



# **Princess Patricia's Canadian Light Infantry**

## **Regimental Strategy**

Version 1 dated 28 August 2016

(Secretorially updated after 160<sup>th</sup> REC and 73<sup>rd</sup> Regimental Guard meetings)

## FOREWORD BY THE COLONEL OF THE REGIMENT

Our Regimental Family had a most successful 100th Anniversary celebration. Our success was in no small measure due to a bold and unifying vision, meticulous planning over the last decade, and our combined excellence in the execution of these plans.

As we look to the future, the Centennial provides us with opportunity: it drew the three entities of the greater Regimental Family closer together to plan and execute the event; it showcased the unique potential of the PPCLI Foundation; and it renewed a sense of kinship and pride amongst our retired members. Our connection with Canadians has never been stronger. Time is ripe to build upon this momentum in order to chart the course ahead for our next 100 years of service to Canada.

What follows is our Regimental Strategy. Much of the contents of this strategy originates from our 1<sup>st</sup> Regimental Strategic Planning Session held on 12/13 April 2015.<sup>1</sup> The main driver behind this effort was the realization that we needed to ensure continued unity of effort amongst our Regimental Entities. It was also acknowledged that we would benefit from a long-term Campaign Plan in order to obtain our objectives.

Guided by our Regimental Vision and Regimental Objectives, our Regimental Strategy will be one of **stability** – in which we seek, over time, to **improve our inter-entity relations, strengthen our governance, enhance our retired component** and **achieve sustainable funding for our Regimental Family**.

To be clear, the present document details a strategy for the **Regiment** – one that will be executed in conjunction with the PPCLI Association and PPCLI Foundation respective of the fact that each of these Entities is self-governed.

While our strategy aims to provide stability, no effective strategy is static. We will continue to seek input from across our Regimental Family and, as required, we will adjust our Strategy to suite evolving strategic conditions. The Regimental Guard – and specifically our Vice-President (Strategy) – will manage the expression of our Strategy and its accompanying Campaign Plan on behalf of, and in lock-step with, the Regimental Family.

//original signed by//  
W.B. Vernon, CD  
Major-General (retired)  
Colonel of the Regiment  
25 August 2016

---

<sup>1</sup> 1050-3 (RM), Minutes from the 1<sup>st</sup> Strategic Planning Session Held Sunday April 12 and Monday April 13 2015, 25 June 2015  
([http://www.ppcli.com/sg\\_userfiles/1st\\_SPS\\_Meeting\\_Minutes\\_\[signed\].pdf](http://www.ppcli.com/sg_userfiles/1st_SPS_Meeting_Minutes_[signed].pdf)).

### **A NOTE ON TERMINOLOGY**

The term ***Regiment*** refers to the serving component – our three Regular Force Battalions, our Regular Force personnel who are Extra-Regimentally Employed, our soldiers who have remustered to other Canadian Armed Forces occupations, and the Loyal Edmonton Regiment (4 PPCLI), an Army Reserve unit.

The term ***Regimental Family*** refers to serving and retired components and individuals, honorary Patricias, officers and cadets of our affiliated Royal Army Cadet Corps, and our family members.

The three ***Regimental Entities*** are the serving component ([www.ppcli.com](http://www.ppcli.com)), the PPCLI Association ([www.ppcliassoc.ca](http://www.ppcliassoc.ca)) and the PPCLI Foundation ([www.ppclifoundation.ca](http://www.ppclifoundation.ca)).

**LIST OF CHANGES, AMENDMENTS AND/OR UPDATES**

SERIAL	SUBJECT	CHANGES, AMENDMENTS AND/OR UPDATES	SOURCE
1.	X. Our Action Plan G. Effective Governance G2 – Publish Museum Strategic Plan and Updated Museum Manual	Museum Manual adopted at 156 <sup>th</sup> REC	Minutes, 156 <sup>th</sup> REC
2.	X. Our Action Plan G. Effective Governance G7 – Update the Regimental Manual and new Soldier's Manual	Updated, approved and posted on Regimental website.	Minutes, 160 <sup>th</sup> REC
3.	III. Our Internal Environment A. Structure and Governance 2. Regimental battle rhythm	Following the 156 <sup>th</sup> REC it was decided that Guard meetings will occur in January and June, tied to Exercise STRONG CONTENDER and changes of command, with REC meetings in March and August, the latter tied to French Grey Weekend.	Minutes, 156 <sup>th</sup> REC
4.	X. Our Action Plan G. Effective Governance H4 – Alberta Museums Association status	Achieved	Minutes, 156 <sup>th</sup> REC
5.	III. Our Internal Environment C. Resources 3. Finances	Regimental finances updated as reported at 72 <sup>nd</sup> Regimental Guard Meeting	Minutes, 72 <sup>nd</sup> Regimental Guard Meeting
6.	III. Our Internal Environment C. Resources 4. Fundraising	Reflects that the fundraising Memorandum of Understanding has been finalized	Minutes, 70 <sup>th</sup> Regimental Guard Meeting

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	SUBJECT	CHANGES, AMENDMENTS AND/OR UPDATES	SOURCE
7.	III. Our Internal Environment A. Structure and Governance 2. Regimental battle rhythm	The new PPCLI website will act as the official Regimental calendar and will be the preferred medium for adding calendar events.	Minutes, 70 <sup>th</sup> Regimental Guard Meeting
8.	II. Our External Environment C. Task Environment 4. Charitable Status	Reflects stand-up of PPCLI Fund to comply with Non Public Property and Canada Revenue Agency guidelines.	Minutes, 158 <sup>th</sup> REC
9.	II. Our External Environment B. Societal Environment 2. Donor relations	Reflects that the Foundation's Case for Support has been developed by the PPCLI Foundation. It should be adaptable to other Regimental Entities and useful to them.	Not applicable
10.	V. Summary of Key Strategic Factors C. Opportunities	Added that the Regiment must be inclusive and welcome new members from all aspects of Canadian society, inculcating them of course into the Patricia way.	Not applicable
11.	VIII. Our Major Projects A. 2. Volume 5 of the Regimental History	Renamed Official Regimental History to capture that this project will be broken into a number of different deliverables. This change is reflected throughout the document.	Minutes, 72 <sup>nd</sup> Regimental Guard Meeting
12.	VI. Our Strategic Posture E. Regimental Policies	Updated Regimental Guard Directive numbering, titles and status.	Minutes, 72 <sup>nd</sup> Regimental Guard Meeting
13.	VIII. Our Action Plan	Numerous Decisive Points updated throughout.	N/A
14.	XII. PPCLI Campaign Plan	Numerous Decisive Points updated throughout.	N/A
15.	III. Our Internal Environment A. Structure and Governance 17. Association 19. Foundation	To improve awareness, mention should be made of both the Association and Foundation in future C-in-C and COR messages.	Minutes, 158 <sup>th</sup> REC

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	SUBJECT	CHANGES, AMENDMENTS AND/OR UPDATES	SOURCE
16.	III. Our Internal Environment A. Structure and Governance 3. Foundation	The PPCLI Foundation has relocated from Calgary to Edmonton	Minutes, 73 <sup>rd</sup> Regimental Guard Meeting
17.	III. Our Internal Environment A. Structure and Governance 16. The Association	Recent Association recruitment efforts have been popular on social media; however, enrolment has not noticeably improved.	Minutes, 159 <sup>th</sup> REC
18.	III. Our Internal Environment B. Structure and Governance 17. The Association	The Association's recent efforts in Mental Health and Suicide Awareness adds weight to its relevance.	Discussions, President of the Association
19.	III. Our Internal Environment C. Resources 6. Monuments and Memorials	The Regimental Monument and Memorial Manual has been digitalized and is situated on the Regimental website as a "living" document.	Minutes, 160 <sup>th</sup> REC
20.	III. Our Internal Environment A. Structure and Governance 9. Financial Framework	No Museum Development Funds (MDF) were allocated from Directorate of History and Heritage (DHH) for FY 18/19. This necessitated in the elimination of the Outreach Coordinator position.	Minutes, 159 <sup>th</sup> REC
21.	II. Our External Environment B. Societal Environment 3. Fundraising	Broad guidelines should be provided as to how funds are to be expended. The Memorandum of Understanding (MOU) amongst the Regimental Entities concentrates on fundraising but there is limited to no direction as to how funds raised to the support the Regiment should be expended.	President, PPCLI Association

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	SUBJECT	CHANGES, AMENDMENTS AND/OR UPDATES	SOURCE
22.	II. Our External Environment C. Task Environment 9. Leadership challenges	Leadership development, including Guard Directive 003 Leadership in the PPCLI – The PPCLI Way, should include a leadership role or expectations after release or retirement. Specifically, senior leaders must become involved in the Association and/or Foundation.	President, PPCLI Association
23.	II. Our External Environment C. Task Environment 13. Veteran's Support	PPCLI Association's Mental Health and Suicide Awareness initiative has been very well received, although funding has been a significant challenge. An effort should be made to have Association members as official members of the Veteran's Affairs Advisory Council.	President, PPCLI Association
24.	III. Our Internal Environment A. Structure and Governance 2. Regimental battle rhythm	Currently, all three Regimental Entities manage their own websites, which is not efficient.	President, PPCLI Association
25.	III. Our Internal Environment A. Structure and Governance 6. Regimental Annual Report	The Association and Foundation should contribute to the Regimental Annual Report, which could improve synchronization and visibility.	President, PPCLI Association
26.	III. Our Internal Environment A. Structure and Governance 15. Veterans' Care	The Association conducts Mental Health and Suicide Awareness, which has been well received.  The Association's Volunteer Patricia Program coordinates with the Veteran's Care Cell to coordinate support for veterans in distress.	President, PPCLI Association

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	SUBJECT	CHANGES, AMENDMENTS AND/OR UPDATES	SOURCE
27.	V. Summary of Key Strategic Factors	<p>Poor reporting of how funds are expended in support of the Regiment.</p> <p>Reliance on military manning in Regimental Headquarters.</p>	President, PPCLI Association
28.	VIII. Our Action Plan F. Benevolence	B5 Mental Health and Suicide Awareness and B6 Veterans and Family Support added	President, PPCLI Association



## **EXECUTIVE SUMMARY**

### **Summary of our Key Strategic Factors**

#### A. Strengths

- We are a proud and unique Regiment that has a well-established and recognized brand. We can continue to leverage our brand for our long-term organizational success. At the same time, we must protect our brand from infringement, and any actions that will cheapen our standing and reputation with our stakeholders.
- We can build on the success of the 100<sup>th</sup> Anniversary by putting in place measures to ensure coherence and synergy between our Regimental Entities.

#### B. Weaknesses

- Our museum is located in Calgary, separated from Regimental Headquarters and its Serving Component. Options need to be explored to mitigate this weakness.
- While financially stable, Regimental Entities must move towards long-term sustainability in terms of funding streams.
- Fundraising is fundamental to our long-term organizational success. Our fundraising goals must remain realistic, clear and tied to activities and objectives. Fundraising must be recognized as a commitment.
- There is an almost complete ignorance of the Association and the Foundation within the Serving Component. Measures must be taken to improve awareness and encourage participation in the PPCLI Association and the PPCLI Foundation.
- **Poor reporting of how funds are expended in support of the Regiment.**
- **Reliance on military manning in Regimental Headquarters.**

#### C. Opportunities

- Based on the success of the 100<sup>th</sup> Anniversary and our participation in Afghanistan, the Regiment has a strong connection with Canadians and considerable momentum.
- Our Regimental Family has a compelling story, especially as it pertains to caring for our soldiers and our legacy of service to Canada. This momentum can be harnessed for increased support.
- The Regiment must be inclusive and welcome new members from all aspects of Canadian society, inculcating them of course into the Patricia way.

#### D. Threats

- More non-profit organizations now compete for fewer dollars.
- The withdrawal or reduction of public support for Regimental Headquarters, our Museum and our Kit Shop operations would have a significant impact upon our long-term organizational success.

**Our Campaign Design**

<p><b>LINES OF EFFORT</b> (Logical lines linking actions, programs and projects in time and purpose to an objective)</p>	<p><b>OBJECTIVES</b> (Clearly defined and attainable goals to be achieved in order to establish the conditions required to achieve the desired end state)</p>	<p><b>DESIRED END STATE</b> (A statement of conditions that defines an acceptable future situation for the Regiment that is favourable and self-regulating)</p>
<p>Proficiency</p>	<p>To enable Commanding Officers to set and maintain the highest standards of unit proficiency, capability, and combat effectiveness.</p>	<p>Princess Patricia's Canadian Light Infantry continues to be a proud, confident Regiment with outstanding leadership, strong discipline and highly developed military skills that enable it to fight and win on the battlefield of today and tomorrow. The Regiment's success and legacy are underpinned by operational excellence and a strong regimental family focused on supporting and maintaining cohesion amongst serving and retired and their families.</p>
<p>Leadership Development</p>	<p>To identify and develop the leadership potential of all ranks of the Regiment for the benefit of the individual, the Regiment, the CAF, and Canada.</p>	
<p>Regimental Family</p>	<p>To develop and maintain cohesion and a strong sense of regimental pride and esprit de corps amongst all members of the regimental family.</p>	
<p>History and Traditions</p>	<p>To record and perpetuate the Regiment's history, customs and traditions.</p>	
<p>Image and Identity</p>	<p>To own and protect a strong and professional image of the Regiment throughout the CAF and Canada.</p>	
<p>Benevolence</p>	<p>To foster the well-being of all members of the Regimental family.</p>	
<p>Effective Governance</p>	<p>To maintain a relevant and adaptable Regimental structure to facilitate the efficient conduct of Regimental and Corps business, to develop long-term plans and goals to support Regimental objectives and to effectively execute the day-to-day operations of the Regiment.</p>	

## **Our Strategic Issues Agenda**

- A. Aim. To set out those important issues that must be addressed, in priority. This is not to say that the Regiment cannot begin on another priority until the preceding issue has been put to rest. Rather, capacity will dictate progress; and some of the following issues can be seen as supporting efforts to subsequent initiatives.
- B. Top-Five Issues. In priority:
1. Inter-entity relations (i.e. Steering Committee, Memorandum of Understanding on fundraising, etc.).
  2. Governance (i.e. Regimental Manual, Guard Directives, etc.).
  3. Succession (funeral planning, selection of future Colonel-in-Chief).
  4. Enhancing our Retired Component.
  5. Requirement for sustainable funding for our Regimental Family (Museum and Archives, Regimental Headquarters contingency, Gault Gallery).

## **Our Major Projects**

- A. The designation of major projects category implies a significant investment of resources (time, money and personnel). Explicit here is the requirement for clear objectives and guidance. The Regiment's major projects over the next ten years are:
1. The PPCLI Museum and Archives in accordance with the Museum Strategic Plan.
  2. Official History of the Regiment.
  3. Regimental Monuments Upkeep Plan.
  4. Project definition for the Gault Gallery (Edmonton).

**TABLE OF CONTENTS**

I. A Primer on Strategic Management.....1

A. Strategy Defined.....1

B. Why do we need a strategy?.....1

C. How should we plan and manage strategically?.....2

D. Strategic Management Model.....3

**ENVIRONMENTAL SCANNING**

II. Our External Environment.....6

A. Physical Environment.....6

B. Societal Environment.....7

C. Task Environment.....12

III. Our Internal Environment.....22

A. Structure and Governance.....22

B. Culture.....32

C. Resources.....34

IV. Stakeholder Analysis.....39

A. Our Stakeholders.....39

B. Stakeholder Power/Interest Matrix.....39

C. Needs and Expectations of Our Critical Stakeholders.....41

V. Summary of Our Key Strategic Factors.....43

**STRATEGY FORMULATION**

VI. Our Strategic Posture.....45

A. Regimental Vision.....45

B. Regimental Mission.....45

C. Regimental Objectives.....45

D. Regimental Strategy.....46

E. Regimental Policies.....46

**STRATEGY IMPLEMENTATION**

VII. Our Campaign Design.....49

VIII. Our Strategic Issues Agenda.....50

IX.	Our Major Projects.....	50
X.	Our Action Plan.....	51
	A. Proficiency.....	51
	B. Leadership Development.....	52
	C. Regimental Family.....	53
	D. History and Traditions.....	55
	E. Image and Identity.....	58
	F. Benevolence.....	59
	G. Effective Governance.....	61
XI.	Key Decisions.....	63
XII.	Our Campaign Plan.....	64

**EVALUATION AND CONTROL**

XIII.	Evaluation.....	69
	A. General.....	69
	B. Five-step Feedback Process.....	69
XIV.	Control.....	69
	A. General.....	69
	B. Regimental Strategy.....	69
	C. Campaign Plan.....	69

## I. A PRIMER ON STRATEGIC MANAGEMENT

### A. Strategy Defined

Soldiers are certainly not strangers to strategy and planning. At the same time, it is also useful to consider the thoughts of business practitioners – both in the for-profit and non-profit domains – as well as academics. Taken together, strategy can be conceptualized in five ways:

- As a *plan* – a unified, comprehensive and integrated plan designed to ensure that objectives are achieved.
- As a *ploy* – a manoeuvre designed to outwit opponents or competitors.
- As a *pattern* – consistency in behaviour, whether intended or not.
- As a *position* – a means of locating an organization within its environment.
- As a *perspective* – an ingrained and shared manner of thinking and acting.<sup>2</sup>

The key point here is that successful organizations cannot afford to rely on one single, limited definition of strategy. Indeed, each of the above definitions adds important elements to our understanding of what a Regimental Strategy ought to comprise, and encourages us to address fundamental questions about our Regimental Family in general.

### B. Why do we need a strategy?

Organizations require strategies for the following reasons:

- To set direction for themselves, or at least to enable them to manoeuvre through threatening environments.
- To focus effort and promote coordination of activity.
- To define the organization.
- To reduce uncertainty and provide consistency.<sup>3</sup>

Simply put, strategic planning and management are crucial for long-term organizational success.

---

<sup>2</sup> See Henry Mintzberg, "The Strategy Concept I: Five Ps for Strategy," *California Management Review* (Fall 1987), 11 – 24.

<sup>3</sup> See Henry Mintzberg, "The Strategy Concept II: Another Look at Why Organizations Need Strategies," *California Management Review* (Fall 1987), 25 – 32.

C. How should we plan and manage strategically?

Our Regimental Strategy should conform to the following principles:

- Coherence. Our Regimental Strategy must be coherent internally (i.e. across the Regimental Entities) and it must be supportive of and aligned with other key actors, and in particular the Canadian Army.
- Comprehensive understanding of our environment. Our internal environment consists of variables (Strengths and Weaknesses) that form the context in which work is done. Our external environment consists of variables (Opportunities and Threats) that form the context in which we must exist and, ultimately, thrive. Our long-term success will depend significantly upon attaining an appropriate match, or 'fit', between our environment and our strategy.
- Mutual respect, trust, transparency and understanding. Consultation and collaborative planning must be sustained across the Regimental Entities. Our Regimental Strategy must promote engagement and openness, and above all protect the Regiment's proud traditions and credibility.
- Efficient use of resources. We must acknowledge that capacity across all of the Regimental Entities is finite. Our recent levels of effort in support of the 100<sup>th</sup> Anniversary cannot be sustained indefinitely. Therefore, our focus must shift towards *'doing the right things'* vice *'doing everything right'*. To maximize effectiveness, moreover, our Regimental Strategy should allow Regimental Entities to focus on and leverage their core competencies.
- Flexibility and adaptability. We must acknowledge that our long-term environment will change, certainly as we look out to our next 100 years of service to Canada. Therefore, our Regimental Strategy must be robust but flexible, adaptable and agile enough to allow the plan to evolve. Periodic and honest assessment will be critical in order to move us towards our objectives.
- Relevance. Our Regimental Strategy must aid in establishing and promoting relevance amongst our stakeholders. It should promote sustainable membership across the Regimental Family, helping to mitigate attrition from the Serving Component and optimize enrollment in the PPCLI Association and support for the PPCLI Foundation.

D. Strategic Management Model

A basic model for strategic management is described in Figure 1, and forms the basis of the analysis that follows in this document. The model's four sequential steps are:

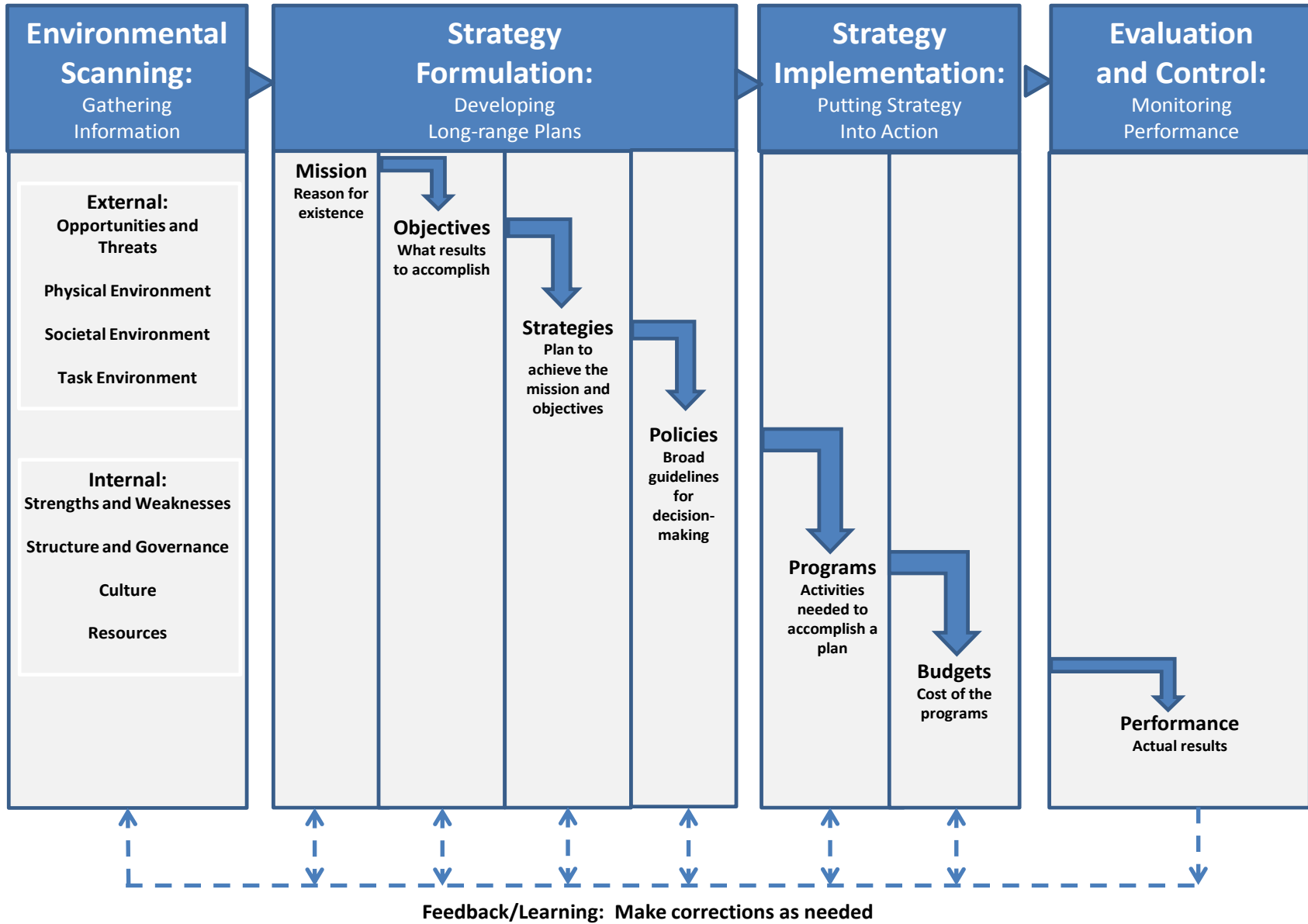
- Environmental scanning.
- Strategy formulation.
- Strategy implementation.
- Evaluation and control.<sup>4</sup>

---

<sup>4</sup> See Thomas L. Wheelen and J. David Hunger, *Strategic Management and Business Policy* Thirteenth Edition (Toronto: Pearson Education, Inc., 2012), 14 – 23.



**Figure 1 – Strategic Management Model**



# **ENVIRONMENTAL SCANNING**

II. **OUR EXTERNAL ENVIRONMENT**

A. **Physical Environment**

SERIAL	OBSERVATION	DEDUCTION(S)
1.	Climate change is a growing threat to national and international security, contributing to increased natural disasters, refugee flows and conflicts over basic resources like food and water. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• The growing cost of climate change will likely reduce the amount of public and non-public funding available to the Regimental Entities – see II B serial 1 below.</li> <li>• The direct risk to Regimental property from natural disasters in Western Canada is assessed as low. Having said that, we must still consider the physical threat from fire, floods and theft, especially at The Military Museums (TMM).</li> <li>• The Regiment must do its small part to combat climate change by embracing environmentally sustainable methods such as minimizing the distribution of paper products where feasible.</li> </ul>
2.	Cyber domain – provides an opportunity to connect with a wider audience of stakeholders than other more conventional mediums. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• Keep our websites and social media up-to-date and active/attractive.</li> <li>• Make the PPCLI museum ‘virtual’.</li> <li>• Encourage e-membership for the PPCLI Association.</li> <li>• Exploit online donation tools.</li> </ul>
3.	Cyber domain – security – our websites are susceptible to attack and/or exploitation by malicious cyber actors. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• Regimental Entities must adopt best practices to protect against and minimize the impact from cyber-attacks. In particular, care must be taken to back-up data on a regular basis and to shield personal information (names, email addresses, credit card information).</li> </ul>

B. Societal Environment

SERIAL	OBSERVATION	DEDUCTION(S)
1.	<p>There are increasing financial pressures on non-profit organizations in the wake of the 2008 financial crisis and the 2015 decline in the price of oil. The loss of funding creates a huge resource problem for the non-profit sector concurrent with an increase in the need for services and programs for the less well off. In sum, more non-profit organizations now compete for fewer dollars. <b>(Threat)</b></p>	<ul style="list-style-type: none"> <li>• Fundraising goals must remain realistic, clear and tied to activities and objectives.</li> <li>• The PPCLI Foundation should emerge as the primary (but not exclusive) fundraising arm within the Regimental Entities, codified by a Memorandum of Understanding between the Regimental Entities.</li> <li>• The PPCLI Foundation will consider the employment of a part or full-time Endowment Officer in a manner similar to other non-profit organizations (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> </ul>
2.	<p>Donors are questioning their own decisions on why they should give to a particular non-profit organization. It has become more crucial for non-profits to state why they acquire their funds and how they use those dollars. <b>(Opportunity)</b></p>	<ul style="list-style-type: none"> <li>• The Regimental Family has a compelling story, especially as it pertains to caring for our soldiers and our legacy of service to Canada.</li> <li>• We must have a simple, common, convincing and resonating reason for donors to give to the PPCLI as opposed to others. This is one area that the three Regimental Entities must have commonality. The challenge becomes convincing donors that we are 'a better cause' than others. Offering an opportunity to associate with Canada's finest soldiers is a very attractive return, however this has been somewhat curtailed by recent fundraising direction.</li> <li>• A professionally written Case for Support has been developed by the PPCLI Foundation. It should be adaptable to other Regimental Entities and useful to them.</li> </ul>

SERIAL	OBSERVATION	DEDUCTION(S)
3.	<p>This new environment is pushing non-profit organizations to be more accountable and transparent.  <b>(Opportunity)</b></p>	<ul style="list-style-type: none"> <li>• Regimental Entities must (continue to) comply with applicable charitable regulations.</li> <li>• Regimental Entities must continue to demonstrate excellence in record-keeping and auditing.</li> <li>• Regimental Entities must be able to link donations to effects achieved, and communicate these achievements widely to existing and prospective donors, using their respective annual reports, newsletters, etc., in addition to specific reporting requirements to Canada Revenue Agency.</li> <li>• The Association has made a very successful transition to the new rules, including the implementation of a Board of Directors and revamped By-Laws. Next will be a Directors' Handbook along with a comprehensive review of the HGMF constitution.</li> <li>• Broad guidelines should be provided as to how funds are to be expended. The Memorandum of Understanding (MOU) amongst the Regimental Entities concentrates on fundraising but there is limited to no direction as to how funds raised to the support the Regiment should be expended.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
4.	Based on the success of the 100 <sup>th</sup> Anniversary and our participation in Afghanistan, the Regiment has a strong connection with Canadians. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• As time passes, we must weave our service in Afghanistan into the overall Regimental narrative.</li> <li>• While we can continue to leverage and promote this connection, we must be careful that our efforts do not lead to fatigue or ill-favour amongst our stakeholders. Balance will be critical.</li> <li>• Anniversaries will be commemorated every five years, with major commemorations every 25 years. Five-year commemorations will include a Better 'Ole and will be tied to other events to maximize participation (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> </ul>
5.	Leverage the success of 100 <sup>th</sup> Anniversary and maintain momentum. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• While we can continue to leverage and promote this connection, we must be careful that our efforts do not lead to fatigue or ill-favour amongst our stakeholders. Balance will be critical.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
6.	Expand and grow community support through such events as the French Grey Ball. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• The aim of the French Grey Ball is to develop and maintain connections to supporters of the Regiment, both military and civilian, in Western Canada (Minutes, 69<sup>th</sup> Regimental Guard Meeting).</li> <li>• Consideration will be made to leveraging a golf tournament linked to the French Grey Ball.</li> <li>• Without unnecessarily limiting the flexibility of the Regimental Entities, the aim of Regimental outreach activities should be established in advance. For example, events could be focused on 'friend-raising' or 'fund-raising', but not necessarily both aims.</li> </ul>
7.	Solidify connections at municipal, provincial and federal levels. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• We need to develop a simple Regimental narrative to support these types of engagements.</li> <li>• We need to develop an engagement/outreach programme.</li> <li>• The Association can be a key enabler in solidifying connections as its members are spread across communities nationwide.</li> </ul>
8.	Our stakeholders are increasingly active online. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• Keep websites and social media up-to-date and active/attractive.</li> <li>• Make the PPCLI museum 'virtual'.</li> <li>• Encourage e-membership for the PPCLI Association. This has two components. The first and already started is encouraging e-membership from the top down. The second (which continues to be hit and miss) is to encourage membership by those who are leaving the Serving Component.</li> <li>• Exploit online donation tools.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
9.	Commission a novel and/or screenplay about one or several of The Originals and their experience(s) in the First World War. Then make sequels. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• Karen Storwick is examining a project to leverage the diaries of Talbot Papineau, in much the same way as the book on Agar Adamson.</li> <li>• This could be viewed as similar to the series of books that was managed by John Ralston Saul on famous/influential Canadians. He might be approached for his thoughts on the idea.</li> </ul>
10.	Community support in Edmonton and Brandon is strong. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• Continue to cultivate this support through invitations to business luncheons and ceremonial activities such as changes of command, parades, and social events.</li> <li>• These activities should take into consideration the synergy that could be achieved for the Regimental Entities to leverage these opportunities.</li> </ul>
11.	Changing societal makeup of the Canadian population and its probable impact on the composition of the Regiment in the long term. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• The Regiment must be inclusive and welcome new members from all aspects of Canadian society, inculcating them of course into the Patricia way.</li> <li>• The Regiment must continue to support higher recruiting efforts as requested.</li> <li>• Opportunities should be explored to conduct community outreach amongst new Canadians.</li> <li>• We must continue to track officer/NCM professional development to ensure that our Regiment remains culturally aware.</li> </ul>



C. Task Environment

SERIAL	OBSERVATION	DEDUCTION(S)
1.	Withdrawal or reduction of DND/CAF support for Regimental Headquarters. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• The Regimental Guard and Regimental Executive Committee must continue to message the need for military Person Years within Regimental Headquarters.</li> <li>• When Regimental finances permit, examine options to hire civilian employees through Canadian Forces Morale and Welfare Services.</li> <li>• Maximum flexibility would be afforded by hiring personnel as contractors.</li> <li>• The tendency to 'load-up' Regimental Headquarters with more responsibilities must be avoided.</li> <li>• Consider burden-sharing with other organizations (Edmonton-based Regiments or civilian institutions).</li> <li>• Consider establishing a privately funded Regimental Headquarters, potentially achieving synergy amongst all Regimental Entities.</li> <li>• Prepare a contingency plan for this possible eventuality.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
2.	Withdrawal or reduction of DND/CAF support for our Museum. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• The Regimental Guard and Regimental Executive Committee must continue to message the need for military Person Years within the Regimental Museum.</li> <li>• Explore options to provide staff through Full Time Equivalents in conjunction with 3<sup>rd</sup> Canadian Division Support Group.</li> <li>• When Regimental finances permit, examine options to hire civilian employees through Canadian Forces Morale and Welfare Services.</li> <li>• Maximum flexibility would be afforded by hiring personnel as contractors.</li> <li>• Consider burden-sharing with other organizations (Edmonton-based Regiments or civilian institutions).</li> <li>• Consider establishing a privately funded Regimental Headquarters, potentially achieving synergy amongst all Regimental Entities.</li> <li>• Prepare a contingency plan for this possible eventuality.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
3.	Withdrawal or reduction of DND/CAF support for kit shop operations. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• Continue to exploit our CANEX partnerships.</li> <li>• When Regimental finances permit, examine options to hire civilian employees through Canadian Forces Morale and Welfare Services (CFMWS).</li> <li>• Maximum flexibility would be afforded by hiring personnel as contractors.</li> <li>• Consider burden-sharing with other organizations (Edmonton-based Regiments or civilian institutions).</li> <li>• Consider establishing a privately funded Regimental Headquarters, potentially achieving synergy amongst all Regimental Entities.</li> <li>• Prepare a contingency plan for this possible eventuality.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
4.	<p>Pressure on our Regimental Fund to abandon its charitable status as a stand-alone from the CAF. <b>(Threat)</b></p>	<ul style="list-style-type: none"> <li>• Revised Guard Directive 006 adopted subject to: approval in writing from CFMWS, approval in writing from CRA, a revised constitution, a terms of reference for selection of directors (Minutes, 70<sup>th</sup> Regimental Guard Meeting).</li> <li>• The Regimental Fund (General Fund) has split into two components to meet its charitable objectives and ensure compliance with CRA guidelines. As a result, Princess Patricia's Canadian Light Infantry Fund (PPCLI Fund), colloquially known as the 'Patricia Fund', has been created from this construct. The PPCLI Fund maintains the same charitable number and charitable objectives; however, its board of directors is composed of 51 percent of non-uniformed personnel to comply with CRA regulations. The PPCLI Fund Board sat its inaugural meeting in November 2017 (Minutes, 158<sup>th</sup> REC Meeting).</li> </ul>
5.	<p>Fundraising, sponsorships, donations and solicitation involving the serving component must adhere to extant regulations (in accordance with CANFORGEN 136/15 ADMRS 002/15 241530Z JUL 15, Charities, Solicitation, Sponsorships, Donations and Acceptance of Gifts, Hospitality and Other Benefits)</p>	<ul style="list-style-type: none"> <li>• These regulations must be taken into account during the planning of fundraising activities. The impact on inter-entity activity needs to be examined in relation to past practices and guidelines/rules developed for future fundraising activities.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
6.	Pressures on the size and composition of the Royal Canadian Infantry Corps (RCIC) and in particular the Regular Force serving component. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• The serving component chain of command must continue to be involved actively in capability and force development.</li> <li>• When possible, the Regiment should seek to post 'champions' to Director Army Force Development, the Canadian Army Land Warfare Centre, and Chief of Force Development.</li> <li>• The Regiment could reinvigorate its involvement with the Royal Canadian Infantry Association and the Conference of Defence Associates.</li> <li>• See serial 12 below.</li> </ul>
7.	Threat to the continuity of the Regimental System. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• The serving component chain of command must continue to be involved actively in capability and force development.</li> <li>• When possible, the Regiment should seek to post 'champions' to Director Army Force Development, the Canadian Army Land Warfare Centre, and Chief of Force Development.</li> <li>• The Regiment could reinvigorate its involvement with the Royal Canadian Infantry Association and the Conference of Defence Associations Institute.</li> <li>• See serial 12 below.</li> <li>• Continue to message the necessity to maintain combat ready forces to respond with mass for domestic and international operations.</li> <li>• Continue to message that our soldiers are equally capable of conducting Security Force Capacity Building and other similar tasks.</li> <li>• Leverage the experience of the PPCLI Senate, who has faced similar challenges in the past.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
8.	Attrition of serving component. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>Recruiting, retention and re-enrollment (RRR) is a rightly so a focus area of the chain of command. The serving component and the PPCLI Association should look to compliment the efforts of the chain of command, especially by liking and sharing RRR products on social media.</li> </ul>
9.	Challenge to the proper, sequential, deliberate growth of leaders possessing moral and physical courage. <b>(Threat)</b>	<ul style="list-style-type: none"> <li>Refresh, distribute and inculcate Guard Directive 003 Leadership in the PPCLI – The PPCLI Way.</li> <li>Continue to make subaltern indoctrination (Exercise RIC-A-DAM-DOO) a major focus.</li> <li>Refresh and issue Guard Directive 009 NCM Career Management and Succession Planning Process (Complete).</li> <li>Formalize our excellent officer career management and succession planning into a Guard Directive so that our process is institutionalized (Complete).</li> <li>Leadership development, including Guard Directive 003 Leadership in the PPCLI – The PPCLI Way, should include a leadership role or expectations after release or retirement. Specifically, senior leaders must become involved in the Association and/or Foundation.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
10.	Develop stronger connections with Allied Regiments. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• Exchanges will continue to be the purview of the chain of command in accordance with Canadian Army policy and based largely on the availability of resources and the Army Managed Readiness Plan. Having said this, Guard Directive 004 Regimental Responsibilities of COs should be amended to reflect that, where possible, Battalion Commanding Officers should exploit opportunities for small unit / reciprocal exchanges. (Complete)</li> <li>• Regimental Headquarters should solidify its connection with The Rifles and the Royal Australian Regiment to include opportunities for visits and the identification of key milestones that our Regiment should recognize, and can be captured in our Campaign Plan.</li> <li>• Prudent horizon scanning could identify when a Rifles unit will be selected for a BATUS serial in Suffield, creating an efficient opportunity for a bi-lateral training.</li> <li>• With Canadian Army support, the PPCLI will re-energize short-term exchange opportunities beginning with 4 Rifles in 2016.</li> <li>• The PPCLI Association could research developing relationships with The Rifles and the Royal Australian Regiment Associations.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
11.	The road to 2021 will provide occasions to mark a broad range of significant anniversaries – the centennial of the First World War, Canada's 150 <sup>th</sup> anniversary, and the 75 <sup>th</sup> anniversary of the Second World War. International and national-level activities will be commanded by Canadian Joint Operations Command as Operation DISTINCTION. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• The Regimental Executive Committee should review the Operation DISTINCTION event list and identify activities that would benefit from PPCLI representation, where capacity exists. Asks could then be pushed to the Canadian Army G3 through the chain of command (i.e. 1 CMBG to 3 Cdn Div HQ).</li> </ul>



Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
12.	<p>Commission/support post-graduate research (or a Canadian Army research project) into the strength of the regimental system in the Canadian infantry using the PPCLI as a case study, and then publish it.  <b>(Opportunity)</b></p>	<ul style="list-style-type: none"> <li>• Director Canadian Army Land Warfare Centre will be consulted to determine if this is an initiative that the Canadian Army is willing to take on (Note: CALWC has indicated that the Canadian Army is unlikely to support a Regimentally-focused research project).</li> <li>• If not, the Regimental Executive Committee should identify a budget for this endeavor if it is to be supported. The following centres of excellence could be approached: <ul style="list-style-type: none"> <li>○ University of Calgary Centre for Military, Security and Strategic Studies – closest to our archives.</li> <li>○ University of New Brunswick Gregg Centre for the Study of War and Society – arguably the most cooperative.</li> <li>○ Wilfrid Laurier Centre for Military Strategic and Disarmament Studies.</li> <li>○ Royal Military College of Canada, Kingston, Ontario – would likely carry the least amount of weight.</li> </ul> </li> <li>• In order to maintain a measure of academic integrity, the Regiment would likely need to fund a research fellowship, which can run \$20,000 to \$30,000 for a year plus research grants of \$2,500 to \$5000.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
13.	Government platform included easier access to veterans' services and support to families of veterans. <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• Our Regiment has considerable experience in caring for the injured and supporting families of the fallen, particularly in dealing with policy gaps.</li> <li>• PPCLI Association's Mental Health and Suicide Awareness initiative has been very well received, although funding has been a significant challenge. An effort should be made to have Association members as official members of the Veteran's Affairs Advisory Council.</li> </ul>
14.	Leveraging our Network <b>(Opportunity)</b>	<ul style="list-style-type: none"> <li>• Codify the practice of populating successive headquarters (Brigade, Division, Army, etc.) with PPCLI officers and NCMs in key positions to ensure the Regiment has a voice and can influence decisions in a positive and constructive manner.</li> </ul>
15.	Operational Tempo <b>(Threat)</b>	<ul style="list-style-type: none"> <li>• Operational tempo is unlikely to abate over the course of the first decade of this strategy. This means that there will be a continuous demand on the time of the Serving Component when it comes to Regimental business. Regimental Headquarters and the other two Regimental Entities will need to be leveraged to fill gaps.</li> </ul>

III. **OUR INTERNAL ENVIRONMENT**

A. **Structure and Governance**

SERIAL	OBSERVATION	DEDUCTION(S)
1.	Active Canadian Colonel-in-Chief (C-in-C). <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• The 100<sup>th</sup> Anniversary provides an excellent example of how the C-in-C can support the Regimental Family's objectives.</li> <li>• 'Active Canadian C-in-C' should form a key component of our Regimental narrative, as it is an aspect that helps make the PPCLI unique.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
2.	The Regimental battle rhythm for governance tends to be haphazard. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Every effort will be made to synchronize meetings, especially the PPCLI Association and the PPCLI Foundation Annual General Meetings, Guard meetings and other events in order to allow for maximum synergy (Minutes, 1<sup>st</sup> Strategic Planning Session). Having said this, there is still a strong desire by Association members to conduct Annual General Meetings at diverse locations. Many members do not have the funds or the desire to travel to Edmonton each year. Reasonable middle ground would be to work towards congregating every five years.</li> <li>• Following the 156<sup>th</sup> REC it was decided that Guard meetings will occur in January and June, tied to Exercise STRONG CONTENDER and changes of command, with REC meetings in March and August, the latter tied to French Grey Weekend.</li> <li>• The new PPCLI website will act as the official Regimental calendar and will be the preferred medium for adding calendar events (Minutes 156<sup>th</sup> REC).</li> <li>• <b>Currently, all three Regimental Entities manage their own websites, which is not efficient.</b></li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
3.	Three distinct Regimental Entities (the Regiment, the PPCLI Association, and the PPCLI Foundation) who each possess core competencies. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• The 100<sup>th</sup> Anniversary After Action Review has been completed. Best practices must be incorporated into the Regimental Strategy, especially for our 125<sup>th</sup> Anniversary.</li> <li>• A Steering Committee has been formed consisting of the Presidents of the Regimental Guard, the PPCLI Association, and the PPCLI Foundation with the Colonel of the Regiment in order to set priorities, synchronize and deconflict efforts (Minutes, 1<sup>st</sup> Strategic Planning Session). The Steering Committee will have a name and a clear mandate.</li> <li>• The Regimental vision and objectives will help to promote unity of effort.</li> <li>• The Colonel of the Regiment will act as a facilitator to coordinate efforts between the Regiment, the PPCLI Association and the PPCLI Foundation (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• The Presidents of the PPCLI Association and the PPCLI Foundation will become ex-officio / non-voting members of the Regimental Executive Committee (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• The PPCLI Foundation has relocated from Calgary to Edmonton (Minutes, 73<sup>rd</sup> Guard).</li> </ul>
4.	Well established processes and procedures within the Regiment based on a solid Regimental Manual (although needs some updating). <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• Update the Regimental Manual and the new Soldier's Manual.</li> <li>• Regimental Manual has been updated, approved and is posted on the Regimental website (Minutes, 160<sup>th</sup> REC).</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
5.	Regimental Headquarters is the only component of the Regiment devoted exclusively to full time Regimental affairs. Regimental Headquarters duties are extensive and are well laid out in the Regimental Manual. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• The Regimental Guard and Regimental Executive Committee must continue to message the need for military Person Years within Regimental Headquarters.</li> <li>• When Regimental finances permit, examine options to hire civilian employees through Canadian Forces Morale and Welfare Services.</li> <li>• Maximum flexibility would be afforded by hiring personnel as contractors.</li> <li>• Regimental Major, Regimental Adjutant, Regimental Warrant Officer and Museum Manager must be carefully selected by the Regimental Executive Committee.</li> </ul>
6.	The practice of issuing a Regimental Annual Report (see section 704 of the Regimental Manual) has fallen into disuse. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• The underlying concept of the Annual Report has merit, but its production and distribution could be streamlined to reduce the burden on Regimental Headquarters.</li> <li>• This report, and reporting requirements for the Regimental Fund, could be incorporated in <i>The Patrician</i>.</li> <li>• The Association and Foundation should contribute to the Regimental Annual Report, which could improve synchronization and visibility.</li> </ul>
7.	The practice of preparing and issuing a Regimental Operating Plan (see section 712 of the Regimental Manual) has fallen into disuse. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• The Regimental Operating Plan has been re-invigorated, informed by the Regimental Strategy.</li> </ul>
8.	The Regiment publishes <i>The Patrician</i> annually; however, this consumes resources – both time and money. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• <i>The Patrician</i> could be expanded to include the requirement of the Regimental Annual Report and charitable reporting under the Canada Revenue Agency regulations.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
9.	<p>Financial framework <b>(Strength)</b>:</p> <ul style="list-style-type: none"> <li>• Sound financial framework for Regimental Funds to include our charitable objectives.</li> <li>• The Regiment currently relies on four streams of income to fund Regimental activities: Voluntary Regimental Contributions Programme (VRCP), Warehouse profits, Directorate of History and Heritage funding, and funding from other organizations (the PPCLI Association, Alberta Gaming and Lottery, Valour Canada).</li> <li>• Charitable status is not at risk as long as the Regiment is willing to adjust the composition of its Board of Directors in order to meet Canadian Forces Morale and Welfare Services' concerns.</li> <li>• Warehouse profits are not at risk as long as the warehouse operates within the Non-public property policy framework.</li> <li>• Directorate of History and Heritage funding is dependent upon general CAF funding, but does not currently appear to be at risk.</li> <li>• In the current economic climate, it may become difficult to gain access to funding from other sources. The PPCLI Association grant is based on Casino profits, and there is therefore a low risk of losing this funding although the level is adjustable based on demand. However, other organizations may withdraw or reduce support over the next 3 – 5 years given the current economic climate.</li> </ul>	<ul style="list-style-type: none"> <li>• Regimental Headquarters can be funded from VRCP and Regimental Warehouse profits (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• Museum funding is not stable or predictable. For example, no Museum Development Funds (MDF) were allocated from Directorate of History and Heritage (DHH) for FY 18/19. This necessitated in the elimination of the Outreach Coordinator position.</li> </ul>
10.	<p>Sound standing orders for kit shop operations. <b>(Strength)</b></p>	<ul style="list-style-type: none"> <li>• The Warehouse Manual has been drafted and is being reviewed.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
11.	Sound (and healthy) Voluntary Regimental Contributions Programme (VRCP). <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• VRCP are holding steady at just under \$15K per month.</li> <li>• Sustain current practice of having the chain of command deal with personnel in arrears.</li> </ul>
12.	The practice of Regimental Retirement Dinners has fallen into disuse. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Although funds have been allocated in successive Regimental Budgets, we have not sponsored retirement dinners for the past two years.</li> <li>• A more timely option may be to discontinue the practice of Regimental Retirement Dinners and support unit-level Depart With Dignity events such as is the practice for our Extra-Regimentally Employed personnel.</li> </ul>
13.	Our museum is located in Calgary, separated from Regimental Headquarters and its Serving Component. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Our museum will remain in Calgary, although there exists the possibility of establishing a satellite gallery in Edmonton (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• Examine moving Archives and Collections from Calgary to Edmonton (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• Recommend that the Regiment look at opening a Gallery in Edmonton, in partnership with private, municipal and provincial agencies.</li> </ul>
14.	Control of Regimental Property (outside of Museum) - Regimental Warrant Officer is working with Quarter-Master Sergeants Instruction to compile a list of Regimental property in the various Battalions and School locations. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• Ensure Regimental Property outside of the Museum is properly inventoried, insured and cared for.</li> </ul>



Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
15.	Regimental Veteran's Care Cell tracks all wounded and deceased personnel in the Regiment and remains as the point of contact for the Regiment to all families of the fallen. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• Veteran's Care Cell is reaching out to the Joint Personnel Support Unit, the PPCLI Association, and Veteran's Affairs Canada to coordinate and offer support where possible.</li> <li>• Veteran's Care Cell maintains files on a number of individuals and tracks them through personal contact and social media.</li> <li>• Recommend that this practice continue. The key lessons learned are sharing information and leveraging social media to achieve specific results.</li> <li>• Peacetime ill and injured must be cared for in the same manner.</li> <li>• The Association conducts Mental Health and Suicide Awareness, which has been well received.</li> <li>• The Association's Volunteer Patricia Program coordinates with the Veteran's Care Cell to coordinate support for veterans in distress.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
16.	<p>PPCLI Association lacks growth (with exception of social followers and a spurt for the 100<sup>th</sup> Anniversary) and younger membership. Recent Association recruitment efforts have been popular on social media; however, enrolment has not noticeably improved. <b>(Weakness)</b></p>	<ul style="list-style-type: none"> <li>• Embrace e-membership for serving component. Leverage the Regimental Executive Committee and Regimental Guard to champion e-membership amongst the serving component.</li> <li>• Recommend leveraging the “Celtic Knot” model to achieve goals of increasing camaraderie amongst serving and retired members.</li> <li>• Focus groups of serving and recently retired members should be considered to understand this audience and inform our engagement framework.</li> <li>• Information about the PPCLI Association should be embedded in the release process at unit level, to include ERE personnel.</li> <li>• Units should imbed an Association presentation in their annual briefs.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
17.	There is an almost complete ignorance of the Association within the Serving Component, outside of unit command teams. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Chain of command will inform serving members that they can join the Association. Senior serving members will set the example by joining (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• Improve distribution of PPCLI Association Newsletters to the serving component through the chain of command.</li> <li>• Serving component (to include Extra Regimentally Employed personnel) will produce outreach programs to engage with the PPCLI Association (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• Exercise RIC-A-DAM-DOO should always include a brief by the PPCLI Association (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• Battalions should continue to include the PPCLI Association in their annual briefings (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• To improve awareness, mention should be made of both the Association and Foundation in future C-in-C and COR messages (Minutes, 158<sup>th</sup> REC).</li> <li>• The Association's recent efforts in Mental Health and Suicide Awareness adds weight to its relevance.</li> </ul>
18.	The PPCLI Foundation (much like the PPCLI Association) is volunteer resource dependent. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• It cannot be taken for granted nor can it be assumed that the PPCLI Foundation will be self-sustaining in terms of membership without being related to the Regimental Family membership in a meaningful way. PPCLI Foundation membership needs to be included in the discussion on membership writ large.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
19.	There is an almost complete ignorance of the PPCLI Foundation within the Serving Component. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Exercise RIC-A-DAM-DOO should always include a brief by the PPCLI Foundation.</li> <li>• Battalions should include the PPCLI Foundation in their annual briefings.</li> <li>• To improve awareness, mention should be made of both the Association and Foundation in future C-in-C and COR messages (Minutes, 158th REC).</li> </ul>
20.	Our Honorary Patricia program lacked structure, purpose and effect. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Revisions were approved at the 154<sup>th</sup> REC and will be incorporated into the revised Regimental Manual.</li> </ul>
21.	There is institutional turn-over of key leadership of the Guard, the Regimental Executive Committee and Regimental Headquarters. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• An updated Regimental Manual, the Regimental Strategy and revised Guard Directives will assist in developing and maintaining situational awareness.</li> <li>• Incoming Commanding Officers and Regimental Sergeants-Major should participate in Regimental Executive Committee once they have been announced (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• About-to-be promoted Colonels should participate in Guard meetings as soon as promotion boards have been approved.</li> <li>• Ideally, the Regimental Guard Vice-President and Vice-President (Strategy) should not rotate in the same year.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
22.	There often exists geographic dispersion of the Serving Component (Battalions in the west, our most senior leadership in Ottawa or otherwise displaced). <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>To a large degree, the Regiment is a victim of Army/CAF succession planning. Maximum use will need to be made of visits and virtual meetings so that the Regimental Guard maintains their situational awareness.</li> <li>Every effort will be made to synchronize meetings, especially the PPCLI Association and the PPCLI Foundation Annual General Meetings, Guard meetings and other events in order to allow for maximum synergy (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> </ul>
23.	There are 11 Royal Canadian Army Cadet Corps affiliated with the Regiment. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>Guard Policy Directive 004 Regimental Responsibilities of COs should include expectations for unit support to Cadets. (Complete)</li> </ul>

B. Culture

SERIAL	OBSERVATION	DEDUCTION(S)
1.	A tradition of strong leadership at all levels of the Regiment. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>Strengthens our brand.</li> <li>Capture in our Regimental narrative.</li> </ul>
2.	An operational focus. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>Strengthens our brand.</li> <li>Capture in our Regimental narrative.</li> </ul>
3.	Provision of 100 years of service to Canada with a unique history. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>Strengthens our brand.</li> <li>Capture in our Regimental narrative.</li> </ul>
4.	High level of credibility within the Canadian Army and CAF. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>Strengthens our brand.</li> <li>Capture in our Regimental narrative.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
5.	We are a western Regiment. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Could lead to a single point of failure within a national institution. Therefore, we need continued broad recruitment, a Regimental narrative that emphasizes our service to Canada, and continued population of successive headquarters with quality PPCLI officers and NCMs.</li> </ul>

C. Resources

SERIAL	OBSERVATION	DEDUCTION(S)
1.	Well-established and recognized brand. <b>(Strength)</b>	<ul style="list-style-type: none"> <li>• We can continue to leverage our brand for our long-term organizational success.</li> <li>• We must protect our brand from infringement, and any actions that will cheapen our standing and reputation with our stakeholders.</li> </ul>

SERIAL	OBSERVATION	DEDUCTION(S)
2.	<p>Excellent, recently renovated Museum that is the most outward expression of our history and Archives that represent our most valuable possession as they tell the story of the Regiment. <b>(Strength):</b></p> <ul style="list-style-type: none"> <li>• <u>The Gallery</u>. The Gallery has been significantly improved, with detailed and realistic displays that provide an outline of the Regiment's history in a chronological, narrative focussed style.</li> <li>• <u>The Collection</u>. The Collection, the mass of material that is held by the Museum, has been inventoried and stored in proper museum-quality cabinets. Additional cabinets to protect the paintings held by the Museum are on order. The collection is being catalogued and is insured under the Canadian Forces Comprehensive Insurance Program (CIP).</li> <li>• <u>The Archives</u>. There is a significant backlog of material in the Archives, which will take approximately five years to properly inventory, describe, and categorize. Once the backlog has been cleared, the entire collection should be digitized and uploaded into the Access to Memory (AtM) project to allow easier access to the material. This will take an additional five years.</li> <li>• <u>Outreach Activities</u>. The Museum currently hosts some 60,000 visitors a year, supports the Valour Canada educational program, and conducts a number of smaller events in schools in the surrounding area.</li> <li>• <u>Governance</u>. The Museum operates according to a published Museum Manual. There is a full-time Manager.</li> </ul>	<p>The Museum Strategic Plan<sup>5</sup> is organized in two phases:</p> <ul style="list-style-type: none"> <li>• <u>Phase One: Preserve</u>. Phase One will focus on improving governance practices and establishing proper inventories of the Collections and Archives. These activities will support the History and Heritage goal of the Regimental Guard and will be the main effort through 2017. The goals are to ensure artefacts and records are secured and protected, to clear the backlog of material in the Archives, and ensure that our practices conform to accepted standards. Current Outreach activities will continue during this Phase. Completing the inventory and appraisal of the collections and clearing of the backlog in the archives will be the trigger for shifting to Phase Two.</li> <li>• <u>Phase Two: Perpetuate and Promote</u>. After having improved governance processes and conducted proper inventories, Phase Two will see the Museum transition to more outreach activity based on the improvements and platform achieved in Phase One. This will include a program of improvements to the Gallery, support to satellite exhibits, and a greater commitment to education programs in collaboration with The Military Museums and Valour Canada.</li> </ul>

<sup>5</sup> 1325-2 (PPCLI Museum GM), Museum Strategic Plan, 2015 – 2020, XX October 2015.



Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
3.	While financially stable, Regimental Entities must move towards long-term sustainability in terms of funding streams. <b>(Weakness)</b>	<ul style="list-style-type: none"> <li>• Regimental Headquarters can be funded from VRCP and Regimental Warehouse profits (Minutes, 1<sup>st</sup> Strategic Planning Session), if these funding streams remain stable.</li> <li>• Topping up the Hamilton Gault Memorial Fund is the priority for fundraising by the PPCLI Association to \$1 million (Minutes, 1<sup>st</sup> Strategic Planning Session). This has been increased to \$1.5 million over ten years. The aim is to make the Association self-sustaining for its four main programmes.</li> <li>• Second priority for funding is to examine moving the Archives and Collections from Calgary to Edmonton (Minutes, 1<sup>st</sup> Strategic Planning Session). For reference, the Museum upgrade program cost \$3 million; a Gallery in Edmonton could cost between \$5 – 10 million not including annual operations and maintenance.</li> <li>• The PPCLI Foundation has a goal to raise \$5 million by 2018 in order to cover annual operations and maintenance and be able to provide charitable disbursements (from income earned without having to touch principal) (Minutes, 1<sup>st</sup> Strategic Planning Session). Initial returns indicate that this was an unrealistic goal.</li> <li>• An ideal condition would be for the PPCLI Museum and the Hamilton Gault Memorial Fund to operate indefinitely without annual subscriptions or support from public and non-public funds. The Museum can operate for as little as \$185K/ year assuming one contracted Archivist and an Outreach Coordinator. With an annual real rate of return of 4% we would require an endowment fund of \$4.5 million alone to support the Museum.</li> <li>• Regimental Entities will maintain the current practice of using the same fiscal year (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• The Legacy Fund, designed to support the 125<sup>th</sup> Anniversary, currently sits at \$261K. This fund will need to be closer to \$2M by 2034 in order to support the envisioned activities. The Benevolent Fund is at \$168K, however this should be increased to \$500K. The Korean Fund sits at less than \$1K and currently does not fulfill its mandate to support Korean bursaries. The Korean bursaries are being paid from the Regimental Funds. The Contingency Fund sits comfortably at \$72K. (Minutes, 161<sup>st</sup> REC).</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
4.	<p>Fundraising is fundamental to our long-term organizational success. Fundraising does not happen without effort. As a standard rule for non-profit organizations, every dollar spent on developing capacity (whether it is communications, donor relations, etc.) will raise four dollars in funding for an organization. <b>(Weakness)</b></p>	<ul style="list-style-type: none"> <li>• The PPCLI Foundation will explore the option of professional fundraising (Minutes, 1<sup>st</sup> Strategic Planning Session).</li> <li>• The Regiment and the PPCLI Association will not conduct corporate fundraising without first coordinating with the PPCLI Foundation (Minutes, 1<sup>st</sup> Strategic Planning Session). This has been captured in the Memorandum of Understanding.</li> </ul>
5.	<p>Historical References – the official history of the Regiment is well document up until 1945 (although the books are not readily available for purchase). We do not have a definitive history of the post-war period or unit lists for the Korean War. Many of our senior leaders across this period are still alive and cogent, as well as many other regimental leaders and characters. However, especially for those who service started in the 1950s, their days and memories are getting shorter. <b>(Weakness)</b></p>	<ul style="list-style-type: none"> <li>• Explore reprinting/re-issuing Volumes I to IV of our Regimental history.</li> <li>• As a matter of priority, establish a plan to publish the Regiment's official history from 1958 to 2000.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	OBSERVATION	DEDUCTION(S)
6.	<p>There are 185 documented PPCLI monuments and memorials, many of which are not visited on a regular basis. <b>(Weakness)</b></p>	<ul style="list-style-type: none"> <li>• We require a comprehensive plan for documenting, visiting and up-keeping our monuments and memorials. This plan should delineate responsibilities amongst the Regimental Family and the maintenance/refurbishment funding streams.</li> <li>• There is a long-standing requirement to digitally document each and every monument and provide a standardized descriptive paragraph for each. This must be all-inclusive and should capture recent initiatives such as the road sign unveiled at Lansdowne Park and Patricia Park.</li> <li>• The Regimental Monument and Memorial Manual has been digitalized and is situated on the Regimental website as a “living” document. (Minutes, 160<sup>th</sup> REC).</li> </ul>
7.	<p>The Edmonton Commemoration cost just over \$1 million. Although guidance for the Regiment's 125<sup>th</sup> anniversary in 2039 will be issued in due course, the cost of something similar in scope to the Edmonton Commemoration would be in the region of \$1.7 million, assuming an annual rate of inflation of 2%.</p>	<ul style="list-style-type: none"> <li>• With a starting balance of \$170,000 in the Legacy Fund, and assuming a growth rate of 3% annually, the Regiment should be saving towards the 125<sup>th</sup> anniversary at a rate of \$40K per year.</li> </ul>

#### IV **STAKEHOLDER ANALYSIS**

##### A. Our Stakeholders

1. Primary Stakeholders (those who have a direct connection with the Regiment and who have sufficient power to directly affect its activities):

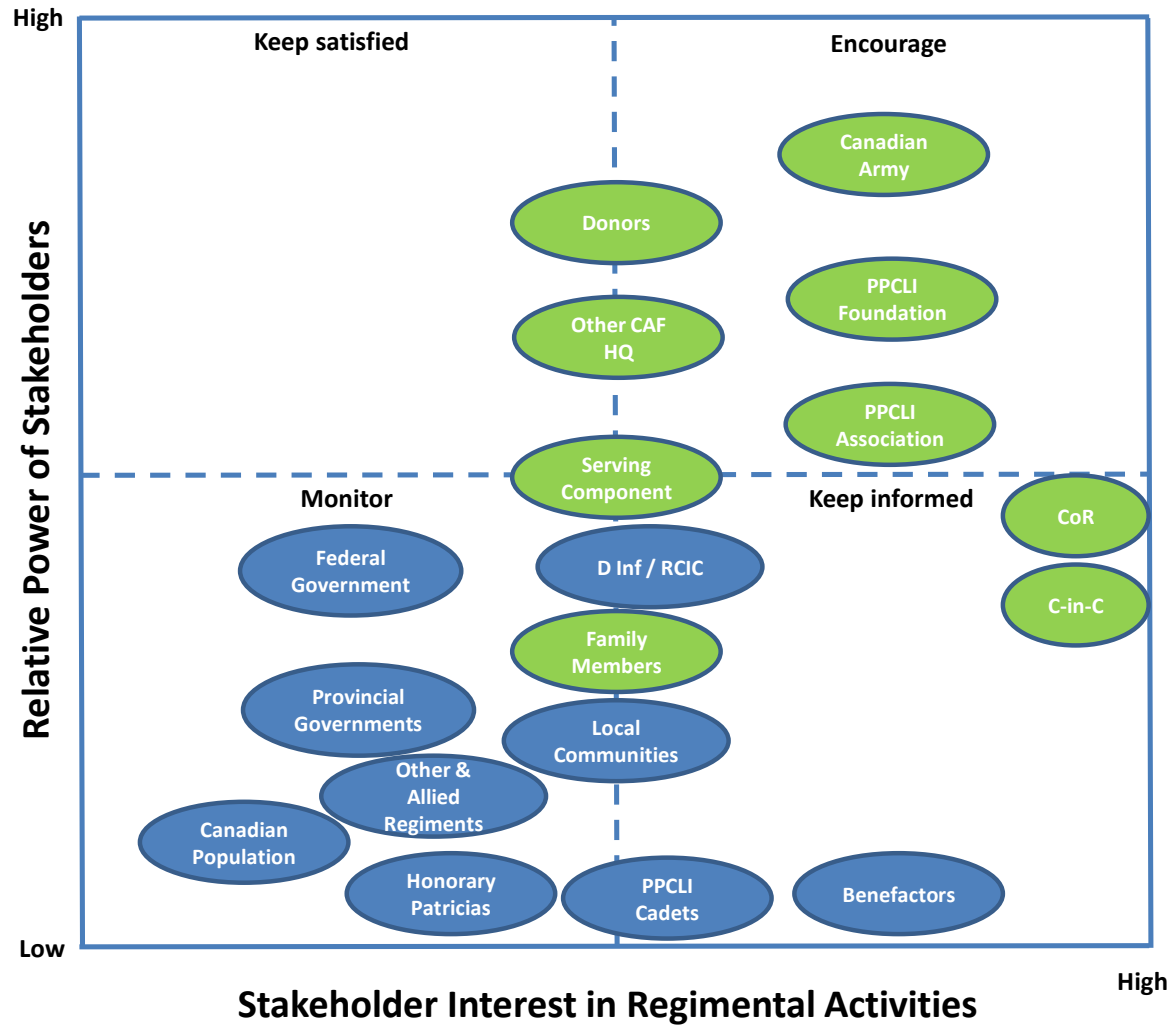
- Canadian Army.
- Other CAF Headquarters (i.e. Military Personnel Command/Director of History and Heritage).
- Colonel-in-Chief.
- Colonel of the Regiment.
- Serving Component.
- PPCLI Association.
- PPCLI Foundation.
- Our family members.
- Donors and funding sources.

2. Secondary Stakeholders (those who have only an indirect stake in the Regiment but may be affected by its activities):

- Federal Government.
- Provincial Governments (specifically Alberta and Manitoba).
- Canadian population.
- Honorary Patricias.
- PPCLI Cadets.
- Local communities (i.e. Edmonton and Shilo).
- Director Infantry/Royal Canadian Infantry Association.
- Other Regular and Reserve Regiments.
- Allied Regiments.
- Beneficiaries.

B. Stakeholder Power/Interest Matrix. See Figure 2 (next page).

**Figure 2 – Stakeholder Power/Interest Matrix**



C. Needs and Expectations of Our Critical Stakeholders

SERIAL	STAKEHOLDER	NEEDS	EXPECTATIONS	KEY DEDUCTIONS
1.	Canadian Army	An excellent infantry regiment for service to Canada.	Alignment with Army strategy, positive contribution to Army culture and effective, sound management of the Regiment's private affairs.	<ul style="list-style-type: none"> <li>• Continue to be coherent with and transparent to Canadian Army.</li> <li>• Continue to demonstrate the underlying value of the Regimental system.</li> </ul>
2.	Serving Component	<ul style="list-style-type: none"> <li>• Leadership development.</li> <li>• A strong sense of regimental pride and esprit de corps.</li> <li>• Benevolence.</li> <li>• Outstanding training and operational opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>• A Regimental structure that is relevant, effective, efficient and transparent.</li> <li>• Combat ready forces and competent leadership to meet assigned operational tasks.</li> </ul>	Continue to reinforce our strengths and address our weaknesses that pertain to structure, governance, culture and resources.
3.	PPCLI Association	Ability to refresh its ranks with new membership.	Opportunity to connect with and attract serving component and recently retired.	<ul style="list-style-type: none"> <li>• Develop and sustain effective inter-entity relations.</li> <li>• Link to local communities.</li> <li>• Assistance to released and retired members.</li> </ul>

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	STAKEHOLDER	NEEDS	EXPECTATIONS	KEY DEDUCTIONS
4.	PPCLI Foundation	<ul style="list-style-type: none"> <li>Activities and objectives that provide a <i>raison d'être</i> for fundraising.</li> <li>Membership support in the way of Trustees and Executive Management.</li> </ul>	Access to the PPCLI brand, cooperation and coordination with fundraising with the other Regimental Entities.	Develop and sustain effective inter-entity relations.
5.	Donors and Funding Sources	A worthy cause to donate to that fits their personal/corporate image, and recognition for their philanthropy.	A clear funding proposal, accountability and a direct link between donations and effects achieved.	<p>Need to work at identifying prospective donors, drawing their attention and translating interest into action.</p> <p>Need to clearly explain how funds are expended in support of the Regiment.</p>

V. **SUMMARY OF OUR KEY STRATEGIC FACTORS**

A. **Strengths**

- We are a proud and unique Regiment that has a well-established and recognized brand. We can continue to leverage our brand for our long-term organizational success. At the same time, we must protect our brand from infringement, and any actions that will cheapen our standing and reputation with our stakeholders.
- We can build on the success of the 100<sup>th</sup> Anniversary by putting in place measures to ensure coherence and synergy between our Regimental Entities.

B. **Weaknesses**

- Our museum is located in Calgary, separated from Regimental Headquarters and its Serving Component. Options need to be explored to mitigate this weakness.
- While financially stable, Regimental Entities must move towards long-term sustainability in terms of funding streams.
- Fundraising is fundamental to our long-term organizational success. Our fundraising goals must remain realistic, clear and tied to activities and objectives. Fundraising must be recognized as a commitment.
- There is an almost complete ignorance of the Association and the Foundation within the Serving Component. Measures must be taken to improve awareness and encourage participation in the PPCLI Association and the PPCLI Foundation.
- **Poor reporting of how funds are expended in support of the Regiment.**
- **Reliance on military manning in Regimental Headquarters.**

C. **Opportunities**

- Based on the success of the 100<sup>th</sup> Anniversary and our participation in Afghanistan, the Regiment has a strong connection with Canadians and considerable momentum.
- Our Regimental Family has a compelling story, especially as it pertains to caring for our soldiers and our legacy of service to Canada. This momentum can be harnessed for increased support.
- The Regiment must be inclusive and welcome new members from all aspects of Canadian society, inculcating them of course into the Patricia way.

D. **Threats**

- More non-profit organizations now compete for fewer dollars.
- The withdrawal or reduction of public support for Regimental Headquarters, our Museum and our Kit Shop operations would have a significant impact upon our long-term organizational success.



# **STRATEGY FORMULATION**

VI. **OUR STRATEGIC POSTURE**

A. **Regimental Vision**

*Princess Patricia's Canadian Light Infantry is a proud, confident Regiment with outstanding leadership, strong discipline and highly developed military skills that enable it to fight and win on the battlefield of today and tomorrow. Our success and legacy are underpinned by operational excellence and a strong regimental family focused on supporting and maintaining cohesion amongst serving and retired and their families.*

B. **Regimental Mission**

*To provide an excellent infantry regiment for service to Canada.*

C. **Regimental Objectives**

1. **Objective One – Proficiency**

*To enable Commanding Officers to set and maintain the highest standards of unit proficiency, capability, and combat effectiveness.*

2. **Objective Two – Leadership Development**

*To identify and develop the leadership potential of all ranks of the Regiment for the benefit of the individual, the Regiment, the CAF, and Canada.*

3. **Objective Three – The Regimental Family**

*To develop and maintain cohesion and a strong sense of regimental pride and esprit de corps amongst all members of the regimental family.*

4. **Objective Four – History and Traditions**

*To record and perpetuate the Regiment's history, customs and traditions.*

5. **Objective Five – Image and Identity**

*To own and protect a strong and professional image of the Regiment throughout the CAF and Canada.*

6. **Objective Six – Benevolence**

*To foster the well-being of all members of the Regimental family.*

7. Objective Seven – Effective Governance

*To maintain a relevant and adaptable Regimental structure to facilitate the efficient conduct of Regimental and Corps business, to develop long-term plans and goals to support Regimental objectives and to effectively execute the day-to-day operations of the Regiment.*

D. Regimental Strategy. In order to achieve our vision, mission and objectives, we shall pursue stability by emphasizing the operational effectiveness that has been achieved to date while proceeding with improvements in the following areas:

1. Improve our inter-entity relations.
2. Strengthen our governance.
3. Enhance our retired component.
4. Achieve sustainable funding for our Regimental Family.

E. Regimental Policies. The following policies will guide our decision-making:

SERIAL	TITLE	STATUS
001	Format and Use of Directives	Current. Posted on ppcli.com.
002	Regimental Commemorations	Current. Posted on ppcli.com.
003	Leadership the PPCLI Way	Secretarial edits 15 January 2018. Posted on ppcli.com.
004	Regimental Responsibilities of the COs	Secretarial edits 15 January 2018. Posted on ppcli.com.
005	Regimental Planning Process and Responsibilities	Secretarial edits 15 January 2018. Posted on ppcli.com.
006	Regimental Financial Policy	Current. Posted on ppcli.com.
007	PPCLI Museum and Archives	Current. Posted on ppcli.com.
008 - 011	Not assigned	
012	Regimental Narrative and External Outreach	Remains in development.

Princess Patricia's Canadian Light Infantry Regimental Strategy

<b>SERIAL</b>	<b>TITLE</b>	<b>STATUS</b>
013	Official Regimental History	Approved 21 January 2018. Posted on ppcli.com.
014	Gault Gallery	To be written.
015	Not assigned	
016	Regimental Visits C-in-C and COR	Approved 29 January 2017.
017-19	Not assigned	
020	NCM Career Management and Succession Planning	Approved 29 January 2017. Limited distribution.
021	Officer Career Management and Succession Planning	Approved 29 January 2017. Limited distribution.
022	Funeral Contingency Plan Lady Patricia	To be deleted. Limited distribution.
023	Contingency Plan C-in-C Funeral Mme Clarkson (draft)	Submitted for review. Limited distribution.
024	C-in-C Succession Planning	Being drafted.

# **STRATEGY IMPLEMENTATION**

VII. **OUR CAMPAIGN DESIGN**

<b>LINES OF EFFORT</b> (Logical lines linking actions, programs and projects in time and purpose to an objective)	<b>OBJECTIVES</b> (Clearly defined and attainable goals to be achieved in order to establish the conditions required to achieve the desired end state)	<b>DESIRED END STATE</b> (A statement of conditions that defines an acceptable future situation for the Regiment that is favourable and self-regulating)
Proficiency	To enable Commanding Officers to set and maintain the highest standards of unit proficiency, capability, and combat effectiveness.	Princess Patricia's Canadian Light Infantry continues to be a proud, confident Regiment with outstanding leadership, strong discipline and highly developed military skills that enable it to fight and win on the battlefield of today and tomorrow. The Regiment's success and legacy are underpinned by operational excellence and a strong regimental family focused on supporting and maintaining cohesion amongst serving and retired and their families.
Leadership Development	To identify and develop the leadership potential of all ranks of the Regiment for the benefit of the individual, the Regiment, the CAF, and Canada.	
Regimental Family	To develop and maintain cohesion and a strong sense of regimental pride and esprit de corps amongst all members of the regimental family.	
History and Traditions	To record and perpetuate the Regiment's history, customs and traditions.	
Image and Identity	To own and protect a strong and professional image of the Regiment throughout the CAF and Canada.	
Benevolence	To foster the well-being of all members of the Regimental family.	
Effective Governance	To maintain a relevant and adaptable Regimental structure to facilitate the efficient conduct of Regimental and Corps business, to develop long-term plans and goals to support Regimental objectives and to effectively execute the day-to-day operations of the Regiment.	

VII. **OUR STRATEGIC ISSUES AGENDA**

- A. **Aim.** To set out those important issues that must be addressed, in priority. This is not to say that the Regiment cannot begin on another priority until the preceding issue has been put to rest. Rather, capacity will dictate progress; and some of the following issues can be seen as supporting efforts to subsequent initiatives.
- B. **Top-Five Issues.** In priority:
1. Inter-entity relations (i.e. Steering Committee, Memorandum of Understanding on fundraising, etc.).
  2. Governance (i.e. Regimental Manual, Guard Directives, etc.).
  3. Succession (funeral planning, selection of future Colonel-in-Chief).
  4. Enhancing our Retired Component.
  5. Requirement for sustainable funding for our Regimental Family (Museum and Archives, Regimental Headquarters contingency, Gault Gallery).

VIII. **OUR MAJOR PROJECTS**

- A. The designation of major projects category implies a significant investment of resources (time, money and personnel). Explicit here is the requirement for clear objectives and guidance. The Regiment's major projects over the next ten years are:
1. The PPCLI Museum and Archives in accordance with the Museum Strategic Plan.
  2. Official History of the Regimental.
  3. Regimental Monuments Upkeep Plan.
  4. Project definition for the Gault Gallery (Edmonton).

VIII. **OUR ACTION PLAN**

A. Proficiency

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
P1 – A. Hamilton Gault Trophy	Director Infantry / Colonel of the Regiment / Commanding Officers	Competition - yearly 1 January to 30 November  Presentation – as soon as practicable after 7 December	Foster interest in and improve the standard of marksmanship in the Infantry of the Regular component of the Canadian Armed Forces.
P2 – Hamilton Gault Skill-At-Arms Trophy	Commanding Officers / Regimental Major	Competition – yearly  Presentation – 17 March	Foster a high standard of military skills in Princess Patricia's Canadian Light Infantry.
P3 – Regimental Achievement Award	Chain of Command / Regimental Executive Committee	Immediately following completion of a CAF or foreign course.	To foster professional excellence on leadership or advanced trade skills.



B. Leadership Development

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
L1 – Distribute and inculcate Guard Directive 003 Leadership in the PPCLI – The PPCLI Way	Regimental Guard / Regimental Executive Committee	September 2016/Yearly	All Regimental leaders are intimately familiar with this Guard Directive, and embrace its tenets in all aspects of Regimental life.
L2 – Refresh and issue Guard Directive 020 NCM Career Management and Succession Planning Process	Regimental Guard Chief Warrant Officer	October 2016/Yearly	Regimental Officers and Senior Officers are intimately familiar with this Guard Directive, and it is used as the principal management policy for NCMs.
L3 – Produce and issue Guard Policy Directive 021 Officer Career Management and Succession Planning	Regimental Guard Vice President (Regimental Colonel)	October 2016/Yearly	Regimental Officers are intimately familiar with this Guard Directive, and it is used as the principal officer career management and succession planning tool.
L4 – Exercise RIC-A-DAM-DOO	Commanding Officers	Annually as determined by the Regimental Executive Committee. Bi-annually with approval of the Regimental Guard.	Strong sense of regimental pride and esprit de corps developed in new subalterns, to include awareness of both the PPCLI Association and the PPCLI Foundation.

C. Regimental Family

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
<p>R1 – Regimental Anniversaries</p>	<p>All</p>	<p>Minor anniversaries will be commemorated every five years (i.e. 2019, 2024, 2029, 2034, 2044, 2049, 2054, 2059, 2069, etc.)</p> <p>Major anniversaries will be commemorated every twenty-five years (i.e. 2039 – 125<sup>th</sup>, 2064 – 150<sup>th</sup>, 2089 – 175<sup>th</sup>, and 2114 – 200<sup>th</sup>)</p> <p>In order to optimize participation within operational and Departmental constraints, consideration will be given to scheduling Regimental events on the margins of institutional activities which create the operational necessity for the Serving Component to converge in one location.</p>	<p>Minor anniversaries will be used to develop and maintain cohesion and a strong sense of regimental pride and esprit de corps amongst all members of the Regimental Family.</p> <p>Major anniversaries will have the additional aim to celebrate our anniversaries with the nation.</p> <p><b>Opportunity for Association and Foundation to conduct their Annual General Meetings in Edmonton during minor anniversaries.</b></p>

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
R2 – Champion e-membership for the PPCLI Association	Regimental Guard Regimental Executive Committee	NLT July 2016  Refresh each fall	Set the example in order to encourage the Serving Component to join the PPCLI Association.  Encourage Extra-Regimentally Employed members to be involved in Branch activities within in their geographic areas.
R3 – Exercise RIC-A-DAM-DOO	Commanding Officers	Annually as determined by the Regimental Executive Committee. Bi-annually with approval of the Regimental Guard.	Strong sense of regimental pride and esprit de corps developed in new subalterns, to include awareness of both the PPCLI Association and the PPCLI Foundation.
R4 – French Grey Ball	Regimental Executive Committee	Annually as determined by the Regimental Executive Committee. Bi-annually with approval of the Regimental Guard.	To develop and maintain connections to supporters of the Regiment, both military and civilian, in Western Canada.
R5 – Regimental Golf Tournament	Regimental Executive Committee in cooperation with the PPCLI Foundation	Annually as determined by the Regimental Executive Committee. Bi-annually with approval of the Regimental Guard.	Confirm intent with Chairman of the Regimental Executive Committee.

D. History and Traditions

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
H1 – Exercise RIC-A-DAM-DOO	Commanding Officers	Annually as determined by the Regimental Executive Committee. Bi-annually with approval of the Regimental Guard.	Perpetuate the Regiment's history, customs and traditions.
H2 – Acquisition Plan	Museum Manager	Continuing process	Procure artefacts from eras where there is a weakness in our Collection.
H3 – Museum Collections Security	Museum Manager	Continuing process	Artefacts and records are secured and protected.
H4 – Obtain recognized museum status from the Alberta Museums Association	Museum Manager	Complete, 156 <sup>th</sup> REC	Obtain status so as to be able to access provincial grants.
H5 – Museum Collections Inventory	Museum Manager	Continuing process	A complete inventory is conducted of our Collections and Archives in accordance with accepted standards and practices.
H6 – Museum Collections Appraisal	Museum Manager	Started 2018 Complete NLT September 2021	A revised appraisal is conducted in order to allow for appropriate insurance to be assigned to items in the Museum.
H7 – Identify opportunities for visits to and recognition of key milestones for The Rifles and the Royal Australian Regiment	Regimental Major	Ongoing	Perpetuate our connection to Allied Regiments through visits and recognition of their key commemorations.

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
H8 – Operation DISTINCTION events reviewed for potential PPCLI participation	Regimental Executive Committee	Complete	Opportunities identified and bids for participation submitted through the chain of command.
H9 – Commission post-graduate research into the strength of the regimental system in the Canadian infantry using the PPCLI as a case study	Regimental Executive Committee	Postponed because of lack of resources	Research fellowship established that leads to a thesis product on the regimental system that can be published.
H10 - Establish a plan to publish the next volumes in the Regiment's Official History.	Regimental Guard	Start January 2018 Complete August 2021	Plan, research, write, approve and publish the next chapter in our Regimental history.
H11 – Develop Regimental Monument/Memorial Upkeep Plan	Regimental Executive Committee	Work is ongoing with Association. Milestones TBC	Track, monitor and upkeep our Regimental Monuments and Memorials
H12 – Museum Deaccessioning program	Museum Manager	NLT December 2017	Clear the backlog of surplus items from Museum inventory.
H13 – The Military Museum Website Upgrade	Museum Manager	On hiatus	Work collaboratively with The Military Museum to improve the museum's website, to include a 'virtual museum' feature allowing the public to tour the gallery and click on objects to learn more.

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
H14 – Obtain designated institution status for Canadian Cultural Property	Museum Manager	TBC	Work with The Military Museums in order to demonstrate stable temperature and humidity status and thus achieve federal status.
H15 – Satellite Exhibits	Museum Manager	December 2018	Develop a capacity to support exhibits outside of the museum.
H16 – Elimination of Archives Backlog	Archivist	Ongoing	Complete the proper accessioning, arrangement and description of our unsorted archival holdings.
H17 - Explore reprinting/re-issuing Volumes I to IV of our Regimental history.	Regimental Major	March 2019	Provide members of the Regimental Family with greater access to our Regimental History in paper and electronic format.
H18 – Project definition and analysis for Gault Gallery, Edmonton	Regimental Guard	Issue Guard Directive for August 2019	Explore options to create, as an adjunct to the PPCLI Museum in Calgary, a satellite gallery in Edmonton to include some or all of our collections and archives.
H19 – Education Outreach	Museum Manager	December 2019	Expand education activities to include curriculum-based activities and visits.
H20 – Populate Access to Memory (AtoM)	Museum Manager	Complete Version 1 by December 2019	Provide an online searchable database of PPCLI archival records.

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
H21 – Archives Arrangement and Description Complete	Archivist	NLT December 2020	Conduct a complete inventory of our Archives in accordance with accepted standards and practices.
H22 – Digitization of Archives	Archivist	NLT September 2025	Produce a list of archival holdings searchable online, with selected documents and photos available in scanned versions.
H33 – War Diaries	Regimental Adjutant	Ongoing	Establish a Battle Rhythm which ensures that Regimental Headquarters requests copies of War Diaries from the National Archives as they are declassified for onward passage to the Museum Archive.

E. Image and Identity

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
I1 - Review the Operation DISTINCTION event list and identify activities that would benefit from PPCLI representation, where capacity exists.	Regimental Executive Committee	Complete	Target important Operation DISTINCTION milestones for Regimental representation.

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
I2 – Websites and social media up-to-date and active/attractive	Regimental Major / PPCLI Association / PPCLI Foundation	Initial confirmation complete for NLT fall 2016  Annual monitoring every spring	Regimental websites are harmonized, up-to-date, and attractive.
I3 – Develop Regimental narrative and outreach programme	Regimental Major / Vice-President (Strategy)	June 2018	Key messages for internal and external audiences that can be used by all Regimental Entities.  An annual programme for outreach.
I4 – Develop Regimental Monument/Memorial Upkeep Plan	Regimental Executive Committee	Work is ongoing with Association. Milestone TBC	Track, monitor and upkeep our Regimental Monuments and Memorials

F. Benevolence

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
B1 – Regimental Veteran's Care Cell	Regimental Major	Ongoing	Track all wounded and deceased personnel in the Regiment and remain as the point of contact for the Regiment to all families of the fallen.
B2 – PPCLI Student Bursary Fund	Hamilton Gault Memorial Fund Board of Trustees	NLT 15 July annually	Advancing the education of the members of the Regimental Family.



Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
B3 – Korean Student Bursaries	Hamilton Gault Memorial Fund Board of Trustees	NLT 1 March in the year the bursaries are awarded	Bursaries offered annually to South Korean students in memory of those Patricias who served in the Korean War.
B4 – PPCLI Benevolent Fund	PPCLI Benevolent Fund Board of Trustees	As required	Disperse benevolent loans and grants to the members of the Regimental Family in time of personal crisis or tragedy in the absence or inability of other public and private programs.
B5 – Mental Health and Suicide Awareness	PPCLI Association	Ongoing	Conduct two centralized workshops per year which promote Mental Health and establish a framework for assisting veterans in distress.
B6 – Veterans and Family Support	PPCLI Association	Ongoing	Oversee Volunteer Patricia Program (VPP), determine how the Association can best support veterans and families and amend existing policies to ensure support. Establish a cooperative relationship with other veterans' organizations or charitable organizations with comparable and compatible purposes and objects.

G. Effective Governance

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
G1 – Transition to new charitable status framework	Regimental Executive Committee	November 2017 (complete)	Regimental financial framework compliant with CAF NPP and CRA regulations.
G2 – Publish Museum Strategic Plan and Updated Museum Manual	Museum Manager / Regimental Major	January 2016  Museum manual adopted at 156 <sup>th</sup> REC.	Provide detailed guidance for ongoing development and improvement of the PPCLI Museum and Archives; ensure proper management of Collections and Archives.
G3 – Establish a Steering Committee consisting of the Presidents of the Regimental Guard, the PPCLI Association, and the PPCLI Foundation in order to set priorities, synchronize and deconflict efforts	Presidents Regimental Guard, PPCLI Association and PPCLI Foundation	March 2016 - Complete	Set priorities, synchronize and deconflict efforts.
G4– Website risk analysis	Regimental Major / PPCLI Association / PPCLI Foundation	Quarterly back-up  Shielding of personal information by NLT fall 2016	Data is backed-up at least quarterly. Regimental Entities put in place measures to shield personal information from cyber-attack.
G5 – Revise and reissue Guard Policy Directives	Regimental Guard	Fall 2018	Existing Guard Policy Directives are revised. New Guard Policy Directives are drafted and approved. Directives are accessible via the PPCLI.com website.

Princess Patricia's Canadian Light Infantry Regimental Strategy

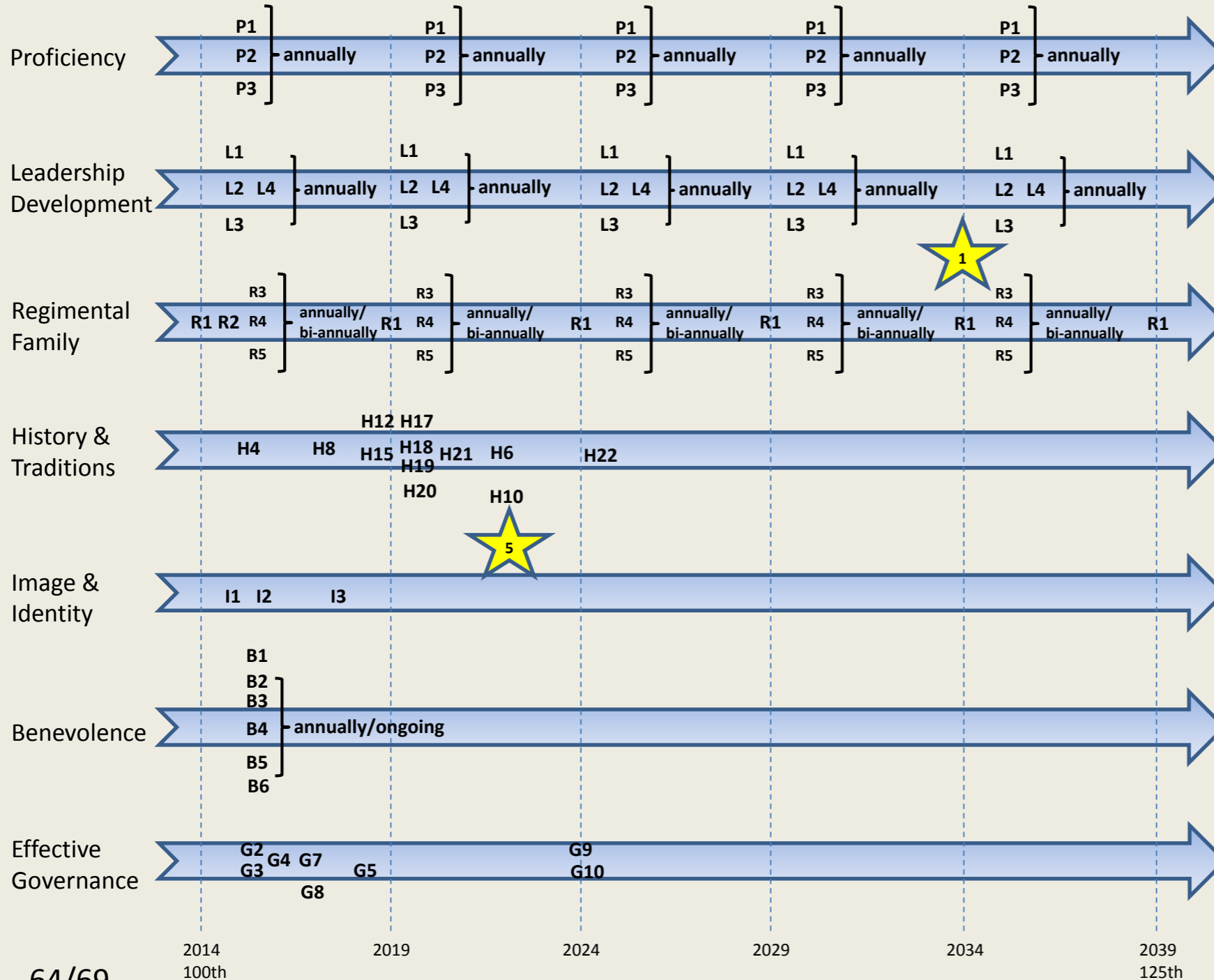
WHAT	WHO	TIME FRAME	EXPECTED RESULTS
G6 – Update and publish a Warehouse Manual	Regimental Major	TBC	Effective governance in accordance with Non-public property regulations.
G7 – Update the Regimental Manual and the new Soldier's Manual	Regimental Major	Regimental Manual updated, approved and posted to Regimental website.  New Soldiers' Manual has been updated	Manuals are updated as required and published online for wide-access, accompanied by an information campaign to publicize their release.
G8 – Control of Regimental Property (Outside of Museum)	Regimental Warrant Officer	December 2016	Ensure Regimental Property outside of the Museum is properly inventoried, insured and cared for.
G9 – Secure long-term funding for Museum (Outreach Director, Archivist, operations and maintenance)	Regimental Family	NLT 2024	Secure stable funding to the sum of \$185,000 per year (plus inflation) from Directorate History and Heritage through the Museum Development Fund program, and/or other sources.
G10 – Obtain permanent manning for Museum	Regimental Guard	NLT 2024	If military positions cannot be secured, alternatives such as hiring civilians must be explored.

**XI KEY DECISIONS**

WHAT	WHEN	REMARKS
1 – Guidance for the 125 <sup>th</sup> Anniversary	NLT 2034	Based on anticipated operational tasks and commitments, provide detailed planning guidance to the Regimental Executive Committee and other Regimental Entities for the conduct of the Regiment's 125 <sup>th</sup> Anniversary.
2 – Guidance for the 150 <sup>th</sup> Anniversary	NLT 2059	Based on anticipated operational tasks and commitments, provide detailed planning guidance to the Regimental Executive Committee and other Regimental Entities for the conduct of the Regiment's 150 <sup>th</sup> Anniversary.
3 – Guidance for the 175 <sup>th</sup> Anniversary	NLT 2084	Based on anticipated operational tasks and commitments, provide detailed planning guidance to the Regimental Executive Committee and other Regimental Entities for the conduct of the Regiment's 175 <sup>th</sup> Anniversary.
4 – Guidance for the Bi-Centennial	NLT 2104	Based on anticipated operational tasks and commitments, provide detailed planning guidance to the Regimental Executive Committee and other Regimental Entities for the conduct of the Regiment's 200 <sup>th</sup> Anniversary.
5 – Proceed with Gault Gallery Project	August 2021	Based on analysis and project definition, determine whether the Regiment will/can commit the resources towards the development of the Gault Gallery.

# XII – PPCLI Campaign Plan

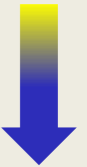
## Lines of Effort



## Objectives

- To enable Commanding Officers to set and maintain the highest standards of unit proficiency, capability, and combat effectiveness.
- To identify and develop the leadership potential of all ranks of the Regiment for the benefit of the individual, the Regiment, the CAF, and Canada.
- To develop and maintain cohesion and a strong sense of regimental pride and esprit de corps amongst all members of the regimental family.
- To record and perpetuate the Regiment's history, customs and traditions.
- To own and protect a strong and professional image of the Regiment throughout the CAF and Canada.
- To foster the well-being of all members of the Regimental family.
- To maintain a relevant and adaptable Regimental structure to facilitate the efficient conduct of Regimental and Corps business, to develop long-term plans and goals to support Regimental objectives and to effectively execute the day-to-day operations of the Regiment.

PPCLI ASSOCIATION



Desired End State

Princess Patricia's Canadian Light Infantry continues to be a proud, confident Regiment with outstanding leadership, strong discipline and highly developed military skills that enable it to fight and win on the battlefield of today and tomorrow. The Regiment's success and legacy are underpinned by operational excellence and a strong regimental family focused on supporting and maintaining cohesion amongst serving and retired and their families.



PPCLI FOUNDATION

# PPCLI Campaign Plan

## Lines of Effort

## Objectives

PPCLI ASSOCIATION

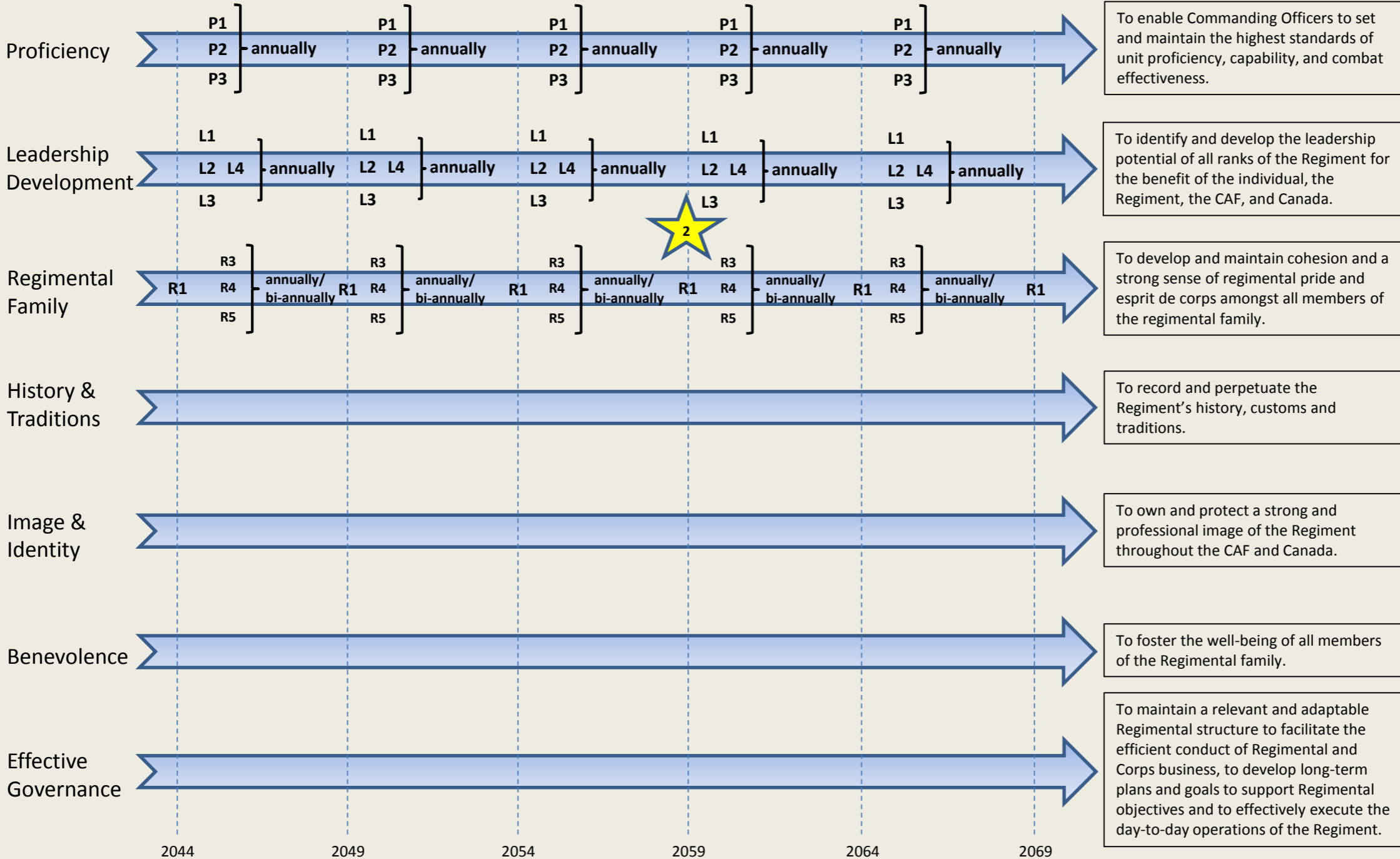


Desired End State

Princess Patricia's Canadian Light Infantry continues to be a proud, confident Regiment with outstanding leadership, strong discipline and highly developed military skills that enable it to fight and win on the battlefield of today and tomorrow. The Regiment's success and legacy are underpinned by operational excellence and a strong regimental family focused on supporting and maintaining cohesion amongst serving and retired and their families.



PPCLI FOUNDATION



- To enable Commanding Officers to set and maintain the highest standards of unit proficiency, capability, and combat effectiveness.
- To identify and develop the leadership potential of all ranks of the Regiment for the benefit of the individual, the Regiment, the CAF, and Canada.
- To develop and maintain cohesion and a strong sense of regimental pride and esprit de corps amongst all members of the regimental family.
- To record and perpetuate the Regiment's history, customs and traditions.
- To own and protect a strong and professional image of the Regiment throughout the CAF and Canada.
- To foster the well-being of all members of the Regimental family.
- To maintain a relevant and adaptable Regimental structure to facilitate the efficient conduct of Regimental and Corps business, to develop long-term plans and goals to support Regimental objectives and to effectively execute the day-to-day operations of the Regiment.

# PPCLI Campaign Plan

## Lines of Effort

## Objectives

PPCLI ASSOCIATION

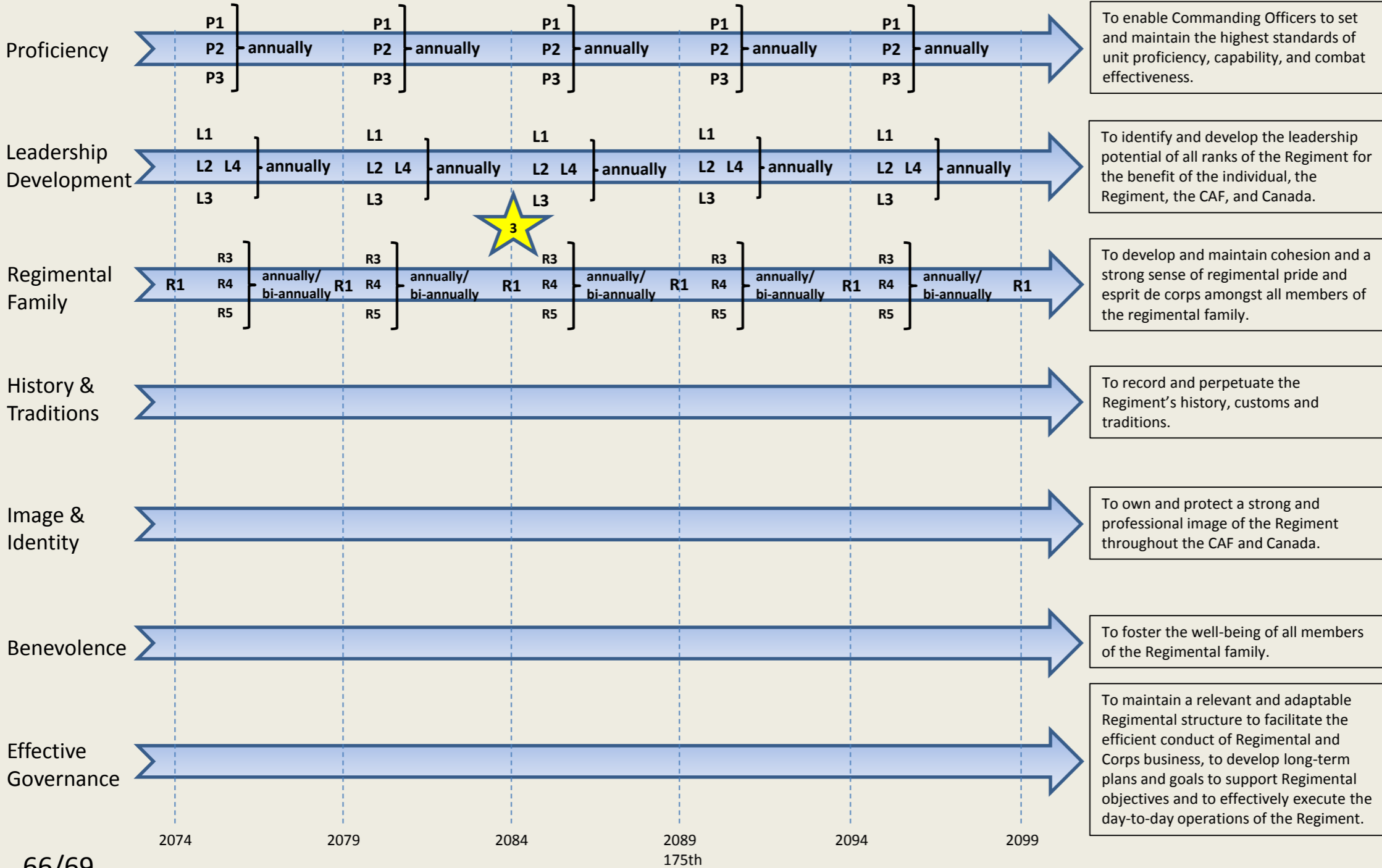


Desired End State

Princess Patricia's Canadian Light Infantry continues to be a proud, confident Regiment with outstanding leadership, strong discipline and highly developed military skills that enable it to fight and win on the battlefield of today and tomorrow. The Regiment's success and legacy are underpinned by operational excellence and a strong regimental family focused on supporting and maintaining cohesion amongst serving and retired and their families.



PPCLI FOUNDATION



To enable Commanding Officers to set and maintain the highest standards of unit proficiency, capability, and combat effectiveness.

To identify and develop the leadership potential of all ranks of the Regiment for the benefit of the individual, the Regiment, the CAF, and Canada.

To develop and maintain cohesion and a strong sense of regimental pride and esprit de corps amongst all members of the regimental family.

To record and perpetuate the Regiment's history, customs and traditions.

To own and protect a strong and professional image of the Regiment throughout the CAF and Canada.

To foster the well-being of all members of the Regimental family.

To maintain a relevant and adaptable Regimental structure to facilitate the efficient conduct of Regimental and Corps business, to develop long-term plans and goals to support Regimental objectives and to effectively execute the day-to-day operations of the Regiment.

# PPCLI Campaign Plan

## Lines of Effort

## Objectives

PPCLI ASSOCIATION

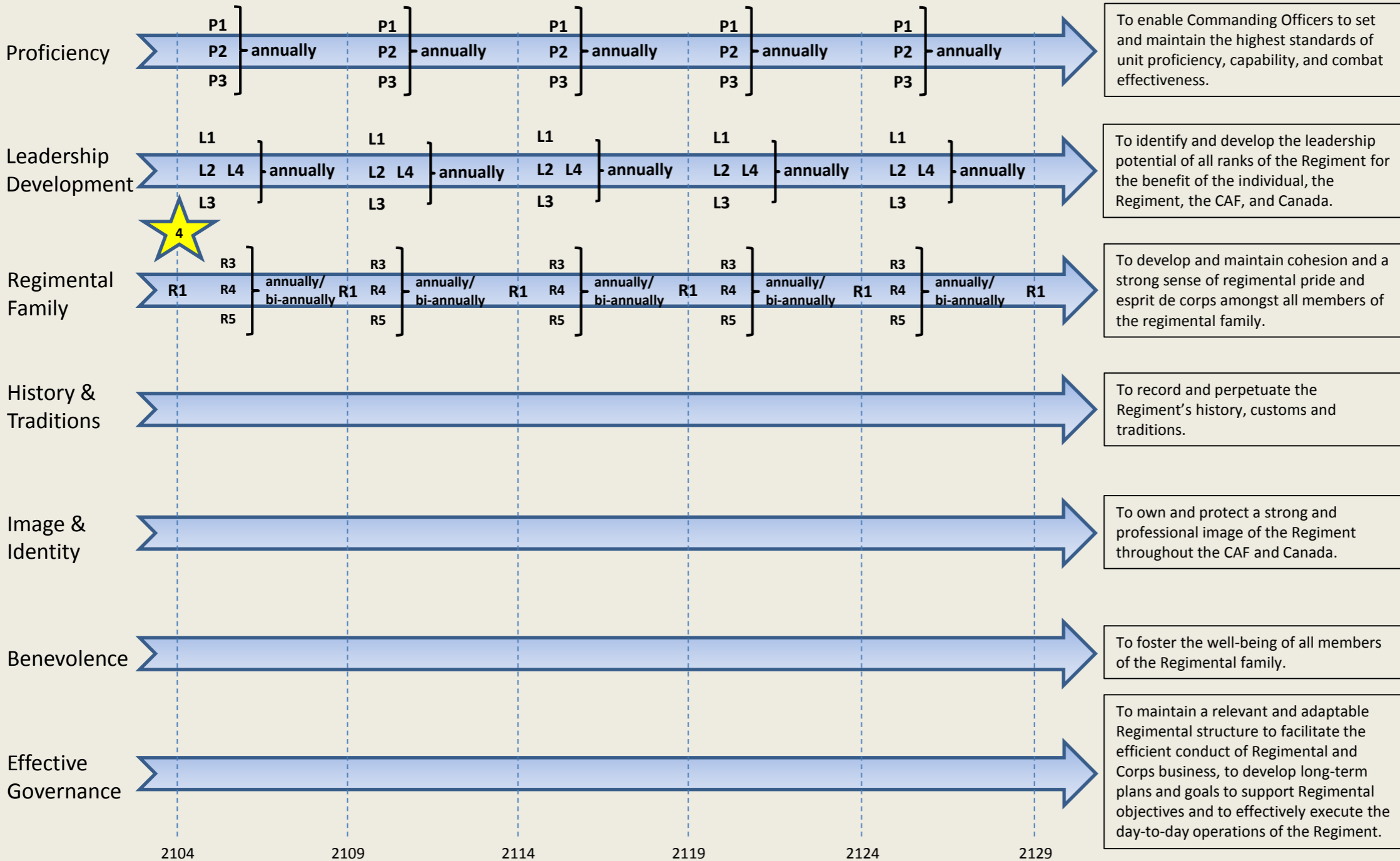


Desired End State

Princess Patricia's Canadian Light Infantry continues to be a proud, confident Regiment with outstanding leadership, strong discipline and highly developed military skills that enable it to fight and win on the battlefield of today and tomorrow. The Regiment's success and legacy are underpinned by operational excellence and a strong regimental family focused on supporting and maintaining cohesion amongst serving and retired and their families.



PPCLI FOUNDATION



2104 2109 2114 2119 2124 2129

200th



# **EVALUATION AND CONTROL**

XII. **EVALUATION**

- A. General. The evaluation process will be simple and easy to manage. Major activities and projects will be examined in a five-step feedback process.
- B. Five-step Feedback Process
  - 1. Determine what to measure. Here the effort will be on the most significant element or elements of the activity or project. Both the process and the results must be capable of being measured in an objective manner.
  - 2. Establish the desired standard, which may be a quantitative or qualitative measure. Often this should tie to the assigned objectives.
  - 3. Measure the actual performance.
  - 4. Compare actual performance with the standard.
  - 5. Reinforce success or take corrective action.

XIII. **CONTROL**

- A. General. A regular methodology will be implemented in order to refresh the Regimental Strategy and monitor progress (or lack thereof) of the Campaign Plan.
- B. Regimental Strategy
  - 1. The Regimental Strategy will be updated following each Regimental Executive Committee and Regimental Guard meeting in order to capture applicable decisions and direction.
  - 2. A periodic refresh of the Regimental Strategy will occur each year prior to the spring Regimental Guard meeting.
  - 3. The Regimental Guard will seek to hold Strategic Planning Sessions no less than every five years in conjunction with Regimental anniversaries. The Regimental Strategy will be revised accordingly.
- C. Campaign Plan. The Vice-President (Strategy) will review the campaign plan within the appropriate planning horizon at each meeting of the Regimental Executive Committee and the Regimental Guard.