

Guild of the Royal Canadian Dragoons

Strategic Plan 2019 - 2024

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# Guild of the Royal Canadian Dragoon

## Strategic Plan

June 2019

### Introduction

1. This Guild Strategic Plan is for the period 2019 to 2024. It describes the process to achieve the Guild's mission and realize its vision. Part I identifies the foundation of the Guild; its mission, vision, and objectives and the CRA approved Objects, Items and Activities. Part II describes the strategic planning process and Part III lists the strategic intents which guide planning for delivery of the Guild Charitable Program (GCP).
2. The strategic plan plots the Guild's route to a successful future. It does not provide specific details on projects and programs but lays out boundaries within which the Guild will operate. The annual Guild Business plan provides detail on individual programs and projects within the constraints of the strategic plan.

### Part I – Foundation of the Guild.

3. Members of the Guild feel a strong sense of duty to provide meaningful support to The Regimental Family. This can only be achieved if all elements of the Guild have a clear understanding of the mission and work towards its accomplishment in a coherent fashion. These terms focus Guild activity:
  - a. Guild Primary Objective: To protect, preserve and further the traditions and heritage of The Royal Canadian Dragoons.
  - b. Guild Mission: To facilitate the desire of the Regimental Family to promote, protect, preserve, and further the Regiment's traditions and heritage; promote and improve the quality of life for Regimental Family members; and promote public awareness and Regimental morale.
  - c. Guild Vision: A Regimental Family with a heightened sense of unity, heritage, and quality of life.

- d. Guild Belief. To achieve its mandated objects, the Guild believes it needs interactive involvement of the Regimental Family and the community to make meaningful contributions for the betterment of both. Through strong name recognition, the Guild will realize this belief by reaching out to The Regimental Family through various activities that contribute to community and national wellbeing.
  
- e. Guild Centre of Gravity: The Guild Centre of Gravity is the trust that the Regimental Family has placed in the Guild to enhance its History and Heritage, Communication and Outreach and Quality of Life. The GCP is designed and executed to ensure that this trust is not lost.
  
- f. Guild Objects, Items and Activities. In 2019 the Guild received CRA approval for an updated version of its Objects, Items and Activities. To be registered as a charity under the Income Tax Act, Canadian law requires that an organization's objects be exclusively charitable and define the scope of activities that can be engaged in by the organization. Subject to limited exceptions, all of a registered charity's resources must be devoted to these activities. The Guild Objects were identified by analysis of the Guild's original articles and define the scope of Guild activity. They are exclusively charitable as are the Activities proposed to accomplish these objects. All Guild projects and programs included in the GCP must be associated with one or more activity. Terminology used in this plan to describe Guild activity is as follows:
  - (1) Objects: An Object is an aim or main intent. Objects define the scope of the activities the Guild will execute to achieve its mission;
  
  - (2) Item: An Item is a sub-element of an Object that defines the scope of the object;
  
  - (3) Activity: An activity is a description of the type of work that will be performed to achieve an object; and

(4) Programs and Projects. Programs and Projects are work elements executed within an activity.

4. The approved Objects, Items and Activities for the RCD Guild are at Annex A. The Guild intends to operate for the next 5 years with its newly approved Objects. During this period, the Guild will conduct a complete strategic review with the intent of confirming or changing Objects, Items or Activities.

## Part II – Strategic Planning Process

5. Organization. Analysis of the approved Objects, Items and Activities has enabled the Guild to organize itself for optimum efficiency and to design an effective program for the achievement of its vision. The Guild structure includes Program Committees aligned with the Objects and a Corporate Services Committee which provides administrative, financial and technical support.
6. Defining the Requirements. Determining how best to serve the Regimental Family is a difficult challenge since the family is so dispersed and has a wide variety of needs. The task is achieved through the work of the Regimental Family Advisory Group (RFAG) which interacts with all elements of the family to determine where Guild support would be most beneficial. The RFAG advises the Board on Regimental Family requirements and its input is the basis for project and program proposals. Projects and programs must align with approved Guild activities.
7. Selecting Projects and Programs. The three Guild program committees (Fundraising, History and Heritage and Quality of Life) are responsible for transforming ideas from the RFAG and others into project and program proposals. The Corporate Services Committee Business Planning Team consolidates these proposals and presents them to the Board. The Board

approves projects and programs for inclusion in the GCP based on a cost/benefit analysis. Projects and programs are grouped as: projects and programs for inclusion in the Business Plan and execution in the next FY or projects and programs for inclusion in short (2-3 years), medium (4-10 years) or long term (11-20 years) project outlook lists. Projects and programs considered critical to the achievement of the Guild Mission are also included on the Strategic Project List. The approved Business Plan provides authority and funding for execution of projects and programs.

### Part III - Guild Framework of Strategic Intents

8. Delivery of the GCP is guided by a framework of strategic intents. Strategic intents are identified over time and reflect a pattern in the direction given by the Board of Directors concerning Guild operation. The intents do not normally apply to specific projects and programs but more to the Guild's general functioning and direction. Intents are updated as required but normally apply over the long term. Working within a framework of intents provides coherence in the Guild's approach to delivering its program. The Guild intents are as follows:
  - a. Culture of Excellence. The Guild intends to operate as a model corporation, aggressively promoting and growing its GCP, flexibly adjusting to changes in the external and Regimental Family environment, and judiciously employing leading edge management techniques to optimize performance.
  - b. Honouring the Regiment and Recognizing Those who support it. The Regiment is a national treasure as the oldest Canadian Cavalry unit with more than 130 years of proud military history. Its exploits during war are woven into the fabric of Canadian nationhood. Support from benevolent donors enables the Guild to properly honor this proud heritage. The Guild intends to recognize the contributions from these donors wherever and whenever possible through all mediums of communication.

- c. Size of the Guild. The Guild intends to keep its governance and committee structure as small as possible while still being able to deliver the GCP. Increased bureaucracy will be avoided.
- d. Investment Income. The Guild intends to grow the size of its investment portfolio to at least \$2M. At this amount the investment income will be sufficient to cover the historical annual cost of the GCP. To reach this goal more quickly, the Guild intends to reinvest investment income to grow the principal.
- e. Guild Program Growth. The Guild intends to increase the quality, size and scope of the GCP every year while remaining within the limits of Guild Objects.
- f. Increased Volunteer Base. Although volunteer support from the Regiment will always be important and appreciated, operational tempo puts a strain on the ability of serving members to devote time and resources to Guild work. The Guild intends to expand the size and scope of its volunteer base to populations both inside and outside of the Regiment.
- g. Strategic Partnerships. The Guild intends to improve the efficiency of its operations by establishing beneficial partnerships with like-minded organizations. The Guild is currently partnered with the RCAC Museum and the Ontario Regiment.
- h. Enhanced Corporate Services. The Guild intends to improve its functional ability by expanding its corporate services capability.

- i. Donor Population. The Guild intends to expand the scope of its donor population by broadening its GCP to include activities that generate interest from a more diverse supporter group. It is hoped that doing so will encourage donors who may not have considered supporting Canada through the Regiment and its Guild in the past. New projects and programs must align with Guild Objects but may target appropriate and interested volunteers and/or worthy recipients who are not in the Regimental Family but provide indirect support to the Family. Providing support to charities such as “Military Family Resource Centres, the “Soldier On Fund” and “Support Our Troops” demonstrates the Guild’s intent to help a more general population.
  
- j. Self-Supporting Programs. To the extent possible, the Guild intends to develop projects and programs which provide increased value to the recipient population but have little or no impact on Guild finances. This will be accomplished by ensuring that new project and program proposals are accompanied by specific pledges to provide the necessary sustained funding for their support.
  
- k. Preferential Contracting of Regimental Family Members. The Guild intends to ensure that the Regimental Family receives the greatest benefit from all Guild expenditures. In support of this intent the Guild will provide the opportunity to Family members to bid on contracts for Guild work. If the Family member is confirmed to have the required capability and the proposal is competitive in quality and price, then the contract will be awarded to the Family member.
  
- l. Improve Name Recognition. The Guild intends to improve its name recognition among the Regimental family and public by launching initiatives that demonstrate the benefits of the Guild. Initiatives are

intended to increase pride in the Regiment and the service of the Regimental Family members, knowledge of the Regiment's history and awareness of the programs the Guild executes in support of the Family. Opportunities such as Regimental and public events will be used to propagate the Guild's message. and

- m. Business Planning. The Guild intends to employ a structured business planning process to identify suitable projects and programs, assign work and manage finances. All Guild activities will be included in annual and longer-term plans and only projects and programs approved in each annual plan will receive funding.

### Conclusion

- 9. This Guild Strategic Plan provides general direction for the achievement of the Guild Vision. It is intended to guide the Board of Directors and Guild Committees as they identify and execute projects and programs. A consistent and coherent approach to delivering the GCP is the most effective way to convert Guild resources and manpower into optimum support to the Regimental Family.