

Module 3

Branch Management



CONTENT OUTLINE

MODULE NAME	Branch Management
MODULE CHAPTERS	Learning Branch Responsibilities Effective Goal Setting Human Resource Management Staff Management Recruitment and Retention Business Administration Management / How to Run a Branch / Administration Finances Bookkeeping Ways and Means Crisis Management Understanding By-Laws
MODULE AUDIENCE	<p>This module is essential for members to become familiar with the operational and administrative procedures to ensure the success running of a Branch. It provides Branch Officers and those aspiring to assume these positions with information to permit them to become proficient in their leadership roles.</p> <p>Further, members with the responsibility of managing personnel resources, both paid staff as well as volunteers, will gain valuable insight through this module.</p>
MODULE DESCRIPTION	<p>The focus of this module is branch management and administration, with a particular emphasis placed on finances and developing a financial plan to prevent financial irregularities, mismanagement and unnecessary major expenditures.</p> <p>Human resources play an important role in the delivery of services and attaining the goals of the Royal Canadian Legion. In addition to a workforce of paid employees, volunteers comprise a significant component of a branch's staff. Important to the successful oversight and management of personnel are learning how to recruit, train, manage and retain all staff.</p> <p>Detail is also provided on crisis management, the process of identifying, analyzing, assessing and controlling the risk that may affect the operations of a branch. This process determines how to handle a current incident that may have a negative impact on part or on the whole branch. Much reference will be made to The General By-Laws and their interpretation.</p>

**DURATION OF
MODULE REVIEW**

Members can anticipate taking 2 hours to review all course material. The material will remain a source for future reference.

**LEARNING
OUTCOMES**

Members completing the module will gain a general understanding of how to run a branch and will be positioned to undertake management and administrative leadership roles. Members will also be able to undertake responsibility for branch human resources.

ROYAL CANADIAN LEGION DOMINION COMMAND LEADERSHIP DEVELOPMENT PROGRAM MODULE 3

LEARNING BRANCH RESPONSIBILITIES

INTRODUCTION

Membership in the Royal Canadian Legion is not a right. It is earned by having served the Crown, by being a family member or relative of someone who has served or by supporting the Purposes and Objects of The Royal Canadian Legion.

Simply paying your Branch membership dues is only a fraction of the total responsibilities you have towards your Branch and the Royal Canadian Legion as a whole.

When a person first joins The Royal Canadian Legion they are initiated which includes among other things, the person swearing an oath to uphold the purposes and objects of the Royal Canadian Legion and that they will actively participate in the annual Poppy Campaign. A complete list of the Purposes and Objects can be found in the first section of The General Bylaws of Dominion Command.

Ideally when a person is initiated into the Royal Canadian Legion, the Branch would have a mentor program in place, where a knowledgeable member is paired with the new member. The mentor would then accompany the new member to general meetings and Branch functions explaining how each functions and how they all relate back to the general meeting and or the executive meetings. The mentor will also be available to answer the new member's questions and get them actively involved in one of our many programs.

Sometimes we learn by doing. This is an effective way if there is someone experienced shadowing the person, explaining each step and showing where further information on the subject can be obtained. Conversely to assign someone to a task or as a chairman who has no experience and does not know their roles and responsibilities is an invitation to failure. Not only for the Branch but for the individual as well, perhaps to the point where that person would never accept another committee chairmanship.

There are a number of excellent Legion publications relating to how the Legion as a whole functions. Many are available as part of this Dominion Leadership Development Program. The initial publications to be learned are the General Bylaws and applicable Provincial Bylaws and individual Branch Bylaws/Regulations.

Opportunities to learn Branch responsibilities are presented in many venues:

- The Branch Leadership chairman may give a small 15 minute presentation to the general meeting at regular intervals.
- Zone and/or District (administrative arms of Provincial Command) hold workshops and invite subject matter experts to speak on various subjects.
- Dominion Command and Provincial Command issue information circulars which are posted on the Branch bulletin board as well as on the individual websites.

- Individual Commands may provide some training in person or on line.
- Individual Command websites are a well of information.

Branch Executive Officers and members have a responsibility to attend Zone and/or District workshops and conventions/rallies to ensure they are up to date on Legion affairs. As well the Branch President may be automatically a member of Zone and/or District Councils and as such are obligated to attend Zone and/or District Conventions/Rallies.

Committee chairmen have a responsibility to ensure various deadlines and standard objectives are met and to give a report on the affairs of the committee at the Executive and General meetings. Branch chairmen may also be required to submit copies of their committee reports to their Zone/District counterparts.

Branches should ensure that they have delegates sent to Provincial and Dominion Convention to input to the proceedings of that convention which shape the future of the entire organization. If a delegate(s) cannot be sent then the Branch should ensure their allotted credentials are given to another member as a proxy vote. This however does not relieve the Branch of the responsibility of learning the results of the convention.

In conclusion there is always something to learn about the Legion, no matter if you are a new member or someone with multiple years of service. If you are a new member tap into that wealth of available knowledge and experience and if you are an older experienced member share that knowledge before it is lost.

Enjoy your Legion experience.

LONG-TERM PLANNING - HOW TO DEVELOP AND MAINTAIN S.M.A.R.T. GOALS

SPECIFIC

First, this section describes the need for a specific goal rather than a more general one. The goal must be clear. To make goals specific, they must tell an individual or team exactly what's expected, why it's important, who's involved, where it's going to happen and which attributes are important.

A specific goal will usually answer the five 'W' questions:

What: What do I want to accomplish?

Why: Specific reasons, purpose or benefits of accomplishing the goal.

Who: Who is involved?

Where: Identify a location.

Which: Identify requirements and constraints.

MEASURABLE

Second is the need for a method for measuring progress toward achieving the goal. If a goal is not measurable it is not possible to know whether an individual or team is making progress toward successful completion. Measuring progress is supposed to help an individual or team stay on track, reach its target dates and that experience of achievement will lead to the continued effort required to reach the goal.

A measurable goal will usually answer questions such as:

- How much?
- How many?
- How will I know when it is accomplished?

Indicators should be quantifiable.

ACHIEVABLE

Thirdly, goals must be realistic and attainable. An attainable goal may stretch a team or individual in order to achieve it, but the goal must not be extreme. That is, the goals are neither out of reach nor below standard performance, since that would be meaningless. When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities and skills to reach them.

An Achievable goal will usually answer the question:

How: How can the goal be accomplished?

RELEVANT

Fourth, choosing goals that matter is important. An accountant's goal to "Make 50 ham and cheese sandwiches by 11am" may be specific, measurable, attainable and time-bound but lacks relevance. Many times you will need support to accomplish a goal: resources, a mentor or leader's support, someone to knock down obstacles. Goals that are relevant to you, your team, your committee, or your branch will receive that needed support.

Relevant goals, when met, drive the individual, team, committee and branch forward. A goal that supports or is in alignment with other goals would be considered a relevant goal.

A relevant goal can answer yes to these questions:

- Does this seem worthwhile?
- Is this the right time?
- Does this match our other efforts/needs?
- Are you the right person?

TIME-BOUND

Lastly, goals must have an identified time-frame, giving them a target date. A commitment to a deadline helps an individual or team focus their efforts on

completion of the goal on or before the due date. This part of the SMART goal criteria is intended to prevent goals from being overtaken by the day-to-day crises that invariably arise.

A time-bound goal will usually answer the question:

- When?
- What can I do six months from now?
- What can I do six weeks from now?
- What can I do today?

HUMAN RESOURCE MANAGEMENT IN THE ROYAL CANADIAN LEGION

INTRODUCTION

Human resources play an important role in the delivery of services and attaining the goals of the Royal Canadian Legion.

This workforce includes not only paid employees, but volunteers who comprise a significant component of the workforce. It can be argued that the management of people-based resources is at its core, the same regardless of whether the people involved are paid or unpaid.

The oversight and management of staff is an important and well-recognized issue among Legions.

Educational programs to teach Legion administrators about volunteer and paid staff management should include ways to recruit, train, manage and retain all staff including volunteers.

SALARIED OR PAID STAFF

Salaried or Paid staff can include anyone from the secretary manager, to the cleaning staff. This staffing component is comprised of individuals who provide assistance to an organization's ongoing functions.

Because a branch or command is paying these individuals it can expect them to meet a certain standard of performance and more control can be exerted with careful supervision. The employer has particular legal obligations to its employees that need to be in place to protect both staff and the Legion as a result of this relationship.

Paid staff motivation is often quite different than that of a volunteer, and therefore financial compensation may be a priority

that needs to be put at the top of the list when it comes to budget time. Yes, your staff is dedicated, but no one can live on a sense of fulfillment and self-worth. It takes cash to pay the rent and it takes time to care for a family and home. Your staff work hard for you, and deserve your respect and support.

VOLUNTEERS

Whether they are frontline fundraising volunteers or sit on a committee or on an executive board, volunteers are an integral part of the Royal Canadian Legion. The motivation of volunteers and the rewards that they receive for their volunteerism is important for effective recruitment and retention in an organization such as ours.

The majority who apply to volunteer through the Legion, are looking to gain skills through our programs or help contribute towards them. It is sometimes difficult to find someone with a solid skill set willing to contribute those skills and experience as a volunteer.

It takes all kinds of people to make a Legion run effectively, and a good HR manager will welcome them all.

VOLUNTEERS AND PAID STAFF WORKING TOGETHER

First, we need to consider how staff and volunteers interact. There needs to be an organizational commitment to the value of volunteers that starts from the top down, and many legion branches have found practical ways to promote positive relations between the paid staff and the volunteer staff.

It is not uncommon for there to be internal resistance when it comes to involving volunteers. Inappropriate volunteer roles or poor working relations between paid and volunteer staff need to be resolved before a good working relationship can be established.

Remember, volunteering is something people do because they want to, and not for financial reward. They will want their contribution to be clearly defined and valued and they will need support.

When we talk about workplaces such as the Legions that work well, acknowledging concerns of paid staff is an important first step in promoting positive relationships with volunteers.

Before any progress can be made, these concerns need to be acknowledged. Questions like, will a volunteer replace me in my job or, it is easier to do it myself than train or involve a volunteer? These sorts of concerns must be addressed before a good relationship can be built.

There are a number of steps that will help build a strong foundation for paid and volunteer staff relationships.

Because of the finite number of paid jobs in our organization, we must seek workers who best match the qualifications and requirements of each job. Education, experience, and being available when we are open for operation all matter a great deal. The result is a relatively homogenous workforce with a core of consistency in approach. The result will be a branch that is better able to meet the needs of its veterans, members and community.

RECRUITMENT

The heart of any Legion will always be its people. So recruiting knowledgeable and competent volunteer and paid staff is the best way to be successful and ensure we fulfill our mandate. It's important to know

how to recruit paid staff in a time-efficient and economical way that will ensure that you find the right employees to work with.

The cost of unnecessary hiring and/or hiring the wrong person can be detrimental to a branch's success. Therefore, before engaging in the recruitment process, directors should clearly understand the operational requirements of the branch and its mandate, and then determine the types of skills and competencies required to meet those needs.

Hiring new employees is not always the answer to our staffing needs. Before proceeding to the process of recruiting paid staff, consider the following questions for meeting your branch's needs:

- When an employee leaves, can certain tasks be eliminated, outsourced or partially taken over by volunteers to help reduce the need to recruit more paid staff?
- Can we train current staff to look after this workload?
- Can a part time or temporary staff member now look after the workload?
- Can we make the position a voluntary one and use volunteer staff to fill its requirements?

After these things have been taken into consideration and before the decision to hire paid staff is taken we should look at the recruitment/hiring process.

RECRUITING PAID STAFF

Develop a job outline prior to recruiting. Outline the position being filled including time requirements, job duties, required education or credentials, and any other requirements or requests that an ideal candidate should have.

This will help you present a clear vision to potential candidates.

Consider hiring internally.

Always begin your recruiting in-house. Employees already working for you will have a valuable knowledge of the organization and you have the knowledge of their past work achievements to help determine if they're right for the job.

Establish a mentorship program.

People whom have worked for or with the person being replaced are more familiar with the job and workload. Mentors avail themselves as experienced friends or comrades who are there to help in any number of situations.

Give yourself as much time as possible.

It's important to take your time when making staffing decisions to ensure that you choose the best candidate for the job. Leave a window of opportunity to reflect on potential candidates instead of rushing to make a hasty decision.

Ask for recommendations from colleagues.

Other branches or commands will likely have recommendations for potential recruits. Ask around to comrades whose opinions you trust for any recommendations of people that might fit the job requirements.

Highlight the benefits.

Enhance any perks or benefits to the job when recruiting, including health insurance, vacation options, and pay raise options. Making the job look as good as possible will increase the enthusiasm of candidates.

Offer more than anyone else.

Offer slightly above the average pay for the position. You can also state that you are willing to negotiate. Not everyone is, so this will add to your appeal.

Recruit diversely.

Open the job to a wide variety of candidates. Improving diversity when you recruit staff will enhance your branch and give you more

opportunities to find great new staff.

Post job offers on job boards when possible.

Use job search sites to recruit staff by posting the job description and checking it often. Many job seekers only search new postings that are less than a week old to save time. Posting more than once will make sure your posting get read.

Check references.

One of the best ways to recruit staff that will meet the needs of your branch is by finding out about their work ethic from past employers. Take the time to call some of the references provided in their resume and ask about work performance, strengths and weaknesses, and reliability. This will give you a better idea of whether the recruit is right for your organization.

RECRUITING VOLUNTEERS

Do we want engaged members (volunteers) rather than simply numbers?

When an organization relies on paid staff to recruit members the motivation is simply getting numbers. What comes with those numbers is high-quantity drop-off. This is because there has been a minimal effort to integrate new members.

Conversely, when an active member recruits a new member, the likelihood of that member helping the new member to integrate into the organization is very high. Active members should recruit at least one new member a year.

This is a very manageable objective and it is likely that the member that did the recruiting will help their new colleague to integrate into the organization by inviting them to the coming meetings, as well as taking them around, and introducing them to other members.

The Dominion Command Mentors Program may be of assistance in getting new members involved.

When looking to recruit new volunteers, start with not only the membership but, those within the community served by your branch. Building strong partnerships within the community your branch serves, as well as the geographic location in which it operates, can be helpful for recruiting new members who may become volunteers.

Some legions find success by creating strong relationships with like-minded organizations. Reach out to members, partners, and other groups that are in direct communication with your organization. From there, members and partners may spread the word to new people who may also be interested in getting involved.

This network of similar groups can then support each other in providing the best services to those in need. Local community members can be a fantastic resource for recruiting skilled volunteers and members, so don't be afraid to reach out to them.

If we are looking to recruit new members that will be actively engaged in our organization as volunteers, we should have the membership recruiting new volunteers and have the support staff engaged in the retention process. Having our members and volunteers sell the idea of membership to their colleagues and friends and then having the professional paid staff do the follow up and answer any additional questions, will help ensure everyone's active participation in this process.

For many branches, a website is the first point of contact about the services we provide. Be sure to include information about volunteer opportunities in a prominent spot on your site. Include short descriptions of positions and an overview of the membership process, as well as online application forms and clear contact information. Use blogging or social media sites, such as Facebook or Twitter, to increase your branch's online presence.

MANAGEMENT

Good HR managers and Legion leaders are able to assess the needs of the organization and have good time management skills. They generally have an ability to match a person to a task. They should be a good listener and have good communication skills in order to build relationships among the staff.

Their job is primarily that of a trainer, delegator, and motivator as they work towards meeting the Legions goals and mission. This ability to keep volunteers and paid staff satisfied and motivated is a daunting challenge.

The accomplishments of your staff are your accomplishments. The staffs' successes become everyone's successes. The more your team of staff accomplishes toward our organization's mission, the better we have done our job.

Some basic guidelines to ensure that your staff has confidence in the management of the organization are:

- Ensure that all staff and volunteer positions have written job descriptions.
- Develop a clear personnel policy and ensure that staff evaluations are performed as required by the policy.
- Be sure that suitable screening measures are in place for those staff and volunteer positions that involve interaction with the public, or in positions of trust.
- Become familiar with the organization's insurance policies and ensure they have acceptable scope of coverage including all liability issues.
- Support professional development and training for staff and volunteers.
- Offer executive members training and education
- Develop and update all member and staff orientation and reference materials.

In most legions, all staff have contact with the membership, and therefore it is important that all staff have some level of training about how to effectively involve volunteers.

RETENTION

Substantial attention needs to be devoted to retention of paid and volunteer staff in our organization. Your building and facilities are not the heart and soul of your organization. In fact, your staff and volunteers are the most precious asset you have. When trained, experienced people walk out the door, you lose your substantial investment in making them part of your organization.

Staff retention should be a main component of our human resource management plan. Long-term paid and volunteer staff provide consistency, ensuring a clear direction toward a common goal and continued momentum over time.

Having long-term staff also establishes a strong point of contact for anyone who needs to access our services and for people looking to become volunteers or paid staff themselves. Both Paid and volunteer staff, no matter how much they care, can burn out if they're exhausted, overwhelmed, or under-appreciated.

As a branch leader, you can help your staff avoid burnout by paying close attention to their needs and taking pre-emptive action before small problems become big ones. One must consider workplace challenges and employee strengths that will help develop a resilient and engaged workforce.

Keep an eye on staff and volunteers to be sure no one is working so hard that they're losing sleep or missing out on important

family events. Reward extra-hard work with kudos and tangible awards like an annual awards ceremony for your volunteers. A cash bonus or an extra day off for dedicated paid employees may help with staff retention.

Recognition at any level, and for any task, delivers reinforcement that their actions and results are appreciated. And for some, recognition is a bit like a life's scorecard. It never hurts, always helps so why not do it?

Paid and volunteer staff leaders should pay special attention to any of our members who are highly-engaged in our organization, even though they may not be selected to be part of the leadership team. These highly engaged members should be encouraged, asked about their opinions, and in all manner appreciated and recognized for their passionate effort to spread the word about the Legion.

Legions are more likely to be successful if they are meeting a real community need for service and engagement. Maintaining the support and trust of supporters and beneficiaries while engaging volunteers effectively and operating with sound governance and good financial management helps to ensure volunteer and employee retention. People naturally prefer committing their time to a well-organized group working toward clear goals.

New staff should be trained, and supported as they become familiar with our organization and its important work. Ensure that opportunities engage all staff in a meaningful way. By presenting opportunities to gain new skills, overcome obstacles, or directly affect change for others, you'll promote satisfaction and dedication amongst your staff.

