

Module 9

Legion Orientation



# CONTENT OUTLINE

<b>MODULE NAME</b>	Legion Orientation
<b>MODULE CHAPTERS</b>	How to Create a Welcoming Environment What Members are Looking For Volunteer Opportunities Effective Goal Setting Understanding the Chain of Command Recruitment and Retention Duties to the Branch Understanding Democratic Process General By-Laws Seminar Resolutions Seminar How to Find Information Understanding Procedures Orientation
<b>MODULE AUDIENCE</b>	This module will be of interest to all members.
<b>MODULE DESCRIPTION</b>	This module is an overview of The Royal Canadian Legion, providing essential knowledge for all members including those with leadership aspirations. It introduces members to the fundamentals of the organization.
<b>DURATION OF MODULE REVIEW</b>	Members can anticipate taking up to 2 hours to review all module content but the material in the module and the referenced manuals will remain a valuable resource.
<b>LEARNING OUTCOMES</b>	Members completing the module will demonstrate knowledge of the Legion, gaining insight and appreciation of all aspects of branch operations.

# ROYAL CANADIAN LEGION DOMINION COMMAND LEADERSHIP DEVELOPMENT PROGRAM MODULE 9

## LEGION ORIENTATION HOW TO CREATE A WELCOMING ENVIRONMENT

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### INTRODUCTION

Once a new member has been recruited and initiated into the Branch then the processes for retaining that member and grooming him to become a leader must be started.

Orientation of a new member consists of numerous steps and the first step is to have one of the Branch members act as a mentor.

What is a mentor? A mentor is an experienced and knowledgeable member of the Branch who is willing to take the time to share his knowledge with the new member.

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### CREATE A WELCOMING ENVIRONMENT

What are some of the main steps to follow in the orientation of a new member to welcome him into the Branch and assure him of his importance to the Organization?

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### INTRODUCTIONS

Introduce him to the President and Executive Members. This should be done formally at the time of his initiation and followed up by an arranged but informal time on another occasion when Executive Members will be in the Branch socializing. Ascertain what areas of Legion activities the new member would be most interested in and see if he would like to get involved in a committee. This would, of course, involve making arrangements with the Chairperson of the appropriate committee.

### GENERAL MEETINGS

Explain the importance of attending General Meetings and take the time to answer any questions he may have on the rituals and procedures that are followed at Legion Meetings.

A simple example of a procedure followed in the Legion that has been known to confuse new members is “Calling for the question”. Some have thought this meant that questions on the subject were being asked for rather than it being a way of concluding discussion. New members may have other such questions that can be easily clarified.

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### LEGION MANUALS

Give the new member access to all manuals available and/or the web site at which they can be found. This should include but not be restricted to Dominion, Provincial, and Branch By-Laws as well as pertinent Regulations for Zone and District.

Other Manuals of importance would be:

- The Act to Incorporate
- Ritual, Awards and Protocol Manual
- Rules of Procedure for Legion Meetings
- Poppy Manual
- Membership Manual
- Membership Form Processing
- Service Officer Handbook
- Chaplains Manual
- Sports Guide
- Public Relations Manual
- Real Property Development Handbook

Along with the above are several pamphlets which contain information that is invaluable to all Legionaries but the new member in particular. i.e: Welcome to The Royal Canadian Legion

All of these are available from Dominion Command and/or may be accessed through the Web Site.

Another publication of interest to new members is the Legion Catalogue. Many members old and new are unaware of the wonderful assortment of items it holds that serve to further our Legion knowledge as well as for personal use and for gift giving, event prizes etc.

An invaluable guide for new members in the Commands that publish them is the Branch Manual. It is a step by step guide for all aspects of Branch Administration and Activities. These are available through the Provincial Command Office and/or the Provincial Command Web Site.

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### **CHAIN OF COMMAND**

The chain of Command and the structure of the Legion should be clarified to the new member.

It is important that a member is aware that information, queries, assistance, ideas or problems are processed through the Branch, the Zone, the District (if applicable), Provincial Command and finally if necessary to Dominion Command. Although staff and executive members at Command Levels are willing to help, the work load on them would become impossible to maintain if over 300,000 members approached them directly with every little item. Your Branch Executive should be your first contact and if necessary they will take it to the Zone Commander, to District etc. Of course, should there be a breakdown of communication at any of these levels the next level is always available.

The new member should be instructed in the correct wearing of the Legion uniform. Although he may not be immediately in possession of a uniform, the leader we are hoping he will become will want to wear one and wear it correctly. This subject is fully covered in Chapter I of the Ritual, Awards and Protocol Manual.

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### **DUTIES OF A MEMBER**

The new member should be informed that all members have certain duties to their Branch.

Most important would be to follow the promise they made when they were initiated and take an active part in Poppy Campaigns. It is also the duty of members to attend Branch Meetings whenever possible to keep aware of what is happening in their Branch and have input to the administration of the Branch.

It is the duty of all members to keep any adverse comments within the confines of the Branch. If a member has a complaint or is concerned with the way the Branch is being run they should first discuss it with the President. If this does not resolve the issue, then it should be taken to a General Meeting. The Bar IS NOT the place for such discussions and certainly they should not be made public.

New members should be encouraged to attend Zone and District Meetings and Provincial and Dominion Conventions.

It is at these events that the scope of The Royal Canadian Legion becomes a reality to members and the feeling of being an integral part of the Dominion wide organization is instilled. It is at these there that members will, by association with more experienced members, learn the essential facts about our great organization and further the personal qualities required to make a great leader.

## **CONCLUSION**

Good Leaders are in demand in the Royal Canadian Legion and an effective orientation program for new members is a large step in the right direction.

# RECRUITMENT AND RETENTION

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## INTRODUCTION

Without members there is no Legion. Try to envision what members are looking for and creating a welcoming environment will become a part of the retention aspect.

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## IDEAS

- Ask people to join – you as a member are the best source the Legion has for recruiting new members.
- Bring your friends and family in – perhaps pay the membership fee as gift to them for a birthday or Christmas or just because.
- Have Legion information booths in malls and at trade fairs – make it particularly attractive not just a Legion sign and some membership applications.
- Have some handouts with information in them on the Legion and have a draw for a prize – perhaps a free membership or...?
- Have knowledgeable and personable members manning then booth
- Hold an open house at the Branch at a time the bar (if you have one) is not open. Invite the people of your community to come and see what it is all about. Have knowledgeable Legionaries in attendance to properly answer peoples queries. Have some Legionaries in uniform and some not so that guests will have the opportunity to see the uniform and recognize its importance but also see that it is not imperative to own one. Serve appetizing finger foods, tea, coffee, juice refreshments. Be sure the is well advertised. Make sure your Branch is made to look as attractive as possible especially around the entrance. Be sure it is cheery and uncluttered. First impressions are most important.

Try to get an article in your local newspaper on a regular basis. Try to establish a positive relationship with all media in your area and get your activities mentioned through them. If you have a “home channel” advertise your meetings and events through them – it is often free. Money spent on advertising through local sources is money well spent. Display posters at strategic locations in the community.

Participate as an organization in community activities that will get you noticed – sponsor a parade on July 1<sup>st</sup> – during Veterans Week. Spearhead a community beautification project or if there already is a beautification society join it,

Promote youth activities such as track and field and poster and literary contest – these youth are our future members. Take any opportunity to speak at schools and gear those speeches to young ears. Have a presence at any youth activities that you sponsor especially if there is a trophy to be presented in the Legions name.

Contact any presently serving or recently retired Veterans – see if there is anything the Legion can do for them and encourage them to come out and get involved.

Sponsor organizations such as Cadets, Scouts, Guides etc. Make them aware of the programs the Legion has for youth.

Facebook is an excellent tool for getting young folks attention and communicating. The world is becoming dependent on electronic communications and the Legion must be progressive and use all means at their disposal if we are to survive and thrive.

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## RETENTION

Get members to mentor new members. A good mentor is invaluable

Make the Installation Ceremony special – call a 5-minute break to have the other members welcome and shake hands with the initiates. Make sure they are invited to join someone for the remainder of the meeting.

Find out what the initiates interests are and encourage them to get involved right from the beginning.

Phone them and invite them to join work parties and events. Perhaps you can have someone pick them up for meetings or gatherings.

Make sure staff is aware that they are the first line of contact with people and it is part of their duties to welcome people warmly when they enter the Branch.

Make sure the entrance to your building is pleasant to the eye when members enter.

Make the premises as cheery as possible.

See that language is controlled in all parts of your building

See that NO ONE ever sits alone in your Legion unless it is by their own wish.

Members have many and varied things that they are looking for in the Legion when they join:

- Honouring the wishes of a relative or friend
- Personal Memories
- Fellowship
- Fun
- It enhances their resume
- A desire to be involved in something worthwhile
- To impress others (a boss or work colleague)

Find out which ones apply to the recruit and promote the applicable items to them.

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## ORIENTATION

- Provide a mentor
- Familiarize member with reference manuals
- Be willing to share knowledge and information
- Be open – Legion not a secret society
- Attendance at - Branch Meetings, Zone & District Meetings - Conventions

Once a new member has been recruited and initiated into the Branch then the processes for retaining that member and grooming him to be a leader must be started.

What is a mentor? A mentor is an experienced and knowledgeable member of the Branch who is willing to take the time to share his knowledge with the new member.

What are some of the main steps to follow in the orientation of a new member to welcome him into the Branch and assure him of his importance to the Organization?

Introduce him to the President and Executive Members. This should be done formally at the time of his initiation and followed up by an arranged but informal time on another occasion when Executive Members will be in the Branch socializing.

Ascertain what areas of Legion activities the new member would be most interested in and see if he would like to get involved in a committee. This would, of course, involve making arrangements with the Chairperson of the appropriate committee.

Explain the importance of attending General Meetings. This is when the regular member has the opportunity to contribute his opinions and feel a part of running “his” Legion. Take the time to answer any questions he may have on Legion Rituals

and Procedures i.e. Initiation and installation ceremonies, The Legion Tribute at funerals, opening and closing rituals etc. A simple ritual followed at Legion meetings which has confused many new members is “calling for the question”. Some have thought this meant that questions were being asked for and have felt embarrassed when they spoke out. There are many things that experienced members are used to they do not realize that they are confusing to new members. Anticipate such questions and ask the new member now and again if there is anything you can clarify for him.

Give the new member access to all manuals available and/or the web site at which they can be found. This should include but not be restricted to Branch By-Laws, Zone Regulations (also District if applicable) Provincial and Dominion By-Laws.

Other valuable sources of information which the new member should be made aware of are:

The Act to Incorporate  
Ritual, Awards and Protocol Manual  
Rules of Procedure for Legion Meetings  
Poppy Manual  
Membership Manual  
Membership Form Processing  
Service Officer Handbook  
Chaplains Manual  
Sports Guide  
Public Relations Manual  
Real Property Development Handbook

As well as the above listed there are several pamphlets which contain information invaluable to all Legionaries but particularly to new members, i.e. Welcome to The Royal Canadian Legion.

All of the above are available from Dominion Command and/or may be accessed through the Web Site and a new member should be assisted, if necessary, to find that site.

Bulletins and Memos from Provincial and Dominion Command should be posted and their place and relevance should be discussed with a new member.

Another publication of interest to the new member is The Legion Catalogue. Many members both old and new are unaware of the wonderful assortment of items it holds that serve to further our Legion knowledge as well as for personal use and for gift giving, event prizes etc.

Another invaluable guide for the new member in Commands that publish them is the Branch Manual. It gives step by step direction for dealing with all aspects of Branch operations – Administrative, Activities, Bar Operations, Lotteries, it is all encompassing. These are available from the Command Office and/or the Provincial Command Web Site.

The structure and Chain of Command within the Legion should be clarified to a new member. It is important that all members are aware that information, queries, assistance, ideas or problems are processed through the Branch, the Zone, the District (if applicable), Provincial Command and finally, if necessary to Dominion. The new member should be aware that Branches are autonomous but only so far as that autonomy does not contravene any of the By-Laws and policies of Provincial and Dominion Commands. Staff at Command levels are always willing to assist and clarify items for members if situations cannot be solved at a nearer level but if over 300,000 members start calling them direct for every minor problem their work load would become impossible to maintain. Your first contact should be your Branch President who should contact the Zone Commander if he is unable to help and from there to District and Provincial etc.

The new member should be instructed in the correct wearing of the Legion Uniform. Although he may not immediately be in possession of a uniform the Leader we are hoping he will become will want to wear one and wear it with pride and correctness.

The new member should be informed that all members have certain duties to their Branch. Most important would be to follow up on the promise they made at their initiation to take an active part in Poppy Campaigns.

It should be impressed upon the new member that attendance at General Meetings is a member's duty for their edification as well as for the benefit of the Branch.

It is the duty of all members to keep any adverse comments within the confines of the Branch. If a member has a complaint or is concerned with the way the Branch is being run they should first discuss it with the President. If this does not resolve the issue then it should be taken to a General Meeting.

The BAR IS NOT the place for such discussions and certainly they should not be made public.

New members should be encouraged to attend Zone and District Meetings and Provincial and Dominion Conventions. It is at these events that the scope and magnitude of the Royal Canadian Legion becomes a reality to members and the feeling of being an integral part of the Dominion wide organization is recognized and understood. It is at these meetings and conventions that members will, by association with more experienced members, learn the essential facts about our great organization and further the personal qualities required to make a great leader.

Good Leaders are in demand in the Royal Canadian Legion and an effective orientation program for new members is a large step in the right direction.

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### **EFFECTIVE GOAL SETTING:**

It is important that a good Leader sets goals for himself, not only for what positions he may wish to attain but what he wants to achieve. From shortly after initiation a new member should be encouraged to make a list of things he wishes to accomplish as a member i.e. Learn as much as possible about the history of the Legion and its aims and objects. As a new member on executive and at each level of involvement he should adjust and expand that list. The list becomes a guide line and should remain flexible. The goals may vary as time goes by but it is important that they be kept in mind as time passes. To effectively attain a goal, it should be remembered when setting it to strive for advancement and put pressure on oneself to go further – do more – but by the same token be realistic.

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### **VOLUNTEER OPPORTUNITIES**

Legion members, with the exception of staff hired for specific purposes, are volunteers and the Legion provides a myriad of opportunities for those who wish to volunteer their services to do so.

The opportunity is there for volunteers to enhance their own abilities in financial fields. If you offer to be or assist the Treasurer, you will be able to vastly expand your financial knowledge. You can increase your public speaking talents by chairing meetings. You can add to your knowledge of catering, cooking, cleaning and beverage service by helping out at the bar, in the kitchen or at work parties for sprucing up the Branch. There is no better way to show your artistic skills and honing them than by doing the decorating for special events. Organizational abilities can be learned or enhanced by chairing committees and events. Volunteer to be the liaison for youth

or seniors activity groups and improve your people skills. The Legion is involved in a wide range of activities and by volunteering to take part in them you cannot help but find yourself reaping the benefits of an excellent, not to mention, free self-improvement course.

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**REFERENCE MATERIALS:**

The General By-Laws  
Branch Manual  
Branch and Command By-Laws  
Command (Dominion and Provincial) web sites  
Other Legion Manuals  
Common Sense

# GENERAL BY-LAWS SEMINAR

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## INTRODUCTION

I was asked to come here today to deliver a seminar on By-Laws and Resolutions. I will begin with By-Laws – and the entire dialogue of the seminar should be as simple as this:

*Here are the By-Law manuals you will require as a member of The R.C.L. They are Branch, Provincial Command and General Bylaws. Please read them carefully – understand their intent – and use them as required to your benefit.*

## END OF SEMINAR—ANY QUESTIONS?

BUT THAT’S NOT REALLY THE END

**It really should be that simple** but I believe that you came here today expecting a little more detail. I will attempt to do so, but truthfully speaking, the various By-laws of the Legion are not that complicated – if you read them for what they are.

**They are Basic Organizational Rules – there’s no hidden magic here.**

Any set of By-Laws should provide basic rules in a manner that helps the organization function in accordance with its original purposes and objects. Any organization with more than a few members, or with planned longevity, or with members who will join and then leave, needs a set of By-laws.

In our organization, we deal with 3 levels of By-laws:

- Branch
- Provincial Command
- Dominion Command – the General By-Laws.

Each has its place and its function and all should be used in tandem with each other. What I mean by that is when developing branch or command By-Laws, they cannot contradict or change the intent of the General By-Laws.

**Example:** Article III, Complaints and Appeals, section 308;

This section deals with the hearing procedures for a complaint which has been properly lodged, and the requirements are very specific as to the rights afforded each individual and the responsibilities of the branch in dealing with the complaint.

Unfortunately, there are branches within our Command who have attempted, and are still attempting, to re-write their By-Laws and include sections which would have the **branch Executive** deal with all complaints within the branch. This contradicts the intent of the General By-Laws and therefore cannot be allowed. This is a simple example – but as I have stated – the By-laws are not meant to be complicated or difficult to follow.

We cannot contradict the By-laws as they are written but can we expand upon them? Within reason – yes you can. For example, section 111(a) of the GBL tells us that, “...members in good standing shall have the right to vote or hold office at any level of the Legion.”

However, many branches have expanded upon this by-law by including the additional requirement of having served on the branch Executive for one year before being allowed to run for say, a Vice-President’s position. This is a perfectly acceptable addition because it does not change or contradict the original intent of the By-Law – being able to hold office as a member in good standing.

Besides our By-laws we have at our disposal various guidelines that are to be used in coordination with the By-Laws: guidelines such as the Poppy Manual, Membership and Sports guides and of course our Rules & Procedures for Legion Meetings.

At any level of the Legion your By-Laws must perform specific functions:

- **By-Laws must set expectations.** Joining the Legion is a form of contract. A member joins expecting certain benefits and responsibilities from his/her membership, just as the Legion has its duties and benefits it expects from the member. By-laws put those expectations in writing, so that both parties clearly understand the nature of their obligations to each other.
- **By-Laws create clarity in disputes.** Anytime you have more than one person in a room, there is potential for disagreement, and if one member has a disagreement or a complaint against another he/she can refer to Article III of the GBL to come to a fair agreement on the issue.
- **By-Laws provide focus and direction.** When groups within the Legion, or even entire Executives, begin to stray, the By-Laws can be used to bring everything back in line. They also provide consistency when membership fluctuates or when Executives turn over. ***With a good set of By-Laws, it really does not matter so much who is in charge, because things should always be done within the same framework.***

This last statement is probably the most important thing I will tell you about By-Laws today! If you have a good set of By-Laws – **and you follow them** – it doesn't matter who is in charge because the business of the branch should always be done within the same framework.

It's when we start to ignore our By-Laws and stray from our boundaries into the world of ***"I'm the President and we'll do it my way"*** then we begin to see problems arising within the branches.

So, here are some quick facts: The General By-Laws of Legion cannot be overruled, or contradicted, by any other By-Laws whether they are Provincial or Branch.

These By-Laws may only be amended, repealed or re-enacted at a Dominion convention by a majority vote of the convention. Dominion Executive Council may revise these By-Laws between conventions but these revisions must then be ratified at the next Dominion Convention, and if not ratified we return to the original By-Law. Similarly, any (hold up book) Provincial Command By-Law changes made between conventions are also required to be ratified during the next Provincial Command convention.

Branch By-Laws must be amended through a process of **notice of motion** – the notice of motion being presented at one general meeting, posted for the information of all members and then debated and voted upon at the next meeting. This procedure allows all who wish to comment on the By-Law change to be in attendance when it is presented.

There are thirteen Articles and 1 appendix in The General By-Laws. Each Article is titled so as to give the reader an idea of where to locate the applicable By-Law they may be seeking.

For example, if you have a question about Dominion Command concerning their rights or responsibilities you would refer to Article IV – **Dominion Command**; a question about **Membership**, refer to Article II, or a question about **Branches**, see Article VI; if it is a general question, start by looking in Article I – **General**.

Within the By-Laws there are certain key words used that have very specific connotations. They are: **SHALL and WILL; SHOULD and MAY.**

Be careful when reading By-Laws that contain these words. **Shall** and **Will** are used to infer that the By-Law leaves little interpretation or flexibility.

As an example, refer to By-Law 103 (b)  
Refer to the note under By-Law 611 (a) (b)

**Should** and **May** are used when a greater range of flexibility is afforded in the use of the By-Law.

We have just seen that there is a certain leeway granted within the written word of our By-Laws, because **not every problem or situation** that arises within the Legion can be referred to a specifically written By-Law. It is human nature to attempt to bend or at times even break the rules, in order to deal with these situations, we must rely on our common sense as we apply the By-Laws.

I cannot begin to tell you how many times I have been asked, “Show me in the By-Laws where it says I can't do this – or do that.” My response is always the same – I may not be able to locate that specific section – but – can you show me where it specifically states that you can.

I will repeat again, Comrades, when using the By-Laws, we must incorporate a good amount of common sense. Unfortunately, common sense is not as common as we might think.

To sum up, as I stated earlier, please read your By-Laws carefully, understand their intent and use them to your advantage.

# RESOLUTIONS SEMINAR

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## RESOLUTIONS SEMINAR

Now, we earlier discussed the fact that By-Laws can only be amended or ratified at a Dominion or Provincial convention. But how does this amending process begin?

It begins with the writing of a resolution. In defining a resolution, we find that it is simply a written motion to be presented to a deliberative body, which in the case of the Legion is our conventions. The substance of the resolution can be anything that can normally be proposed as a motion.

Within the structure of the Legion, the resolution process is the only way that the membership can revise or affect policy or procedures. We have all read and dealt with resolutions. You will recognize a resolution through its distinctive use of the phrases, “WHEREAS” and “THEREFORE BE IT RESOLVED”.

A resolution is generally prefaced and introduced by the word WHEREAS. These “whereas” paragraphs state the reasons for the resolution. Whereas clauses should identify a problem or need for action, address its timeliness or urgency, note any effects on the organization being asked to adopt the resolution or the public at large, and indicate whether the proposed policy or action will alter current policy or by-laws.

Whereas clauses are not voted upon, they only offer an explanation and the rationale for the resolution. However, the statements contained in the whereas clauses can be the cause of much disagreement and debate. Members frequently attempt to debate and amend these prefacing statements, often to the neglect of the main reason for the resolution.

Whereas clauses can defeat or pass a resolution, more is not necessarily better. State your reasons for the resolution but don’t be redundant. The convention delegates will get stuck on the redundancies rather than the supporting information contained in the remaining clauses.

The “Therefore Be It Resolved” clause, or simply, the resolved clause, comes at the end of the whereas clauses and is the essential part of the resolution. This clause should be concise and clear.

A single issue should be addressed in each resolution. If multiple resolved clauses are included in a resolution, each must be independent, related to a central subject, and completely comprehensible after removal of the whereas clauses. In other words, each resolved clause must be able to stand alone in its content, logic and structure.

Too many resolved clauses may defeat the resolution. Do not try to accomplish too much with one resolution. If you write a resolution with many resolved clauses, it may be better to break them out into separate resolutions. The convention floor may adopt the resolutions more readily if they are considered separately.

If the wording of the resolution is unclear, confusing, unnecessarily long or involved, it is within the purview of the Dominion Command or Provincial Command resolution committee to rephrase the motion prior to it being presented to the assembly.

A resolution may be written to take a specific action or position that affects only the Legion itself. This type of resolution is referred to as an internal resolution. Or, it may request that a specific action or policy be adopted which necessitates contact with other organizations or levels of government such as Veterans Affairs. This would be considered an external resolution.

All resolutions to a Dominion convention must be submitted by a deadline determined by our By-Laws (subsection 919.c – 112 days before convention) and a copy of the book (Convention Proceedings) containing all resolutions must be forwarded to all delegates at least 6 weeks prior to convention (subsection 919.e). Deadlines for resolutions for a Provincial Command convention must be submitted according to the Command Provincial By-Laws. The convention book containing all resolutions delivery date will also be governed by the Provincial Bylaws.

How a resolution is written can determine whether it is adopted or defeated. If the intent of the resolution is unclear, it may be defeated even if it is explained properly on the convention floor. Poor grammar can defeat a resolution; if you are unsure how to state something so that it expresses your intention, consult your Comrades for feedback. Or, you can consult with the Dominion Command constitution and laws committee. If a resolution is poorly written, no matter how well intended, it will be looked upon as wasting the time of the convention floor.

Comrades, I have discussed two topics which can be considered as being quite dry and not very exciting to listen to - not as captivating as some other topics you may hear or have heard today. However, without our By-Laws, or our resolution process, the Legion would have passed into history many years ago.