



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

## **Regimental Strategy**

Version 3 dated 9 March 2020



## FOREWORD BY THE COLONEL OF THE REGIMENT

In April 2015, and building on the success of our Centennial, the Regiment's senior leadership participated in our 1<sup>st</sup> Regimental Strategic Planning Session.<sup>1</sup> The eventual outcome of this session was the Regimental Strategy and its accompanying Campaign Plan. The Regimental Strategy was first published in August 2016, and it has been updated secretarially to capture applicable developments, decisions and direction.

While much has been achieved in the period 2014 – 2019, the occasion of the Regiment's 105<sup>th</sup> Anniversary provided an excellent opportunity to continue our drive towards coherence, relevance and sustainability – both on the part of the Regiment and the broader Regimental Family.

What follows is Version 3 of our Regimental Strategy, informed largely by discussions held during our 2<sup>nd</sup> Strategic Planning Session.<sup>2</sup>

Guided by our Vision, Mission and Objectives, our Regimental Strategy seeks, over time, to ***improve coherence, strengthen our governance, enhance our retired component*** and ***achieve sustainable funding for our Regimental Family***.

While our strategy aims to provide a measure of 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 suit evolving strategic conditions. The Regimental Guard – and specifically our Vice-President (Strategy) – will manage the Strategy and its accompanying Campaign Plan on behalf of, and in lock-step with, the Regimental Family.

//original signed by//  
V.W. Kennedy  
Brigadier-General (retired)  
Colonel of the Regiment  
9 March 2020

---

<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)).

<sup>2</sup> 1150-1 (RAdj), Minutes from the 2<sup>nd</sup> Strategic Planning Session Held Friday, 9 August 2019, 18 November 2019 (<https://ppcli.com/wp-content/uploads/2020/03/Minutes-from-the-2nd-Strategic-Planning-Session-Held-Friday-9-August-2019.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 Canadian Army Cadet Corps, our family members to include families of the fallen, other associated elements including bands that have a historic affiliation with the Regiment, and non-Infantry occupations that have served with the Regiment at home and abroad. The inclusiveness into the *Regimental Family* does not translate to an expectation of guaranteed support. Instead, the prioritization of support for Patricia soldiers first from the Regiment, then the Regimental Family, will be maintained in our limited resource environment.

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)). At the request of the PPCLI Foundation, a Ways Team will ***explore*** options to reduce to two Regimental Entities (uniformed and non-uniformed). The Regimental Steering Committee has issued separate guidance to shape the analysis and consultation process.

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

[illegible]

## REGIMENTAL PLACEMAT

Generate excellent infantry leaders, soldiers and teams to meet Canada's defence objectives.

Mission of the Regiment

Role of the Regimental Family

Provide support to the Regiment and members of the Regimental Family while perpetuating the unique culture, history and heritage of the PPCLI.

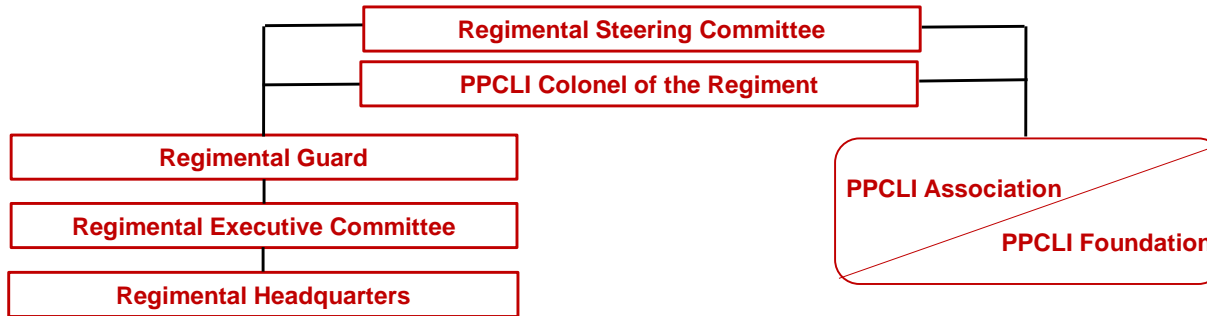
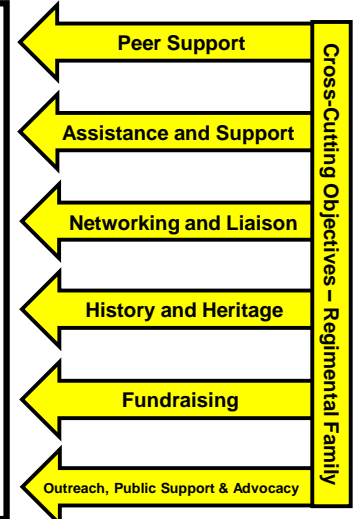
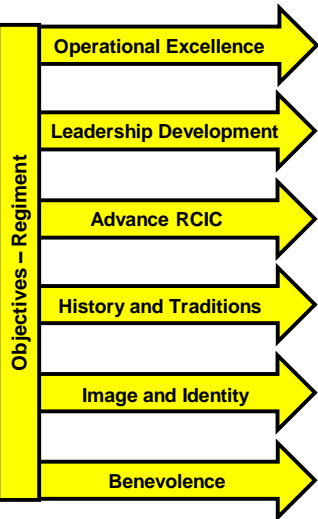
### PPCLI Vision

*Cohesive, relevant and disciplined, Princess Patricia's Canadian Light Infantry generates and sustains uniformed leaders, soldiers and teams who, underpinned by unwavering character, ethical behaviour and a proud legacy, deliver operational excellence through fighting and winning in battle and by occupying key positions in the Canadian Army and across the Canadian Armed Forces.*

### PPCLI Centre of Gravity

### Operational Effectiveness

*Princess Patricia's Canadian Light Infantry success stems from a unified Regiment and Regimental Family comprised of Canadians who, in and out of uniform, support each other and benevolent endeavours while perpetuating our unique culture, history, heritage and bonds with Canadians whom we serve.*



### Regiment (In Uniform):

PPCLI Battalions; PPCLI ERE Offrs and NCMs; Remustered Soldiers; LER (4 PPCLI)

### Regimental Family (Out of Uniform):

Serving, Retired, Families; Honoraries; Cadets; Affiliated Organizations

## **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.	Summary of Our Key Strategic Factors .....	6
A.	Strengths .....	6
B.	Weaknesses.....	6
C.	Opportunities.....	7
D.	Threats.....	7
III.	Stakeholder Analysis.....	9
A.	Our Stakeholders.....	9
B.	Stakeholder Power/Interest Matrix.....	9
C.	Needs and Expectations of Our Critical Stakeholders.....	11

## **STRATEGY FORMULATION**

IV.	Our Strategic Posture.....	14
A.	Regimental Vision.....	14
B.	Regimental Centre of Gravity.....	14
C.	Regimental Mission.....	14
D.	Regimental Objectives.....	14
E.	Role of the Regimental Family.....	15
F.	Regimental Strategy.....	15
F.	Regimental Policies.....	16
G.	Governance, Assessment and Planning Rhythm.....	18

## **STRATEGY IMPLEMENTATION**

V.	Our Campaign Design.....	20
VI.	Our Strategic Issues Agenda.....	21
VII.	Demand Signals for Resources.....	22
VIII.	Our Action Plan.....	23

A.	Operational Effectiveness.....	23
B.	Leadership Development.....	24
C.	Advance the RCIC.....	25
D.	History and Traditions.....	26
E.	Image and Identity.....	28
F.	Benevolence.....	30
IX.	Key Decisions.....	32
X.	Our Campaign Plan.....	33

## **EVALUATION AND CONTROL**

XI.	Evaluation.....	35
A.	General.....	35
B.	Five-step Feedback Process.....	35
XII.	Control.....	35
A.	General.....	35
B.	Regimental Strategy.....	35
C.	Campaign Plan.....	35

## 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>3</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>4</sup>

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

---

<sup>3</sup> See Henry Mintzberg, "The Strategy Concept I: Five Ps for Strategy," *California Management Review* (Fall 1987), 11 – 24.

<sup>4</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

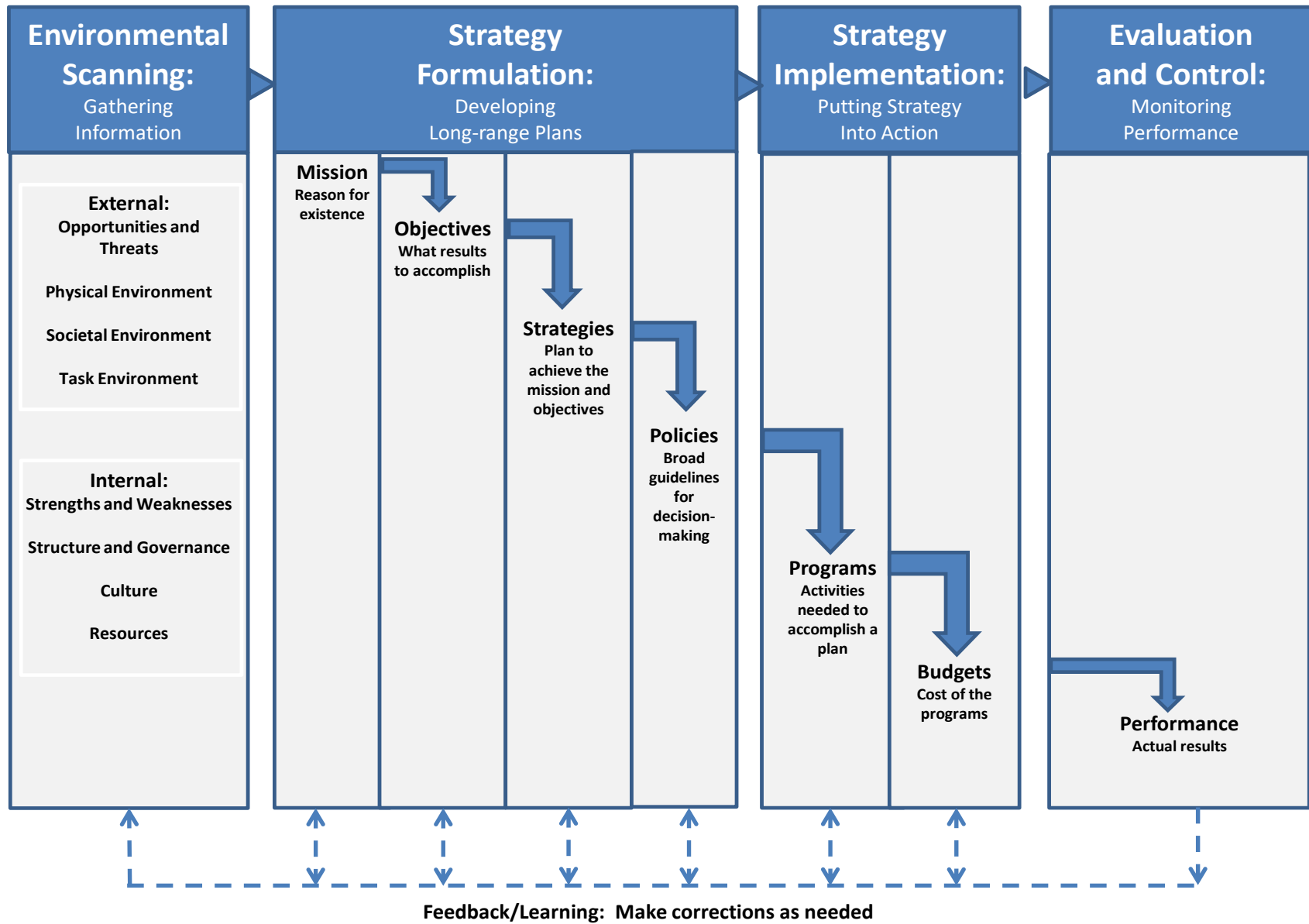
A basic model for strategic management is described in Figure 1, and forms the basis of the analysis that follows in this document. The model's four sequential steps are:

- Environmental scanning.
- Strategy formulation.
- Strategy implementation.
- Evaluation and control.<sup>5</sup>

---

<sup>5</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. **SUMMARY OF OUR KEY STRATEGIC FACTORS**

### A. **Strengths**

- A tradition of strong leadership at all levels.
- An operational focus.
- Provision of over 100 years of service to Canada with a unique history.
- A high level of credibility within the Canadian Army and Canadian Armed Forces.
- A well-established and recognized brand.
- An active Canadian Colonel-in-Chief.
- Three distinct Regimental Entities (the Regiment, the PPCLI Association, and the PPCLI Foundation) who each possess core competencies.
- Well-established processes and procedures based on an updated Regimental Manual and other governance tools.
- The operations and maintenance of our Regimental Headquarters can be sustained (largely) through the Voluntary Regimental Contributions Programme and Warehouse profits.
- An 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.
- Excellent support by the PPCLI Association to multiple charities and benevolent activities.

### B. **Weaknesses**

- The Regiment's governance battle rhythm remains haphazard and does not facilitate well the achievement of mid to long-term goals.
- A general lack of familiarity with our strategies, policies and programs.
- Funding for our museum, especially from Directorate of History and Heritage, is not stable.
- Our museum is located in Calgary, separated from Regimental Headquarters and its Serving Component.
- The Foundation and Association are dependent upon volunteers.
- The PPCLI Association has experienced slow growth and requires younger members. Recent Association recruitment efforts have been popular on social media and membership has improved slightly.
- Fundraising is fundamental to our long-term organizational success. Our fundraising goals must remain realistic, clear and tied to activities and objectives.
- There are 185 documented PPCLI monuments and memorials, many of which are not visited on a regular basis and do not have plan in place for upkeep.
- There is limited direction as to how funds raised to support the Regiment should be expended.

- Unlike the PPCLI Association which produces a three-year report, there is limited external reporting on how the PPCLI Foundation and Patricia Fund distributes funds based on their respective objectives.
- The Regiment, Association and Foundation administer their own websites. This is indicative of a greater theme of inefficiency and a lack of overall clarity to distinguish differences of the Regimental Entities to external audiences.

C. Opportunities

- Based on the success of the 100th Anniversary and our ongoing involvement in operations, the Regiment has a strong connection with Canadians.
- The Regimental Family has a compelling story, especially as it pertains to caring for our soldiers and our legacy of service to Canada.
- The environment is pushing non-profit organizations to be more accountable and transparent.
- The Regiment must be inclusive and welcome new members from all aspects of Canadian society, inculcating them into the Patricia Way.
- There exists an opportunity to champion transition and veterans' issues for the betterment of our soldiers and veterans.
- The Association's recent efforts in Mental Health and Suicide Awareness adds weight to its relevance.
- The demise of one-cause associations like the Korean Veterans' Association may permit the Regimental Family to assume greater responsibilities.
- Operational tempo enhances the reputation of the Regiment by our excellence on operations; perpetuates our "First in the Field" reputation.
- There exist numerous, scalable options to improve the accessibility and attractiveness of the Regimental Museum.

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.
- There is continued pressures on the size and composition of the Royal Canadian Infantry Corps (RCIC), and in particular the Regular Force serving component, brought on by initiatives such as Force 2021, Force Mix and Structure Design (FMSD) and Strengthening the Army Reserve (StAR).
- The continued existence of the Regimental System should not be taken for granted.

- The Regiment's operational tempo is unlikely to abate. There will be a continuous demand on the time of the Serving Component when it comes to Regimental business, celebrations, etc.
- There is a lack of understanding and knowledge on how the Association and the Foundation supports the Regiment, veterans and their families.

### III **STAKEHOLDER ANALYSIS**

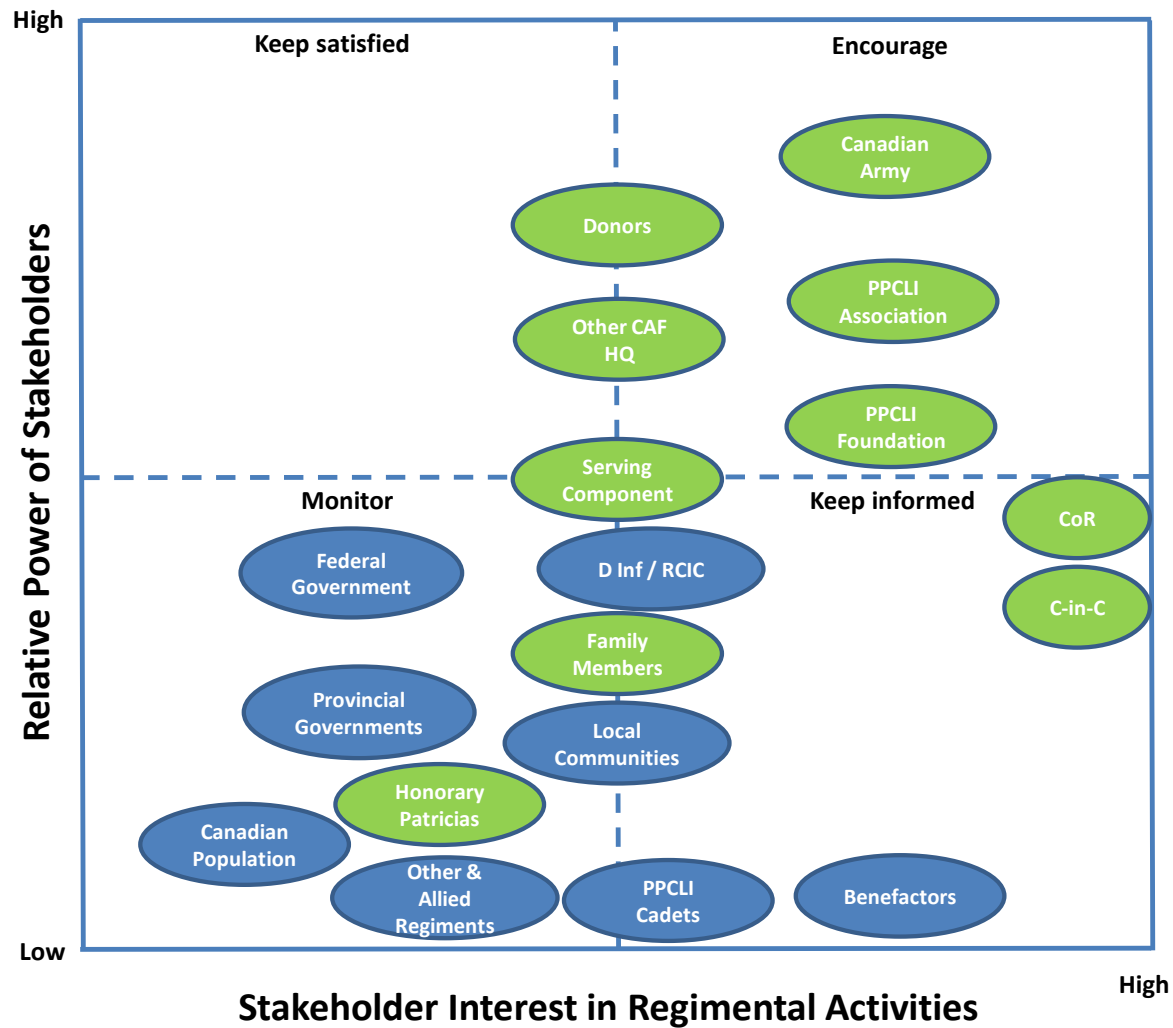
#### A. Our Stakeholders

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, and well trained and capable officers and NCOs for employment in the Army structure and beyond.	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 the 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>

# **STRATEGY FORMULATION**

#### IV. **OUR STRATEGIC POSTURE**

##### A. **Regimental Vision**

*Cohesive, relevant and disciplined, Princess Patricia's Canadian Light Infantry generates and sustains uniformed leaders, soldiers and teams who, underpinned by unwavering character, ethical behaviour and a proud legacy, deliver operational excellence through fighting and winning in battle and by occupying key positions in the Canadian Army and across the Canadian Armed Forces. Princess Patricia's Canadian Light Infantry success stems from a unified Regiment and Regimental Family comprised of Canadians who, in and out of uniform, support each other and benevolent endeavours while perpetuating our unique culture, history, heritage and bonds with Canadians whom we serve.*

##### B. **PPCLI Centre of Gravity**

*Operational effectiveness.*

##### C. **Regimental Mission**

*Generate excellent infantry leaders, soldiers and teams to meet Canada's defence objectives.*

##### D. **Regimental Objectives**

###### 1. **Objective One – Operational Excellence**

*Deliver operational excellence across the full spectrum of operations in pursuit of Canada's defence objectives at home and abroad.*

###### 2. **Objective Two – Leadership Development**

*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 – Advance the Royal Canadian Infantry Corps (RCIC)**

*Champion the enduring relevance of the Regimental System and inform infantry doctrine, structure, capability and force development.*

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

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

5. Objective Five – Image and Identity

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

6. Objective Six – Benevolence

*Foster the well-being of all members of the Regimental Family.*

- E. Role of the Regimental Family. Our Regimental Family provides support to the Regiment and members of the Regimental Family while perpetuating the unique culture, history and heritage of the Princess Patricia's Canadian Light Infantry. The Regimental Family's cross-cutting objectives include:

1. Peer support.
2. Assistance and support.
3. Networking and liaison.
4. History and heritage.
5. Fundraising.
6. Outreach, public support and advocacy.

- F. Regimental Strategy. In order to achieve our vision, mission and objectives, we shall pursue continual improvements in the following areas:

1. Coherence across the Regimental Family.
2. Governance.
3. Enhance our retired component.
4. Sustainable funding for our Regimental Family.

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

SERIAL	TITLE	STATUS
001	Format and Use of Directives	Current. Posted on ppcli.com.
002	Regimental Commemorations	Posted on ppcli.com. Requires an update to capture lessons learned from the 105 <sup>th</sup> Anniversary.
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.
013	Official History of the Regiment	Approved 24 January 2018. Posted on ppcli.com.
014	Memorial Travel	Draft submitted for review
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 external distribution.
021	Officer Career Management and Succession Planning	Approved 29 January 2017. Limited external 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.

Princess Patricia's Canadian Light Infantry Regimental Strategy

SERIAL	TITLE	STATUS
024	C-in-C Succession Planning	Being drafted.



- G. Governance, Assessment and Planning Rhythm. To improve coherence, the Regiment and Regimental Family will transition to the following governance, assessment and planning rhythm:

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
		RM Report	RSC		Guard		REC			RSC	
				Association AGM	Foundation AGM					PF BoD	
Execute In-Year Regimental Family Activities											
Assess Last Year's Performance (report on policies, programs & projects over the last calendar year)				Identify Next Year's Activities (identify the level of ambition for the next calendar year)				Approve Budgets for Next Year (secure resources from the Patricia Fund, Hamilton Gault Memorial Fund, Foundation)			

Notes

1. Guard = Guard Meeting. RSC = Regimental Steering Committee Meeting. REC = Regimental Executive Committee Meeting. AGM = Annual General Meeting. PF BoD = Patricia Fund Board of Directors.
2. The Regimental Entities' charitable activities are planned and executed on the basis of the calendar year (January to December).
3. The November RSC Meeting formulates general planning guidance for the next calendar year. The April RSC Meeting conducts evaluation and monitoring and provides in-year course correction.
4. The June Guard Meeting is tied to Battalion/Brigade changes of command.
5. The August REC Meeting is tied to French Grey / Gala weekend.
6. The schedule omits PPCLI Foundation quarterly meetings and PPCLI Association monthly meetings.
7. Single-issue or conditions-based adhoc meetings can be called as required.

# **STRATEGY IMPLEMENTATION**

V. **OUR CAMPAIGN DESIGN**

LINES OF EFFORT (Logical lines linking actions, programs and projects in time and purpose to an objective)	OBJECTIVES (Clearly defined and attainable goals to be achieved in order to establish the conditions required to achieve the desired end state)	DESIRED END STATE (A statement of conditions that defines an acceptable future situation for the Regiment that is favourable and self-regulating)
Operational Excellence	Deliver operational excellence across the full spectrum of operations in pursuit of Canada's defence objectives at home and abroad.	<b><u>PPCLI Vision</u></b> Cohesive, relevant and disciplined, Princess Patricia's Canadian Light Infantry generates and sustains uniformed leaders, soldiers and teams who, underpinned by unwavering character, ethical behaviour and a proud legacy, deliver operational excellence through fighting and winning in battle and by occupying key positions in the Canadian Army and across the Canadian Armed Forces. Princess Patricia's Canadian Light Infantry success stems from a unified Regiment and Regimental Family comprised of Canadians who, in and out of uniform, support each other and benevolent endeavours while perpetuating our unique culture, history, heritage and bonds with Canadians whom we serve.
Leadership Development	Identify and develop the leadership potential of all ranks of the Regiment for the benefit of the individual, the Regiment, the CAF, and Canada.	
Advance the RCIC	<i>Champion the enduring relevance of the Regimental System and inform infantry doctrine, structure, capability and force development.</i>	
History and Traditions	Record and perpetuate the Regiment's history, customs and traditions.	
Image and Identity	Embody and protect a strong and professional image of the Regiment throughout the CAF and Canada.	
Benevolence	Foster the well-being of all members of the Regimental family.	

VI. **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. Improving cohesion across the Regimental Family.
  2. Governance.
  3. Succession.
  4. Enhancing our Retired Component.
  5. Sustainable funding for our Regimental Family.

**VII. DEMAND SIGNALS FOR RESOURCES (FINANCIAL, TIME AND PEOPLE)**

SUBJECT	FUNDING REQUIRED	HORIZON	REMARKS	STATUS	PRIORITY
Museum Improvements	\$353,500	Now - 2024	Accessibility improvements, creating of interactive displays, archival improvements	Concept approved. Unfunded.	3
Volume VI of the Regimental History	\$150,000	2020 - 2023	Represents author fees and research expenses. Publishing costs to be confirmed.	Approved. 10% funded.	1
Celebrate the 110 <sup>th</sup> Anniversary	TBC	2024	Guidance not yet issued. Scope to be determined following 105 <sup>th</sup> Anniversary After Action Review.	Unfunded	4
Colonels-in-Chief Statue	\$150K (estimated)	2024	Refer to Briefing Note "Memorializing the Colonels-in-Chief"	Proposed. Unfunded.	5
Celebrate the 115 <sup>th</sup> Anniversary	TBC	2029	Guidance not yet issued. Scope to be determined.	Unfunded	8
Volume VII of the Regimental History	\$150K (estimated)	2029	See Guard Policy Directive 013	Unfunded	7
Celebrate the 120 <sup>th</sup> Anniversary	TBC	2034	Guidance not yet issued. Scope to be determined.	Unfunded	9
Celebrate the 125 <sup>th</sup> Anniversary	\$2M (estimated)	2039	\$310K in Legacy Fund. Regiment must contribute \$27K – \$40K yearly.	15% funded	2
Refurbish Frezenberg Monument, Lansdowne Park Memorial, Patricia Park	\$50K (estimated)	2038	PPCLI Association lead	Annual maintenance funded by HGMF. Funded.	6
Extension to The Military Museum	\$5M (estimated)	No timeline established		Aspirational	11
New Gallery Space in Edmonton	\$1.5M (estimated)	No timeline established	Does not include annual rent/mortgage and operations and maintenance.	Aspirational	12
Privately funded Regimental Headquarters and Museum	\$5-8M (estimated) Endowment Fund	No timeline established		Aspirational	10

VIII. **OUR ACTION PLAN**A. **Operational Excellence**

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
E1 – Conduct the A. Hamilton Gault Trophy Competition	Director Infantry / Colonel of the Regiment / Commanding Officers	Competition - yearly 1 January to 30 November  Presentation – as soon as practicable after 7 December  Presently inactive	Foster interest in and improve the standard of marksmanship in the Infantry of the Regular component of the Canadian Armed Forces.
E2 – Conduct the Hamilton Gault Skill-At-Arms Trophy Competition	Commanding Officers / Regimental Major	Competition – yearly  Presentation – 17 March  Presently on hiatus	Foster a high standard of military skills in Princess Patricia's Canadian Light Infantry.
E3 – Regimental Achievement Awards	Chain of Command / Regimental Executive Committee	Immediately following completion of a CAF or foreign course.	Foster professional excellence on leadership or advanced trade skills.
TBD – DPs for cultivating/perpetuating warrior ethos, individual training, collective training, professional development...	Regimental Executive Committee	TBD	These need to be flushed out, balancing distinct authorities, responsibilities and accountabilities of the institution.

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	Yearly to new subalterns and Master-Corporals	All Regimental leaders are intimately familiar with this Guard Directive, and embrace its tenets in all aspects of Regimental life.
L2 – Refresh and re-issue Guard Directive 020 NCM Career Management and Succession Planning Process	Regimental Guard Chief Warrant Officer	Yearly	Regimental leaders are intimately familiar with this Guard Directive, and it is used as the principal management policy for NCMs.
L3 – Refresh and re-issue Guard Policy Directive 021 Officer Career Management and Succession Planning	Regimental Guard Vice President (Regimental Colonel)	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 – Conduct 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. Perpetuate the Regiment's history, customs and traditions.

C. Advance the RCIC

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
A1 – Battalion participation in Canadian Army Working Groups, to include Light Forces Working Group (LFWG) and Mechanized Forces Working Group (WG)	Commanding Officers	On demand	Patricia leaders add value to infantry doctrine, structure, capability and force development.
A2 – Regimental input to Force 2021, FMSS and StAR	Commanding Officer, Senior Patricia leaders at formation level and within the institution	On demand	Patricias contribute and help shape Canadian Army structure, capability and force development informed by collective operational experience and dedication to operational excellence.
A3 – Engage and consensus-build with The Royal Canadian Regiment and the Royal 22e Regiment	Commanding Officer, Senior Patricia leaders at formation level and within the institution	Adhoc and during Exercise BAYONET, Infantry Advisory Boards, Extended Infantry Advisory Boards and Infantry Council	Help articulate a unified RCIC position to Canadian Army senior leadership on important issues.



D. History and Traditions

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
H1 – Celebrate Regimental Anniversaries	All	<p>Minor anniversaries will be commemorated every five years (i.e. 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>Opportunity for Association and Foundation to conduct their Annual General Meetings in Edmonton during minor anniversaries.</p> <p>Increased Serving Component knowledge of PPCLI Association by their attendance at the Annual General Meeting.</p>

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
H2 – 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.
H3 – Obtain War Diaries for the Regimental Archives	Regimental Adjutant	Ongoing	Establish a battle rhythm which ensures that Regimental Headquarters requests copies of War Diaries from the Directorate of History / National Archives of Canada for onward passage to the Museum Archive.
H4 – Develop and Maintain the Regimental Monuments and Memorials Manual	Regimental Headquarters / PPCLI Association	Ongoing	Track, monitor and upkeep our Regimental Monuments and Memorials in accordance with the established concept of support. PPCLI Association responsible for Regimentally designed memorials. Battalions and Bases responsible for memorials that they create. Families are responsible for their own memorials.

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
H5 – Issue Comprehensive Museum Guidance	Regimental Guard	December 2020	Building on the extant Museum Strategic Plan, provide guidance on appraisal activities, insurance, virtual accessibility, interactive displays, museum transition and Afghanistan expansion.
H6 – Publish Volume VI of the Regimental History (Princess Patricia's Canadian Light Infantry: 1958 – 2000), explore limited republishing of Volumes I, II and III	Regimental Executive Committee / Regimental Editorial Board	Late 2023	Plan, research, write, approve and publish the next chapter in our Regimental history.
H7 – Publish Volume VII of the Regimental History (Princess Patricia's Canadian Light Infantry: 2001 – 2014).	Regimental Executive Committee / Regimental Editorial Board	2039	Plan, research, write, approve and publish the next chapter in our Regimental history.

E. Image and Identity

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
I1 – Plan and Conduct the French Grey Ball / Gala	Regimental Executive Committee	Annually as determined by the Regimental Executive Committee. Bi-annually with approval of the Regimental Guard.	Develop and maintain connections to supporters of the Regiment, both military and civilian, in Western Canada.

Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
I2 – Plan and Conduct a 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.	Develop and maintain connections to supporters of the Regiment, both military and civilian, in Western Canada.
I3 – Develop Regimental Narrative and Outreach Programme	Regimental Major / Vice-President (Strategy)	Delayed pending review by Regimental Entities	Key messages for internal and external audiences that can be used by all Regimental Entities.  An annual programme for outreach.
I5 – Conduct Option Analysis for a Regimental Family Website	Regimental Major / PPCLI Association / PPCLI Foundation	December 2020	Pursue alignment of a single website with a general PPCLI brand that meets the needs of the Serving Component, the PPCLI Association and the PPCLI Foundation.
I6 – Effective social media presence and maintenance plan	Regimental Major / PPCLI Association / PPCLI Foundation	December 2020	Maintain a Regimental Family website that is attractive and informative.

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	Advance the education of the members of the Regimental Family.
B3 – Korean Student Bursaries	Regimental Executive Committee / Patricia Fund	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.

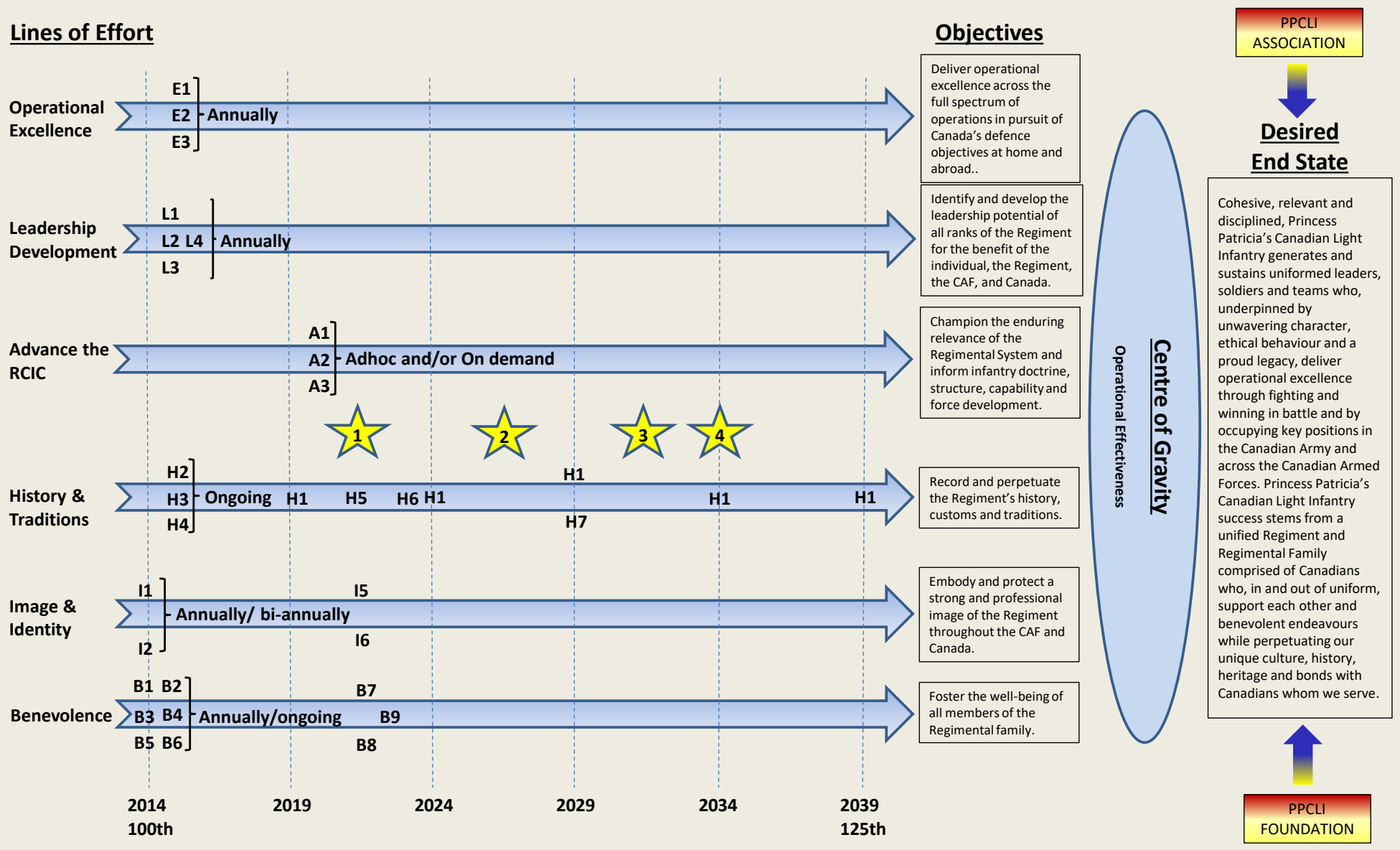
Princess Patricia's Canadian Light Infantry Regimental Strategy

WHAT	WHO	TIME FRAME	EXPECTED RESULTS
B5 – Mental Health and Suicide Awareness	PPCLI Association	Ongoing	Conduct one workshop per year alternating between eastern and western Canada in order to 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.
B7 – Develop Departure Package for Releasing/Retiring Members	Regimental Major / PPCLI Association / Liaison with CAF Transition Units (AB/North and SK/MB)	NLT Summer 2020	Convince releasing/retiring members that the PPCLI Association has value and they should join as members.
B8 – Protocol for Death or Serious Injury of a Serving Member	Regimental Major / Regimental Guard	NLT Summer 2020	Standardized response to be taken by the Regiment in case of the death or serious injury of a serving member is captured in a Guard Directive.
B9 – Contingency Plans for Funerals	Regimental Major / Colonel of the Regiment	NLT Summer 2021	Funeral plans are to be codified for the Colonel-in-Chief and former Colonels of the Regiment.

**IX. KEY DECISIONS**

WHAT	WHEN	REMARKS
1 – Guidance for the 110 <sup>th</sup> Anniversary	NLT November 2022	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 110th Anniversary.
2 – Guidance for the 115 <sup>th</sup> Anniversary	NLT November 2027	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 115th Anniversary.
3 – Guidance for the 120 <sup>th</sup> Anniversary	NLT November 2032	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 120th Anniversary.
4 – Guidance for the 125 <sup>th</sup> Anniversary	NLT November 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.

X. OUR CAMPAIGN PLAN





# **EVALUATION AND CONTROL**

XI. **EVALUATION**

- A. General. The evaluation process must 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.

XII. **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 secretarially following each Regimental Executive Committee and Regimental Guard meeting in order to capture applicable developments, decisions and direction.
  - 2. A periodic refresh of the Regimental Strategy will occur each year prior to the spring/summer 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.