



# The Guild of the Royal Canadian Dragoons

## Strategic Plan 2024-2029

April 2024

### **Introduction**

1. This Guild Strategic Plan is for the period 2024 to 2029. It describes the process to achieve the Guild's mission and to realize its vision. Part I identifies the foundation of the Guild: its mission, vision and the CRA accepted Purposes, Items and Activities. Part II describes the strategic framework 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 Vision: To foster A Regimental Family with a heightened sense of unity, heritage and quality of life.
  - b. Guild Purposes, Items and Activities: In 2019 the Guild received CRA acceptance for an updated version of its Purposes, Items and Activities. The accepted Purposes, Items and Activities for the RCD Guild are at Annex A. To be registered as a charity under the Income Tax Act, Canadian law requires that an organization's purposes 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 Purposes 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 purposes. 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:

- i. Purpose: A Purpose is an aim or main intent. Purposes define the scope of activities the Guild will execute to achieve its mission;
  - ii. Item: An Item is a sub-element of a Purpose that defines the scope of the purpose;
  - iii. Activity: An Activity is a description of the type of work that will be performed to achieve a purpose; and
  - iv. Programs and Projects: Programs and Projects are work elements executed within an activity. Programs are enduring and projects have a defined start and end.
- c. Guild Belief: To achieve its mandated purposes, 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.
  - d. 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.
  - e. Guild Mission: To promote, protect, preserve and further the Regiment's traditions and heritage; and promote public awareness and Regimental morale.
  - f. Guild Main Effort: To promote and improve the quality of life for Regimental Family members.

## **Part II – Strategic Framework**

- 4. Organization. Analysis of the approved Purposes, 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 included Program Committees aligned with the Purposes and a Corporate Services Committee which provides administrative, financial and technical support.
- 5. Regimental Family Advisory Council (RFAC). 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. One of the key contributors to this task is achieved through the work of the Regimental Family Advisory Council (RFAC) which interacts with all elements of the Regimental Family to determine where Guild support would be most beneficial. The RFAC advises the Guild Board of Directors on Regimental Family requirements and its input is the basis for project and program proposals. Projects and programs must align with approved Guild activities.

6. Guild Charitable Program (GCP). The three Guild program committees (Community Outreach, History and Heritage and Quality of Life) are responsible for transforming ideas into project and program proposals. The Corporate Services Committee Business Planning Team consolidates these proposals and presents them to the Guild Board of Directors. The Board approves projects and programs for inclusion in the GCP based on a cost/benefit analysis. The GCP are grouped as projects and programs for inclusion in the annual Business Plan and are executed in the next fiscal year. The approved Business Plan provides authority and funding for projects and programs.

### **Part III – Five Year Strategic Outlook**

7. The Guild's near-term actions are guided by a Five Year Strategic Outlook framed by strategic intents. Strategic intents are identified over time and provide direction to the Board of Directors concerning Guild operations. 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. Attached as Annex B is the Guild's Five-Year Strategic Outlook. The Guild strategic 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. The Guild intends to increase the quality, size and scope of the GCP every year while remaining within the limits of the Guild Purposes.
  - b. 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.
  - c. Guild Executive Evolution. The Guild intends to create additional stability and for selected key executive appointments of the Guild. The current Guild governance structure has the Colonel of the Regiment as the President and Chairman of the Board of Directors, the Commanding Officer as the Second Vice-President and Regimental Second-in-Command as the Treasurer and Chairperson of the Corporate Services Committee. These are relatively short-term appointments (one to three years) and the delivery of the GCP is a long-term effort. To improve continuity and stability, the Guild intends to enhance stability and create a better long-term vision by selecting retired individuals to take on roles traditionally held by serving members of the Regiment. Developing options that move in this direction will be a major effort over the next two years.
  - d. 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 long-term plans and only projects and programs approved in each annual plan will receive funding.

- e. Investment Income. The Guild intends to grow the size of its investment portfolio to at least \$2 Million. At this amount the investment income will be able to cover annual core corporate costs. As a result, a continued fundraising effort will be used for major initiatives in line with the annual Guild Charitable Program (GCP). To reach this goal and to surpass it, the Guild intends to reinvest investment income and a portion of fundraising income to grow the principal. The Guild intends to grow its Investment Fund as much as its fundraising will permit until the \$2 Million dollar target is reached. The aspirational goal is to continuously reinvest the interest and/or dividend income from the Investment Fund while recognizing that, should the Guild's operations at any time require financial support, income and principal from the Investment Fund may be used for that purpose.
- f. Fundraising. Although the intent of the Guild is to fund the majority of the GCP through investment income, fundraising will continue to be a key activity for the Community Outreach Committee. 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 Purposes but may target appropriate and interested volunteers and/or worthy recipients who are not in the Regimental Family but provide indirect support to the Regimental Family. Providing support to charities such as "The Military Family Resource Centre", "The Soldier On Fund" and "Support Our Troops" demonstrates the Guild's intent to help a more general population. The Guild needs to work toward creating a Donor Strategy and Self Sustaining GCP.
- g. 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 honour this proud heritage. The Guild intends to recognize contributions from these donors wherever and whenever possible through all mediums and communication.
- h. 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.
- i. 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.
- j. Regimental Patron. Building on the success of our first Regimental Patron, David Batten, the Guild will continue to support this very important appointment. The Patron will help the Guild to enhance and build strategic partnerships and recognize those that support the Regimental Family. The second Patron for the Regiment is Marjolaine Hudon.

- k. 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.
- l. 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 Regimental Family members to bid on contracts for Guild work. If the Regimental 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 Regimental Family member.
- m. Improve Name Recognition. The Guild intends to improve its name recognition among the Regimental Family 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 Regimental Family. Opportunities such as Regimental and public events will be used to propagate the Guild's message.
- n. Significant Events. Over the next five years the Regiment will be celebrating several key events. In 2024 we will be celebrating the 50<sup>th</sup> Anniversary of our association. In 2025 we will be celebrating the 80<sup>th</sup> Anniversary of the liberation of Leeuwarden and the 125<sup>th</sup> Anniversary of the action at Leliefontein. All of these events will require detailed planning well in advance of the activities.

## **Conclusion**

- 8. 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.



Dean Milner  
Major-General (Retired)  
President of the Guild of the Royal Canadian Dragoons

Annex A: Guild Purposes, Items and Activities  
Annex B: Guild Five Year Strategic Outlook



## Annex A

### To Guild Strategic Plan 2024-2029

#### **PURPOSES, ITEMS AND ACTIVITIES**

The numerical designators for the Purposes, Items and Activities are shown in brackets at the end of the descriptions. These designators display the link between Purposes, Items and Activities. All programs and projects executed by the Guild must be associated with an approved Activity.

1. **Purpose 1**: To promote, protect, preserve and further the traditions and heritage of the Royal Canadian Dragoons (hereinafter referred to as the “RCD” or the “Regiment”) as part of the Canadian Armed Forces (1):
  - a. **Items for Purpose 1**: The Guild will achieve Purpose 1 by:
    - (i) Displaying Regimental artifacts to members of the RCD and the public (1,a);
    - (ii) Collecting and preserving artifacts relevant to the history of the Regiment, and funding the operations of the Regiment’s archives (1,b);
    - (iii) Holding or participating in ceremonies and educational activities to mark important events in the history of the Regiment (1,c);
    - (iv) Fostering liaisons with civilian authorities at all levels in order to establish, maintain and operate museums, exhibitions or demonstrations of items of regimental historical significance, memorabilia, artifacts or property (1,d); and
    - (v) Collecting, disseminating and publishing information concerning the Regiment, of interest and relevance to members of the Regimental Family and the public at large (1,e).
  - b. **Activities that support Purpose 1**: Guild projects and programs are executed as part of the following activities. Activities may be associated with multiple Items and therefore may have multiple numerical designators:
    - (i) Supporting exhibitions and community events (1,a,(3)), (1,c,(2));
    - (ii) Funding and operating the regimental museum at Garrison Petawawa and the regimental archives (1,a,(1)), (1,b,(1));
    - (iii) Acquiring, maintaining and preserving ceremonial dress uniforms and historical uniforms and accoutrements (1,a,(2)), (1,b,(2));

- (iv) Making available objects and documents of historical significance to the Guild to civilian authorities and museums for display on request (1,d,(2));
  - (v) Sponsoring and participating in projects, for example: parading in historical uniforms on Parliament Hill; participating in CNE Warriors Day Parades; attending parades, fairs or exhibitions with historical vehicles, artifacts and other educational materials and hosting gatherings of interest to the Regimental family and/or the public (1,c,(1)), (1,d,(1));
  - (vi) Communicating with the Regimental Family and the public through the annual publication of its magazine, the Springbok, via social media and via its website [www.dragoons.ca](http://www.dragoons.ca) (1,e,(1)); and
  - (vii) Periodically publishing a history of the Regiment in such a quantity and format as to be available to the Regimental Family and the public (1,e,(1)).
2. **Purpose 2**: To promote the well-being, morale and quality of life of the Regimental Family by funding, supporting and undertaking projects that assist cadets and current and former soldiers and their families (2).
- a. **Items for Purpose 2**: The Guild will achieve Purpose 2 by:
    - (i) Executing projects that assist the families of injured soldiers and activities to support the families of deployed soldiers (2,a);
    - (ii) Making materials and resources available that connect and support soldiers of the Regiment and their families (2,b);
    - (iii) Maintaining and managing the memorials and places of remembrance dedicated to Dragoons (2,c); and
    - (iv) Providing support and financial assistance for the Regiment's current and former soldiers, and their families to pursue post-secondary education (2,d).
  - b. **Activities that Support Purpose 2**: Guild projects and programs are executed as part of the following activities. Activities may be associated with multiple Items and therefore may have multiple numerical designators:
    - (i) Providing the necessities of life to victims of disaster (2,a,(1)), (2,b,(1));
    - (ii) Acquiring recuperation kits for wounded soldiers (2,a,(2));
    - (iii) Issuing educational bursaries for post-secondary education (2,d,(1));
    - (iv) Sponsoring projects aimed at improving the quality of life of soldiers' families and other members of the community (2,a,(3));

- (v) Assisting with reasonable travel expenses for families of fallen soldiers who need to travel to participate in memorial events, where public funds are not available to assist (2,b,(2));
- (vi) Communicating with the Regimental Family through the annual publication of its magazine, the Springbok, and via its website [www.dragoons.ca](http://www.dragoons.ca) (2,b,(3)); and
- (vii) Supporting maintenance of sites of historical importance to the Regimental Family like its monuments, which would include anywhere Dragoons are interred (2,c,(1)).

3. **Purpose 3**: To promote public awareness of the Regiment including (3):

a. **Items for Purpose 3**: The Guild will achieve Purpose 3 by:

- (i) Communicating the activities of the RCD to the public at large (3,a); and
- (ii) Strengthening the links between the RCD and the communities that surround and support it (3,b).

b. **Activities that support Purpose 3**: Guild projects and programs are executed as part of the following activities. Activities may be associated with multiple Items and therefore may have multiple numerical designators:

- (i) Supporting exhibitions and community events (3,a,(2)), (3,b,(2)); and
- (ii) Communicating with the public through the annual publication of its magazine, the Springbok, via social media, via its website [www.dragoons.ca](http://www.dragoons.ca) (3,a,(1)), (3,b,(1)).



# GUILD FIVE YEAR STRATEGIC OUTLOOK 2024-2029

2023      2024      2025      2026      2027      2028      2029

Mission: To promote, protect, preserve and further the Regiment's traditions and heritage; improve the QOL for the Regt Family members; and promote public awareness and Regt morale.

History and Heritage  
 To promote, protect, preserve, and further the traditions and heritage of the RCD

Quality of Life  
 To promote the well-being, morale and QOL of the Regt Family by funding, supporting and undertaking projects that assist cadets and current and former soldiers and their families.

Communication and Marketing  
 To promote public awareness of the Regimental Family

Fundraising

Corporate Services

- ★ 1 Change of CoR
- ★ 2 50<sup>th</sup> Anniversary of RCD Association
- ★ 3 Create Donor Strategy
- ★ 4 Updt Regt Museum
- ★ 5 Leewarden 2025
- ★ 6 LLFN 2025
- ★ 7 Self Sustaining GCP
- ★ 8 Evolution of Guild Exec
- ★ 9 Change of CoR
- ★ 10 Appoint 3<sup>rd</sup> Patron

Vision: A Regimental Family with a heightened sense of unity, heritage and QOL

