



PEC October 2024

Administration and Operational Management of a Legion Branch

What are the 4 Key Components to run an Operationally Compliant Branch?

PRESENTERS

- Tony Rushworth, Branch Operation Advisor
- Darryn Langstaff, Branch Operation Advisor

AGENDA

- 1)Financial Management**
- 2)Human Resources**
- 3)Compliance and Legal Obligations**
- 4)Branch Operations**

**All of your branch's decisions should
revolve around the mission statement
and the three Pillars on which we
conduct our business**



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Mission Statement

“Our mission is to serve Veterans, which includes currently serving Military and RCMP members, their families, to promote Remembrance and to serve our communities and our country. “

The Legion serves all Veterans

The Royal Canadian Legion was founded by Veterans and is for Veterans. advocating for the care and benefits for all who served Canada access to our services is available at no cost, whether or not they are Legion members. The Legion helps thousands of Veterans each year and makes significant positive changes in their lives.

The Legion exists so that Canada never forgets

Understands the importance of honouring past sacrifices and acknowledging the courage of those who served and still serve today. Remembrance Day Ceremonies, the Poppy campaign, commemorative activities, youth education, and more.

The Legion serves our communities and our country

Legion Branches are the cornerstone of communities 1,350 Branches from coast to coast to coast, our members provide local services and supports Legionnaires provide essential services to their communities.



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Recognize your mission as the sole star of your organization.

- **At times, Executive members and the organization's leader can get lost in their own points of view and the squabbling ends up subverting the organization's mission.**
- **Taking time to make sure that your mission is front-and-center ensures that toxic behaviors don't poison your organization's success or goals for the future.**
- **When self-interests or egos are involved, executives can act in ways that are detrimental to the organization.**

Shouldn't the board be focusing on our organization's mission?

The ultimate goal of every not-for-profit organization, and hence every organization's board, is the achievement of its mission. Consequently, a significant portion of the board's time and energy needs to be focused on the organization's mission and progress in achieving it. However, the organization must protect its assets, pay its bills, compensate its employees, receive and manage donations, and undertake a host of other financial activities. Doing so in an efficient and effective manner is critical to achieving its mission. An organization that is not financially secure cannot focus on achieving its mission, as efforts of the board and management are directed to financial survival.

Financial Management

How can we define Financial Management?

Understanding budgeting, financial reporting, and fundraising. Executives need to manage branch finances transparently and responsibly, ensuring sustainability

Board members in the Non Profit sector have a wide variety of skills and interests. However, some may feel uncomfortable reviewing financial information and may be poorly equipped to provide the required oversight of the financial affairs of the organizations which they have been elected to govern. This gap presents a threat to the sustainability of the organization. It may also expose individual board members themselves to legal liability. The bottom line is that overseeing the financial affairs of NPOs is a key responsibility of the board, and of every member of the board.

Financial Management

Executive Members have a “fiduciary duty” to their membership to act honestly and in good faith in the best interests of the organization. This responsibility is sometimes referred to as the “duty of loyalty”, but it is much broader than just loyalty. It speaks to concepts such as the duty of confidentiality and not participating in decisions in which the executive member may have a personal interest. Directors also have a “duty of care” that requires them to act with the care, diligence and skill that a reasonably prudent person would exercise in comparable circumstances. This obligation means that directors must diligently apply their skill, expertise, education and intelligence to the job of being a director to make reasonable business decisions. Each board member does not need to have financial expertise, or to be a financial expert, but all directors should develop a basic level of financial literacy.

Tomorrow’s session with Emily will cover some aspects of reporting



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Human Resources

How can we define Branch Human Resources?

Training on employee / volunteer management, including recruitment, retention, and conflict resolution. This is essential for maintaining a motivated and cohesive team.

Employee management, as it relates to BC workplace legislation, volunteers and the branch's role for HR.

Tomorrows session with Karen's covers this topic.

Compliance and Legal Obligations

How can we define Compliance and Legal Obligations?

Ensuring that Executives are aware of and adhere to all legal and regulatory requirements including those related to health & safety; privacy; the Legion bylaws & policies; Liquor licensing & regulations; and gaming regulations.

Legion executives need to be aware of and adhere to all of these requirements and note that pleading ignorance does not absolve you from liability.



RECOGNIZING BYLAWS AS GUARDRAILS TO ASSURE EFFICIENCY AND EFFECTIVENESS.

The Royal Canadian Legion's bylaws play a crucial role in ensuring the organization operates efficiently and effectively. These bylaws serve as a framework that guides decision-making, outlines the roles and responsibilities of members and officers, and establishes procedures for meetings and elections.

By recognizing these bylaws as guardrails, members can navigate their duties with clarity and consistency. They help prevent misunderstandings and conflicts, ensuring that everyone is on the same page regarding expectations and processes. This structure not only fosters accountability but also empowers members to contribute meaningfully to the Legion's mission.

Moreover, by adhering to these guidelines, the Legion can maintain its focus on its core objectives—supporting veterans, promoting remembrance, and serving the community. In this way, the bylaws are not just rules, but vital tools that enhance the Legion's effectiveness and sustainability.



Liquor License Compliance

1. **LIQUOR LICENSE MUST BE POSTED**
2. **FLOOR PLAN MUST BE ACCESSIBLE**
3. **SERVING IT RIGHT FOR ALL STAFF**
4. **LIQUOR REGISTER MUST BE ACCESSIBLE**
5. **LCRB SOCIAL RESPONSIBILITY SIGNAGE POSTED**
6. **MAINTAIN AN UP-TO-DATE INCIDENT LOG**

Licensees have additional responsibilities beyond the terms and conditions listed on the face of the liquor licence. They have a dual responsibility to control the conduct of patrons within the establishment by controlling conditions that might lead to patron misconduct. They must also deal with inappropriate conduct when it arises.

Section 61(3) of the Act ensures licensees and permittees have the authority to deal with inappropriate or unsafe patron conduct. Licensees are responsible for ensuring that sufficiently trained staff are employed at all times to fulfill their obligations to prevent intoxication and other inappropriate behaviour and deal with it when it arises.

Controlling Your Establishment

Your responsibilities

You and your employees are responsible for controlling the behaviour of patrons.

- You must ensure that no one is harmed as a result of liquor misuse or criminal activity in your establishment or at an event site.**
- you are required to take steps to ensure your business does not disturb the surrounding community. Anyone providing door security at an establishment is required to be licensed under the Security Services Act.**
- An individual who has been asked to leave, or who has been barred from entering your service area, must not return for at least 24 hours.**
- If a person does not comply, they are committing an offence and may be arrested.**
- If there is an imminent threat to people's safety, the LCRB can suspend a liquor licence for 24 hours or suspend/cancel an authorization and order the immediate removal of patrons. In extraordinary circumstances, the LCRB may suspend a licence or authorization or impose terms and conditions for up to 14 days without a hearing.**

Over service and intoxicated patrons

- **It is your responsibility to make sure patrons do not become intoxicated while in your establishment or at an event site.**
- **You must not let a person who appears to be intoxicated enter or remain in your service area.**
- **You must refuse the person service, have the person removed and ensure they depart safely.**
- **You must write down all incidents of intoxicated patrons and the action you took in an incident log and have the information available for the liquor inspector or police officers.**

Disorderly or riotous conduct:

- **You must not allow disorderly conduct or unlawful activities to take place in your establishment or at an event site. This includes behaviour that might cause a reasonable person to believe his or her safety is threatened.**
- **If you know or suspect that this kind of behaviour has taken place, is currently taking place or may take place, you must notify the police immediately.**

Policies regarding the management of patron conduct are based on the duties set out in the Liquor Control and Licensing Act of both the Branch and the licensee.



Liquor Inspectors Visits

The inspections process ensures liquor and cannabis licensees, authorization holders and permittees are following the requirements established in the liquor act, regulations, and terms and conditions and cannabis acts, regulations, and terms and conditions.

Inspectors check for compliance by:

**Inspecting licensed and authorized establishments
Investigating complaints**

The enforcement process follows a specific order. Serious or repeated contraventions might mean the Liquor and Cannabis Regulation (LCRB) has to take enforcement.

Liquor Inspectors Visits

LCRB inspectors regularly inspect licensed and authorized establishments to ensure compliance with legislation and licence terms and conditions.

These inspections may be done with or without advance notice and can be conducted by the Liquor Inspector or Local Police

Generally, inspections focus on issues, such as

Intoxication

Sale to minors

Overcrowding

Sale or purchase of unlawful liquor

Sale, possession, or supply of unlawful cannabis

Community disturbances associated with the operation of a licensed or authorized establishment

Local Police Officers may also make regular, unannounced visits to licensed or authorized establishments.

Generally, they look for anything that may lead to a disturbance within the community or could threaten public safety, such as: Noise ... Overcrowding ... Drunkenness As well as Minors in possession of liquor or cannabis

Liquor Inspectors Visits

Inspectors also do inspections to review records and documents, such as:

Liquor or cannabis licence

Floor plan

Serving It Right or Selling It Right certification for staff

Liquor or cannabis register (purchase receipts)

Incident Log

Price List

Social Responsibility/Awareness Signage

Gaming Requirements

Licenses for Meat Draw, 50/50/, Raffles, Bingo and Poker

Record Keeping:

All sales and Expenses/Payouts for each license
Yearly filing records (2 online ones)
10 week Window for Renewal

Who is Allowed to Play

Participation of Organization Members

Board members and those listed as responsible for the conduct and management (officers responsible) of an event **are not permitted to participate** in any gaming events held by their organization.

At the discretion of the officers or members responsible for the event, all other volunteers may be permitted to purchase entry into events where they are not actively volunteering at the time of purchase.



Branch Operations

How can we define Branch Operations?

This includes training on day-to-day administrative tasks, managing membership records, organizing events, and maintaining the branch's facilities.

It also includes looking for other opportunities to enhance the Legion's business presence.



Legion Business Models

The Legion is comprised of two business models:

The First is as a Service Organization:

Service to Veterans, their families and the community along with conducting the annual Poppy Campaign and Remembrance.

The Second is a Revenue based business.

A revenue based business that is designed to deliver profits which allows for sustained on going operational requirements. Any model that doesn't provide this profit must be reviewed and analyzed. Once done, there needs to be a determination to change, modify or discontinue model based on individual Legion branches requirements.



Ensuring Sustainability

Other opportunities to enhance the Legion's business presence through other Revenue Streams.

Alternative Revenue Sources

Thrift Store

Revelstoke Legion opens Bargain Basement

A new second hand store has come to town and donations and volunteers are needed

Accept donations only when open



No furniture

All displays on wheels, easily maneuvered

Provides rent to Legion, Builds funds for other improvements and community

One of three stores servicing Revelstoke

Open 12 – 4

Tue-Sat

Volunteer run

Other Branches Cash Generators

Overview: Thrift Store

Branch # 46 Revelstoke

Branch # 94 Quesnel



- Here is what each branch brings in (net) annually from just their thrift store:
 - Branch 46 Revelstoke - \$75,000+
 - Branch 94 Quesnel - \$31,000+

Alternative Revenue Sources

Farmers Market Partner and or Event Supplier

Saturday, September 28th After the Fall Fest Market Down East Kitchen Party

Foot stompin' music, a dance or two
Stories and Songs

Ugly Stick Competition

Sign in at the Bar!

Snacks by



Down East Kitchen Party

It's a Kitchen Party! Bring yerself, yer friends and if you got it, a musical instrument. Ugly stick, spoons, fiddles, guitars anything to make the evening fun!

Saturday, September 28th
after the Fall Fest Market on 13th Street
Starting at 7:00pm

Join us for foot stompin' music, songs and maybe a dance or two
Ugly Stick competition, see who has the best!

71 Extend
Fish & Chips
Clam Chowder
Lobster Rolls
and more

Legion
Windermere District #71

Branch # 71 Windermere
Net \$28.8K

Alternative Revenue Sources

Farmers Market Partner and or Event Supplier



Branch # 35 Armstrong

Net \$15K from Parking admission. They provide volunteers to run parking lot, splitting revenues.

Alternative Revenue Sources

Campgrounds and Cabin Rentals

Branch 94 Quesnel



Legion Beach Campground

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Alternative Revenue Sources

Would you like to provide cooking classes?



The Royal Canadian Legion Br 59 on 6th St has a wonderful kitchen that would be ideal for holding cooking classes.

There is room for six people and an instructor comfortably. I for one love to cook and I am always looking to learn something new. Perogies is one just one of the recipes I would be interested in learning how to prepare.

Is there anyone in our community who would consider putting on some cooking classes?

For Kitchen Rental we charge \$75.00 for four hours or \$100.00 for the day.
We have a 10 burner gas stove and double oven.

For more information, please contact Cindy our Hall Rental Chairman at



rclbr59@gmail.com
or 250-442-6242.

BRANCH 59
GRAND FORKS

Alternative Revenue Sources

Recycle Depot

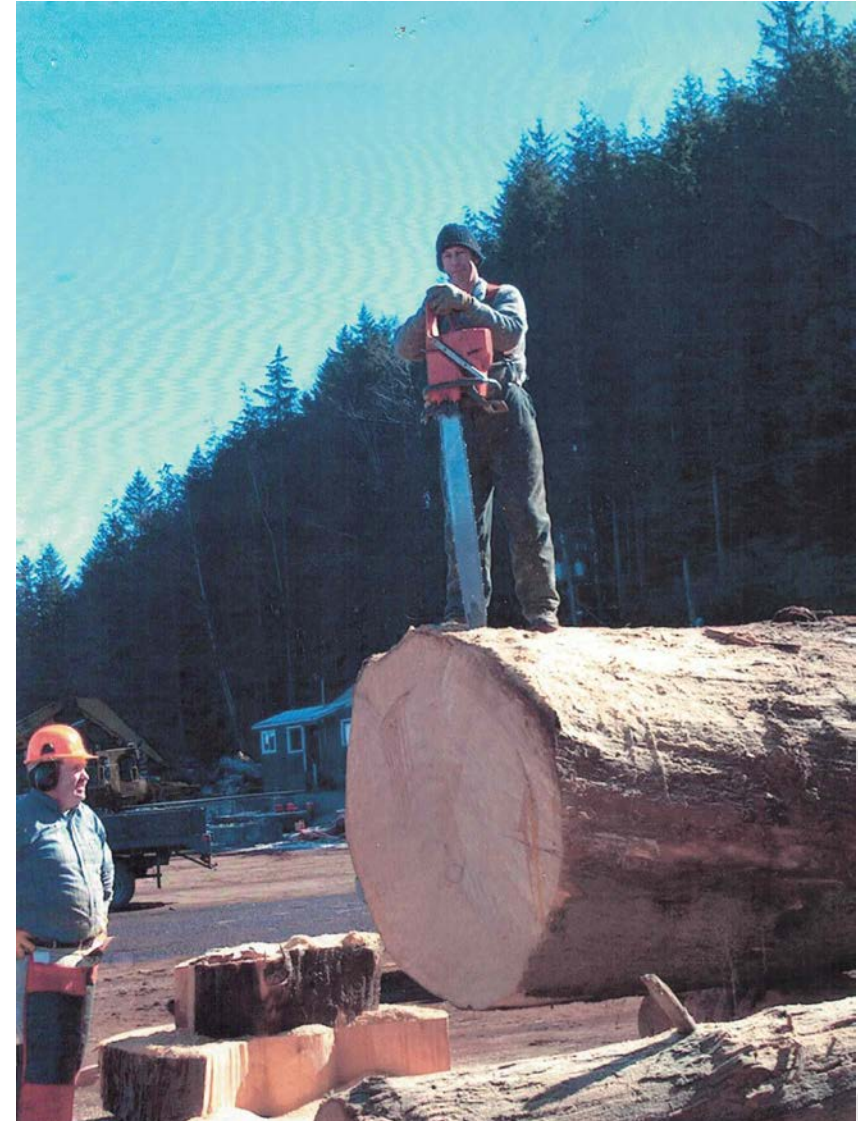
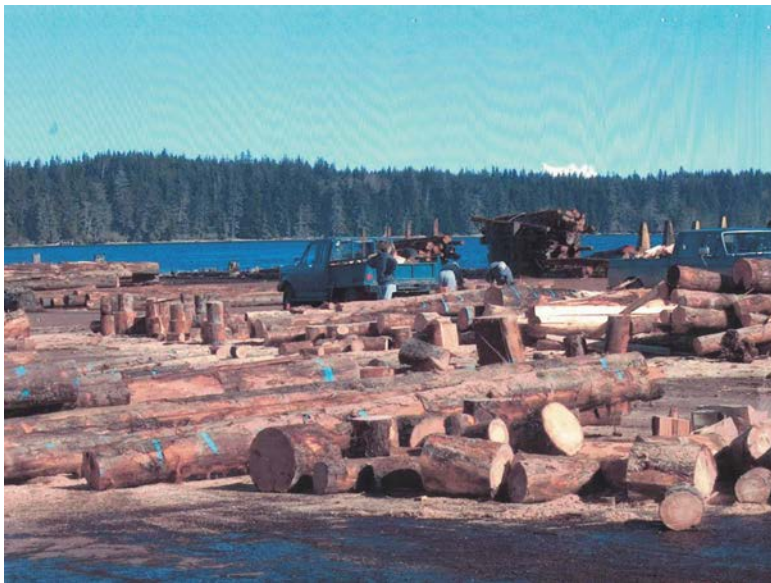


Alternative Revenue Sources

Fire Wood Sales

Port McNeil Branch 281

Up to \$19,000 splitting in a weekend



Alternative Revenue Sources

Retail Case Lot Food Sales / Takeaway Meal Service Program

With inflation and rising food costs branches are poised through their connections to be able to serve the Community by offer different staples at reduced prices.

Examples include:

Frozen Meat/Pies

Heat and Serve Meals

Vegetables

Sundries



Branches can reach out to their membership to survey members needs and then can fill a niche and add to their revenue with no extra cost.

Orders paid in full and pre-arranged pickup time is scheduled.

Alternative Revenue Sources

Community Fundraisers

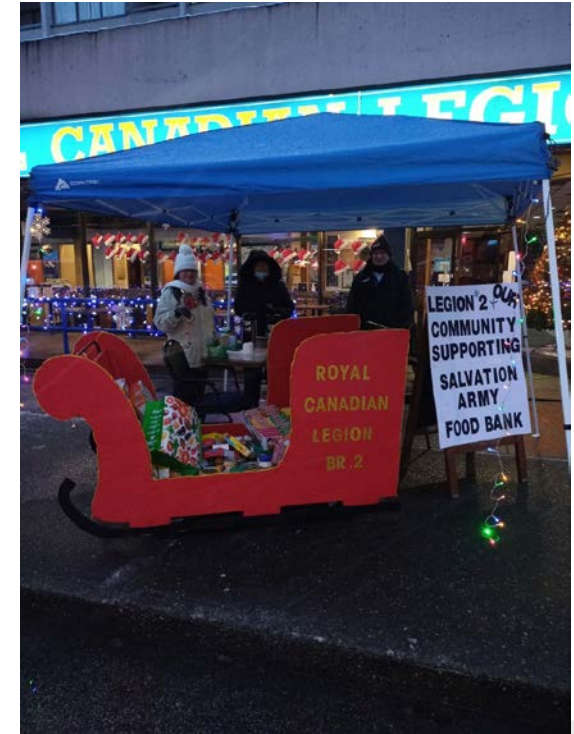


Creston Legion raises \$785 at BBQ fundraiser

Coupon Book Sales



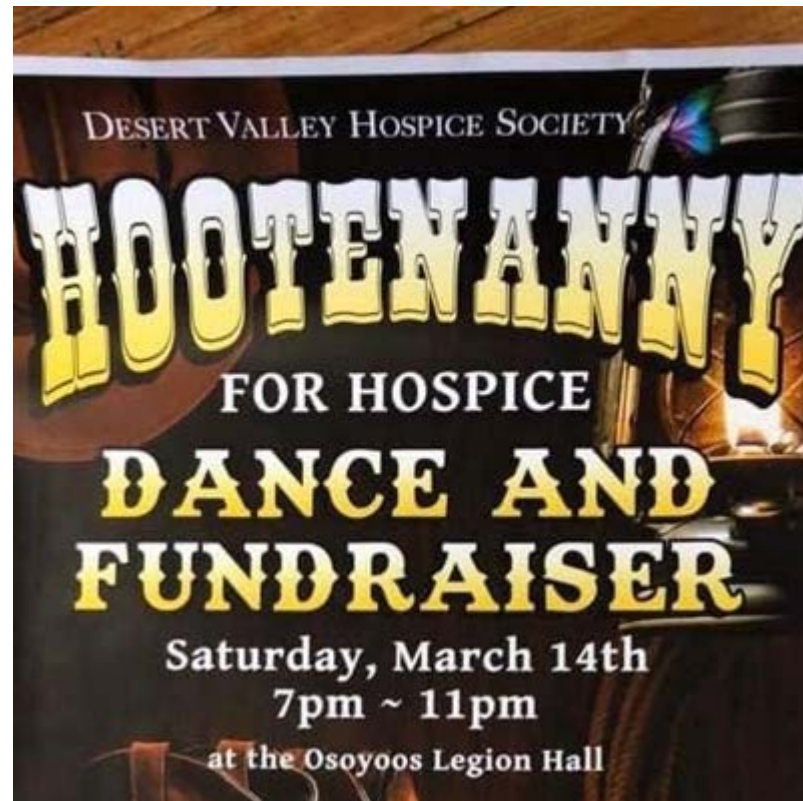
Barriere Legion Branch 242 rep, Eileen Miers, with a cheque for \$1450



Toy and Food Drive New West Legion

Alternative Revenue Sources

Community Fundraisers





FUND RAISING IDEAS

These are tried, tested and true! This list was prepared based on successful events held by hard working Legionnaires around the Command.

1. **Craft Sales** - Items can be made by members at home, or as part of a group activity within the branch. A log style dollhouse sold for \$150.00. Craft Fair can be held on its own or as part of a town fair.
2. **Social Nights** - Movie night for the town every two weeks. (Need an unlicensed hall for this) Popcorn sales etc. Also can be weekly / biweekly cards night.
3. **Barbecue** - Annual event or a quarterly event – if you do every week the novelty wears off.
4. **Fishing Derby** - Entry fee with trophies and prizes.
5. **Raffles / Draws** – 50/50's require a gaming license - but remember the required charitable donation to the community must be made – the Branch can't keep all the proceeds.
6. **Walking / Garden Tours** - Nature and heritage walks
7. **Bottles and Penny Drives** – get members to bring them in so you don't have to do pick-ups all the time. Keep a big "pickle" jar on the counter and indicate on the jar what the fund raising is for, i.e. new roof; chairs; pool table or large screen TV.
8. **Beer Garden** – held around a special summer celebration or annual picnic especially if you could host the picnic on your own property.
9. **Community Calendar** – get local merchants to advertise around the outside of a monthly calendar (size of a business card ad). Some Branches make enough to cover expenses and then some! The same thing can be done to get funding to cover cost of printing the monthly newsletter!
10. **Notice Board** - sell advertising around outside edge for extra money.
11. **Hall Rental** – actively market and promote your hall rentals! Remember Legion liquor can be provided to 'private member functions.' This is a HUGE opportunity for the Branch to make money – check with Command for what qualifies as a "private member's function."
12. **Rental for office space** – Branches that are making money have other means of income than the licenced premises – some Branches have retail space for rent and some really successful Branches own houses from which they obtain rent.
13. **Flea Market / Garage Sales** - run once a month or quarterly in the hall – you either sell tables to people for their own displays or you have your members donate their "stuff" for the Branch to sell and they keep the profit.
14. **Sale of Firewood** - hard work but smaller Branches have made money at it!
15. **Concession Stand at Local Fairs** – hard work but a real \$ maker. Work with other local groups to run their concession stands. Often times they can't get their own members to run the concession in addition to the other work involved in their events. How about your local ball teams that you support. Offer to run the concession stands at their ball tournaments.

16. **Crib / Darts / Horseshoe / Pool Tournaments** – hold them in the unlicensed hall and get local seniors groups or "youth" groups involved. Sell light refreshments and get local merchants to donate prizes! Promote membership as well!
17. **Rutabaga Bowling / Tomato Can Curling / Watermelon toss** – might be messy and sound goofy but Branches in farming communities have a blast! Make your money off the concession stand – sell tickets to members and bona fide guests to attend and run a beer garden.
18. **Theme Dinners i.e. Steak or Spaghetti Dinner Nights/Western Theme Events** – Friday night dinners are very popular. Mix the menu for variety and make sure you charge enough! The biggest problem is the cost of the dinners is too low! A dinner for \$10 is not unreasonable and we have seen dinners as low as \$4. Branches can't expect to make the \$'s on the bar on dinner evenings because lots of members come out only for the dinner and coffee – or maybe one glass of beer – and then they go home! You need to make money on the dinner. Run meat draws or raffles during dinner! Give tokens for future dinners – five tokens and the sixth meal is free! Plan a monthly "ethnic" night – different country each month. In addition to the dinner night – have the LA put on a pie sale. We know of a Branch where their ladies sold 500 pies and made \$1200 in profit.
19. **Snow Golf** – Branches that have a lot of snow seem to find this fun. It's just like a summer golf tournament. There's a fee to enter. You sell tickets to members and bona fide guests. They come back to the Branch for prizes and dinner and you make some money on the bar.
20. **Silent Auctions** – get members and local merchants to donate items for auction. Place the items around the hall with the page in front of each item where members can indicate their bid. Hold a dinner that evening. Charge a fee for the dinner and throughout dinner and the cocktail hour members are urged to place their bids. After dinner announce the winners and collect your money!
21. **Jam Sessions / Amateur Nights / Karaoke** – self-explanatory.
22. **Line Dancing** – self-explanatory.
23. **Conker Competition** – Using conkers off the trees tie on a length of string and members try to "break each other's conkers!" It's apparently really fun!!!
24. **Bake Sales** – self-explanatory.
25. **Pancake Breakfasts** – usually run in conjunction with special days i.e. Mother's Day, Father's Day, Easter Sunday etc. Sell tickets to members and bona fide guests. Include some other activities to make it fun – maybe a silent auction. Make sure the cost of the ticket is enough to allow for some profit for the Branch.
26. **Cookbook** – this idea requires an outlay of dollars for printing of the books. If handled properly can make money.
27. **Fashion Show** – Men wearing women's bathing suits! Sell tickets and raffle off dinner with the best "bathing beauty." Lots of laughter and fun and usually a good night at the bar.
28. **Spring Plant Sale** – self explanatory.
29. **Used Sports Equipment Sale** – offer the hall to local youth group to run this sale. At the sale run a concession and make some money!
30. **Spring Tea** - hosted by Branch and LA in the unlicensed hall. Invite the public. Charge a small fee \$5 per head. Serve fancy sandwiches, dessert, tea and coffee (provided by the LA). Obtain door prizes from local merchants – give them advertising. Place spring flowers on all tables. If possible have quiet background music; maybe a student could play the piano or harp? Invite a youth group sponsored by

the Branch to serve refreshments. Invite their parents to attend because you fund their child's youth program. Invite local dignitaries. Have a guest speaker! Get a couple of Legion Information Booths to display! Great opportunity to build awareness around the Legion, get some new members and a small opportunity to make some money!

31. **Host Command Level Sporting Events** – don't overlook the chance to see some big sales in the licensed premises as a result of hosting Command level sports events. Sure it's a lot of work – but well worth it. Get details from Command on what is required.
32. **Boat Race** – start with two sheets plywood. Build a boat that will float and race ½ mile at the end of the event.
33. **Skits Competition** – between Branches.
34. **Canadian Tire Dollars** – in those communities where there is a Canadian Tire store, encourage members to donate their "dollars" to the Branch. Keep a jar on the bar and anytime handyman expenses arise – use the "Canadian Tire Dollars" to purchase the supplies.
35. Give out cheques to charities at a Meat Draw and have the recipients give a small talk on what they use the money for.
36. **Dessert Auction/Pie Nights** – have businesses, LA, Branch members donate desserts for auction. Dinner tables must be set up to seat six or eight members and each dessert must be large enough to serve the number seated at the table. At the end of the evening meal – set up tables in the middle of the hall with all the desserts. Give members a break after dinner and let them look at the table of desserts and then auction off each dessert. Have some fun! Branches have raised as much as \$1000 clear profit – the desserts are donated!
37. **Fear Factor Night** – a lot of work but a lot of fun! Potential for a full – house – maybe a LOT OF SPECTATORS. Fashioned after the TV show.
38. **Corn Roasts** – Branch provides corn and fixens' – members bring their own meat for barbequing. A great family event and a great way to get members socializing. This works well in the summer.
39. **Tomato Growing Contest** – This is from Fraser Valley Zone. Fun and a \$ maker. Buy tomatoes for \$2 sell them for \$5 and judging contest for the best tomatoes – obtain guidelines from Command.
40. **Bank of Nova Scotia** – some Branches have indicated that this bank is a very good contact for participating in community events and have been known to match donations for some projects.
41. **Legion Idol** – Coquitlam Branch has a terrific weekly event leading up to finals for "Legion Idol." This involves singers who sing along to Karaoke. Branch has packed house the night of the event.



**If you want a copy of the power
point presentation email:**

Info@legionbcyukon.ca

Put “ BOA Training” in subject line

More questions, please do not hesitate
reaching out to us by e-mail at:

Info@legionbcyukon.ca

tony.rushwoth@legionbcyukon.ca

darryn.langstaff@legionbcyukon.ca



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