

THE ROYAL CANADIAN LEGION

ONTARIO COMMAND

TRAINING AND ORGANIZATIONAL DEVELOPMENT

BRANCH LEADERSHIP TRAINING SERIES

PHASE 1V

CHANGE AND SUCCESSION PLANNING

## FORWARD:

The Royal Canadian Legion operates in Ontario as the largest Veterans' lobby group in the province. At this time, this opinion is a fact. However, as the climate in Ontario as well as Canada changes regarding all services, we as the members of the Legion must accommodate these changes or at the absolute least realize they are coming.

Arguably, Legion has had a difficult time with change and in some cases has vigorously resisted change. The no-smoking movement and the change in societies' acceptance of alcohol have made operating Legion Branches more challenging. Amalgamation efforts, while successful in some areas, are not widely considered as a viable alternative to keeping Branches open. There is still, in some areas, resistance to allowing younger members to hold office and to lead the organization. In fact there is, in some areas, fervent opposition to "giving up the reins"!

As well, there are very few Branches that operate using a business plan. Many Branches still operate on the premise that "It has worked well for the last twenty five (25) years so there is no need to change things". The concept that Legion is two (2) distinct entities, a business and a veteran's service organization is not understood and, quite frankly, not accepted in many Branches. Many of the programs available from Provincial Command are misunderstood or simply not known. The Branch Financial Advisory program is not understood in some areas. In some areas it is seen as a "vehicle for Command to run your Branch". In still other areas, it is not well known at all. The fact that Ontario Command offers a low interest loan is misunderstood or not well known. We still have issues with Branches not filling our Poppy reports properly or Branches misusing Poppy funds.

Perhaps the most disconcerting part of this process is attendance at seminars. Time and time again we have good to excellent turn outs. The issue is that the wrong people are attending. In fact, in most cases, the presentation team is “preaching to the choir”. Those back in the Branch that think they know what the issues are or those who find a comfortable chair at the “table of knowledge” and even those who have learned just a little and may have formed an opinion on misinformation are simply not attending these leadership seminars. That is our target audience!

Many Branches have issues finding volunteers to help make the Branch viable in the community. In fact, many Branches frustrate every year around election time to find enough people to fill the various chairs required to operate the Branch.

To this point, there has been a rather bleak picture painted regarding Legion Branches. Certainly, there are Branches which operate extremely well. The problem is that these successful Branches are in the minority.

Any time we point out problems, we must be prepared to offer solutions.

Phase 1V of the Branch Officers Training seminar series will deal with two (2) components.

1.....CHANGE

2.....SUCCESSION PLANNING

This seminar will employ the buzz group format with a view to provide the opportunity for seminar participants to develop ideas and programs which they will be able to take back to their respective Branches and put into effect right away.

In short, this seminar will show the participants that change and succession planning are learned skills just as leadership and problem solving are learned skills.

## LESSON PLAN

As mentioned earlier, the training method will be the buzz group format. Each group will consist of no more than 20 people and not fewer than 12. As with other seminars the group must pick a name, a group leader and a scribe. The group leader and the scribe must be different people for each exercise. A flip chart will be used by the groups to write down their findings. These findings will be shared by the group with the other groups who will be acting as the general body at a Branch membership meeting. The participants are encouraged to ask questions and ensure that they understand what the presenting group is saying.

This seminar will also involve hands on participation by the facilitators. Each facilitator must ensure that his/her group does not “get into the weeds” and waste time. As well, the facilitator will attempt to control those who feel they require more air time than others.

The key to success in this seminar is that each participant must understand and work towards consensus. The issue here isn't about who is right but what the group feels is right.

The buzz groups will be asked a series of questions and given a time frame to answer them. Once the first exercise is completed the groups will be asked to present their findings and explain their reasoning to the other groups. There are no wrong answers here. However, the groups must justify their results to the other groups.

The participants will be asked to fill out personal evaluation forms at the end of the seminar. As well, some of the participants as chosen by the facilitators will be asked to sit with a focus group at the end of the day to further critique the seminar.

Before the actual group participation takes place, it is critical the lead presenter define and explain change.

### **IT HAS BEEN SAID THAT “IF NOTHING CHANGES, THEN NOTHING CHANGES”!!**

This statement may seem simplistic. However, when given some thought it is indeed correct. We see change all around us every day of our lives. In fact, in most of the cases where change is accomplished, we make the required changes. We change behaviours, we change clothes, we change friends, we change addresses, and we change almost everything that affects our lives.

**CHANGE.....is defined as “the process of altering; to make or become different; to exchange; to transform”.**

A fundamental of change is the acceptance of the proposed change. In short selling change will be critical to the success of any change attempt. Adults will not accept change if they feel the change is for the sake of change only and does not show any value added.

Change must be explained, described, defined and most importantly sold. Fundamental to the acceptance of any type of change is explaining “what’s in it for them”!

Further, Branches today must understand the role of consensus in their Branch activities.

**Consensus is defined as “general agreement”.**

A vote taken properly at a general membership meeting and passed by the majority is termed as general agreement. In short, the majority of the members present felt that the motion they were voting on was the right way to go for the Branch. Who is right is never as important as what is right.

**COMPONENT # 1.....CHANGE**

**THE ONLY PEOPLE WHO REALLY LOVE CHANGE ARE DAMP BABIES!!!**

**QUESTION 1**

***“What are the 5 (five) most important issues that must change in Legion TODAY”?***

The buzz groups will be given thirty (30) minutes to arrive at five points. In the thirty minutes they must determine five points and rank them in order of importance. Again there are no wrong answers here. The point of this portion of the exercise is to establish consensus and show that the majority of any group are usually on the right track.

In an attempt to help the buzz groups to establish priority a voting system can be used. If the group is not able to arrive at consensus the facilitator will step in and ask the group to vote on each of the 5 points. After this vote takes place the five points are ranked in order of which point got the most votes down to the point of which vote got the least votes. The groups will then share their findings with the other groups.

## **Question 2**

### **What changes are required around the most important problem as defined in question 1?**

Once again the groups will be asked to “brain storm” for ideas and develop at least five issues around the most important problem they determined in question 1. Consensus is required. However, in the event the facilitator feels that consensus will not be achieved the same voting procedure will take place. The groups will be given 30 minutes for this exercise and then will share their results with the other groups.

### **Buzz group task 1**

#### **Develop an action plan to change the most important problem as defined in question 1.**

The plan must include time lines, who will do what, what resources are required and what the end result will look like. Again the facilitator may be required to help the group stay focused on establishing a plan to change the problem they have elected to work on. This exercise may take an hour. The facilitator must ensure that the group take advantage of this opportunity to use the tools that they have seen in the previous seminar situations. While it may appear that the problem solving seminar is the most relevant the leadership values seen in phase 1 will serve to show when leadership is required, what types of leadership is required and who involved in the process are most able to bring the group to successful solutions to the problems.

This seminar is designed to show the participants that change those areas in our Branches which truly require changes is reasonably achieved with a group effort. The participants will also learn that a well functioning group can achieve almost anything they choose to as long as they are willing to function as a group and use consensus to its full potential.

## **Component 2.....SUCCESSION PLANNING**

Today's Legion Branches, in some cases, have very serious problems filling all the chairs at the Branch elections. The way to change this worrisome problem is succession planning.

**Succession is defined as "the act of following in order".**

**Planning is defined as "a strategy worked out in advance of an action, to work out the means of doing something".**

To completely understand this process and how it relates to today's Legion, Branches must establish a system whereby members are willing and able to advance through the various chairs in their respective Branches. This may seem like an impossible task. However, when what is at stake is considered, not to take this action may well mean the loss of even more Branches.

The question must be asked "Why don't capable members step up and run for office"? This question must be asked without the aid of the ever popular "rose colored glasses". We must look to the root problem. Some examples of root problems can be:

- a.....lack of understanding of the Branch and its place in the community
- b.....a conscious decision by others not to give up a position and allow a new person to hold office
- c.....very poorly run meetings which in turn frustrates those in attendance
- d.....lack of understanding of Legions heritage and how Legion has affected Canada and its growth

There are most probably more examples. The point here is that we have issues that need to be resolved before we can develop a succession plan.



This portion of the seminar will be conducted exactly the same as the first component.

### **Question 1**

**What are the five most important reasons Branch members do not want to assume office?**

As with the first component, the group will be allowed 30 minutes to develop the 5 points they feel are most important. Consensus will again be the vehicle to getting to the most important 5. In the event consensus is not reached, the voting system as described in component 1 will be used. Once completed, the group will again share their results with the other groups.

### **Question 2**

**What changes are required to address the most important of the five chosen in question 1?**

The same format will be used in this segment as in the first component.

### **Buzz group task 2**

**Develop an action plan to change the most important of the five as defined in question 1 of the succession plan component.**

The same format will be used as in the first component.

At the end of the seminar a focus group will be determined and sit for a short time to help the facilitators with “what went well and what are the opportunities for improvement”?