, the vote must take place via an in-person Executive Board meeting.
    - 2. All Executive Board members must cast a vote for fund requests exceeding \$500.
  - iv. 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.
- c. Executive 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. Executive Board members granted a budget will be expected to give regular status reports to both the co-presidents and the treasurer.
- d. 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 that the reimbursement check is being requested for.



**LAUNCHING CHAPTER ON ECHELON WEBSITE**

Once a report has been filed to National Headquarters and the National Advisory Board’s Young Adult Task Force, the final step is launching the new chapter on the Echelon website. National Headquarters will coordinate with the local Salvation Army and Echelon leadership.





## THE FUTURE OF ECHELON

The Echelon Start-Up Strategy is merely a prologue; the real story is when young adults take the mantle of “mobilizing the next generation.” Though at times it is truly hard work, keep in mind, starting and mobilizing an Echelon is also fun. At its heart, Echelon is about creating a community of extremely smart and gifted individuals who passionately care about their community. This community can be The Salvation Army’s best ally, not only for the prospects of today, but for every future generation to come.

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