

ROYAL CANADIAN LEGION

STRATEGIC PLAN – 2018 - 2026

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Strategic planning will help you fully uncover your available options, set priorities for them, and define the methods to achieve them.

Robert J. Mckain¹

1. Introduction

The Going Forward Committee developed this Strategic Plan for the Royal Canadian Legion that will provide an operating and growth plan for the period 2018 – 2026, the Centenary of the Legion.

2. Background/History/Governance

The Legion has operated as Canada's largest veteran and community support organization since its inception in 1926. The Legion was formed during a consultative process with various veterans' organizations following the cessation of hostilities of the First World War. Its formation created a viable independent advocacy agency to the government to ensure that veterans and their families receive the care and support needed following their service to the country.

Since its inception, the Legion continues to support Canada's Veterans and communities. Volunteerism forms the basis of the organization and Legion members give freely of their time to assist Veterans and the members of their community and youth. Any member of the Canadian public can become a member of the Legion.

An Act of Incorporation and a set of General By-Laws govern the Legion. Governance follows the democratic model where officers are elected to their positions at all levels of the organization. The national convention is the overriding governance body of the Legion with day-to-day activities managed by a council comprised of national, provincial and appointed officers. A national staff supports the Council.

¹ <http://www.quoteland.com/author/Robert-J-Mckain-Quotes/6434/>

3. Organizational Tenets

The Legion is founded on the tenets of service and camaraderie. Not only is service to the country and community important, the main tenet is altruistic: service above self or selfless service on behalf of others.

Comradery is a natural state created through service and common cause. It is the spirit of friendship and community in a group. In the military sense, comradery is enhanced through mutual trust, experience and confidence.

Members sought out the Legion for both of these tenets.

a. Vision Statement

Our Vision Statement serves as a long-term and aspirational goal for the organization. The Focus on the Future Committee presented to the 2012 Dominion Convention the following vision statement for the Legion that was accepted:

“Our vision is to be the most highly respected Veteran and Community Service organization.”

b. Mission Statement

The mission of the Legion has remained relatively unchanged since the inception of the organization. However, in recognizing the RCMP as Canada’s national police force with military origins, at the same convention in 2012, an updated and expanded statement to be more definitive of our core purpose was presented and accepted:

“To serve Veterans, which includes serving military and RCMP members and their families, to promote remembrance and to serve our communities and our country.”

The Mission and Vision Statements go hand in hand and should always be used together.

c. Core Values

Core values are what support the vision, shape the culture and reflect what the organization values. They are the essence of the organization's identity – the principles, beliefs or philosophy of values.² Again, in 2012, the Focus on the Future Committee presented core values to the convention and those values are:

- **SERVICE** – We provide dedicated support and compassionate assistance.
- **INTEGRITY** – We behave ethically and in a manner which inspires trust, mutual understanding and confidence.
- **RESPECT** – We are supportive, inclusive, courteous and fair to all, honouring the dignity and worth of every person.
- **LOYALTY** – We are steadfast in our patriotic allegiance to the Sovereign, to our Country, to The Royal Canadian Legion and to our Comrades.
- **TEAMWORK** – We cooperate and work together selflessly, in Comradeship, to achieve our shared Mission.

d. Brand Positioning

The brand positioning statement aims to summarize how the organization is different from comparable organizations, and how it provides a unique service or experience to its audiences. The positioning statement should be aspirational, but realistic – it should describe what the brand can and should be

Recommended Positioning Statement:

To Canadians, The Royal Canadian Legion is the foremost national organization that honours military service, promotes remembrance and provides valuable support and services to military and RCMP Veterans, their families and communities.

² <https://7geese.com/benefits-of-having-core-values-and-how-to-set-them-in-your-organization/>

4. SWOT Analysis

The Organizational and Operational Services Review by Strategy Corps conducted a Strength, Weaknesses, Opportunities and Threats (SWOT) analysis and presented this to the Council in November 2017. The results of that analysis are attached as Annex A.

In analyzing the SWOT, the following themes become apparent:

- i. Membership/Demographics.
- ii. Governance.
- iii. Infrastructure.
- iv. Communications/Marketing.
- v. Culture.
- vi. Recognition/Value Proposition.

These themes will now be examined in detail as part of the Legion's major goals.

5. Major Goals

- a. **Specific Objective 1. Membership/Demographics.** As stated in the Operational Services Review: “No tactics big enough to address membership.” The Legion’s membership categories, profile and demographics have evolved over time to permit a wider audience access to membership. That said, current demographics profile an older membership base versus a younger one. This will drive the need to attract and retain a different profile. As well, over the years, various membership policies and processes have created barriers to effective recruitment, retention and renewal that have yet to be addressed. An example is that some of our current members do not understand the criteria for membership and are overburdened as volunteers when having to administer the process. There are currently no membership plans to deal with the three R’s: Recruitment, Retention and Renewal. Recently initial strides have been made at changing the membership processing administration from a reactive business model to a proactive business model. The use of technology is a key driver. As this transformation continues, the business model will permit more direct contact to Legion members versus using intermediary contact. This will enable the member to have a more direct influence in the membership experience and process. In addition, the new model also permits better communications, monitoring and measurement.

MEMBERSHIP NEEDS TO BE A PRIME STRATEGY AND FOCUS OF EFFORT!

Strategy	Action Step	Person/s	Year	Completion	Evaluation
Membership General	<ol style="list-style-type: none"> 1. Review membership categories. 2. Review membership intake/welcoming process. 3. Propose changes to address issues. 	<ul style="list-style-type: none"> • Membership Committee • National and Provincial Commands • Branches • Members 	continuous	continuous	
Membership Plan	<ol style="list-style-type: none"> 1. Develop a recruitment plan. 2. Develop a retention plan. 	<ul style="list-style-type: none"> • Membership Committee • Marketing and Communications 	2018/2019	2019 and beyond for constant review	<ul style="list-style-type: none"> • Prime marker is the cessation of membership

Strategy	Action Step	Person/s	Year	Completion	Evaluation
	3. Develop a renewal plan. 4. Need to secure buy in from Commands and Branches. 5. Develop marketing and communications tools.	<ul style="list-style-type: none"> Membership Services DEC Provincial Commands Branches 			losses and potential growth. <ul style="list-style-type: none"> Need to develop membership targets and goals by region.
Membership Processing	1. Continue with modernization process capitalizing on technology and access to members. 2. Continue developing membership statistics and metrics.	<ul style="list-style-type: none"> Member Services Commands Branches Members 	2018-2026	Continuous	

i. Resources needed

- Leadership and the will to advance
- Current manuals and processes
- Membership Committee
- National and provincial levels of authority
- Branch engagement
- Member engagement
- Communications and marketing assistance

b. Specific Objective 2. Governance. The aim of this objective is to enhance and better understand the governance model of the Legion as well as the role of elected officials and staff. The last review of the governance for the Legion resulted in a reduction of representation at the National level. The question now becomes: is the current governance model relevant for today's operation? Do all parties including elected officers and staff understand their roles and responsibilities and what is the best board engagement model? Finally, the current committee structure in comparison to similar organizations notes that the Legion has an abundance of committees. Is this necessary and can it be reduced?

Strategy	Action Step	Person/s	Year	Completion	Evaluation
Act of Incorporation and GBLs	<ol style="list-style-type: none"> 1. Review GBLs for consistency with Act 2. Increased awareness of governing tenets. 3. Propose changes as needed. 	<ul style="list-style-type: none"> • DEC • C&L Committee • Convention 	2018-2019	By 2020 ratified at convention	Continuous monitoring and review required
Roles of Elected Officers and Staff	<ol style="list-style-type: none"> 1. Review current board operating model. 2. Review TORs for SEOs and senior staff. 3. Focus of board – reporting or strategic? 4. How to effectively manage elected officer turn over. 	<ul style="list-style-type: none"> • DEC • SEOs • Provincial Presidents • Senior staff at national and provincial levels 	2018/2019	By end of 2019	Education and application required with monitoring

Committee Structure	<ol style="list-style-type: none"> 1. Review and align committee structure to need, 2. Review meeting policy and impact of technology. 3. Review programming to ensure meets mission statement. 	<ul style="list-style-type: none"> • Dominion President • SEOs and Committee Chairs • Staff 	2018	In place by Aug 2018	2019 take to convention 2020
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i. Resources needed

- Current governing manuals of the Legion
- Active engagement of Legion leadership and senior staff at both national and provincial level
- Active engagement of the C&L Committee
- Consultative process with all levels of the Legion

c. Specific Objective 3. Infrastructure. Canada has over 5100 municipalities (2016), 3500 Tim Hortons (2013), 1400 McDonald's (2014) and over 1400 Legion branches (2018). Legion infrastructure has developed since our creation in 1926. The majority of Legion branches were built in a different membership heyday and today's branches have difficulty in keeping up with maintenance and overhead. Branches are located in rural areas and urban centres. The value of real estate holdings across the country varies but cumulatively it is high. Unfortunately, in most cases Legion branches have not kept pace with modernization or urban renewal and many are now located away from where populations chose to live. In addition, in some areas there are many branches serving a smaller population base which could be better served by an amalgamation of branches. The number of branches and their locations also gives rise to the potential of redeveloping the property into more useable and functional space not only by the branch but also for the good of the general public.

Deloitte provided an unsolicited brief concerning property review and optimization which comes with a management and analysis platform to assist ongoing management. Branch autonomy and acceptance of this sort of system is a factor to be considered.

Strategy	Action Step	Person/s	Year	Completion	Evaluation
Branch Sustainment	<ol style="list-style-type: none"> 1. Determine willingness for renewal. Location dependent. 2. Review GBLS to expedite process. 	<ul style="list-style-type: none"> • Need to form a development committee to commence researching and production of advice. • Need for all leadership to encourage and support. • Need for command presidents to provide appropriate direction to branches. 	Ongoing	continuous	
Sustainment Opportunities	<ol style="list-style-type: none"> 1. Devise a development plan/checklist. 2. Review existing command policies. 3. Investigate development possibilities via partnerships. 4. Modernization of branches is essential to meet local needs. 5. Engage local communities 6. Actively promote redevelopment of branches. 	<ul style="list-style-type: none"> • Need to develop a capability to provide advice and knowledge. • Need to have entire Legion leadership supporting. • Need to have branch willingness to participate. 	Ongoing	continuous	

i. Resources needed

- Leadership engagement at all levels
- Outside expertise and advice

d. Specific Objective 4. Communications/Marketing. Communications and marketing are key factors at all levels of the Legion to ensure that the general public is aware of the capabilities and support provided by the Legion and our members to national and local events. This will enhance public awareness and understanding of the Legion. It also greatly assists in developing strategic partnerships with other similar organizations and others who support the same principles as the Legion.

Strategy	Action Step	Person/s	Year	Completion	Evaluation
Implementation of a marketing plan.	<ol style="list-style-type: none"> 1. Marketing plan currently exists to 2022. 2. Current plan focus is membership. 3. Expand focus to all Legion programs as supporting plans. 4. Need for review and tweaking as necessary. 5. Exploit technology. 	<ul style="list-style-type: none"> • DEC approval granted. • Committee Chairs • Provincial commands support for plans • Marketing and Communications 	Ongoing	Ongoing	<ul style="list-style-type: none"> • Outreach metrics • Reduction in membership losses
Implementation of a communications plan	<ol style="list-style-type: none"> 1. Communications strategy exists 2. Need to develop supporting plans for each activity. 3. Need to promulgate to all levels. 4. Need to provide useful tools for all levels. 5. Exploit technology 	<ul style="list-style-type: none"> • DEC approval and support by commands • PR Committee engagement • Branch and member awareness 	ongoing	ongoing	

i. Resources needed:

- Current marketing plan
- Active engagement by Marketing and Communications
- Active engagement by PR Committee
- Approval and support of commands
- Branch and member awareness

e. Specific Objective 5. Culture. There are many reports of a non-welcoming environment when guests arrive at a Legion. In addition, in some cases, Veterans have been turned away from joining and/or participating in Legion sponsored events. There are also reports of anti-social behaviour by some branches and their members. Situations such as these do not serve to portray the Legion as a veteran and community support organization but rather as a closed, non-accepting private club. This does not serve to promote the Legion as an open and welcoming place.

Much of this cultural environment has been built up over the years and no longer serves any specific or perceived purpose. As well, many small towns do not have a demographic of Veterans among their population which can create an uncomfortable environment and mistrust. Cultural change in any organization is one of the most difficult objectives to obtain but is needed within the Legion.

Strategy	Action Step	Person/s	Year	Completion	Evaluation
Fostering Legion core values.	<ol style="list-style-type: none"> 1. Education of Legion core values. 2. DEC acknowledgement and support that change is necessary. 3. Provincial command actions issues. 4. Branch and member support 	<ul style="list-style-type: none"> • DEC • Provincial commands • Branches • Members • All staff at all levels 	Ongoing	Ongoing	<ul style="list-style-type: none"> • Complaints actioned quickly • No more complaints

Strategy	Action Step	Person/s	Year	Completion	Evaluation
Promote a Welcoming Environment (Culture)	<ol style="list-style-type: none"> 1. Membership Committee Hospitality Program 2. Legion wide promotion, acceptance and implementation 3. Continued monitoring and action as necessary. 4. Develop a policy to respond to complaints within a given time period, ie, 72 hours. 	<ul style="list-style-type: none"> • Same as above • Membership Committee 	2018/2019	ongoing	

i. Resources needed:

- Hospitality Program
- Leadership
- Communications to all

f. Specific Objective 6. Recognition/Value Proposition. There are two aspects to this objective. The first is to ensure that the product we provide is recognized as having value. That product comes in the form of services that meet our Mission Statement as well as services that we provide from each level of authority in the Legion and most definitely services that are provided at the branch as this is where the brand meets the general public. If the branch does not provide anything of value, then why does it exist?

The second aspect of this objective relates to how we recognized those who serve not only within the Legion but also those who serve our Country, the Veterans. Recognizing service provides validation and encourages people to participate.

Strategy	Action Step	Person/s	Year	Completion	Evaluation
Increase value proposition	<ol style="list-style-type: none"> 1. Cumulative effect of branch modernization and culture. 2. Ensure product meets Mission Statement and Core Values. 3. Meeting members needs 	<ul style="list-style-type: none"> • All leadership levels of the Legion • Branch acceptance is critical 	2018-2019	2019	
Recognition	<ol style="list-style-type: none"> 1. Enhance current programs to recognize Veterans. 2. Enhance current programs to recognize volunteers. 	<ul style="list-style-type: none"> • All leadership levels of the Legion. • PR Committee • R&A Committee • Marketing and Communications 			

- i. Resources needed:
- Current Honours and Awards System of the Legion

6. Evaluation/Conclusion

This Strategic Plan has addressed many issues that have been raised by the Focus on the Future Committee, the Organizational and Operational Services Review and the many discussions that have taken place with senior leaders of the Legion.

In basic terms, each objective is a marker that further assists the Legion in this transformative period. There is no need to retire old customs but there is a need to renew and modernize current practices. So, what does success look like?

- The Legion will continue to meet its Mission Statement, practice its Core Values and realize its Vision.
- The Legion will modernize and provide services that meet the needs of its communities. Those needs will necessarily vary from location to location but basic tenets of the Mission will be met.
- Legion membership will stabilize and grow as other Canadians see the value in belonging and giving back to those who serve and to their communities.
- Legion branches, the mainstay of the organization, will welcome newcomers and will engage their communities. Private clubs are no longer welcome.
- Legion influence in the Country will grow and be respected due to a cohesive leadership and common purpose.
- Legionnaires will be recognized for their service to Veterans and their communities.

Creating a new operating environment is not an easy task. No longer can the Legion operate as it always has in the past. Modernization and cultural transformation is key to attracting new members who believe in and support the Legion Mission.

“The difference is that was then, this is now.”

— [S.E. Hinton, *That Was Then, This Is Now*](#)³

“All you need is the plan, the road map, and the courage to press on to your destination.” Earl Nightingale⁴

³ <https://www.goodreads.com/work/quotes/3200846-that-was-then-this-is-now>

⁴ https://www.brainyquote.com/quotes/earl_nightingale_159044

SWOT Analysis

The Organizational and Operational Services Review completed by Strategy Corps conducted a Strength, Weaknesses, Opportunities and Threats (SWOT) analysis and presented this to the Council in November 2017.

b. Strengths

- Providing services to veterans (priority of mission statement)
- Legion and Poppy as a recognizable National brand
- National footprint
- Strong policy provides framework for a national organization
- Volunteerism
- Proven success in generating revenue through merchandizing
- Staff commitment and leadership
- Proven success at doing better with less
- Improved marketing and centralized membership processing
- Autonomy

c. Weaknesses

- Lack of an overall strategic plan
- Ability to address the membership issue and aging demographic
- Insufficient internal communication hurts confidence and execution of new strategies and change management exercises
- Insufficient external communications to Canadian public
- Elected officer turn over cycle impacting consistency in leadership required to navigate change
- Fewer in person meeting, erodes relationships
- Elected officer vs staff governance confusion
- Bottom up decision making
- Ability to focus on the greater issues versus those of a minor nature
- Cultural resistance to change
- Infrastructure
- Funding model based on membership
- Culture of autonomous operations
- Too many committees

d. Opportunities

- Veterans issues salient again – Afghanistan Veterans
- Public sympathy for OSI and Veterans
- Seek new opportunities to partner – government and other associations
- Build strength and momentum via cooperation with other organizations
- Reposition/frame Legion as a broader service club, i.e., supporting our communities
- Partner to refresh branches/co-brand
- Increased use of technology for information and administration

e. Threats

- Public does not know or understand the Legion, who can be a member?
Still not known internally as well.
- Internal culture and outdated infrastructure can be a deterrent
- Transparency issues via media
- Lower membership reduces footprint and influence
- Aging membership/demographics
- Emergence of other competitors and service delivery providers
- Competition from other community organizations