



Giving
Hope
Today

PRD REPORT

- Background
- Summit Report & Strategic Actions

Submitted to the
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TABLE OF CONTENTS

PRD REPORT

I. PRD BACKGROUND	Page 1
A. 2013 PRD Task Force	Page 1
B. 2013/14 PRD Roundtable Discussions	Page 1
i. Period of Strategy	Page 2
ii. Partnership Definition	Page 2
iii. PRD Vision	Page 2
C. 2014 Leaders' Summit	Page 3
i. PRD Purpose Statements	Page 3
a. Public Relations	Page 3
b. Development	Page 3
c. Emergency Disaster Services	Page 3
II. 2014 PRD SUMMIT REPORT	Page 4
A. Overview	Page 4
B. Public Relations	Page 4
i. Strategic Actions	Page 4
C. Development	Page 5
i. Strategic Actions	Page 5
D. Emergency Disaster Services	Page 7
i. Strategic Actions	Page 8
E. Concluding Remarks	Page 9

PRD REPORT

I. PRD BACKGROUND

A. 2013 PRD Task Force (October 2012 - June 2013)

The Public Relations and Development (PRD) Department has benefitted from a decade of stability which followed a challenging decade of change. Over the past 10+ years, many system improvements and fundamental building blocks were established within the PRD Department. Moving forward, it will be crucial to build upon this foundation, particularly in the highly competitive donor market that we now work within.

In the fall of 2012, the PRD Task Force was commissioned by the Chief Secretary to review and determine the effectiveness of the current public relations and development functions and consider how more can be done by PRD to support the mission of The Salvation Army within the Canada and Bermuda Territory.

Through various conference calls over a year and a half, including a two-day Summit at THQ on May 1-2, 2013, the PRD Task Force realized that this would be an opportunity to enhance partnerships and communication, and strengthen what is already in place rather than tear down and rebuild.

The PRD Task Force engaged as many stakeholders as possible through a survey that was developed by Andrew Grenville and sent to PRD Offices, Corps, Social Centres, Advisory Boards, Vendors and other friends of The Salvation Army. It became clear that the department had transformed over the years, and was now prepared to move forward strategically.

As a result of the PRD Task Force, seven recommendations were developed and later submitted to the Office of the Chief Secretary in the late spring of 2013. The recommendations are summarized as follows:

#1: Period of Strategy

#2: Partnership Definition

#3: Transparency and Accountability

#4: Ethnic Diversity

#5: Revenue Generation Plan

#6: Volunteers

#7: Technology

B. 2013/14 PRD Roundtable Discussions

Following the submission of the PRD Task Force recommendations and in preparation of the PRD Summit in September 2014, DSPRD's began discussing next steps at PRD Roundtable meetings and during monthly conference calls.

From the outset, it was clear that all DSPRD's agreed that it was time to improve communication between DHQ's and THQ with the understanding that we are stronger

together and could accomplish so much more than working individually. We began to share best practices with one another, discuss challenges, and look for new opportunities. Discussions relating to the Task Force recommendations #1 & #2 resulted in a new vision statement for PRD.

i. Period of Strategy (Recommendation #1)

It is the recommendation of the PRD Task Force that The Salvation Army move forward, aggressively and strategically, with a nationally coordinated program within PRD that will increase awareness and raise the necessary funds to support the social services work of The Salvation Army in Canada and Bermuda in this competitive donor market.

Supporting Summary

- Implement a Territorial Public Relations & Development accreditation process that aligns with and supports Imagine Canada's Standards Program.
- Provide Public Relations & Development training to all Divisional Commanders to help them carry out the PRD responsibilities which are included in their current positional descriptions.
- Ensure that the Territorial Public Relations & Development Secretary schedule regular visits and/or video conference calls to all divisions to enhance partnerships.
- Continue to involve the Territorial Public Relations & Development Secretary or designate in the recruitment and hiring process of key PRD staff such as DSPRD, Director of Development, Major Gift and Planned Giving personnel.

ii. Partnership Definition (Recommendation #2)

The PRD Task Force recommends that the THQ PRD Department work with Divisional PRD personnel to develop a clear and consistent policy, or a series of policies, that better identifies the boundaries for working within PRD at all levels of the organization.

Supporting Summary

- Current policies that outline how PRD activities are to be handled across the territory need to be formalized, easily understood and accessible.
- There needs to be some flexibility at the local level to respond to the unique needs of the community, within a nationally coordinated approach.
- Develop policies that form strong partnerships through the sharing of best practices between Divisional PRD offices and Territorial PRD that focus on, but not be limited to, Human Resources, Systems, Fundraising, PR and Donor recognition.
- Determine where final authority rests and create a conflict resolution process.

iii. New PRD Vision (Recommendations 1&2)

Working together, PRD personnel will identify and standardize key elements within the Territory that will increase awareness and raise financial support to further the mission.

C. 2014 Leaders' Summit (September 15-17, 2014)

DHQ Leadership teams from across the Territory gathered in Winnipeg for the annual welcome of Cadets and then participated in a Leaders' Summit from September 15-17, 2014. During the Leaders' Summit, DSPRD's spent time together reviewing the vision statement and the 2013 Task Team recommendations. They discussed PRD as a whole and spent a considerable amount of time discussing the opportunities and challenges within each of the three areas of PRD.

i. PRD Purpose Statements

By the end of the Leaders' Summit, keeping the vision at the fore, three new purpose statements (one for each area of PRD) were created. They would serve as the platform for discussions that would take place during the PRD Summit that immediately followed the Leaders' Summit.

a. Public Relations Purpose Statement

"Through ongoing consultation with all divisions, the public relations team is committed to creating a comprehensive communications and marketing plan that supports our Development and EDS needs, is transparent and accountable, recognizes ethnic diversity, embraces volunteers and maximizes the use of technology in order to raise the profile of The Salvation Army in the Canada and Bermuda Territory."

b. Development Purpose Statement

"Through ongoing consultation, with all divisions, the development team will prepare and implement a consistent, comprehensive fundraising plan that is based on the Communication, Marketing and EDS plans, a plan that is transparent and accountable that recognizes ethnic diversity, embraces volunteers and maximizes the use of technology in order to meet the financial needs of today while building a foundation for a viable and sustainable tomorrow for The Salvation Army in the Canada and Bermuda Territory."

c. Emergency Disaster Services Purpose Statement

"Through ongoing consultation, with all divisions, the EDS leadership team will establish a viable, consistent and comprehensive emergency disaster plan that is based on the Communication, Marketing & Development plans, a plan that is transparent and accountable that recognizes ethnic diversity, embraces volunteers and maximizes the use of technology in order to enhance existing EDS ministry within The Salvation Army Canada and Bermuda Territory."

II. 2014 PRD SUMMIT REPORT (September 17-19, 2014)

A. Overview

For the first time in over 12 years, PRD personnel from across the Territory gathered together. The team met in Winnipeg, MB on September 17-19, 2014 with the goal to share in fellowship, discuss best practises and set forth future courses of action. PRD personnel participated in breakout sessions with their corresponding sections for five sessions over the two and a half day timeframe. All three sections that define PRD (Communications, EDS and Development) were well represented from every division (75 out of over 120 PRD personnel were in attendance).

Basing all discussions on the newly drafted vision of PRD and the three corresponding function statements, the key priority for everyone involved was to develop tangible and measureable strategic action plans for each of the three PRD sections.

B. Public Relations

Based on the new public relations function statement above, the PRD communications & marketing (PR) staff made recommendations during the PRD Summit. The vast majority of the timeframe was spent on discussing our advertising campaign (summer and winter), owned media (websites, social media, annual review, etc.), earned media (the importance of pitching our good news to journalists and key influencers) and crisis communications. The following is a summary of the **eight strategic actions** that resulted from the group discussions.

i. Strategic Actions

a. Launch the “It’s Time to End Poverty in Canada” Campaign

- Campaign to run through to 2015

b. Develop New Campaign for 2016-2018 (20)

- During 2015, we will develop a new campaign for 2016-2018 (20) based on our established fundraising needs.

c. Fully Integrate Our Marketing Approach

- We will work towards a fully integrated marketing approach so that all of our assets and resources remain consistent.

d. Enhance Ongoing Dialogue

- We will dialogue on a regular basis through email, teleconference and, if possible, annual or bi-annual gatherings.

e. Establish Resource Sharing Database

- We will create a resource database for the sharing of our marketing and communications assets.

f. Prioritize Earned Media

- We will make earned media a priority, striving to see more positive news stories about TSA, and utilize new communications tools to facilitate this.

g. Provide Consistent Key Messaging

- When responding to important or challenging issues, we will ensure consistency in our key messaging. When appropriate, THQ will provide support in the crafting of these key messages.

h. Reposition Dignity Project

- We will reposition the Dignity Project to be a youth campaign that will promote brand awareness and encourage volunteerism and social action.

C. Development

Keeping the above items in mind, and building on the development function statement, four discussion groups were established. The following is a summary of the **five strategic actions** that resulted from the group discussions.

i. Strategic Actions

a. Review Donor/Donation Systems

- Establish a single donor database which records up to date information on donor giving in all Salvation Army locations.
- Enhance and standardize donor acknowledgement, recognition and stewardship practices across the Territory through all streams of donation revenue.
- Ensure donor information is properly managed, safely stored, accessed by appropriate personnel and by the donor themselves.
- Donor information must be properly managed, safely stored, accessed by appropriate personnel and by the donor themselves.
- Make use of all existing fundraising channels (e.g. direct mail, digital, mobile, major gifts, planned giving, etc.) that further enhances the ultimate donor experience, which should focus more on the donor than on the needs of the organization. Donor access, interactivity and user satisfaction are the core of this experience.

b. Enhance Resource Sharing Opportunities (i.e. Special Events)

- Set up a Workgroup on Lotus Notes where grant and sponsorship proposals can be added and shared with ease among development staff across the Territory.
- Recognize the value of allowing SE Coordinators to do site visits to other Divisions to experience how they execute their events and to share best practices and ideas.
- Actively engage Advisory Boards in identifying and securing event and program sponsors.
- Provide National Event Planning Software, accessible to all Divisions and provide Raiser's Edge access to event staff.
- Recruit and manage volunteers to support all events.

c. Establish Corporate Strategies & Process

- Hire a national corporate lead to provide proactive support to the Divisions in the following areas:
 - Case for support
 - Consolidation of RE/Shelby records into one system so that PRD is aware of individual and organizational giving in all locations
 - Collaboration among Divisions
- Seek opportunities for ongoing connection with Advisory Board members.
- Clarify the process to be followed for external use of TSA logo; create agreement template.
- Keep national corporate lead updated on what is happening at local level.
- THQ to copy Area Commanders in all e-mails that go to the DSPRD's regarding national partnerships and reporting requirements; define impact/consequences if local MU's do not comply with reporting requirements.
- Implement a prospect clearance protocol at Divisional level, not just at the National level.
- Establish one main constituent record in RE for national organizations and their affiliated regional/local offices.

d. Develop & Launch a Standardized Major Gifts Program

Establish a working group to:

- develop a national case for support template which will provide a framework for information needed to prepare a case for support document for each Division

- review and update the current information available in the THQ Manual section on Lotus Notes and make appropriate sections available to Development staff across the Territory.
- review current statistical information sources and identify areas that need to be enhanced to ensure accurate and meaningful information for inclusion in case for support/case statements
- develop a process flowchart for the actual construction of a case for support/proposal including process for internal approval of funding proposals
- establish a formal prospect research framework and capability which will provide an efficient way for major gift staff at all levels to identify prospective donors/sponsors
- develop guidelines and tools that will support more effective grant proposal writing at all levels.

e. Standardize Legacy/Individual Donor Processes

- Review existing donor development process and recommend enhancements that will provide donors and prospects with the ultimate donor experience.
- Establish a recognition system that will work for everyone – flexibility based on divisional needs but also consistent approach/processes and timely execution of the program.
- THQ to explore feasibility of engaging an external supplier to provide “high tech” support for high volume legacy prospecting to free up local legacy staff for donor engagement/stewardship.
- Hold more frequent national conference calls to review/revise legacy prospecting strategy and results on an on-going basis

D. Emergency Disaster Services

Based on the new emergency disaster services function statement above, the PRD EDS staff brought forth several key recommendations during the PRD Summit. The time spent together was extremely beneficial for EDS personnel. Moving forward, EDS will now be focusing on the **four strategic actions** listed below as they will serve as an ongoing agenda item for future conference calls and will govern our priorities for the foreseeable future.

i. Strategic Actions

a. Standardize EDS Ministry

- EDS leadership to examine present divisional practices for registering and vetting EDS volunteers and edit the current documentation, develop any needed new documentation, check lists and processes that will ensure that volunteers are properly initiated in a consistent way across the territory.

- EDS personnel work towards standardizing EDS uniforms and branding. In consultation with Supplies & Purchasing, continue to develop standard uniform options for EDS personnel in the field.
- Reporting of Disaster responses from across the Territory helps us to tell our story. The EDS working group will review existing documentation for reporting events and our current system of reporting, and will explore and implement ways of telling our story.
- Search out companies that can offer design options and competitive pricing for the manufacturing of new or for the retrofitting of existing older Community Response Units.
- Develop Territorial standards for naming and branding of resources.
- Establish a repository for the sharing of information and resources between Divisional EDS leadership.

b. Develop & Implement Education/Training Strategies - ICS

- EDS leadership to seek out opportunities to engage officers to offer a basic understanding of the Incident Command System and the ministry of EDS.
- For unit leaders, it is recommended that EDS details be included in the farewell brief.
- EDS orientation be a formal part of the yearly schedule of training at the College for Officers Training.
- A cadre of Incident Commanders that are highly trained in the implementation and use of the incident command system be established across the territory. This group should consist of members of the Territorial Crisis Support Team and other individuals from across the territory who have demonstrated leadership skills and competency.
- Policy groups meet twice a year to be determined by Division to review current status and readiness.

c. Review Funding Models

- Establish a working group to explore our present funding model and further explore the possibility of having EDS funded through THQ Public Relations.

d. Evaluate Disaster Response Process

- The Territorial EDS Director and Divisional leadership examine the present process for approving the deployment of personnel across Divisional jurisdictions with the purpose of streamlining that process.
- The Territorial EDS Director and the TPRDS to work with the Territorial Secretary for Personnel to streamline the process at the Territorial level.

E. Concluding Remarks

Determining the success of a venture such as the PRD Summit is often very difficult, as various people will look at this from varying perspectives. From my perspective, the “success” of an event stems back to the desired outcomes that were first put forth.

In this case, specifically THQ PRD and the DSPRD’s wanted to develop strategic actions for the Public Relations, Development and EDS sections based on the vision statement and the three corresponding function statements. Furthermore, we wanted to encourage our PRD teams to use the time for networking, fresh ideas, and sharing best practices. More importantly, we viewed this as an opportunity to unite as a team with a strong desire to do better in all areas of our PRD responsibilities.

While we still have work to do, we are on the right track in PRD – at THQ and across the Territory. Since the conclusion of the Summit, the prevailing question has been, “Can we do this again next year in 2016”. Was the event worth it? Our PRD team at THQ and across the country respond with an astounding, YES!

On behalf of the Canada & Bermuda PRD team, I respectfully submit this PRD Report complete with background information, the Summit report and the strategic actions that were developed. From this, we have been developing specific action plans for each of the three areas with PRD and discuss them on a weekly basis within THQ PRD and on a monthly, ongoing basis, with DSPRD’s during audio/video conference calls.