



Legion 
*BRITISH COLUMBIA/YUKON
COMMAND*

2019 BRANCH MANUAL

*Promoting Remembrance
Serving Veterans
And Our Communities*



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

This manual is prepared by BC/Yukon Command. The manual contains policies and procedures as approved by the Executive Council and convention resolution. This manual does not take precedence over the General By-Laws or BC/Yukon Command By-Laws. Copies of other publications will no longer be included in the manual. Masculine words include the feminine and singular words include the plural. This manual is for the guidance of all branch officers and members of BC/Yukon Command of The Royal Canadian Legion. Members can readily access the manual through the webpage and download their own copy. To keep the cost of this publication down, only reference will be made to the respective publications available from Dominion Command with respect to specific regulations governing aspects of the Legion operation. For those few branches that don't have internet access Command will produce copies in-house for sale.

This manual was last published in 2013. Additional copies can be ordered from the BC/Yukon Command office and you can access a copy on the Command webpage. Wherever the website addresses are referred to for BC/Yukon Command and Dominion Command – note the following:

BC/Yukon Command – www.legionbcyukon.ca

Dominion Command – www.legion.ca

PART I - THE ORGANIZATION

Established in 1926, the Royal Canadian Legion has become Canada's largest Veteran support and community service organization. The more than 270,000 members in over 1,400 Branches across Canada make a difference in the lives of Veterans and their families, provide essential services within their communities, and remember the men and women who made the ultimate sacrifice for our Country. The mission of the Legion is to serve Veterans, which includes currently serving military and RCMP members, and their families, to help promote remembrance and serve Canadian communities and the country. The Royal Canadian Legion BC/Yukon Command is a non-profit organization consisting of 145 Branches, 67 Ladies' Auxiliaries and over 44,000 members. Guided by the three pillars of Remember, Join and Give, the Royal Canadian Legion BC/Yukon Command works to improve the lives of Veterans and their families.

There was a time when the Legion and its branches were more fiscally successful and had less need to work cooperatively, or to rely on help from their Command. Unfortunately, that is no longer the case. The whole organization must work as a cohesive team and put the mission ahead of anything else. Legionnaires are some of the most dedicated and hardworking volunteers in the country – with a common mission and strong support from your Command officers and staff, the BC/Yukon Command can and will be a success story well into the future.

Provincial Command

Provincial Executive Council (PEC)

The Provincial Executive Council is the governing body between conventions. The PEC consists of the Executive Committee elected at Convention, the Command President; First Vice President; two Vice-Presidents, Treasurer; Chair, along with the Immediate Past President, Zone Commanders and a representative of the Tuberculosis Veterans Section. The Executive Council meets twice a year, in Spring and Fall.

The Command President, in accordance with the *General By-laws* Section 418.a., has the power to suspend a branch charter and to take disciplinary measures against a branch or any of its members. This is only done in extreme cases such as that of non-compliance.

Executive Council Minutes

Minutes of Executive Council meetings are sent to Zone Commanders and Members of the Executive Council. They are also posted on Branch Corner. The minutes should be reviewed and any items of interest to the branch should be referred to the next general meeting for any action or information requested by the branch, then posted in the branch for the membership to review. Copies of the Standing Committee reports should be referred to the respective committee at the branch level. It is the responsibility of the Branch to distribute these reports appropriately. Members of the Command Standing Committees are also asked to arrange a presentation of their official Committee Report for the general meetings of their respective branches and for their zone meetings. It is hoped that this effort will help to educate more members about the activities of Command Standing Committees within BC/Yukon Command.

The Legion and the Public

The reputation of the Legion in this country has been exceptional. Our organization is a patriotic icon in the communities it serves. It has been seen over the years that this reputation can quickly be damaged by the actions of members or branches. Branch Executive Committees and members should be leaders in social progressiveness by ensuring the inclusiveness of everyone. This organization does not tolerate any forms of discrimination including sexism or racism. Branches should ensure that any material published or posted on social media associated with the Legion or any branches be free of derogatory comments. Even in jest, materials containing reference to particular cultures or religions can be discriminatory, even if it is not intentional. Exercise extreme caution. Every branch must have a very careful quality control of all materials to ensure that nothing is issued in the name of the branch, even within its walls, to be used to discriminate against others.

Religious symbols, such as headdress or other head coverings, should not be considered a hat by the house standards within a branch. In addition, it is critical that members who may verbalize prejudiced attitudes be quickly reminded of their constitutional responsibility to uphold the reputation of this organization – the Legion is not a place where these views are welcome.

Remembrance Day is an opportunity to remember all the men and women who gave the ultimate sacrifice for our Country. This is an excellent opportunity to hold services where local multicultural groups can be invited to participate in whatever way is appropriate to help honour our fallen soldiers. Local First Nations leaders may agree to provide support and attendance in parades and services. This type of open and culturally diverse public event is an opportunity to include younger generations and show leadership.

Electronic Communication

The internal communications policy states that all branches are to receive all Command communications by email. This can be accomplished by branches having a branch email account within the location or assigning the address and responsibility for receiving the emails to a member of the executive through their home computer. In addition, the internal communication policy also specifies that every member of every Branch Executive in the organization has the right to receive email copies of every memo from BC/Yukon Command. Modern organizations communicate digitally, and this policy is critical to the ability to recruit volunteers to serve on Branch Executives. For some remote regions, internet access may be very limited, please advise Command to ensure communications are mailed to your Branch in these cases.

Surveys

From time to time BC/Yukon Command needs your feedback, guidance or advice on important decisions. Branches opinions are important and they often have great ideas. Surveys are a way to ensure everyone's opinions and ideas are heard. When a survey is conducted, you will receive a digital link to a secure survey website. Please complete the survey and help build the best programs possible.

Dominion Command and BC/Yukon Command Mailings

Inclusion of Appeals for Financial Assistance by Other Organizations

Both Dominion and BC/Yukon Command often work with other organizations and may make appeals to branches for assistance in lending financial support to these organizations. Branches are not expected to donate. The decision to lend financial support must be decided by the branch's general membership.

Dates to Remember

A poster is issued annually to branches. Serious consequences can occur with respect to missed deadline dates. The following dates are included on the poster:

Financial Statements

Audited Financial Statements:..... April 30

(Must follow the Command Pro Forma and must be audited)

Non-Profit Organization (NPO) Information

Return to Revenue Canada: June 30

Poppy

Poppy Order: September 1

Poppy Fund Statements: October 31

Poppy Fund Assessments (as approved by convention):
January 31
& October 31

Youth Literary, Poster and Video Contest (video contest entries are submitted directly to Command)

Submission Deadlines:

Branch.....November 15

Zone.....December 15

BC/Yukon Command.....January 15

Sports

Zone Intent to Participate Form and cheque to BC/Yukon Command:.....December 1

Names of Participating Zone Winners to Command:.....Date varies according to sport;
check deadlines on sports registration forms

Gaming

Gaming License Renewal: (Meat or 50/50 draws):.....December 31

Note: Apply for renewal of "A" licences at least three months before your licence expires!

PLEASE enter your own date of renewal: _____

Liquor License

Provincial Government Liquor License Renewals to Victoria: Date varies by Branch

Convention Resolutions Deadlines (You will be advised of the definite date in each case)

BC/Yukon80 days prior to Convention opening

Dominion132 days prior to Convention opening

Workshops

Leadership & Business Management Workshop – Check with Your Zone Commander

BC/Yukon Command and Dominion Conventions

BC/Yukon Command Convention Resolutions

Refer to BC/Yukon Command By-Laws Article VIII for information on submitting resolutions for BC/Yukon Command Convention. Refer to the General By-Laws Article IX for details on Dominion Convention resolutions. Since there are lengthy administrative procedures involved, any resolutions not received on time **cannot** be accepted. BC/Yukon Command will acknowledge receipt of all resolutions. Resolutions must include the minutes of the General Membership meeting authorizing the resolution.

The general headings under which resolutions fall are:

- Rules over which the Legion can exercise direct control in that they deal with matters affecting the organization such as by-law amendments.
- Rules that require submissions to governments, either at municipal, provincial or federal level, but primarily relating to the federal government and concerning desirable changes in Veterans' legislation.
- Rules of a general nature that reflect the concern of Canadians on such subjects as maintaining the strength of the Armed Forces, immigration, drug abuse, etc.

Resolutions normally originate at the branch level but may also originate at the Command Executive level. Zone meetings may send resolutions to the Command Executive Council for review, but resolutions intended for Conventions must originate at a branch.

Resolutions dealt with at the Zone level must have originated from a branch. If a resolution is channelled through the Zone meeting, the Zone cannot change the resolution except to correct any inaccurate information. A Zone cannot stop a branch resolution from going forward, even if a zone meeting votes non-concurrence a branch can still send its resolution through to BC/Yukon Command.

Resolutions requiring immediate action should be referred to the BC/Yukon Command Council. It is necessary that it includes a preamble or cover letter that provides a full explanation of the resolution.

Resolutions intended for Convention must be clearly marked as such. Resolutions intended for a government department are referred through Command to ensure requests are in line with established Legion policy.

Resolutions must be in an appropriate format with explanation by way of one or more "whereas" sections of preamble and a "resolved" section outlining specifically what action is being requested. Resolutions involving matters where urgent action is desirable, should not be held up for submission to BC/Yukon Council or to a Convention. Such resolutions can be forwarded at any time and will be referred to the appropriate Standing Committee or to Dominion Command. There is no special form on which to submit resolutions.

Election of Voting Delegates

Only a duly constituted general meeting can select delegates to Convention. This is covered in the *BC/Yukon Command By-laws*. It is appropriate for a Branch Executive Committee to make recommendations, but the final decision must be made by election at a general membership meeting.

Supplies and Regalia Ordering Procedures

Supplies listed in the Legion Catalogue are ordered directly from Dominion Command. Contact information can be found in the *Dominion Command Supply Catalogue*; you can phone toll free 1 888 301 2268 or consult their online store page at <https://www.poppystore.ca/>

BC/ Yukon Command provides some supplies and the official price list is issued annually. It is also posted on the webpage at <https://www.legionbcyukon.ca/branch-corner/guidelines-and-forms>. Each item carries a code number for ordering purposes. Purchase order forms are available from Command by request. Orders are accepted by phone, fax and e-mail; orders through fax and email are recommended.

Payment of Accounts with BC/Yukon Command

Payment of branch accounts, such as general supplies, poppy supplies and poppy assessments, are made upon receipt of the invoice or due date of poppy statement. BC/Yukon *Command's Performance Standards* outlines steps taken when non-payment arises.

Trademarks

Design Registration Legion Emblem and Name

Branches wanting to produce sale items with either the Legion logo or name must use only those suppliers who have signed agreements with the Legion. The contract is available from the BC/Yukon Command office.

Dominion Command maintains registration of the following items under the *Trademarks Act*, in the name of The Royal Canadian Legion

- "The Royal Canadian Legion"
- "Canadian Legion"
- "Legion"
- The Legion Tie
- The Legion Badge (crest)
- The Legion Logo
- The Poppy Symbol
- Diamond Jubilee "torch" Logo

According to the Act no one shall adopt, manufacture or use these trademarks or ones that can be mistaken for them without the written permission of Dominion Command. Dominion Command has delegated to Provincial Commands the responsibility of maintaining the signed agreements with suppliers in each Command.

Branches are authorized to use registered Legion trademarks on letterheads, in advertisements and on publications relating to Legion matters without seeking Command approval. Registered trademarks may be used on external branch signs to provide visual identity of Legion buildings and premises. Templates for BC/Yukon Legion brand materials, letterhead and business cards are available for branch use, and you are encouraged to implement this Legion branded look in your branch.

Relationship with BC/Yukon Command and Zone

BC/Yukon Command is here to help branches, to co-ordinate Legion work and carry out council directives etc. Questions are welcome on any matter of concern. If you do not know who to speak with about your question, just ask the receptionist and she will direct your call to the appropriate staff member. Zone Commanders can also answer many questions and can be very useful as a source of information. It is also very important that all Branch Executives log into the private area of the BC/Yukon Command website called "Branch Corner", in order to access the most current information. Tremendous effort is put into making sure that every possible resource is available, much of it can be obtained online or through your Zone Commander.

In an organization the size of the Legion, with 147 branches, there has to be a body that both oversees and acts as a resource for the organization, BC/Yukon Command's role includes ensuring branches are fiscally viable, comply with the by-laws of the organization and are able to access the information needed to grow and thrive. BC/Yukon Command also provides advisory services for redevelopment, and initiates marketing campaigns encouraging the public to join and engage with the branches.

Each branch is autonomous in the conduct of its affairs within the Constitution. However, there are many requirements that have to be fulfilled, and in matters so important to the causes the Legion are dedicated to, all branches must pull together as a cohesive unit.

Once the body of Convention reaches a democratic decision, it becomes the responsibility of each branch and its membership to support the decision, despite the fact the branch and all members may not be in favour. The project has become a "Legion" initiative and the name of the organization is involved in

the success or failure of the project. To ensure 100% success, full co-operation from all branches is necessary. The Legion can no longer afford to be a loose collection of non-cohesive solitary entities.

The BC/Yukon Command Legion Foundation

BC/Yukon Command has a registered Charitable Foundation. The Foundation is the giving arm of the branches with the right to accept charitable donations and issue receipts for income tax purposes. The objective when forming the Foundation was to create a legally recognized vehicle, which could become part of the members' regular giving program. The Foundation does not compete with branches for donations or engage in fundraising activities which would compete with branches for the funding necessary for their ongoing projects. There are some types of donations that the Foundation can accept that branches cannot. These are:

1. Charitable donations for which an official receipt for income tax purposes is required.
2. Charitable donations in lieu of flowers and otherwise in memory of deceased loved ones.
3. Bequests to a charitable organization recognized by Canada Customs and Revenue Agency as a charitable Foundation.
4. Income from trusts and money designated to be held by the Foundation and utilized for specific purposes.
 - a) Proceeds from financial vehicles such as life insurance programs and annuities.

The Foundation funds:

- Activities which provide medical, social and other services, equipment and facilities including low rental housing required by those with low income & seniors
- Research into the medical problems of seniors including geriatric research
- Bursaries and scholarships to enable those in need to attend post-secondary educational institutions.
- Programs which contribute to the mental, physical and social well-being of persons to provide them with the education and training necessary to achieve a reasonable and sustainable quality of life.
- Programs such as Veterans Transition Network, Legion Military Skills Conversion Program at BCIT, Cockrell House for homeless Veterans and Vancouver Island Compassion Dogs.
- Youth track and field

The Foundation solicits by direct mail to members and through information posters to branches. Branches are asked to distribute information and support the goals and objectives of the Legion Foundation but are not required to solicit or fundraise on its behalf. The Foundation can cooperatively support local projects that are too large for a branch alone. Branches, at their discretion, can direct charitable donations to the Foundation.

PART II – THE BRANCH

There are a number of administrative responsibilities that branches carry out in order to maintain their Legion Charter. You cannot be a Legion branch if you do not follow the by-laws and the reporting rules. This section deals with the key areas where branches interact with BC/Yukon Command. There is an often misinterpreted line between “Branch Autonomy” and the responsibilities branches have to maintain their good standing as a Legion branch. Please refer to the [Performance Standards](#) section in addition to this section for specifics.

Zones

BC/Yukon Command is divided geographically into zones. Zones are not a chartered body of the Legion and therefore cannot make decisions on Legion policy. Their purpose is to act as a co-ordinating body for the branches in the zone, to oversee and to settle disputes between branches within the zone,

and to educate branch executives and members at meetings. Each Zone elects a Zone Commander who, by virtue of this office, holds a seat on the Executive Council.

The zone council usually consists of the Zone Commander and two or more elected or appointed officers of the zone along with delegates from each branch. Frequency of meetings is according to the provisions of the respective Zone Regulations, but in accordance with BC/Yukon Command By-Laws.

Branches may refer any matter to the Zone but still have the right of direct contact with BC/Yukon Command on any subject.

Zone Commanders are required to hold Presidents' meetings and Poppy Workshops within their respective zones. At this zone meeting one of the items to be reviewed is use of this Branch Manual. In return presidents are expected to go through the same kind of orientation with their own executive at branch level with respect to the use of the various manuals to help them in their duties.

Zone Commander

The branches within a zone elect a Zone Commander at least four weeks before a BC/Yukon Convention. Newly elected Zone Commanders do not take a place on the Executive Council or assume their duties until the conclusion of the Convention. Only sitting Zone Commanders or in their absence the Deputy Zone Commander is paid expenses, as approved, for attending Conventions.

BC/Yukon Command pays the expenses of the Zone Commander to attend council meetings. If a Zone Commander is unable to attend official meetings, including BC/Yukon Conventions, the Deputy Zone Commander can be authorized to attend and have their expenses paid by BC/Yukon Command. The Deputy Zone Commander is encouraged to attend PEC meetings for mentorship purposes even when the Zone Commander is attending; however, expenses for the Deputy Zone Commander are not covered by Command.

BC/Yukon Command Treasurer asks that Zone Commanders each submit their budget for approval by September 1st for inclusion in the next year's budget. This amount cannot be exceeded nor a balance carried forward. The Zone Commanders duties are of an advisory and supervisory nature and are carried out at the direction of the President and the Executive Council.

The BC/Yukon Command By-laws define the duties of a Zone Commander as:

Duties of the Zone Commander as defined in the *BC/Yukon Command By-laws (Article 11)*:

11.5.1 - Has the authority to act on behalf of British Columbia/Yukon Command as directed by the Command President.

11.5.2 - Shall monitor branches to ensure there is compliance with the [Zero Tolerance and Performance Standards](#) of British Columbia/Yukon Command.

11.5.3 - Shall be entitled to require branches to submit both general and executive committee meeting minutes and monthly operating statements.

11.5.4 - He shall at all times, be conversant and close in touch with the problems of the branches within his zone and their deliberations from time to time.

11.5.5 - He shall pay at least one visit per year to each of the branches within his zone.

11.5.6 - He shall be expected to attend all meetings of the Zone Council, and shall have a vote, unless acting as chairman at which time he may vote according to the provisions of sub-section 9.7.2 of these By-Laws.

11.5.7 - He shall submit to British Columbia/Yukon Command one report each year on behalf of each branch within his Zone, covering the twelve-month period ending on the 30th day of April and based on official branch visitations. The report is to be sent to British Columbia/Yukon Command within fifteen (15) days of the official branch visitation.

11.6 - Zone Commanders are subject to the disciplinary provisions of Article III of the General By-laws should circumstances warrant.

There is a Zone Commanders Duties and Responsibilities Manual that is provided to Zone Commanders following every Provincial Convention. Any member interested in becoming a Zone Commander can request a copy of the manual from the Command Office. This interesting and diverse role is an excellent way of contributing to the progress of the Legion.

Delegates to the Zones

In accordance with BC/Yukon Command By-laws, Branch delegates to the zone, who must be members in good standing, can be elected or appointed either at a general meeting or by the Executive Committee of each branch.

Zone Meeting Minutes

All business conducted, including Open Forum discussions are to be properly recorded. Minutes are to be sent to the Command office in accordance with the BC/Yukon Command By-laws. The by-laws also require that all zone minutes shall be sent to Command within 30 days of the meeting.

Attendance of Command Representatives at Branch Functions

A Zone Commander is required to make one official visit to each branch annually. Command Officers are also available for visits to branches under certain circumstances. Invitations to a Command Officer involve the completion of an official invitation form available at the Command Office. Invitations must be submitted at least one month before the function. The Command President must approve the participation of a Command Officer.

Command office can provide a biography for introduction purposes each time a Command Officer is sent to represent the Command at an official function where the Officer is considered to be the main guest or keynote speaker.

Command Officers should be invited to functions only on the basis that the Command representative would provide a meaningful role to the proceedings. The official invitation form made available through the Command office asks for confirmation of exactly what role the Command Officer will play. Please see [Appendix M](#) for the form.

Remember, Zone Commanders and Command Officers, like Branch Officers, are volunteers who give up their free time on behalf of the Legion.

Branch Advisory – They are here to help!

Branch Advisory Operations Committee

Along with Zone Commanders, Branch Advisory Team is the central point of communication between the branches, the Branch Advisory Operations Committee (BAO), and the Admin/Finance Committee.

The Branch Advisory Operations Department consists of a team of 4 Regional, Branch Operations Advisors (BOA's) who work directly with Zone Commander and Branch Executives, The Deputy Executive Director and a Branch Advisory Coordinator.

The Branch Advisory Operations Department works closely with the Branch Advisory Operations Committee, which is made up of members of the Admin/Finance Committee. Together, they provide branches with advice on operational best practices and guidance when they navigate through difficult issues, or when the branches demonstrate they need additional support. The goal is to provide advice on sound operational practices to ensure the aims and objectives of our organizational mandate are properly carried out.

The role of the Branch Advisory Operations Department in BC/Yukon Command is to support branches with their operations.

They are here to help our branches. Areas where they can assist include but are not limited to:

- Communicating with external organizations on your behalf
- Worksafe
- Planning and budgeting
- Grants
- Property taxes
- Renovations
- Financing
- Approvals

Branch Advisory Development Committee

The role of the Branch Advisory Development Committee, a sub-committee of the Admin/Finance Committee is to support branches with the sale of property and redevelopment projects. The Branch Advisory Development Committee will be assisting the branch, to ensure the best interests of the developing branch are represented at all stages of the redevelopment process. The purpose of this committee is to deal with branches entering development projects, focusing on branch development, meaning new construction, substantial building additions that increase the footprint of the branch, and demolition.

In addition, the Branch Advisory Development Committee has the following responsibilities:

- Review and endorse development proposals and status updates, and submit to the Admin/Finance Committee requests for approval of branch development projects.
- Make recommendations on improvements to submission packages and development documents, which may include referring documents to BC/Yukon Command lawyers for input.
- As required, send a representative of the Committee to attend various development meetings, including developer status meetings and municipal approvals.

Please contact them and they will be happy to assist.

Non-Profit Status

Section 103 of the General By-laws defines the Legion as a non-profit organization. According to the Act of Incorporation, each Command and branch is autonomous and treated individually by the Canada Revenue Agency (CRA).

The branches are incorporated under the Legions Act under the federal government. The Legions Act has been extended to British Columbia under Chapter 53. Chapter 53 can also be founded on the BC government website at http://www.bclaws.ca/civix/document/id/lc/psl/56053_01

Legions:

ARE NOT Societies (are NOT incorporated under the Society's Act)

ARE NOT Charitable Organizations (are NOT registered Charities for CRA Purposes)

Legions are:

ARE private members' social clubs – created by Act of Parliament

ARE “Not–profit–Organizations” by CRA definition

There is NO Incorporation number for any branch, the only number you may use is the Business Number assigned for CRA Purposes, which you use for GST and payroll remittances, and BC PST number for PST remittances.

It is the responsibility of each branch and Command to protect this non-profit status. Under the Income Tax Act, organizations that provide dining, recreational or sporting facilities for their members are taxable on their income. If you have questions on what is taxable in your branch, please contact your BOA or the Command Office.

Performance Standards

All branches are expected to maintain compliance with the BC/Yukon Command [Performance Standards Policy](#). This policy is in place to ensure branches are able to effectively carry out the programs and purpose of the Royal Canadian Legion.

Branches who are non-compliant with this policy may be placed on any level of graduated performance management upon recommendation of the Branch Advisory Operations Committee and at the discretion of the Admin/Finance Committee.

A full copy of the policy is available on the BC/Yukon Command website. Please ensure your branch is familiar with this policy and do not hesitate to ask questions. A copy current to January 2019 is provided in Appendix A.

In accordance with the Section 133 of the Branch pro-forma: Any branch requests for expenditures over \$5,000 must first be approved by BC/Yukon Command.

BC/Yukon Command's approval is required for:

1. Commercial Lease Agreement and Renewals
2. Financing (including mortgages, unsecured lines of credit, branch credit card, equipment term loans or leases, and other financing over \$5,000)
3. Renovations or equipment purchases in excess of \$5,000

All branch expenditures over \$5,000.00 require the approval of the Branch Advisory Operations Department. This includes expenditures by a Branch's Ladies Auxiliary.

A branch must request approval for spending grant money received, such as: New Horizon Grant, Enabling Accessibility Funds, and any other grants. Failure to do so could result in a branch being placed on any level of Performance Standards.

This process is not meant to discourage branches from spending their money, but rather it is to encourage branches to work with Command to help ensure their long-term sustainability.

Branches are also encouraged to contact their BOA when they have a project in mind. The BOA is a great resource and can help members make sound choices for their branch. Information about submitting expenditures for approval is provided in the [Appendix B](#).

Property Disposal

In accordance with Section 121 of The General By-laws and Section 3(2) of Chapter 53, Statutes of British Columbia, no branch may hypothecate, pledge, lease, sell, convey or otherwise dispose of its real or personal property without the approval of the Provincial Command.

In addition, in accordance with Section 132 of the Branch pro-forma: see Holding of Property section 121 in Article I of The GBL's, there is the requirement of special general meeting approval, for all of the above mentioned transactions proposed by the branch and/or trustee(s). As per Section 121(c) ii of *The General By-laws*, a necessary component of the approval process requires that the branch give written notice of the proposed transaction, setting out the reasons for its proposal and that written notice be sent by post to the last known address of every person entitled to vote on the proposal no less than 14 days before the date set for the meeting.

If your branch is considering selling any property, please contact the Branch Advisory Operations Department to help guide you through the approval process. Branches who engage Command early in this process have greater rates of success. Please see [Appendix D](#) for full copies of the requirements.

Property Redevelopment

In British Columbia, there are Royal Canadian Legion branches that have valuable properties in good locations and are looking to property redevelopment as a means of ensuring their branch will be sustainable well into the future.

All branches looking to redevelop their property are required to go through a series of approvals with BC/Yukon Command. Approval will be granted at various stages in the redevelopment process, and approval must be obtained by the branch at every stage. A branch cannot proceed to a subsequent stage in their redevelopment until receiving approval for the previous stage. Please see the [Appendix E](#) for full copies of the requirements for property redevelopment.

For some branches there are opportunities to turn their properties into revenue generating streams, however, historically when branches undertake property development in isolation from their provincial command they can fall prey to predatory developers. In some cases, this can result in a loss of revenue, loss of equity in the project, or worse, branches can lose their property entirely.

As a result, in addition to the regular approval requirements, branches must also hire a project management company to act in their best interest, and to oversee the redevelopment project until completion. Although branches are not required to use the development company created by Command, it is recommended they consider it as it has been designed to be Legion specific with extremely competitive pricing.

BCYC Development Corporation

With redevelopment and development there are significant risks connected to all entities involved in the development. Given this risk, BC/Yukon Command's legal counsel recommended containing this risk by creating a company under the BC/Yukon Command to handle the advising and brokering of our branches' development deals. This newly created company, "BCYC Development Co." will be able to identify opportunities and share expertise in not-for-profit partnerships with developers.

The Legions in BC and the Yukon have an excellent opportunity to become a leader in growth in sustainable operations throughout Canada. As a Provincial Command, our aim is to be proactive in assisting branches with property development by providing development expertise, increased bargaining power and promoting a consistent Legion image and presence for Legion developments in the province.

Approvals – Financing

All branch requests for financing (mortgaging, line of credit, loans, and credit cards) require the approval of the Branch Advisory Operations Department. Information about what to submit when requesting financing is provided in the [Appendix C](#).

Funding Pools

The Branch Advisory Operations Department manages two funding pools which are available to branches in need of financial assistance. Please see the [Appendix F](#) for full copies of the requirements.

Branch Sustainability Fund

Funds innovative initiatives promoting branch sustainability up to a combined annual maximum disbursement of \$50,000.00. Disbursements out of this fund are at the discretion of the Admin/Finance committee. This is funded by 25% of Branch closure assets and revenue received from the Command Care Fund. Branch Operations Advisors (BOAs) are also funded through this.

Branch Assistance Fund

This fund was created to help branches execute objectives of the BC/Yukon Command Strategic Plan and can be used for:

- Low interest non-collateral revenue generating loans. These loans are for the purchase of new equipment, software, technology or service
- Low interest loans, requiring collateral – These loans are used to provide bridge financing to branches who are in between development projects

Peer to Peer Loans

The Peer to Peer Lending initiative was set up to allow for inter-branch lending. Branches who have a surplus of funds and are interested in helping out a branch who is in need of funding can apply to be matched with a branch. This program works well because it allows the lending branch the opportunity to earn interest while at the same time helping another branch to secure the funds they need and often at a much better rate of interest than what is available through a bank or credit union. Please contact the Branch Advisory Operations Department for more information.

Licensed Premises The Liquor Control and Licensing Branch has been renamed to the Liquor and Cannabis Regulation Branch (LCRB) to represent their new additional responsibility of licensing and monitoring the private retail sale of non-medical cannabis in British Columbia.

Criminal Record Check

NEW executive members must provide a criminal record check and personal history summary to the Liquor Control and Licensing Branch of British Columbia. As a non-profit most jurisdictions will offer criminal record checks for free; all executive members who are required to submit a criminal record check should bring a letter on branch letterhead to their local police detachment stating the criminal record check is needed for volunteer purposes.

Below you may note the requirements from Liquor & Cannabis Regulation Branch, with respect to the Criminal record check for new and returning executives, and implications on the liquor licence held by the branch.

- Any changes to the directors must be submitted to the Liquor and Cannabis Regulation Branch.
- New directors are required to submit a completed criminal record check, along with their personal history summary.
- Returning directors do not need to resubmit their criminal record check unless if a returning director has acquired a criminal record since completing a previous check, this information must be reported to the Liquor and Cannabis Regulation Branch so that it can be reviewed.
- If a director refuses to submit the required information, the change application can't be completed, and the liquor licence will be suspended until the required information has been submitted, or the individual is removed as a director.
- If a new director is found to have a criminal record, this information is reviewed by the Liquor and Cannabis Regulation Branch to determine whether or not they are fit and proper to hold a liquor licence.
- If it is decided that an individual is fit and proper to hold a licence the change application will continue. However, if it is decided that an individual is not fit and proper to hold, or continue holding a liquor licence, then they would need to be removed as a director, or the licence would be suspended.

- Criminal Record checks must have been completed within four months of the submission of your application.
- Liquor servers are not required to complete a criminal record check, unless they are also a director of the legal entity holding the licence. They are required to complete the Serving it Right course.

The personal history form can be found at

https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/business-management/liquor-regulation-licensing/forms/lcrb004_personal_history_summary.pdf

All information must be submitted with a Form LCLB005a which can be found here

https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/business-management/liquor-regulation-licensing/forms/lcrb005a_application_for_a_permanent_change_to_a_licence_all_licence_types.pdf

Liquor Licensing

The majority of Legion branches have a Liquor Primary Club Licence, and follow the same general rules as Liquor Primary, with few exceptions:

- Can only sell liquor to members, or their guests and must keep a visitors' registry (visitor registry does not apply to minors)
- Members of the public who are not guests of a club member are not permitted to enter or remain in a service area when liquor is sold or served, but may attend events when liquor is not sold or served.
- Must not advertise to the general public
- If the club hosts a special event and is the permittee, you will be required to apply for a *special event permit*.
- If a member is hosting an event, they do not need a special event permit, and the branch can serve their alcohol to the party.

Advertising

- Branches with a Liquor Primary Club Licence cannot advertise their events or liquor prices, availability, etc to the General Public.
- Branches can advertise that their legion halls are available for rent for: special events, private functions, etc. It is illegal to advertise or promote any special occasion by suggesting liquor will be available
- If the renter wants to have alcohol at their event, they need to obtain a Special Event Permit, the branch cannot supply alcohol.
- Legion Logo - more information under Corporate Identity and Brand Standards Manual.
- The Badge is for membership-related matters, and should not be ever used in advertising.

Changing your Liquor Licence

On January 23, 2017, the Provincial Government of British Columbia made a number of changes to the Liquor Act. In response to these changes the Branch Advisory Operations Department has created a policy. The overall objective of this policy is to allow branches to change their license if it improves their overall operations while at the same time ensuring BC/Yukon Command can remain a membership-driven organization that meets the mission and objectives of the Royal Canadian Legion.

If you would like to open to the public, you may apply to the Liquor and Cannabis Regulation Branch (LCRB) to transition your liquor primary club licence to a basic liquor primary. **This is a permanent change to the licence that requires local government/First Nation approval.** If you are approved, your special club conditions will be removed.

A liquor primary license allows the branch to serve to non-members, while liquor primary clubs only allows the branch to serve to members and guests of members. Liquor primary allows the branch to advertise to the public, while liquor primary club licences do not allow any advertising to the public but they can advertise to their members. Liquor primary clubs allow members to hold private events and serve branch liquor, while under a liquor primary licence, in order for members to hold private events, they would have to get a Special Event permit.

Any branch considering a change must receive approval from the Branch Advisory Operations Committee prior to submitting their application to the LCRB. Failure to do so will result in a branch being placed into Trusteeship. Please contact the Branch Advisory Operations Department and your BOA with your questions. Please see the [Appendix G](#) for full copies of the requirements.

Leasing your Branch Kitchen

Under the [Liquor Primary Terms and Conditions](#) branches are now able to lease their kitchen to a third party. This will require the approval from the Branch Advisory Operations Department. We strongly encourage branches to work with their BOA when considering a lease arrangement. More information on the requirements and what is needed for approval is available in [Appendix H](#)

Special Occasions Licenses - "Outside" Groups - Prohibition against Supplying Liquor

Outside groups that rent Legion premises for special occasions must obtain their own liquor. The Legion is not to involve itself. It is illegal to rent unlicensed halls/auditoriums to outside groups and then arrange for the Legion to supply liquor. The Liquor and Cannabis Regulation Branch (LCRB) consider this a serious infraction of the regulations.

LCRB considers that branches have a responsibility to emphasize that special occasion licenses are required, if liquor is going to be served. Branches must remind renting groups to provide adequate supervision, to ensure minors are not permitted to consume alcoholic refreshments.

Special Occasion Licenses for an unlicensed portion of Legion premises, except where an extension of licensed premises has been authorized under Section 27 (b) (i) of the [Liquor Control and Licensing Act](#), a special occasion license must be obtained for a function, if liquor is served. The maximum number of special occasion licenses permitted in a year is 24. It is illegal to advertise or promote any special occasion by suggesting liquor will be available.

Renting Your Branch Hall/ Facilities

Renting out your branch hall for private functions is a great way to generate extra revenue for your branch. Remember that hall rentals are more than just allowing someone to use your space. If an employee must be there to open the branch or lock up, or if there is any clean-up done by the branch after the event these costs should be built into your rental pricing. Some other important considerations are:

- What do other halls in your community charge?
- Do you have a hall rental policy? A policy at minimum should include:
 - Your pricing
 - Hours that the hall is available
 - Any set-up, take-down and clean-up costs
 - Damage deposit costs
 - Any other responsibilities the renter will be taking on (such as if the building is damaged)

If a renter wants to serve liquor at their event, the renter must obtain their own [Special Event Permit](#) and supply their own alcohol.

If your branch is licensed as a Liquor Primary or if your facility is being rented by a member, the branch may be able to provide and serve their own alcohol. Please contact the Branch Advisory Operations Department or the Liquor and Cannabis Regulations Branch for information.

Terms and Conditions of your Liquor Licence

For branches that operate a licensed premise (bar), it is important that your executive, staff and bartenders are knowledgeable on the [Terms and Conditions](#) associated with your license. The easiest place to find this is on the Liquor and Cannabis Regulations Branch (LCRB) website:

<https://www2.gov.bc.ca/gov/content/employment-business/business/liquor-regulation-licensing/publications-resources/liquor-licensee-terms-and-conditions-handbooks>

Most branches in British Columbia operate under a Liquor Primary Club Licence which can be found in the Liquor Primary Terms and Conditions. For branches that obtain permits to hold special events, please ensure you are familiar with the Special Event Permit Terms and Conditions. Please contact the Branch Advisory Coordinator if you need help obtaining a copy of the [Terms and Conditions](#).

Tips for compliance

- Ensure all staff, managers and a member of the executive have valid Serving It Right certificates. This course can be found online at <http://www.servingitright.com/>
- Post your licence in a visible area
- Renew your licence on time
- Display posters and tent cards mailed to you by the LCRB
- Follow the proper rules in the Terms and Conditions if minors are allowed in your licensed area
- Do not allow over service
- Maintain your Guest Register if you are a Liquor Primary Club
- Do not sell liquor outside of the approved hours on your licence
- Ask the Branch Advisory Operations Department if you have any questions

Serving It Right™: B.C.'s Responsible Beverage Service Program

Serving It Right is a self-study course that educates licensees, managers and servers about their legal responsibilities when serving liquor, and provides effective techniques to prevent problems related to over service.

You are responsible for ensuring your paid staff and members who are volunteering their time as bartenders take Serving It Right and you must keep records for at least six years that show the name of each employee, their Serving It Right certificate number and the expiry date, if applicable. You must produce this record to a liquor inspector or peace officer upon request.

Effective September 15, 2020, servers holding certificates with no expiry date must obtain Serving It Right certification. The course packages, exams and certificate numbers can be found online at www.servingitright.com, or by phoning 604-633-9798.

Conduct

It is important that all staff and executive are aware and follow the proper conduct while in the licensed premises. Please read the [Terms and Conditions](#) of your licence for more information.

Some important rules of conduct to remember:

- You must ensure no one is harmed as a result of liquor misuse
- Do not serve to someone who is already intoxicated
- You can ask someone to leave the establishment for 24 hours
- You must take reasonable measures to ensure you do not disturb your community and neighbours
- You must obey the maximum number of patrons allowable under your licence.

It is the branch's responsibility to make sure members and guests do not become intoxicated while in your establishment or at an event. The branch must not let a person who appears to be intoxicated enter or remain in the service area. The person must be refused service and the branch must ensure they depart safely. This responsibility will fall to your bartender or a member of the executive who has their Serving It Right and has not consumed any alcohol.

Any incidents of intoxicated persons and any actions taken by staff or the executive must be recorded in an incident log and be made available to the police or liquor inspector if asked.

Employee and Executive Conduct

Employees CANNOT consume liquor while on duty. This includes all paid staff and members who are volunteering their time as bartenders.

Executive members or employees CANNOT conduct branch business after consuming any amount of alcohol. Once a member of the executive or employee has entered the bar for a drink, they are considered to be a regular patron of the bar and cannot act on any authority.

Purchasing Liquor

All alcohol must only be purchased from authorized sources and branches are required to maintain a record of all purchases by date and storage location in the branch. This record must be kept up-to-date and be made available to a liquor inspector or police officer at any time. Please see the [Liquor Terms and Conditions](#) of your licence for more information.

Selling Liquor

The LCRB has requirements for minimum drink pricing and serving sizes. Please consult the [Terms and Conditions](#) of your licence for this information. Branches are allowed to conduct Happy Hours and have two tiered pricing for members and guests.

Please work with you BOA if you have questions on drink pricing or are looking for suggestions on how to improve your profit margins.

Minors

If your branch has a Liquor Primary or Liquor Primary Club Licence, you must have a special condition on your licence to allow minors (those under the age of 19) into the licensed area. During these times, the branch must have food options and non-alcoholic drinks available.

As a means to minimize unlawful entry by minors, it is recommended that you post signage at the entrance to your establishment indicating that minors are not permitted. If your licence permits minors under specified conditions, the signage should clearly indicate the conditions.

Remembrance Day

Branches operating as a Liquor Primary Club can be open to the public on Remembrance Day by applying to the LCRB to temporarily suspend their liquor licence. If your branch is not planning on serving alcohol, this is the only step you need to take.

If your branch also wants to have liquor available, you will also need to apply for [a Special Event Permit](#) online. A branch operating under a Special Event Permit must follow all the guidelines of the Special Event Permit Terms and Conditions, including purchasing liquor from the Liquor Distribution Branch. Branch liquor cannot be used. Please contact the LCRB or the Branch Advisory Operations Department for more information.

Legalization of Cannabis

Medical Cannabis

The Federal Cannabis Act came into effect on 17 October 2018, and provides for the legal, recreational use of cannabis, subject to provincial, territorial and municipal restrictions. The Federal Cannabis Act governs recreational cannabis under a separate and independent regime from the existing medical cannabis regime under the Access to Cannabis for Medical Purposes Regulations (“ACMPR”),

Pursuant to the ACMPR, Health Canada can issue an authorization to possess Cannabis for medical purposes. Further, the BC Human Rights Code, among other provincial human rights codes, specifically prohibits discrimination in relation to accommodation based on protected grounds, such as disability (i.e. medical disability/need in respect of medical cannabis).

No establishment can discriminate against individuals who have a medical need, such as medical cannabis.

That said, any establishment serving alcohol, must uphold their duty to avoid over-serving any person to intoxication, whether by alcohol, cannabis (recreational or medical) or any other substance.

Recreational Cannabis

With the legalization of Cannabis on October 17th, 2018, BC/Yukon Command received questions from branches inquiring about their obligations and rights, please note below helpful information ([Appendix K](#)).

Can we sell cannabis?

Cannabis currently can only be sold in stand-alone licensed retail locations or on-line.

How much can a person possess?

A person can possess up to 30 grams in a public space. 1 cannabis cigarette = roughly 0.5 grams

Where can people consume?

In general, the rules for consuming cannabis in public mirror the rules for consuming tobacco. For example, citizens will be free to consume cannabis on public sidewalks, but not on any sidewalk/boulevard adjacent to a school property.

Smoking/vaping is also banned in municipal, regional, and provincial parks, except for designated campsites. You are also not allowed to smoke or vape within six metres of doorways, windows, air intakes of public buildings, bus stops, or bus shelters.

Smoking or vaping is prohibited in vehicles, as well as in indoor public places—except in a designated room at assisted living or retirement facilities or hospitals; or in a hotel room by registered guests (the hotel may choose to prohibit).

Can customers consume recreational cannabis on my licensed patio?

No, **it is illegal to consume cannabis on a patio that is open to the public.** Even if your patio is licensed to permit tobacco smoking, cannabis consumption remains prohibited.

Do I have to have a designated smoking area for cannabis?

No. Although cannabis is legal; you are **under no obligation to allow consumption on your property.**

If you already have a smoking area, we strongly recommend you do not allow smoking/vaping of cannabis in this area. It is currently unclear how consumption of cannabis could impact a licensee's potential liability or duty of care to a patron if you allow them to consume cannabis on your property, while you are also serving them alcohol.

If you have a designated smoking area, we recommend posting a sign to clearly indicate smoking or vaping cannabis is strictly prohibited on your property.

Do I need to update my house and employment policies?

Yes, your employment and house policies need to be updated to include cannabis. Just because cannabis is legal does not mean your employees are allowed to smoke/vape at work. As with alcohol, you can and should prohibit employees from consuming at work.

Will Serving It Right need to be updated?

Yes. The new version is being launched on October 17th and will incorporate new material covering potential changes to risk and duty of care, as well as information on how to detect visible signs of intoxication from patrons who have consumed cannabis.

Employees are not required to re-certify in SIR, but we recommend that they do. They will have to re-certify in a year or so anyway, and cannabis legalization is a good reason for your team to bone up on the principles of responsible beverage service.

Liquor and Cannabis Links

Liquor and Cannabis Regulations Branch Contact Information:

<https://www2.gov.bc.ca/gov/content/employment-business/business/liquor-regulation-licensing/bc-liquor-control-and-licensing-contact-us>

Liquor Control and Licensing Act: <http://www.bclaws.ca/civix/document/id/lc/statreg/15019>

Liquor Terms and Conditions: <https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/business-management/liquor-regulation-licensing/guides-and-manuals/liquorprimary-handbook.pdf>

Liquor Control & Licensing Forms: <https://www2.gov.bc.ca/gov/content/employment-business/business/liquor-regulation-licensing/bc-liquor-licensing-forms>

Cannabis Terms and Conditions: <https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/business-management/liquor-regulation-licensing/guides-and-manuals/cannabis-retail-store-licence-handbook.pdf>

Serving it Right: <http://www.servingitright.com/>

Gaming

In British Columbia, all gaming activities are regulated by the Gaming Policy and Enforcement Branch (GPEB). For an activity to be considered gaming, all three of the following elements must be present:

- Prizes – a prize consisting of money or anything of value will be awarded
 - Chance – the outcome of the activity cannot be predetermined or determined solely by skill
 - Consideration – players must pay or exchange something of value, to be eligible to participate
- It is most likely gaming, and you need a licence!

Based on projected sales, there are four main license classes:

Class A – More than \$20,000 in Gross Revenue, and based on projected sales, they fall under one of three categories:

- Registered raffles are \$250,000 or more
- Major raffles are up to \$250,000
- Minor raffles are up to \$100,000

Under a Class A licence, eligible groups and organizations are limited to:

- No limit in gross revenue in a 12 months' period;
- No limit on gross revenue per licence;
- Minors are not permitted to buy or sell tickets;
- Individual prize values do not have a limit; and
- No limit on price per ticket.

Completed Class A applications must be received 10 weeks prior to the event start date.

Class B - \$20,000.00 or less in Gross Revenue per licence

Under a Class B licence, eligible groups and organizations are limited to:

- No limit in gross revenue in a 12 months' period;
- Up to \$20,000 gross revenue per licence;
- Individual prize values do not have a limit; and
- No limit on price per ticket.

Completed Class B applications must be received 10 business days prior to the event start date.

Class C licences are available to organizations that are Registered Provincial Fairs only, such as Fairs and Exhibitions

Class D - \$5,000.00 or less in Gross Revenue per licence

Under a Class D gaming event licence, eligible groups and organizations are limited to:

- Maximum of \$10,000 gross revenue in a calendar year;
- Up to \$5,000 gross revenue per licence;
- Individual prize values not exceeding \$500;
- Minors are not permitted to buy or sell tickets; and
- A \$2 maximum charge for each chance to win a prize.

Completed Class D applications must be received 10 business days prior to the event start date.

Most branches apply for a Class A or Class B licence for each individual activity. (Meat Draws, 50/50). Branches can run multiple events of the same kind (example – Meat Draws) throughout the year on a single gaming licence. When applying for a licence, specify how often the branch plans to run an event throughout the yearly period (ie – every Friday and Saturday from 6:00pm-8:00pm).

Legions fall under the category of **Community Service Organizations (CSO's)**.

CSO's are responsible for:

- Monitoring how gaming proceeds are disbursed by the donation recipient and required to report to GPEB any instance where funds were used inappropriately; ·
- Must ensure a Major Capital Project is approved by GPEB before gaming proceeds are donated towards the project; ·
- May donate to an organization with which they are associated with, as long as the recipient organization meets all eligibility criteria; ·
- May use gaming proceeds for their own programs where GPEB has provided written approval;
- Cannot receive gaming proceeds from, or donate gaming proceeds to, another service club or community fundraising group (see section 8.9 of the A/B Guidelines).

To confirm the eligibility of a recipient organization, please send an email to gaming.licensing@gov.bc.ca. The email should include the legal recipient name and the corresponding licence number from which the funds would be generated.

Disbursing Gaming Funds

Gaming money must be used for eligible disbursements related to the direct delivery of programs and services within British Columbia. When in doubt, please send an email to GPEB at gaming.licensing@gov.bc.ca at or contact GPEB via telephone at (250) 387-5311 ext. 1

One-time donations

Are permitted to an individual or family within the service organization's community where the donation will provide emergency assistance or relieve an exceptional condition or circumstance.

Scholarships and bursaries

Are eligible where scholarship/bursary programs are offered by an eligible organization whose Board determines the selection criteria and award procedures.

Capital projects (\$20,000 or less)

Include construction of new facilities, renovation or maintenance of existing facilities, and property development.

Projects valued at \$20,000 or more are **Major Capital Projects** and require pre-approval by GPEB.

BC/Yukon Command provides branches with a Donation Information Chart, a list of approved eligible programs for donating gaming funds. Please go to Branch Corner of the www.legionbcyukon.ca website, for an up-to-date chart.

Administration Fees

As a Community Service Organization(CSO), branches are permitted to keep a portion of gaming money for general revenues. This portion comes from net revenues. The breakdown is as follows:

- Donations up to 25% of gross revenue – Branches may retain up to 10% of net proceeds from their licensed gaming activity
- Donations 25% or more of gross revenue – Branches can keep 15% of the net proceeds.

All gaming money must be given away within 12 months of when it is received. If your branch is unable to meet this timeline, please call the GPEB and ask for an extension.

Expenses

All money raised from a gaming event is classified as follows:

- Gross Revenue – All money that is generated through gaming.
- Prize Costs –The value of a prize and any delivery costs to the winner.
- Expenses –Any cost related to the event. ALL receipts MUST be documented.
- Net Revenue – (Gross Revenue - Prize Costs - Expenses = Net Revenue)

Requirements for compliance:

- A Legion may pay expenses directly related to the conduct and management of a licensed gaming event;
- Branches give away (at minimum) 25% of their gross revenue
- Expenses cannot exceed 25% of the actual gross revenue for the ticket raffle.;
- Prize costs are deducted from gross revenue, but are not an event expense;
- Examples of permitted expenses are advertising, licensing fee(s), and printing;
- Receipts must be kept for each expense as part of your gaming event records; and
- Expenses for an event may be prorated.

Gaming Reports

Requirements for compliance

- Have a separate account for gaming funds
- Submit all reports on time
- **Gaming Event Revenue Report (GERR)** is required to be completed for each licence, and must be submitted within 90 days after the expiry of each licence (licenses cannot be combined onto one report);
- **Gaming Account Summary Report (GASR)** reflects the activity in your gaming bank account within the organizations fiscal period, and must be submitted within 90 days after the expiry of each fiscal year end (regardless of gaming activity);
- Apply for a new licence 12 weeks in advance
- Save all receipts and keep good records for donations
- Ask questions, if you are unsure

These forms are located on the GPEB website at:

GERR: <http://www.gaming.gov.bc.ca/licences/docs/form-event-revenue-rpt.pdf>

GASR: <https://www2.gov.bc.ca/assets/gov/sports-recreation-arts-and-culture/gambling/grants/form-acct-summary-rpt.pdf>

These reports must be submitted by email to gaming.licensing@gov.bc.ca

Employee and Executive Conduct

Any employee or member who is responsible for a gaming event are not permitted to purchase tickets. It is recommended that staff not be permitted to buy tickets in any situation.

Executive members who are not responsible for gaming activities should use their judgment when deciding to purchase a ticket. This is to ensure that the branch gaming activities remain transparent.

Alternatives to Gaming

There are alternative fundraising ideas that do not require a gaming licence. This means that the branch can keep all of the money that is raised. A Silent Auction is a great event which does not require a gaming licence and can generate general revenue funds for the branch.

Please contact the GPEB if you have an idea and are unsure if it requires a gaming licence.

Gaming Online Service

Very important: please note that the Gaming Policy and Enforcement Branch (GPEB) is transitioning to a paperless process for Licensing. Branches need to submit an application using the Online Service System.

All future applications and payments must be submitted at the following link to apply online:
<https://www.gaming.gov.bc.ca/gaming/common/Welcome.do?start=true>

If applicable it is best to use your assigned L&G file number to prevent duplication. If you do not have an L&G file number you may request one to be assigned to you. Should you require any assistance with the online application process, please contact GPEB via telephone at (250) 387-5311 ext. 1 or by email at gaming.licensing@gov.bc.ca

Guidelines & Conditions

These documents provide important information about gaming grants, including: eligibility; allowed use of funds; reporting; etc.

Community Gaming Grant - Program Guidelines: <https://www2.gov.bc.ca/assets/gov/sports-recreation-arts-and-culture/gambling/grants/guide-cgg.pdf>

Capital Projects Sector Guide: https://www2.gov.bc.ca/assets/gov/sports-recreation-arts-and-culture/gambling/grants/capital_project_grants_2018_sector_guide.pdf

Community Gaming Grant – Conditions: <https://www2.gov.bc.ca/assets/gov/sports-recreation-arts-and-culture/gambling/grants/cond-cgg.pdf>

PAC/DPAC Grant Conditions: <https://www2.gov.bc.ca/assets/gov/sports-recreation-arts-and-culture/gambling/grants/cond-pac-dpac.pdf>

Helpful Resources

Gaming Policy and Enforcement Branch Contact Information: <http://www.gaming.gov.bc.ca/>

Licensing Direct: Telephone: (250) 387-5311 ext. 1; Email: gaming.licensing@gov.bc.ca

Gaming Grants, Online Application Resources, and Forms:

<https://www2.gov.bc.ca/gov/content/sports-culture/gambling-fundraising/gaming-grants/documents-forms?keyword=gaming&keyword=guidelines>

British Columbia Association of Charitable Gaming (BCACG): <http://bcacg.com>

***The BCACG can provide assistance with licence applications, Licence applications, Gaming Event Revenue Reports, Gaming Account Summary Reports, and help answering gaming questions**

BC Lotteries

The British Columbia Lottery Corporation (BCLC) licenses all lottery products in BC. Any branch that sells lottery products must have a separate bank account. All staff and volunteers who work with lottery products in your branch must be certified through the BCLC certification program.

- Lottery products in branches are:
- Pull-Tabs
- Keno
- Pacific Hold'em
- Lottery
- 50/50 on line

Employee and Executive Conduct

Staff, and volunteers who are responsible for lottery products are not allowed to play any lottery game or purchase any lottery products in their branch. BCLC recommends that family members of staff and volunteers also do not play in the branch.

Staff, volunteers, and their family members are welcome to play products at another branch or lottery location.

We recommend the executive refrain from playing lottery products in their branch.

Requirements for compliance

- Ensure all staff and volunteers who work with lottery products have their lottery retailer certificate
- ID anyone who appears to be under the age of 25
- Do not play lottery products in your own branch if you work/volunteer with lottery
- Do not sell lottery products outside regular branch hours
- Report any damaged shipment of products to BCLC
- If a shipment is clearly damaged when it arrives, do not take it. Contact BCLC right away
- Separate Lottery account

Any revenue that a branch generates through lotteries can be used as general funds. Remember that BCLC automatically conducts a "sweep" of your bank account every week. This sweep is BCLC's profits and is calculated based on all online sales and pull-tabs. Please contact your BCLC Territory Manager for any specific questions relating to your branch sweep.

Resources

BC Lotteries Contact Information: <http://corporate.bclc.com/customer-support/contact-us.html>

BC Lotteries Training Resources: <http://lotto.bclc.com/retailer-hub/training-and-certification/training-resources.html>

BC Lotteries Certification Program: <http://lotto.bclc.com/retailer-hub/training-and-certification/english-training-and-certification.html>

Grants

Grants are available to assist with projects directed towards the improvement of the community. When applying for grants it is important to clearly define your idea, seek community support and review the grantors reasons for giving money. By clearly defining your idea you are able to better find a grant that fits best with the desired outcomes of the project. The funding agencies or foundations typically want to know that a proposed activity or project reinforces the overall mission of an organization or grant seeker. They will also want to see that the community is in need of and supports the project.

When filling out the application aim to tie it to the mission and objectives of the funding organization or foundation. Look through all the requirements and restrictions of the grant completely in order to ensure your project fits and that all of the requested information is included.

Funding can come from all levels of government, Local Service Clubs, Community Foundations Granting, Regional District Granting, Corporate and Business Granting, Provincial Granting and Federal and National Foundation granting. Try to keep up –to-date with the grants available to you and in your community. If you have any questions, or for information about grants to apply for, contact the Branch Advisory Operations Department.

Property Taxes

Legion branches are recognized as non-profit charitable organizations through the *Act to Incorporate the Royal Canadian Legion*. The Community Charter of British Columbia allows municipalities the option to grant property tax exemptions to non-profits and community organizations. Submitting a strong application to your local municipality will increase the likelihood of being approved.

Applying for a Property Tax Exemption

For more information on making a strong application please look in [Appendix I](#). If you have any questions on this process or for help with your application, please contact Branch Advisory.

Branch Insurance

The BC Yukon Command group insurance program is in partnership with Axis Insurance and Intact Insurance. The advantage of a group policy is competitive rates and a plan that is tailored to meet the needs of Legion branches. In 2013, branches voted to make this policy mandatory at the BC/Yukon Command Convention.

Please contact the Branch Advisory Operations Department if you have any questions regarding your coverage or any insurance claims. Intact Insurance provides access to two free hotlines through our insurance coverage:

- **Legal Guidance Hotline:**

- 1-866-534-2509; hours of operation Monday to Friday 6am-5pm and Saturday 6am to 2pm

- **Identity Theft Hotline:**

- 1-866-498-4338; hours of operation Monday to Friday 6am to 5pm

Note – you will be required to give your policy number

SOCAN

The Society of Composers, Authors and Music Publishers of Canada is authorized by the Government of Canada to collect a fee from establishments using music. Please visit their website for more information: <http://www.socan.ca>

Resound

Re:Sound is a company authorized by the Copyright Board of Canada to collect tariffs on behalf of artists and record companies. It is a separate company from SOCAN (Society of Composers, Authors and Music Publishers of Canada) and both companies collect different tariffs for different parties. Please visit their website for more information: <https://www.resound.ca/tariffs/>

Zero Tolerance Policy

BC/Yukon Command does not tolerate theft of any kind. If you suspect someone is stealing in your branch, please contact the Branch Advisory Operations Department. Any theft can lead to expulsion from the Legion and/or criminal charges. Please see [Appendix J](#) for a copy of this policy.

Channel of Communication

The proper channel of communication is for the branches to contact their Zone Commander or BC/Yukon Command. If a branch feels it has an issue that should be considered by Dominion Command direct the query through BC/Yukon Command. Dominion Command has a policy of referring branches to the provincial Command office when they receive direct queries from the branches. The exception with this policy is routine correspondence dealing with membership processing or supply items provided through the Dominion Command Supply Department.

There is nothing improper about a branch communicating with its own MLA or MP. However, it is improper to communicate direct with any Provincial or Federal Government Minister or Department. All such correspondence must go through the Command. In turn, BC/Yukon Command, when dealing with Federal matters has to work through Dominion Command.

Commitment of Officers

It is the responsibility of the Branch President and the Executive to adhere to all the terms of reference in this branch manual. Failure to comply with the terms set out in this branch manual may be constituted as a violation of your obligation to the branch and to your office.

It is extremely important that prior to the time any Legion member takes on a responsible position to serve a branch either elected or appointed that the Officer fully realizes and accepts the objects of the Legion. The objects are generally outlined as follows:

- To assist ex-service personnel and dependants in the preservation of their physical, mental, financial and social well-being.
- To assist and support any program in the Legion or in the community that lends itself directly or indirectly toward fulfilment of the Legion's objectives.
- To be active in or support any activity that tends to preserve democratic government and traditions in Canada.

It is also appropriate to remind elected Officers and those who are appointed as Chairmen of Standing Committees, that when their term is over, it is their responsibility to help and mentor the incoming officers and Chairmen so there is a smooth transition. Based on their experience when taking over the position, they will know the appropriate way to help the new Officers and Chairman to ensure their success.

Ethical Behaviour

The Command Executive Council members must all sign a letter of Ethical Behavior and the branches and Ladies Auxiliaries of BC/Yukon Command are urged to do the same. It is often the first impression that stays with members and the public. Someone not acting correctly or having dealings in an unethical manner could give a bad impression.

The most important thing you can do for the integrity of your branch.

There are two different sets of ethical behaviours guidelines that can be used in the branches – the first which is printed below is specifically for branches “Ethical Behaviours for the Branch Executive Committee.” This agreement must be signed and committed to by every Branch Executive Officer, if their Branch has approved this as a policy.

- Attendance at all executive and general meetings is crucial. You have been elected by your fellow members to manage the affairs of the branch and you as an Executive must lead by example.
- Come to all meetings prepared. Each of you will have been appointed as Chairman of specific standing committees and it is expected that you come to the meetings with written reports. When your reports have been presented you will be expected to hand in the written report to the Recording Secretary.
- Any discussion that takes place at Executive Committee meetings must be kept in confidence. No one should be repeating to anyone the discussion that takes place at the meetings. The minutes of Executive Committee meetings are presented to the general membership.
- There will not always be a unanimous agreement on matters within the committee. However, you should strive to reach unanimous agreements because it will be harder to convince the general membership of a decision if not everyone on the committee agrees. However, having said that – you are governed by “majority” decisions so if you find yourselves in a situation within the Executive where you have a “majority” decision but cannot reach a “unanimous” decision it is expected that everyone on the committee support the “majority” decision. That means no criticizing other Executive Committee members at a general meeting or amongst the membership. Please respect the decisions reached within the Executive. If you feel so strongly that at the general meeting you can’t support a recommendation from the Executive, then abstain from the vote. You must not stand up at a general meeting and publicly criticize the decision reached within the Executive.
- Familiarize yourself with the branch by-laws; the General By-laws and the Command’s Branch Manual.
- The by-laws are in place to prevent expending any funds without the prior approval of the general body and it must be adhered to.
- If there are any problems with one another – they are discussed at the Executive Committee meeting. Don’t let matters fester – if something is said at an Executive meeting that you don’t feel comfortable with the time to speak up about it is at the meeting. It is expected that there is participation from everyone at the meetings. You are a team – you don’t operate in isolation.
- Remember as members of the Executive Committee you are always on display. Members look to you for leadership and how you behave at meetings and at social events will always be under the scrutiny of the members. Of particular importance is how you conduct yourselves when you are representing the Legion at events outside the branch. Remember – you represent the membership.
- When attending Legion events where Legion Dress is expected, you wear the uniform with pride. This means not only looking your best but acting your best as well. The *Ritual and Insignia Manual* describes what is authorized as official Legion dress including the number of lapel pins we are entitled to wear. You must be the leading example for your members when you appear in full Legion Dress.
- The language you use as Legionnaires is critical to how you are perceived by our members and the public. Inappropriate language should never be used in or out of uniform within the Legion. Remember you are a reflection of not only your branch, but the Legion as a whole. Be a proud, and a respectful Legionnaire.
- The Executive Committee is the employer. If you have issues concerning behavior of the staff you will discuss these issues within the confines of the Executive – not in the licensed premises

- The President will make these same commitments of behavior to you the Executive. Members of the Executive must adopt these rules of Ethical Behavior for the Executive.

NOTE: The other available Ethical Behaviour guideline is the one signed by Provincial Officers – which includes Senior Admin Officers and Zone Commanders.

PART III - GUIDE TO SERVICE WORK

Reference - Service Officer Handbook

Command Office

The BC/Yukon Command Service Bureau assists branches and individual ex-service persons in matters on service work such as: Disability Benefits, Veterans Affairs Canada (VAC) Programs, and Benevolent Funds. BC/Yukon Command does not have a legal department and can't give advice on matters of the law.

Branch

Each branch must have a Service Officer. For Disability Benefit Applications referral should be made to the BC/Yukon Command Service Bureau.

Definition of "Veteran"

Questions are sometimes raised about what defines a "Veteran." Section 101.d of the *General By-Laws* provides the definition of a "Veteran" for the purposes of The Royal Canadian Legion:

"VETERAN: A Veteran is any person who is serving or who has honourably served in the Canadian Armed Forces, the Commonwealth or its wartime allies, or as a regular member of the Royal Canadian Mounted Police, or as a Peace Officer in a special duty area or on a special duty operation, or who has served in the Merchant Navy or Ferry Command during wartime."

Canada Pension Plan, Old Age Security, Guaranteed Income Supplement/Widow/Spousal Allowance

The Canada Pension Plan came into effect on January 1, 1966 and from that date contributions have been required from employees, the self-employed and employers. The plan therefore applies to almost everyone who is working.

Under the plan, monthly pensions are paid to persons in retirement, to widows, widowers, orphans, the disabled and children of a disabled contributor. In addition, there is a death benefit that is payable to the estate of the contributor. A disturbingly large number of spouses are not aware of the benefits available to them as widows of employees covered by the Canadian Pension Plan. The various aspects of the Canada Pension Plan are rather complex and comprehensive and detailed information should be obtained direct from the District Offices of the Income Securities Programs.

A full pension under the Old Age Security Act is payable to everyone who has resided in Canada for a total of 40 years after the age of 18. If you are unable to meet that requirement, there are alternative methods of fulfilling the residence requirement to qualify for a full pension. Specific information can be obtained from offices of the Service Canada. Partial pensions may be paid to persons who are 65 or over and who cannot qualify for a full pension. Again specific information should be obtained from appropriate officials.

Operating in conjunction with the Old Age Security program is the Guaranteed Income Supplement that is available to recipients of Old Age Security with limited income apart from the basic Old Age pension. Entitlement is normally based on the pensioner's income in the preceding year and calculated in accordance with the Income Tax Act. In the case of a married couple each partner is considered to have one half of their combined income.

The spouse of an OAS pensioner may be eligible for what is known as a Spouse's Allowance if the spouse is between 60 and 65 years of age and meets the OAS residence requirements. The Spouse's Allowance may be full or partial depending on the spouse's history of residence in Canada. Eligibility is subject to income test on the basis of the couple's combined yearly income. The maximum full monthly allowance is equal to the basic OAS pension plus the maximum amount of GIS at the married rate. Further information should be obtained from appropriate officials at Service Canada.

Call 1-800-277-9914 for information on all programs as listed above. OLD AGE SECURITY, GUARANTEED INCOME SUPPLEMENT AND SPOUSE'S ALLOWANCE

British & Allied Claims

Former members of the British Armed Forces residing in Canada can apply for a number of benefits or privileges, some available from sources in the United Kingdom and some from Canada.

Some benefits are available from Canada for those who served in Allied Countries such as Holland, Belgium, Norway, Australia, and the United States. Call VAC Foreign Countries Operations in Ottawa at: 1 888 996-2242.

FUNERALS AND BURIALS

Immediate Things to Do On the Death of a Pensioner – Note: This is the responsibility of the executor of the will. A Legion Service Officer may be asked to assist with this process.

1. Contact **Veterans Affairs Canada at 1-866-522-2122** if the person was receiving VAC Disability.
2. Notify **OAP, CPP by calling 1-800-277-9914**. Note: Do not cash any cheques after the death even if the cheque arrived before the death. All cheques will have to be returned, and will be re-issued to the beneficiary or to the estate of the deceased. OAP and CPP require social insurance numbers.
3. Notify the bank. They will need a copy of the will and again the death certificate. **DO NOT OPEN THE SAFETY DEPOSIT BOX-** (it is a good idea to have a copy of the will handy, and not in this box, as it may take a few days to get it opened). Also **DO NOT** take money from a joint bank account, until you have notified the bank. Funeral costs can be paid by the bank, from the deceased account and the funeral director should be informed to send the bills to the bank.
4. All insurance companies, investment companies and other relevant firms should be notified. Most will require a copy of the will and of the death certificate. It is suggested that you have at least 10 copies of the death certificate on hand for notification purposes.
5. A lawyer will do most of the above noted procedures; however, to save considerable expense, it is quite possible to do this oneself. It is the job of the EXECUTOR, not the beneficiary. With reference to the last sentence, it is not advisable to have the spouse act as the executor (although this seems very common), as the spouse is usually too upset to deal with the details right away. Many couples rely on their children being available to help. But please note that the executor still must do the signing of forms, etc. If you decide to have someone outside the family be the executor, **ASK FIRST**. It is a lot of work, and would be a shock to anyone to learn that they have been named executor without their knowledge or consent.
6. If the will is a very simple one, many of the banks will do the probate for you (although they do not make this very public). Usually the only cost is for the forms.
7. The most important thing is-- have a will properly made. It costs a lot more to die without a will than to pay a lawyer or notary public to make one. Make sure that the will contains a list of all to be notified, people and companies, and detailed instructions to the executor (bank account numbers, etc.).
8. If a beneficiary dies before the pensioner, notify the holder of the investment plans, insurance companies, etc.

9. Sometimes a Living Will is prepared prior to death. It helps those who are the caregivers and relatives in making decisions when the person is either too ill or incapacitated to conduct their own personal affairs. It can prevent family disputes and ease the stress of dealing with a spouse or relative who is ill.
10. Power of Attorney ceases at the moment of death.

Last Post Fund

The Last Post Fund assumed responsibilities from Veterans Affairs Canada to action all veterans' funerals and burials for qualified veterans and certain other qualified persons. All notifications of veteran's deaths must be referred to the Last Post Fund. The Last Post Fund will action any required request for financial assistance.

Last Post Fund has a Special Grave Marking Program in effect for the provision of markers for those veterans' gravesites, which have been without a permanent marker for a minimum of five years. Command has a brochure explaining how branches can work with the Last Post Fund on this project. Contact the Command office for a copy.

If the grave has a permanent marker (i.e. - granite, concrete, bronze, etc.) Last Post Fund cannot mark the grave again. If there is room on the marker to engrave the Veteran's service particulars, the family or the Legion may arrange to do so, but LPF cannot help. However, if the grave was only ever marked with a decomposable marker (i.e. wooden cross or stake) which has now decomposed over time and the grave is left without a marker, and it has been unmarked for 5 or more years, then the cemetery would be able to certify that "the grave is unmarked, the LPF marker is acceptable

You can direct your queries to:

Last Post Fund

401-505 René-Lévesque W, Montreal QC H2Z 1Y7

Telephone: 1 (800) 465-7113 Fax: (514) 866-1471 E-Mail: info@lastpost.ca

The Last Post Fund is a non-profit corporation whose purpose is to ensure, insofar as possible, that no veterans are denied a dignified funeral and burial for lack of sufficient funds at the time of their death. The Last Post Fund operates in co-operation with, and is supported financially by, the Government of Canada through Veterans Affairs Canada.

The National Office of the Last Post Fund is in Montreal, Quebec, the city in which it had its beginning in 1909. There are branch offices in every Province of Canada except Prince Edward Island, which is served by the New Brunswick/PEI branch in Saint John, N.B. The Last Post Fund is also represented in the USA (in California and Florida) and in the United Kingdom.

The Service Officer's handbook has a section devoted to the Last Post Fund.

Benevolent Funds

The Legion acts as agent for these funds by arranging interviews, completing forms, obtaining supporting evidence and administering the transfer of any monies. The Service Officer's handbook has a section on Benevolent Funds. This is not a pension or continuing allowance, but rather a grant to assist a veteran or widow in difficult circumstances, e.g. to help in an emergency, or purchase needed clothing, furniture, home repairs, etc.

British Old Age Pensions

Nearly all British emigrants are entitled to some Old Age Pension from the United Kingdom provided they have paid in for 10 YEARS AT THE FULL RATE FROM AGE 16 years and/or since they commenced work: this includes time spent in H.M. Forces. This time frame is not cast in stone there have been some exceptions. Questions should be directed to The International Pension Centre:

The Pension Service 11
Mail Handling Site A
Wolverhampton
WV98 1LW
United Kingdom

Telephone: +44 (0) 191 218 7777
<https://www.gov.uk/international-pension-centre>

Keep copies of all your letters and completed application forms for your reference, as they do occasionally get lost in the post.

Any benefit received is taxable income in Canada and can attract the Pension Tax Credit, if the credit is not already absorbed in whole or in part by other eligible income; since the married rate amounts are split.

Canadian Forces Member Assistance Program (CFMAP)

This is a free, confidential phone line staffed by professional counsellors. It exists to help Veterans, serving member of the Canadian Armed Forces and their family members who have personal concerns that affect their personal well-being and/or work performance. Short-term referrals to local psychological support services can be granted by this service. CFMAP can be accessed by calling **1-800-268-7708**. More information can be found by visiting <http://www.forces.gc.ca/en/caf-community-support-services-map/member-assistance-program.page>.

Elderly Renters (Safer)

This is a program with the objective of providing direct cash assistance to senior citizen renters, relative to which senior citizens in need, may receive assistance in the payment of rent and to ensure that no senior citizen has to spend an unreasonable portion of income on rent. The amount of assistance is based on how much income is received and how much rent is paid, but the basic provision is that if you pay more than 30% of your total income for rent, SAFER may reimburse you part of the amount which is over 30% of your income.

Basic eligibility pertains if you are 60 years of age or older; are a renter; pay more than 30% of income for rent; in receipt of Old Age Security and if you or your spouse has resided in British Columbia for one year. For more information on how to apply for SAFER, call BC Housing at 604-433-2218, or 1-800-257-7756 outside the Lower Mainland.

Real Property Tax Deferral

People aged 55 and over may defer payment of their real property taxes until they sell the property or until their death. At that time, all the taxes plus interest must be paid. To be eligible a person aged 55 or over must be a Canadian citizen or landed immigrant and has lived in BC for the last year before the application. The property listed on the application must be considered under the Act to be in actual use for residential, farming, commercial or industrial purposes. Please direct enquiries to 1 888 355-2700 (Toll-free in B.C.).

Motor Vehicle Fuel Tax Rebates to Persons With Disabilities

Under the Motor Fuel Tax Act, persons with disabilities are eligible for a rebate of tax paid on purchases of fuel used to propel a motor vehicle.

Persons eligible to receive rebates under this legislation are those who:

- Suffer loss of a limb
- Are permanently dependent on a wheelchair

- Have complete and permanent functional loss of the lower limbs
- Have a permanent impairment of movement to the extent that it would be hazardous for you to use public transit (whether or not it's available)
- Have a permanent mental disability to the extent that it would be hazardous for you to use public transit (whether or not it's available)
- Have a permanent sight impairment to the extent that you are not eligible to hold a driver's licence
- Receive a 100% veteran disability pension through active service in any war while in Her Majesty's forces (including civilians who serve in support)
- Receive disability assistance or a disability supplement from the Ministry of Social Development and Social Innovation

Eligibility Qualifications

Applicants must hold a valid British Columbia driver's license and own or have "ownership interest" in a motor vehicle, which they drive themselves. New applicants must be able to provide evidence of their disability, such as a doctor's certificate, a Worker's Compensation Board letter, or a letter from Social Services and Housing, confirming that they are receiving benefits under the G.A.I.N. for the handicapped program. The fuel consumed in only one designated vehicle will be eligible for this tax rebate. In order to claim you must submit the rebate claim form with original invoices attached to:

Ministry of Finance
 PO Box 9435 Stn Prov Govt
 Victoria, BC, V8W 9V3

For more information, contact the Ministry of Finance directly at 1 877 388-4440.

ICBC

A discount may be available to retired seniors for the compulsory portions of their annual auto insurance. Information on the specifics is to be obtained from your insurance agent when purchasing auto insurance.

HAFI - Home Adaptations For Independence

HAFI provides financial assistance for home renovations/modifications that help eligible low-income British Columbians with mobility or health issues continue to live in their home. A grant of up to \$20,000 is available based on the costs of material and labour. Apply through the BC Housing Office. For more information, contact HAFI at 1-800-257-7756.

Home Owner Grant

This annual grant program reduces taxation for seniors and certain handicapped persons. To qualify a senior must own and occupy a home as a principal residence and pay property taxes on that home.

Long Term Care

Admission to long-term care must be arranged through the family doctor and Regional Health Authority.

Ferry Passage

BC Seniors travel at 50% off regular adult fare Monday through Thursday except holidays upon presentation of a BC Services Card, a BC Gold Care Card (age 65 or greater), a BC Driver's License, a BC Identification Card, or a Birth Certificate. If you are presenting a Birth Certificate, proof of residency in BC is required. The BC Seniors discount applies only to the passenger fare.

Please note: the 50% off regular adult fare is not applicable on the Inside Passage, Haida Gwaii and Discovery Coast Connector routes. However, a special discount on B.C. Senior passenger fares on these routes is available.

HandyDart Custom Transit

HandyDART is a door-to-door, shared ride service for passengers with physical or cognitive disabilities who are unable to use conventional public transit without assistance. It is available in many of the province's larger centers.

Disability Tax Credit

The disability tax credit (DTC) is a non-refundable tax credit that helps persons with disabilities or their supporting persons reduce the amount of income tax they may have to pay. An individual may claim the disability amount once they are eligible for the DTC. This amount includes a supplement for persons under 18 years of age at the end of the year.

The purpose of the DTC is to provide for greater tax equity by allowing some relief for disability costs, since these are unavoidable additional expenses that other taxpayers don't have to face. This tax credit is not automatic—you must apply by completing the T2201 form with the assistance of your physician. Receipt of the DTC is used by Veterans Affairs Canada to determine eligibility for certain benefits. More information can be found by contacting Canada Revenue Agency directly.

Old Age Exemption

Seniors are allowed a deduction from income in calculating federal/provincial income tax.

Out-Of-Province Hospital/Medical Coverage

Provincial Hospital and Medical plans provide very limited benefits for most expenses incurred outside of British Columbia. Therefore, anyone involved in a trip outside of British Columbia even for short periods should obtain extended health benefit coverage from an appropriate agency. Medical and hospital treatment in the USA is extremely expensive. Our Command Service Bureau has been involved in cases in which hospitalization and related medical costs for one week has resulted in a total bill of approximately \$20,000. Two cases involved treatment for approximately \$60,000 each. Coverage can be obtained from a number of organizations listed under the heading of "medical Service Organizations" in the telephone directory in the Yellow Pages. Dominion Command has partnered with Medipac and you may want to contact them for a quote 1-888-939-0001.

PART IV - FUNCTION OF LADIES AUXILIARIES TO LEGION BRANCHES

Under the *General By-laws* of The Royal Canadian Legion, authority is provided for branches to form ladies auxiliaries upon approval of Provincial Command. Once Command approval has been given the Dominion Executive Council issues a certificate to that Auxiliary. The *General By-laws* provides that an Auxiliary is under the control of the branch.

Purpose

The sole purpose of forming a Ladies Auxiliary (LA) is to assist the branch in carrying out its work serving Veterans and their dependants, the community and country.

Status

Having recognized the question of jurisdiction and the purpose of forming an Auxiliary, it then becomes necessary to define some uniform method of operation and the type of liaison and co-operation that must exist. There are many branches that have a different conception of the real status of auxiliaries and while the meaning of "Auxiliary" is "The offering or providing of help," it is necessary that we are very clear that the role of the LA is as a resource and a partner with their branch. The LA is a valued asset for programs and projects of the branch and fundraising is a major role of the LA.

The Ladies Auxiliary to branches in BC/Yukon Command, over a period of many years, have provided invaluable assistance to the cause of The Royal Canadian Legion, Veterans and their dependants, the country and the community. Many branches would not have survived had it not been for the LA. Looking upon an Auxiliary in this light, it automatically follows that there must be a close liaison and good co-operation between a branch and its Ladies Auxiliary.

Those branches that are successful have the strong support of their Ladies Auxiliary. Also, branches that have good working relationships with their auxiliaries ensure there is a proper channel of communication. These branches ask their Auxiliary to name a representative that will regularly attend branch general meetings and act as liaison between the groups and the Auxiliary extends the same offer to the branch to send an observer to Auxiliary general meetings.

A continually demanding and arbitrary attitude adopted by a branch can only lead to resentment, friction and lack of co-operation. On the other hand, the benefits that can occur for a branch from an understanding attitude are irreplaceable. The first basic principle that a branch must adopt is that the vast majority of those who join a Ladies Auxiliary do so in dedication to and support of a cause

Method of Operation

Some branches require their auxiliaries to obtain branch permission when they undertake any special function or project. This is unnecessary, providing the Auxiliary operates within the confines of overall Legion policies and bearing in mind Legion aims and objects.

BC/Yukon Command recommends the following suggestions for the operation of Auxiliaries:

- An Auxiliary, if requested/required at the beginning of the year, should submit to the branch, a tentative program of its anticipated operations for the year. They should also submit an annual report showing the program carried out during the year.
- The Auxiliary should submit to the branch, an Annual Financial Statement, showing the total amount of funds raised and the disposal of such funds, including any donations to other organizations.
- The Auxiliary should ascertain if the branch requires any financial assistance before disbursements of any accumulated funds.
- Where the branch is not in need of financial assistance, Auxiliary funds may be donated to other worthwhile projects outside the normal sphere of Legion operation.
- Where an Auxiliary has raised funds through some project for a specific purpose, and this purpose has been advertised, then any surplus from that project must be allocated for the purpose as advertised and cannot be utilized for any other purpose.
- The Auxiliary members are expected, wherever possible, to assist the branch in such things as serving banquets, light refreshments, canvassing during poppy campaign, and other branch projects.
- The Ladies Auxiliary, in the majority of cases, has been responsible in the purchasing and supplying of kitchen facilities in Legion branches, including dishes and crockery, which must of course, be available for use at all branch functions. When there is a request for the use of the kitchen by an outside organization because the Auxiliary does not do the catering, a satisfactory agreement should be reached between the Auxiliary and the branch for the use of such facilities.
- There should be no argument regarding the ownership of any equipment, such as dishes, crockery, cooking utensils, etc. While purchased by and the responsibility of the Auxiliary, in the final analysis, the ownership rests with the branch.
- The Auxiliary is responsible for the enrolling and admission of new members, without referring to the branch for approval.
- The Auxiliary should submit, through the branch, to BC/Yukon Command - for public relations and publicity purposes - photographs and news stories of any worthwhile projects they have completed.
- The Auxiliary should be permitted to run its own internal affairs, subject to their by-laws, except where they may refer to the branch for any advice or guidance.

The branch should at all times respect the status of the Auxiliary and the role it is fulfilling as a very important and valuable asset of the branch. The branch should call on the Auxiliary without hesitation when it needs assistance, but should never fail to recognize the valuable contribution made by the Auxiliary to The Royal Canadian Legion. Auxiliary expenditures over \$5000 need approval of the Branch and Branch Advisory.

Branch Assistance to Ladies Auxiliaries

It is not news that the many ladies' auxiliaries to The Royal Canadian Legion in BC/Yukon Command are experiencing difficulties in carrying on their activities. Aging members, a lack of new younger members joining the organization and burn out in long time, overworked present members, make it imperative that changes come about if the ladies' auxiliaries are going to survive. It is known how much the branches need the ladies' auxiliaries to carry on their good work.

Dual Office - Branch and Auxiliary

A member can hold office in the LA and Branch Executives at the same time. The only limitations on holding office in the Legion are what are defined in of the current *General By-laws*.

Branch Employee - Auxiliary Executive Member

Under the *General By-laws* it is permissible for a Ladies Auxiliary member employed by a branch, to be allowed to hold office within the Auxiliary at the discretion of the branch.

Ladies Auxiliary - Membership within the Branch

There is a very specific policy in effect with respect to ladies who belong to both the branch and the Auxiliary. If an LA member, who holds membership in both the branch and Auxiliary, attends the branch meetings, she must do so strictly on the basis of being a branch member. The member must not wear her Ladies Auxiliary uniform unless she is officially representing the Ladies Auxiliary, in which case, she is not allowed to participate in the meeting as if she were a branch member. If the lady attends a meeting of the Ladies Auxiliary, she must do so strictly on the basis of being a member of the Auxiliary. The member must not wear her branch uniform to a LA meeting unless again, of course, she is officially representing the branch for some reason. As a result of changes made at the 1998 Dominion Convention, LA members may wear their LA medals on their branch uniforms on the right breast, if they so choose.

Complaints - Ladies Auxiliaries

A complaint involving an LA member may only be lodged by another LA member and the provisions of the *General By-laws* shall apply in respect of procedures.

PART V - TERMS OF REFERENCE

This section of the manual contains some suggested Terms of Reference for each of the elected positions as well as for the standard "Standing Committees" found in most branches. These Terms of Reference were developed with the help of Command Officers as well as some branches. It is suggested that each branch follow the Terms of Reference as these guidelines will help you run a successful branch.

Following the Terms of Reference for each position policies that apply to that position have been included. The policies are governing regulations. The Terms of Reference are guides.

PRESIDENT

The position of Branch President in The Royal Canadian Legion is one of heavy and diversified responsibilities and should never be undertaken lightly. The President is required under his obligations to the branch and his office to adhere to the terms stated in this branch manual. The President is required

to be a leader; an accountant; a public relation expert; a diplomat; a supervisor; a policeman; a teacher and at times a magician! A President gives willingly of his/her time and personal life to their position. They must be ever aware that as Chief Elected Officer, they are always on display and are ultimately responsible for Branch operations.

If acting as Chairman, the President calls the meetings to order; announces all business; puts all questions and informs the members on points-of-order. While in the chair they do not take part in debates but if they want to enter the discussion, they must relinquish the chair until the question under debate is settled. Even though the President may be acting as chairman, they still have the right to exercise a vote at meetings. They cannot however vote twice in the event of a tie.

They keep a firm control of the meeting but must not dominate the meetings. After taking office, at the first meeting of the Executive, they appoint the Chairmen of the various Standing Committees of the branch, subject to general meeting approval and usually after consultation with the Vice-Presidents.

They have the power to suspend any member of the branch if a charge is properly laid under the *General By-laws*, in accordance with the authorizing section of the General By-laws.

A President is required to attend and may be required to chair all General and Executive meetings. The individual branch by-laws contain the authority with respect to who chairs. If acting as a Chairman, please refer to the Terms of Reference under Chairman.

A President must ensure that the branch is fully engaged with the BC/Yukon Command infrastructure – although branches have autonomy, the survival of our organization is in the unity of our collective effort and cooperation. In order to achieve this, the President must be involved with the Zone Commander and the Branch Operations Advisor as one avenue to Command. Any President who opts to operate outside the infrastructure is subject to removal from office by the Command President.

A President must be completely aware of the financial position of the branch; they must know where the money is coming from, where it all goes and they must ensure that the branch properly accounts for all money. The only way he and the members of the Executive can make business like decisions is if they have access to a written monthly financial statement that shows the complete financial situation of the branch. He must provide the new Executive with the assurance that Director's Liability Insurance is in place to protect individual members.

The President...

- Is the ex-officio of all committees and while allowing the committee Chairmen to run their committees without obvious interference, while still making sure that all committees are doing the job that was intended.
- Must be aware of the operations of the licensed premise and know the required profit levels and percentages, as well as the level of service that is being offered to the members.
- Must agree to and sign the proper liquor or gaming documentation as required by law
- Must be prepared on occasion to deal with the media and the general public in a knowledgeable manner.
- Must be completely familiar with all the by-laws, regulations and manuals and be sure that all by-laws are followed.
- Is responsible to see that the vice-presidents are involved and trained in the running of the entire operation.
- Is responsible for ensuring that his branch is properly and completely involved in the poppy campaign and observance of Remembrance Day and that the community, including schools and youth groups are aware of, and involved in, this special occasion.
- Must be cognizant with the works of the Ladies Auxiliary (LA), co-operate with them to the fullest extent and generate respect and goodwill between the branch and Auxiliary. It is strongly recommended that he/she ensure at least one joint meeting a year occurs between

the two Executives. The President should also encourage the LA to appoint a Liaison Officer to attend branch meetings and report back to the LA on any branch activities that might involve their support.

- **Must ensure that the branch is represented at zone meetings, conventions and workshops and that the knowledge acquired at these meetings is shared with, and put to use in, the branch.**

It is the President's responsibility to...

- See that 'in branch' workshops/training sessions are held and that the Executive in particular and the general membership are kept up to date with the current workings of the organization on the provincial and national level.
- See there is appropriate attendance of members at Legion Information workshops and should encourage all members to attend. The workshops are not restricted to members of the Executive Committee.
- Maintain a liaison with their zone, BC/Yukon, and Dominion Commands. They must encourage the branch to work with, and under direction of, these levels and that the branch membership is aware of the entire picture, the magnitude of the organization, and not allow them to see only their small area as being the entire Legion.
- Ensure any complaints and/or disciplinary actions are handled in complete accordance with the *General By-laws*.
- Ensure that the branch complies with all laws and ordinances in particular with the Liquor Control and Licensing Branch, Gaming Policy and Enforcement Branch, BC Lotteries, WorkSafe BC and Canada Revenue Agency and all required paper work is completed and filed with the proper authorities.
- Ensure that all deadlines required by local authorities or other levels of the Legion are met.
- Ensure dress and behaviour are exemplary and present themselves and the branch in the most acceptable light possible at all times.
- Refrain from making any official statements or doing "Legion work" in a branch when consuming alcohol – even one drink.
- **Installation Of Officers** - So as not to prolong the meeting, the election and installation of Officers should not be on the same evening. Installation should be carried out at the next meeting or at a special installation evening. The ceremony covering the Installation of Officers is in the Ritual, Awards and Protocol Manual. The retiring President opens the meeting and occupies the chair until the time to conduct the installation. The chair is then turned over to the Installing Officer to conduct the ceremony.
- The ceremony of installation has no legal significance with respect to assuming office. Under the incoming officers assume their positions either on January 1, if the elections are held in November or December, or on July 1, if elections are held in May or June. It is customary that the Zone Commander will be invited to be the installing officer.

It is not necessary for the President to do all of the aforementioned activities personally, in fact the ability to delegate is a must, but it is up to the President to ensure the actions are carried out.

As Chief Elected Officer, at any level of the Legion, the President must be the spot where "the buck stops." He must always remember to be slow to blame and quick to praise. He must ensure the continued harmony of the operation and be prepared to sing, write, type or televise his unending thanks to everyone involved at all possible opportunities.

Increasingly branches are experiencing difficulty in recruiting members and volunteers to serve on their executives. Often the reason for this is because of discord among members and infighting among the executive. It must be first and foremost in the mind of the President that dealing swiftly and maturely with interpersonal conflicts so as not to compromise the hospitality of the branch to new members. Airing of dirty laundry after an executive meeting is absolutely inappropriate and subject to

discipline. If you as the Branch President feel that you cannot handle this rift, ask your Zone Commander or Command for assistance.

Command gets many official and informal complaints from members. The vast majority of them are around the problems in a branch being allowed to languish and fester. The President is responsible for making their branch a nice place to be.

The President and officers of the Branch should make themselves knowledgeable with the following:

References:

- | | | |
|-------------------------------|--------------------------|---|
| - Branch By-laws | - BC/Yukon By-laws | - BC Legion Act |
| - Ritual and Insignia | - Act of Incorporation | - Performance Standards |
| - General By-laws | - Rules of Procedure for | - Zero Tolerance Policy |
| - Branch Manual | Legion Meetings | |
| - Command policy as published | | |

IMMEDIATE PAST PRESIDENT

The *General By-laws* provides that the Immediate Past President (IPP) is a full voting member of the Executive Committee with the same rights as the other members. Their general function is to act in an advisory capacity to the President and the Executive Committee to help maintain continuity of policy.

Because the Immediate Past President is automatically a member of the Branch Executive Committee and holds the position on that basis, it is not appropriate for him to hold any other elected office. The Immediate Past President could run for other positions on the Branch Executive. See *General By-laws* with respect to resignation. If a President resigns, whatever the reason, they are not permitted to continue on the Executive Committee as Immediate Past President. This is covered in the *General By-laws*.

The position of Immediate Past President is often overlooked in the ranks of importance. The IPP has experience in the position, the difficulties, the possible pitfalls and has much information to share with the new President. While being ever ready with assistance and advice when called upon, the IPP must take care not to take over and continue running things.

The main responsibility of the Immediate Past President is to: -

- Be available to the current President with advice and assistance.
- Maintain continuity - who better than someone who has been around and done these things to help blend the past with the present workings

The Immediate Past President should be prepared to:

- Chair a committee or two of considerable importance - Constitution and Laws, Finance or Licensed Operations are committees where past experiences and knowledge of an Immediate Past President can be put to good use.
- Assist the President training and orientation of the new Executive
 - i.e. "in branch" workshops and seminars and the IPP should be prepared to be a delegate to zone meetings and/or Conventions, if called upon.
- Assist the President with the important task of making the Executive and membership aware of the magnitude of the organization. Together they must show how far the Legion's works extend outside an individual branch. They must promote the necessity of good relations with the zone and to both Command levels.
- Be harmonious with the members of the Executive and do all in his power to promote harmony among all members.

The IPP may well be a good choice for meeting with the media on certain occasions having had experience in this area.

VICE-PRESIDENT

The office of Vice-President is very important. One or more Vice Presidents are elected to assist the President in the performance of his duties. The offices held by Vice-Presidents are, in order of rank, the second most important to that of the President. It is critical to the welfare of the branch to have a well-trained 1st Vice-President. The positions of Vice-President are to be regarded as training or grooming positions for the President's position. **A person should not assume the duties of a Vice-President if they are not willing to move up the ladder and eventually assume the duties of President.**

In the absence of the President all rights and powers vested in him are transferred to the Vice-President according to their seniority of office. The First Vice-President will succeed the President automatically if the President cannot complete his term. A Vice-President cannot refuse to move. They would have to resign if they did not want to assume the higher position.

Members who have recent previous Executive experience in the Legion should fill Vice-Presidential positions. Some branches have restrictive wording in their bylaws to ensure previous branch experience. In most branches a Vice-President would expect to chair at least one committee for their term of office as well as participate in executive decision-making.

References:

- Branch By-laws - Rules of Procedure for Legion Meetings
- Branch Manual
- General By-laws- Ritual and Insignia Manual
- BC/Yukon By-laws

EXECUTIVE COMMITTEE

The Executive Committee is the governing body between general meetings. The size of a Branch Executive is in the branch by-laws and is usually based on the number of Standing Committees to which Chairmen have to be appointed from the Executive. A candidate for any of the offices and Executive positions (except President) must expect an appointment to one or more Standing Committees.

A branch has the right to expect that when a member accepts nomination for an office he is accepting a commitment to carry out duties and responsibilities during term. Executive Committee members should not be taking extended leaves of absence. The Executive Committee bears the responsibility to adhere to the terms in this Branch Manual and failure to do so may constitute a violation of their obligation to the branch and their office

The Executive conducts the business of the branch between general meetings subject to direction from, and approval by, the general meeting. Any member elected to the Executive should give whole-hearted support to the President and committee. It is expected that all members of the Executive abide by and support decisions arrived at by a majority vote. However, there is nothing preventing a member from abstaining from voting. An Executive member who will not support an Executive decision cannot talk unfavourable of the decision or should resign from the Executive. The member would then be free to voice their personal opinion.

It is common practice to elect some Executive members to a longer term so there is never a completely new Executive and to preserve continuity of administration. This type of procedure must be covered within individual branch bylaws.

Executive Committee Authority

It is not constitutionally permissible for a branch general meeting to delegate to the Executive during summer recess, "full powers." The Executive continues, during the summer recess, to be governed by the

provisions of the *BC/Yukon Command By-laws*. The only expenditures an Executive can make without prior approval of the general membership are those specifically identified in the *BC/Yukon Command By-Laws*. The two permissible categories are for normal operating expenses such as salaries, wages, property taxes, bar supplies, etc., and emergency repairs or replacement of equipment that is essential to branch operations. No branch can delegate to its Executive, any powers to make expenditures other than those identified in the *BC/Yukon Command By-laws*. Additional information can be found in branch bylaws with respect to expenditure of funds.

References:

- Branch By-laws
- General By-laws
- BC/Yukon Command By-laws
- Rules of Procedure for Legion Meetings
- Branch Manual
- Performance Standards

SECRETARY

It is mandatory for all branches to have a Secretary.

If an employee, such as a secretary-manager or a paid secretary is performing the duties of this office, the branch may elect a “recording secretary” here instead. If the branch **elects** only a recording secretary, then that is the position that signs along with the president. However, **the by-laws must allow for a secretary of some sort because the only two positions that can sign legal documents are the President and the Secretary. If the branch doesn’t have an elected secretary but they approve a position of secretary-manager, then the secretary-manager can sign legal documents (but not cheques). The position of the “secretary” must be defined in some capacity as Section 136 of *The General By-law’s* states the seal of the branch shall be in the custody of the “secretary”.**

Furthermore, the *BC Legion Act* states, “all deeds, bond, mortgages, transfers, assurances, conveyances, contracts and other instruments with respect to real and personal property owned by the Command or a branch shall be executed under the seal of the Command or branch attested by the signatures of the President of the Command or branch and its secretary.

The ceremony of initiation of a Secretary states, “you have been elected or appointed to a most important office etc.” The efficiency of the operation will depend on the enthusiasm and interest shown by the Secretary. It is recognized that there is a difference between the degree of efficiency that can be expected from Secretaries who are unpaid and carrying out duties in their spare time and those who are fully employed in this position. The Legion owes a great debt of gratitude to those who accept this office without remuneration and Command is grateful to them for their co-operation.

The Secretary is the person who is supposed to know all the answers or where to find them. Therefore, they should become acquainted with the proper operating procedures of the Legion. However, no matter how efficient a Secretary may be at a branch, or Command for that matter, it is not a one-man show. There are others who have equal responsibility for the smooth running and progress of the organization. It is imperative that the closest liaison be maintained between the Secretary and the executive, particularly the President. Only a well-informed President and Executive can conduct the affairs of the branch and arrive at a just and proper decision on behalf of the branch and the Legion as a whole. The secretary is an important part of the public relations, and particularly internal relations. Quite often, the secretary is the only officer with whom many members will ever have contact. The manner, in which the secretary treats them, will be critical with reference to the opinion they have of the branch.

The Secretary is probably in the best position to put their knowledge to work for the branch. The Secretary cannot be familiar with the full contents of the various booklets and manuals however, what is expected is that the Secretary will at least know where information can be found and should have copies of the various booklets, manuals and reference guides close at hand for easy reference when the need arises. This reference material can be located on the BC/Yukon website: www.legionbcyukon.ca under branch corner and the Dominion Command website at: www.legion.ca under “who we are” tab and then “how we operate” tab

The Secretary keeps a complete and accurate record of the business transacted at all branch and Executive meetings. He carries out his duties according to the instructions received from the Executive and general meetings. It is important for all Executive members to remember that once a decision has been reached in a democratic manner - it is the duty of every member to support it regardless of personal feelings. It is especially important the Secretary adopts this attitude, because as far as policies emanating from outside the branch are concerned, everything is communicated through the Secretary. If the Secretary decides to withhold information, the lines of communication break down and the effect is really one of censorship or the enforcement of personal opinions, biases or prejudices. This is a serious situation and must be dealt with promptly.

Correspondence addressed to the branch

Correspondence addressed to the branch **is not the personal property of the secretary.** Although the secretary can reply on their own initiative on some issues, correspondence involving other than routine business must be perused by the President and reported to the Executive. Under BC/Yukon Command internal communication policy all Executive members have the right to receive all correspondence and memos by email. The Executive in turn, after perusing this correspondence, can decide what is appropriate for referral to general meetings.

Command circulars are numbered for easy reference. This makes it easy to determine if a circular is missing. Circulars from BC/Yukon Command are issued electronically and are also posted on the Command webpage in the branch corner log in area: www.legionbcyukon.ca Dominion Command circulars are mailed to the branches and are also available on the "For Members and Branches" section of their webpage. Master copies of the circulars should be maintained in the branch office or posted in the branch for the general membership access. Chairmen of the appropriate standing committees within the branch should receive their own copy of the circular, if not copies of all circulars received. Again, it is critical to understand that the internal communication policy ensures that all executive officers have the right to directly receive BC/Yukon memos. They should promptly complete all questionnaires and reports as required. They should advise BC/Yukon Command whenever there is any change in the office of the secretary, president or service officer. The secretary is responsible for completing and submitting to BC/Yukon Command office the annual list of officers' report sent to all branches in December.

Branch Meetings

Prior to the meeting the secretary along with the president/chairman should prepare an agenda and must go over the business to be at the meeting. The president should be made aware of matters coming before the membership and become familiar with the details of important subjects.

An agenda usually takes the following form: -

- Opening Ceremony in accordance with *Ritual and Insignia Manual*
- Confirmation of Quorum in Attendance
- Adoption of previous general meeting minutes
- Reading/Distribution of previous Executive Committee meeting minutes for information
- Business arising out of the minutes
- Correspondence
- Presentation of written monthly financial statement
- Applications for membership/transfers of membership
- Presentation of Written Committee Reports Unfinished Business
- New Business
- Good and Welfare
- Closing Ceremony in Accordance with *Ritual and Insignia Manual*

Committee Chairmen are required to present written reports to general meetings. After presenting their report for adoption to the meeting, the written report is handed to the secretary. This way the secretary does not have to write notes concerning the report, as the written report will be available for reference when the minutes are prepared.

*It is recommended that copies of the general meeting and executive committee minutes be distributed before the meeting so that the minutes may be adopted as circulated. This does away with the lengthy process of reading of minutes, which is sometimes considered boring by the members in attendance.

Relinquishing of Office

In branches with no paid staff it is quite common for a secretary at the end of his term to feel relieved and turn over the keys to her/his successor. Any secretary will admit that if his predecessor had given more training, the job would have been much easier. With so many forms to complete and deadlines to meet and the thousand and one other duties, it is no wonder when a new Secretary becomes discouraged.

Minutes

Minutes are primarily a record of what was done in a meeting, not what was said by individual members. It is appropriate to try and incorporate into the minutes the “flavour of the debate,” and to show that members exercised due diligence when making their decisions. “Bare bone” minutes, recording only the decisions made, will not suffice. An acceptable compromise is to give an objective point form summary of discussions leading to decisions.

For Example:

“A motion to approve the budget was made. The main points made in favour of the motion were.... The main points against the motion were.... The motion to accept the budget was then adopted.”

Recording the debate in summary form means that:

- The same point was made by several members, it is only recorded once, thereby eliminating the repetition inherent to verbatim minutes
- There is no indication as to “who said what,” and the minutes become less personal and more objective
- The names of the mover and seconder are not required by the rules and regulations. However, it is recognized that some branches have done this for years and if it is the wish of the membership that the names of the mover and seconder are recorded then the secretary is obligated to continue the practice. The fact is that when a motion is moved and seconded and finally adopted, the motion doesn't belong to the member who moved the motion or the member who seconded the motion – the motion belongs to the body that adopted the motion. Also, many members will second a motion just to get the subject on the floor for debate. Seconding a motion doesn't necessarily mean the member supports the motion either. Members express their decision on the motion when they vote on the motion.

The essentials to be included in the minutes: -

- Kind of meeting (regular, special, general or executive)
- Branch name
- Time, date and place
- Confirmation that quorum is in attendance
- Name of presiding Officer
- Action on minutes of previous meeting
- Time of adjournment
- All motions that were passed, with short statement of discussion that took place

The minutes should be prepared as soon as possible following the meeting. Hand-written minutes should be taken and kept in a bound booklet. Taking minutes on single sheets of paper is asking for trouble. It is too easy to lose pages. The President and Secretary must sign the minutes of the previous meeting.

The secretary keeps a complete and accurate record of the business transacted at all branch and Executive meetings. He carries out his duties according to the instructions received from the Executive and

general meetings. It is important for all Executive members to remember that once a decision has been reached in a democratic manner, it is the duty of every member to support it regardless of personal feelings. It is especially important the secretary adopts this attitude, because as far as policies emanating from outside the branch are concerned, everything is communicated through the secretary. If the secretary decides to withhold information, the lines of communication break down and the effect is really one of censorship or the enforcement of personal opinions, biases or prejudices. This is a serious situation and must be dealt with promptly.

Adoption of Executive Committee Meeting Minutes

Executive Committee meeting minutes are not to be adopted by a general meeting. They are read for **information purposes only**. Adoption means confirmation by the people who attended a meeting that the minutes of that meeting as written, are a correct record of the business that transacted. Therefore, one group cannot adopt the minutes of a meeting of another group. Questions may be asked by the general membership about anything that appears in the Executive Committee minutes

Signature on Legal Documents

Regardless of which Officers are designated as signatories or the banking accounts, as detailed in individual branch by-laws, the *BC Legion Act* makes it mandatory that only the secretary and the president are permitted to sign documents such as contracts, deeds or mortgages. Legal documents signed by other than the president and secretary could be challenged in a court of law. A branch's by-laws must include either the election or appointment of a Secretary.

References:

- | | | |
|-------------------|------------------------------|----------------------|
| - Branch By-laws | - Act to Incorporate | - Rules of Procedure |
| - General By-laws | - BC Legion Act | |
| - Legion Meetings | - Branch Manual: | |
| - BC/Yukon bylaws | - Rituals, Awards & Protocol | |

RECORDING SECRETARY

Individual branch by-laws must contain the authority for the position of recording secretary. Depending on the branch by-laws, this position may be appointed or elected. There is nothing constitutionally to prevent a recording secretary from proposing motions at meetings, but nevertheless it is considered inappropriate because of the nature of this job's duties. The recording secretary has to accurately record the proceedings at meetings. If the recording secretary is involved in the proceedings by proposing motions, or otherwise involved in discussion and debate, the accurate and complete recording of the proceedings suffers to an unsatisfactory degree.

The recording secretary should understand that normal participation at meetings will be severely curtailed. They should give opinions only when asked, or if members are not aware of all the facts or if something illegal or unconstitutional is about to be acted upon. In branches with salaried secretary-managers the duty of being the recording secretary is often part of their job description. Such requirement would have to be stipulated in the job description for the paid position. A recording secretary who is a member also has the right to exercise a vote during general meetings.

References:

- Branch By-laws
- Rules of Procedure for Legion Meetings
- Branch Manual

CHAIRMAN

Branches can create a position of chairman whose sole responsibility is to chair meetings. It is recommended the position not be elected. The president, subject to branch approval, should be permitted to appoint a member who is well suited to the duties (specific provisions for this must be in the individual branch by-laws).

Without a chairman the meetings may be long, pointless, or chaotic because one or more members may not know how to behave. Having a chairman stops someone from monopolizing the meeting by rambling on about unrelated topics, or getting loud, offensive and attacking others in order to get their way.

A chairman is required to govern the meetings in accordance with the *Rules of Procedure for Legion Meetings*. They should, particularly when they start their new term, to take few minutes before the start of meetings, to establish some ground rules and then uniformly enforce them.

Sample ground rules include:

- Stay on the topic
- Everyone participates
- Wait to be recognized before speaking
- No side conversations
- Do not complain without offering a solution
- It's OK to disagree, but no personal attacks
- Be specific/use examples to make a point
- Stand when you address the chair
- Listen to others

By identifying in advance how members are expected to behave, it makes it more likely they will follow the ground rules. Members who do not obey need to be reminded of the rules. Members who consistently violate rules or whose behaviour is disruptive should be asked to leave the meeting if necessary.

Ground rules keep a meeting on track, but don't expect the membership to necessarily welcome the rules at first. When the chairman first presents the ground rules, they should ask for a motion of approval. After that all they have to do is remind the membership of the rules previously adopted and conduct the business of the meeting in accordance with those rules.

References:

- Branch By-laws
- General By-laws
- BC/Yukon Command By-laws
- Rules of Procedure for Legion Meetings

TREASURER/FINANCE CHAIR

The treasurer is responsible for keeping a true and accurate account of all money received and paid as well as a record of all financial transactions. All funds must be deposited in the name of the branch in a bank or other recognized financial institution designated by the branch. The branch books must be up-to-date and ready for review when required by the Executive, auditors or upon request by Command. Make sure all who handle cash on behalf of the branch are aware of the requirement to deposit all cash on a regular basis. If there is some valid reason for not making the bank deposit (small communities with no banking institutions) the cash must at least be kept in a locked safe. Over the years many branches have lost cash due to break-ins as a result of cash being left on the premises. You must have a firm policy on the requirement to deposit cash regularly. A solid cash control is to have the daily cash sheet tie into a daily deposit slip.

Qualities of a Treasurer or Finance Chairman

When the nominating committee begins the task of identifying suitable candidates for office of treasurer, the best candidate for the job will be someone who is prepared to spend not one but several terms in office to gain the required experience to complete the tasks properly and effectively.

Ideally the best candidate for the position of treasurer/finance chairman is someone who possesses a sound working knowledge of Generally Accepted Accounting Principles (GAAP) and basic bookkeeping practices. The candidate should also be willing to make themselves familiar with the GST, PST (or the sales taxes of the day) gaming rules & regulations, lottery rules, liquor rules & regulations and payroll requirements. The treasurer needs to have good sound business experience.

The treasurer cannot interpret policy with regard to programs the members wish to adopt. The prime function is to see that no financial waste occurs in the day-to-day operation of the branch and that property and assets are preserved for branch use from one year to the next. Also, they must ensure that financial surpluses are available and sufficient to cover branch programs decided as being within the reasonable capacity of the branch to support. Finally, they must watch the expenditures of the various chairmen and warn them from time to time as to what extent their budgets are expended during their elected terms.

Duties of the Treasurer – Chairman of the Finance committee

Treasurer's responsibilities include:

- Accountable to the president and Executive for the proper management of all aspects of the branch finances consistent with the policies and objectives set by the Executive and in accordance with the by-laws of the branch. Most branch by-laws require a written monthly financial statement as well as the requirement for adoption of a yearly budget. The treasurer must ensure the by-laws are adhered to.
- Implement proper controls to keep a true and accurate account of all money received and paid as well as a record of all financial transactions.
- Completion and approval of the annual business plan and budget. Command has made available a guide for an annual business plan.
- Ensuring all funds are deposited in the name of the branch in a banking institution designated by the branch. NOTE: Cash deposits are to be done regularly.
- Ensure that the branch books are up to date and ready for review when required.
- Building cash and investment reserves for long-term needs.
- Ensure the annual Audited Financial Statements follow the Command pro forma and are audited (externally or internally).
- Chair the Finance committee.
- Ensure that ALL cheques issued have the required signatures of the two persons as designated within the branch by-laws.
- Present a written monthly financial statement as often as directed by the general meeting and must have one available for each Executive meeting. (See individual branch by-laws)
- Ensure all applicable government forms are completed and remitted.
 - i.e. Non-Profit Information Return.

- Review and preparation of T4's and T4 Summary where appropriate.
- Ensure blank cheques are **NEVER** signed.
- Review the monthly bank reconciliation and check that balances agree with the monthly operating statement.

Other Responsibilities

- Must ensure all disbursements are made by cheque, after a proper purchase order/cheque request has been filled out, except for minor disbursements from petty cash.
- Must look carefully at gross profit percentages for the licensed premises, break open ticket sales and Keno each and every month and investigate any discrepancies from targets.
- Devise, implement and enforce proper systems of internal controls.
- Ensure a separate accounting for all break open transactions. (See Licensed Premises section of this manual on "Break open Ticket Sales" for further information).
- Ensure all inventories are reconciled monthly to recorded sales and gross profits. Identify and promptly investigate all differences each month (plus or minus).
- Check bar/licensed sales daily, look for unusual fluctuations and investigate anything unusual.
- Ensure all bar stock receipts are properly received and be sure you receive what you ordered - all cases and kegs are full.
- Ensure all sales are rung up at the time of the sale - strictly enforce.
- Ensure the cash register drawer is closed between sales - strictly enforce.
- Monitor cash register tapes for an excessive number of "voided" sales.
- Ensure the bartender floor sales are recorded on the cash register.
- Ensure all spillage and normal bar losses are rung through cash register and recorded daily and signed off or confirmed by the secretary/manager/treasurer or bar manager. Weekly or monthly raise a journal voucher (crediting the inventory and debiting spillage account) to write the spillage off at cost price, not retail and also account for the appropriate tax for that total amount.
- Ensure all inventories are taken monthly and appropriate adjustments for inventory changes are made in the accounting records to ensure correct calculation of gross profits; ensure that all purchases and sales made during the month are recorded in the correct accounting period.
- Ensure the branch is covered for the correct and appropriate insurance levels. The correct insurance coverage is available through the Command group commercial insurance program and branches are expected to participate.

Finance Committee

The Committee shall meet at least once a month and shall:

- Peruse accounts and approve payment.
- Transmit business relating to the finances of the branch.
- It may permit accounts covering fixed expenditures, such as salaries, wages, government deduction, taxes, routine office expenses, supplies and general maintenance as required for the efficient business of the branch, to be paid in the interim, between meetings of the committee, upon certification of the treasurer and the secretary manager.
- Deal with all expenditures other than those items referred to in paragraph 3 (above) of the terms of reference.
- Report to the branch executive on expenditures that may be or are in excess of the budget as approved.
- Report on any proposed expenditure that does not come within the budget before such expenditures are approved or made.

Summary

The treasurer/finance chairman has important responsibilities to the president, executive and general membership. Ideally the same person should hold the position for two or more years. The finance committee can change but it takes at least a year to establish continuity and therefore more than one year is preferable for the chairman to hold his position.

The function of the treasurer or finance chairman and his committee essentially is to see that money is available at all times to cover the cost of:

- The basic administration of the branch.
- Programs for Veterans services, member participation sports, junior sports, cadet groups, cubs, guides, children's parties, bursaries and certain Command programs.
- The purchase, development, maintenance and replacement of real and personal property of a branch.
- The operation of a licensed premise with the objective of deriving a profit from the operations sufficient to cover real and personal property costs and debt servicing and branch program costs and an appropriate portion of administrative costs, all as mentioned above.

It is important the treasurer realize, that the operation of a licensed premises with the sole objective being to provide salaries and wages and other benefits to paid staff, and other operating expenses of a licenced establishment, with nothing left over for other expenses or Legion programs is no way to run a branch.

Unless the treasurer is allowed to ensure that a surplus or profit from branch licenced operations and other membership activities is realised to ensure that the branch meets its obligation to its members and their families in need and certain recognized obligations it has to its community, the branch has no reason for existing. The treasurer and the membership must realize the real and fair financial capacity of their branch and honestly decide on programs they can afford to support and maintain and be proud of those programs.

Budget

No sustainable operation can function without a budget. It is simply one of the most critical tools for an executive to use to manage the business of the branch. The budget should be a realistic but reasonably liberal projection of income and expense items founded on figures showing in the audited financial statements over a previous one to three-year period. An annual budget has to be developed and then followed.

Taking all income and expense items into careful individual consideration in the licenced operation, its real property expense, and general administrative functions, the treasurer and his committee must establish, at the onset, a surplus. With the surplus projected and carefully established the treasurer will call upon the various committee chairmen of the branch to give budgets for each of their activities in the coming fiscal term. These budgets must illustrate in detail sources of income from various committee activities as well as detailed expenses from each of these activities.

The finance chairman or treasurer can assist the chairmen in setting up their budgets. Preparing the overall budget is the responsibility of the finance committee (treasurer, chairman).

- Each committee chairman should be given a memorandum with the amount the committee has been allocated for the ensuing year. The committee can only spend allocated funds on the specific items in the budget. Any other expenditure is subject to review by the finance committee before they can be spent. (finance committee, executive and general membership approval must be granted before any additional expenditure is made)
- A monthly financial report to each chairman, showing expenditure to date and the remaining balance keeps committees from over spending their budget.

When all committee budgets are in the hands of the treasurer or finance chairman he should sit down with his committee to make a final review of his projections of all items of income and expense keeping in mind that the end result must:

- Cover all branch committee expenditures.
- Cover the cost of construction, renovation, possibly debt and servicing costs.
 - i.e. repayment of principal and interest loans.

- That cheque-signing procedures, as reviewed by the committee, are maintained and followed at all times. A bill or invoice must be attached to each cheque. The cheque is to be signed by any two of the authorized signatories. **(Specific provision of signatories are incorporated into individual branch by-laws)**. Cheques for reasonable operating costs must be processed at frequent and regular intervals. All cheques meeting the various expenses of committees must be within the budgets as presented by committee. *BC/Yukon Command By-laws* cover disbursement of money authorized by branch general meetings.
- Leave a reasonable surplus for contingencies.
- At mid-term a complete review of the budget is to be made and adjustments arranged with the knowledge and consent of the membership.

Annual Business Plan

This is often initiated by the finance committee, but is the responsibility of the entire executive. You can get information and support in writing your business plan from Branch Advisory at the BC/Yukon Command office. Branches wishing to develop their property will find that one of the requirements of the Branch Advisory Panel is submission of a business plan. Lending institutions also make this a requirement for loan application.

POLICIES

Blank cheques are never signed.

The only persons allowed to sign cheques are those signatories specifically identified in the branch by-laws. Never sign a cheque if the amount and the payee have NOT been entered. The most serious cases of misappropriation of funds involved members who signed blank cheques in good faith. Any person authorized to sign cheques must be covered under your dishonesty insurance policy and this requirement is contained in branch by-laws. The treasurer must present a written monthly financial report. The report as submitted by the treasurer or chairman of the finance committee requires a motion of "acceptance."

All money held on deposit by a branch must be either in a general account; a poppy trust account; a separate gaming account, (which includes BINGO, raffles and casinos), a lotteries funds account, investment account or a Membership per capita account. No separate accounts for an individual committee is permitted. Cash deposits are to be done regularly. The cheques for these accounts must clearly be marked i.e. "Poppy Trust Account," "Gaming Account," "General Account," "Lotteries account," etc.

No contracts or leases involving expenditures of branch funds can be made without the consent of the finance committee and the general membership. Recognize that by signing a lease or contract that there is a long-term commitment of funds, therefore a long-term projection should be done to ensure the branch can meet the financial commitment into the future. Approval of Branch Advisory is required before entering into leases or contracts. The Secretary, in the presence of the President, under seal must sign all contracts. The BC Legion Act allows only the Secretary and the President to sign legal documents. The seal of a branch shall be at all times kept in accordance with *General By-law* Section 136.

Licensed Premises Responsibilities – (See Licensed Premises Section of this Manual for more info)

The treasurer and his finance committee must be prepared to require certain standards of costs to be limited and sales prices of beverages and products to be raised and preserved at a level which ensures that gross profit percentages are consistent with recommendations as made from time to time by Command's Branch Advisory Committee and that the total expense for wages and fringe benefits does not exceed 25% of gross sales plus Lotteries Product commissions and break open profit for the licenced premises. On the Admin side (office staff) the ratio is 5% of gross sales plus Keno and break open profit. However, if break open and Lottery products sales are handled totally by volunteers then the profit is not

added to the gross sales when calculating the Admin percentage (this % does not necessarily include the cost of an external bookkeeper if there is no in-house volunteer capable of providing this service).

The Treasurer and his committee must constantly control the movement of liquor, beer and cash within the bar operation. It is understood some branches give the responsibility of liquor inventory to the House/Licensed Chairman. Every effort must be made to use metered liquor and beer dispenser's information about professional inventory takers can be obtained from the Command office.

The authority to provide a limited number of free drinks as authorized within the provisions of Section 12 of the *Regulations of the Liquor Control and Licensing Act* must be carefully recorded by bar staff. In addition, bar staff that are intimidated and pushed into supplying free drinks are within their rights to lodge legal action against the branch. There is a worksheet available from Command accounting to assist in calculating the value attributable to "Free drinks" for accounting purposes.

It is absolutely essential that the movement of physical stock is constantly and ruthlessly measured. Any dishonest employees or branch members are promptly suspended pending an investigation, and further action is required. Remember BC/Yukon Command has a ["zero tolerance" policy](#) when it comes to misappropriation of funds or assets. Police are involved immediately and without hesitation.

The Treasurer and the committee must regularly calculate gross profit percentages on the sale of each class of products sold from the branch and they are to report such information to their membership at each regular meeting of members of the branch. As costs change, gross profit percentages change. The expected gross profit percentages can be found in the licensed premises section of the Branch Manual. Unless these steps are followed there are thousands of dollars that are lost from branch revenues annually and in some cases, actual theft of inventory is not recognized as such. This seriously restricts the funds available for membership programs, the repayment of major loans made by branches, and, at times, brings branches over a period of years practically into a situation of bankruptcy.

With the above factors considered the treasurer and finance committee lay down their budget and have it passed by the membership at the first or second monthly meeting during their annual term of office. From that point on they must seriously strive to run a tight ship. The end result being that they will have maintained an active branch in funds during their term of office. The branch will have planned surpluses available for contingencies or gathered in reasonable amounts over a term of years to provide an "umbrella" during periods of economic hardship.

Non-Profit Organization Information Returns

Filing of the Non-Profit Organization Information Return is **mandatory** if your branch fits the guidelines issued by Revenue Canada in that your dividends, interest, rentals or royalties reaches \$10,000 or more in the calendar year, or your total assets are \$200,000 in your fiscal period. If you have any doubt as to whether your branch is required to file this return, please contact the Command Controller. The return must be filed within six months of the end of your fiscal period. In the case of BC/Yukon Command branches that is 30 June each year.

Branch Signatories and Authorized Accounts

Branch by-laws set out specific provisions and define signatories. The policy requires two primary signatories. One or perhaps two alternate signatories can also be authorized to sign in the absence or disability of one or both of the primary signatories.

The authorized signatories sign all branch accounts. There are no separate signatories for the poppy fund. Under provision of the *BC Legion Act*, the only proper branch signatories for legal documents or contracts are the President and Secretary elected, appointed or paid employee. Purchase or sale of real property requires approval of the general membership, and the following of Article 120 to 124 of the *General By-laws*.

Branches are allowed to have the following Bank accounts: - general, poppy and whatever separate accounts are required from time to time by government or government agencies (including **a separate transfer account if required by a financial institution to accommodate a permitted credit card facility**). Branches which operate with a line of credit are required to have a separate bank account for processing of membership per capita tax. All accounts will have the same signatories as authorized in the individual branch by-laws. Remember the poppy account is a separate trust account. If a branch sells BC Lottery, they are required by the Lotteries Branch to maintain a separate bank account for their Lottery Product transactions. Branches with a line of credit or mortgage are required to have a separate membership account.

Expenses - Branch Officers

Especially where Branch Presidents and Service Officers are concerned, some branches have made payments of fixed amounts that are supposed to reimburse the President and/or Service Officer for expenses incurred in extending branch hospitality to visitors and guests, etc., and conducting visitations by the Service Officer. Branches often refer to this action as providing an "honorarium." **This procedure is unconstitutional.** Sometimes branches also try to give the Branch Service Officer and/or President a monthly amount for use of their personal car. A record of actual mileage must support such claims. You cannot simply provide a lump sum each month.

The proper method of handling reimbursement of out-of-pocket expenses is through submission of a voucher. The voucher must provide details of the expenditure and carry the signature of the Officer concerned. The voucher must indicate, the number of kms driven and based on the established policy within the branch as to how much per km is reimbursed, and then the member receives payment. Payment must be made based on actual mileage.

Branch Financial Statement

Annual audited Branch Financial Statement must be submitted to BC/Yukon Command office by 30 April. Section 617 of the *General By-laws* makes this mandatory.

Pro Forma Financial Statement

By convention mandate branches are required to submit the annual audited financial statement in accordance with the pro forma. Copies of the pro forma are available on the BC/Yukon Command website. The Pro forma is a standard Financial Statement format which includes separate schedules for calculation of Gross Profit on Licenced Premises Sales and a separate operating statement for the Licenced Premises.

Financial Review or Audit Committee

In accordance with the *BC/Yukon Command By-laws*, branch annual financial statements must be audited. The branch may choose to have an external audit or an internal audit. The general membership at a duly constituted general meeting has to approve the appointed auditors.

The following is an excerpt from the *BC/Yukon Command By-laws*:

Financial Obligations

12.3 A branch shall ensure an audit committee examines the accounts of the branch each year.

12.3.i The financial review or audit committee of a Branch need not be designated professional accountants and may or may not be members, but shall not be members of the Executive Committee of the Branch or an employee of the Branch.

12.3.ii On or before the 30th day of April of each year, all Branches whose gross annual income from all sources, direct or indirect, is in excess of \$10,000.00 shall file with British

Columbia/Yukon Command, in the prescribed form as required by British Columbia/Yukon Command, a properly audited and certified financial statement.

12.3.1 Branches shall maintain an adequate system of financial reporting, ensuring compliance with provincial and federal legislation and subject to direction by British Columbia/Yukon Command.

12.3.2 The Branch Finance Chairman for the year being audited must sign off before submission of the audited financial statement to British Columbia/Yukon Command.

12.3.3 Every Branch whose gross annual income does not exceed \$10,000.00 from all sources, direct or indirect shall file with British Columbia/Yukon Command in the form prescribed by British Columbia/Yukon Command, on or before the 30th day of April each year, a certified statement of the financial operations for the preceding calendar year.

12.3.4 Under special circumstances for monitoring purposes and only when requested by your Zone Commander, any Branch shall file a monthly statement with the minutes to the Zone Commander.

12.3.5 Under special circumstances for monitoring purposes and only when requested by British Columbia/Yukon Command, any Branch shall file a monthly statement with British Columbia/Yukon Command for the interim period of time.

12.4 Every Branch shall participate in the Group Insurance Program for Branches.

It is important to note that if an external accountant does the financial statements and the statements are "Notice to Reader" or "Review Engagement Report", then an internal audit committee still must do an internal audit. More information can be provided by the Command Controller with respect to the focus on controls for this audit as opposed to finances.

The Internal Audit committee should consist of three members. The Internal Audit Committee need not be designated accountants and may or may not be Legion members. Anyone who has served on the Executive for the prior year or who is currently serving on the Executive may not be an audit committee member. All persons (including salaried staff) with financial responsibility or inventory duties for the licensed premises or break open ticket sales are also **ineligible to be members of the audit committee**. In addition, it would not be appropriate to have a person on the audit committee who had a personal/family relationship to paid staff who are responsible in any way for the financial operation of the branch. This would be perceived as a conflict of interest.

The statement must follow the format of the pro forma financial statement. The Audit Committee is required to affix their signatures to the certificate verifying the audit. Internal Audit Committee members must be provided with a copy of the Internal Audit Guidelines. The Internal Audit Committee has to be a hands-on committee with respect to their review of the branch's financial operation; engaging the Executive Committee in completion of the checklist and questionnaire. Audit Committee members place themselves at risk if they merely sign the audit certificate at the request of the branch, without having performed the actual audit.

BC/Yukon Command By-laws state that the financial year of the BC/Yukon Command and all branches within the Command shall be the calendar year. On or before the 30th day of April of each year, all branches whose gross annual income from all sources, direct or indirect, is in excess of \$10,000, shall file with the BC/Yukon Command, in the form as required by BC/Yukon Command, a properly audited and certified financial statement. Branches whose gross annual income does not exceed \$10,000 from all sources, direct or indirect, shall file with BC/Yukon Command in the form as required by BC/Yukon Command and not later than April 30th, a certified statement of the financial operations for the preceding calendar year.

Internal Audit Guidelines

To assist branches that use internal Audit Committees the Branch Advisory Committee developed some Internal Audit Guidelines including a Checklist and Questionnaire. Copies are available upon request through BC/Yukon Command. Internal Audit Committees must sign the certificate verifying the accuracy of the audit on behalf of the branch.

References:

- | | | |
|--------------------|----------------------------------|-----------------------------|
| - Branch By-laws | - <i>General By-laws</i> | - Internal Audit Guidelines |
| - BC/Yukon By-laws | - Guide for Annual Business Plan | - Performance Standards |
| - Branch Manual | - Pro Forma Financial Statement | |

BY-LAWS CHAIRMAN

It is the responsibility of the By-laws Committee Chairman to ensure the branch has adequate and up-to-date by-laws. Branch by-laws should be reviewed regularly to ensure they cover the needs of the membership. Branch by-laws are the rules and regulations accepted by the branch for its own guidance. Branch by-laws cannot supersede Dominion or BC/Yukon Command by-laws.

By-laws must be carefully drawn up and comply with the *Command Pro Forma By-laws*. The BC/Yukon Command Constitution and Laws Committee has the responsibility of maintaining a current Pro Forma for branch use. It is important for the branch to ensure that when by-laws are being revised that it is a current Pro Forma that is being referred to because they are amended frequently. Pro Forma by-laws are available upon request from the Command office and they are also posted on the Command webpage: <https://www.legionbc yukon.ca/branch-corner/guidelines-and-forms>. Branch by-laws should be reviewed following every convention to ensure their wording is consistent with the policies set at conventions.

Branches By-laws Changes

A Branch By-laws Committee or the Branch Executive does not have the power to approve changes to the Branch By-laws.

Over periods of time, it will be necessary for a Branch to consider changing or amending their Branch By-laws. There is a specific procedure for doing this in order that the process is done in a timely manner without the amendment requests being sent back and forth between the Branch and BC/Yukon Command. If a Branch follows these simple instructions, the process should proceed easily.

1. The Branch By-Laws Committee tasked with changing or amending By-laws should discuss the proposed changes, in particular, if a change is made to one section, are there any other sections that will be affected. If so, the other sections should be amended at the same time.
2. At a General Meeting, the By-law Committee will provide a Notice of Motion to the membership. This Notice of Motion will detail the changes being proposed to the Branch By-laws.
3. The wording of the Notice of Motion will contain the section(s) proposed for change, along with the proposed new wording. (See example under [Appendix L](#))
4. The Notice of Motion is filed with the Secretary at the General Meeting, discussion takes place, and the Notice of Motion is put on the agenda for the following General Meeting for a vote. A vote on the Notice of Motion will not take place on the day it is tabled. The delay until the next meeting is to ensure everyone has a chance to look at the proposed amendments, and is prepared to speak to them at the next General Meeting.
5. At the second General Meeting, the Notice of Motion is brought forward, discussion takes place, and a vote is held.
6. If the motion to approve the proposed amendments passes, a copy of the proposed amendments, along with a copy of the minutes of the meeting when the proposal was passed, is sent to BC/Yukon Command. The BC/Yukon Command's Constitution & Law Committee

members consider the changes or amendments, then forward to the Command President, for final approval.

7. Note: If the above procedure is not followed, if the Minutes of the General Meeting do not accompany the proposal, or if the Constitution & Law Committee have some issues with the proposal, the proposal will be returned to the Branch, with comments or suggestions.
8. Changes or amendments do not come into effect until such time as they have been approved at the BC/Yukon Command level.

It is absolutely unconstitutional and illegal for a branch to act on amendments until the branch "master" copy is returned to the branch with the certificate of approval affixed. **No authority exists at any level of the organization to allow non-compliance with any by-law provision under any circumstances.** The policy requires branches to respond to reports from the Command By-laws Committee within 90 days. Ladies Auxiliary by-laws must be amended in the same way with the added requirement that their by-laws must be ratified by their home branch at a duly constituted general meeting.

Elections - Motion by Defeated Candidate to Make Election "Unanimous"

It is neither constitutional nor technically correct for a defeated candidate to make a motion that any particular election be declared unanimous. Elections in the organization are based on secret ballots in relation to which those who are entitled to vote make their choices according to their desires. Based on the results from such a ballot vote there is no relevance at all to a motion to declare an election "unanimous." Unless individual branch by-laws state otherwise, a plurality vote applies at branch level.

Election of Members of the Same Family

It is not unconstitutional for more than one family member to be elected to the Executive. If members feel this poses a conflict of interest, they should think about it before they cast their ballots at election night. When there is the potential for a conflict of interest position with respect to authorized signatories, efforts should be made to ensure that two members of the same family do not sign at the same time. Contact with Command should be made if this situation arises for further discussion.

Branch - Employees - Voting Rights

All voting members in good standing have all the rights of such category except any right that is specifically taken away from them. An example of this is covered in Article I. There has never been any intention members should be precluded from attending branch meetings or speaking or voting in any issue that arises. Voting members who are paid employees have a right to attend meetings. They can speak and vote on issues that arise with the exception of issues that would have a direct impact on their employment. Because of the perceived conflict of interest members are to abstain from such participation. An example would be discussion on hours of operation. Obviously, members who are staff should not participate in that discussion. To avoid this situation entirely, some branches encourage employees to take out membership in neighboring branches. This avoids all possible conflict.

Branch Elections

All offices have to be filled from "the top down." This means the office of President must be filled before proceeding with the office of First Vice-President. If a branch gets to the point where it cannot fill a particular office, elections must stop. If at that meeting it proves impossible to fill a position, the branch cannot move on to lower offices. Arrangement must be made for a subsequent meeting to fill the vacant office before electing any of the lower offices.

Elections to Fill Vacancies that Occur During the Year

The general policies that apply to filling vacancies during an elective year vary considerably. Branches must consult their own by-laws. The policy is that a person, who is holding a position on the Branch Executive does not have to resign from that position to be a candidate for a higher office. If they are successful in they bid for the higher office, following the election there must be a further election to fill the office they have vacated.

Prohibition against Paid Employees Serving as Elected Officers or Executive Committee Members

Article I of the *General By-laws* provides that no member who is a full-time or part-time employee of any branch or organization thereof, who receives directly or indirectly any salary or wages for services rendered to a branch or organization is eligible to hold any Executive position. The *General By-laws* also covers services where a "fee or commission" is paid and does not apply to anyone who receives a salary or wages. Branches are urged to contact the Command office for specific rulings.

No amounts even if authorized by a meeting are to be paid to an Elected Officer. It doesn't matter if this is received directly or indirectly, by way of salary or wages or in the way of a bonus or honorarium. Members of the Executive can only be reimbursed for actual out-of-pocket expenses, which are supported, by receipts or vouchers. It is possible for Ladies Auxiliary members employed by a branch to hold office in the Ladies Auxiliary at the discretion of any individual branch.

Quorum

Branch by-laws cover the quorum for general meetings. By policy the quorum for a general meeting cannot be less than three more than the total number that comprise the Executive Committee. This is not a reference to the total number of Officers and Executive members who are in attendance at a meeting. It refers to the **total** number of Officers, Executive members, including the Immediate Past President, as provided for in the by-laws of any particular branch.

To legally transact business, a quorum must be present not just at the start of a meeting, but must be maintained throughout the meeting. If, after the meeting gets underway with the required quorum and members subsequently leave the meeting to the point where a quorum is no longer present, no further business can be legally transacted.

Non-Confidence Vote

A non-confidence vote in the Legion, either in a specific Officer(s) or in the Executive Committee, does not bring about the need for resignation. An Officer subjected to a non-confidence vote may choose to resign, but there is no requirement he do so. The same applies to an Executive Committee member who is the subject of a non-confidence vote. Officers and Executive Committees have the right to serve through to the end of the normal elected term unless constitutionally suspended or expelled under the relevant provisions of the General By-laws.

Resignation

Notice of resignation does not have to be submitted in writing to make it effective. Nor does the resignation have to be accepted by an Executive Committee meeting or a duly constituted general meeting. Most often resignations are given verbally. The reason notice of resignation doesn't have to be accepted formally by a meeting, is that regardless of whether the meeting accepts the resignation, if the member resigns – he resigns!

Notice Of Motion

Notice of motion is applicable only if required by specific provision of the branch by-laws. Usually notices of motion apply only to proposed amendments to by-laws. Some branches have specific provisions in their by-laws to require notices of motion with certain types of expenditures. However, unless the individual branch by-laws so provide, such notice of motion is not applicable and cannot be insisted upon. As far as the *General By-laws*, the only matter where notice of motion is a requirement is with dissolving of a branch as per Article I "Holding of Property."

References:

- Branch By-laws
- BC/Yukon Command By-laws
- General By-laws
- Pro Forma By-laws
- Branch Manual

NOMINATING COMMITTEE

The by-laws of each branch set out the procedures for nominations and elections. Convention mandate allows branches the option that the general membership need only elect the Chairman of the Nominating Committee, while the Chairman of the Nominating Committee may appoint the other two members. If a branch would like to make an amendment to reflect this option, the branch by-laws must be sent to Command for approval by the Constitution and Laws Committee.

Nominating Committees are comprised of persons who have indicated they do not intend to run for office. A Nominating Committee cannot nominate members of the Nominating Committee. Once the Nominating Committee has reported and has been "stood down," it is permissible for a member of that Committee to be nominated from the floor.

Policy governing the duties of the Nominating Committee was set at a BC/Yukon Convention. The Nominating Committee must present a proposed slate of suitable candidates for each of the offices – the list to include one name per position. With reference to the "at-large" positions on the Executive, the Nominating Committee may identify more than the number of vacancies that are involved. If other candidates are nominated, they must be nominated from the floor following the presentation of the Nominating Committee report.

Branches can hold their elections only during two periods in a year. They may elect in November or December with the newly elected Officers assuming office on January 1. If they elect in May or June, the newly elected Officers assume office on July 1. No matter when the Installation of Officers takes place, Officers assume their duties on January 1 or July 1. Any change in the time of year of an election involves amendments to branch by-laws. Any such amendment does not become effective until approved by BC/Yukon Command. The change cannot be carried out until the branch receives official notification to that effect. Elections of the Ladies Auxiliary to a branch must coincide with the election of the branch. However, the change would not take effect until the Command By-laws Committee approved the amendments to the L.A. by-laws.

The *General By-laws* provide that any branch through its by-laws may require a member to have served one term on the Executive Committee to be elected President or Vice-President or Chairman. The by-laws may also require a member hold membership in the branch for one year to be eligible for election to the Branch Executive. Unless the individual branch by-laws specifically provide otherwise, the reference to "one year" is considered the immediate preceding 12 months prior to taking office.

Where the restrictive provision refers to candidates for President and Vice-President, all Vice-Presidential offices are subject to the restrictive provision. If a branch wishes the restrictive clause to apply merely to the offices of President and First Vice-President, then it must specifically spell this out in its own by-law provision. Branches are advised to have the same eligibility qualifications with respect to election of President and all Vice-Presidential positions. This will ensure that should the President subsequently resign the Vice-Presidents will meet the same requirements as for the position of President.

It is recommended that the Nominating Committee consider the following list when considering potential candidates. It would also be a good idea to give this list to each candidate running for office:

Top 10 Critical Success Factors For Leaders in the Royal Canadian Legion

1. Clear and meaningful purpose for existence.
2. Clear understanding of members' needs and how to meet them.
3. Determination to modernize the organization locally at the branch and support the growth of your Provincial Organization.
4. Strong volunteer leadership by the President with the ability to:
 - Have and communicate a vision for the organization in a mature and positive manner;
 - Subordinate personal interests for the good of the whole;

- Serve as Legion spokesperson to members, the press and public at-large;
 - Monitor the performance of the Legion in achieving its objectives and goals;
 - Exercise positive personal leadership in motivating fellow officers, members, committee members and staff;
 - Support and defend the policies and programs adopted by the Executive.
5. An Executive Committee that:
 - Comprises recognized leaders who Command the respect of their fellow members and professional peers;
 - Is aligned with and committed to the Legion's purpose, strategies and core values;
 - Focuses outward and on outcomes: where are we going and how will we know when we get there;
 - Knows how to work effectively as a team of equals;
 - Invests in two-way communication with the membership;
 - Can surface and resolve conflict;
 - Possesses unquestioned integrity.
 6. Competent and professional staff organization.
 7. Strong staff leadership, with the ability to:
 - Ensure efficiency, quality, professionalism and integrity in the implementation of the Legion's strategies, programs and policies;
 - Provide advice, counsel and context in support of sound strategic thinking;
 - Foster and catalyze staff team creativity and judgment in service to the executive, committees and the membership;
 - Monitor the performance of the Legion in achieving its objectives and goals;
 - Exercise personal leadership in motivating Executive Committee officers, committee members and staff.
 8. Strong partnership between volunteers and staff based on common expectations, trust, collaborative planning, joint evaluation, strong communication, and mutual respect.
 9. Strong financial foundation to support the Treasurer/Finance committee: an effective framework for managing, monitoring, reporting and controlling all aspects of revenue, expenses and cash flow.
 10. Effective officer and committee chair succession process. Follow the chain of Command and the proper channel of communication.

References:

- Legion BC/Yukon.ca.
- Branch Corner
- Branch Operations

CLUB OR MANAGEMENT COMMITTEE

Reference should be made to the Licensed Premises section of this manual for further information. The President of the branch should appoint a member of the Executive as Chairman of a committee to monitor the operation of the licensed premises. The term used for this committee varies from branch to branch. It is sometimes referred to as the Club or Management Committee or the House Committee. Regardless of the name, this Chairman and this committee are responsible to the Executive for the formulation and enforcement of the general policy of Club operation such as house rules, staff service, and percentages and in some cases entertainment (in the licensed section only). However, some branches have a separate Entertainment Committee.

Basically the House Committee deals with any problems pertinent to the operation. The Chairman acts in an advisory capacity to the head bar manager or senior staff member in the licensed premises. Keeping in mind that the authority to hire and fire staff remains with the whole Executive, not with a Standing Committee. The specific wording on the authority to hire and fire will be found in individual branch by-laws.

It is recommended that each branch establish a Respectful Workplace Policy for protection not only of employees but volunteers.

Normally, the Chairman will make a weekly check with the head bar staff person. Remember any expenditure of funds, if they involve other than normal-operating expenses of the branch, must be authorized by the general body prior to the expenditure, i.e. a request for new glassware or installation of a metered system.

Some branches have a Finance committee through which all expenditures are channelled before submission to the Executive. This acts as a financial safety valve, which should result in the elimination of hasty and possibly unnecessary expenditures. In some cases, where the operation is relatively small and the license is operating with the minimum staff possible, the Chairman is held solely responsible for the liquor stock and the maintenance of liquor control. Regardless of the size of the operation it is not good business to allow bar staff, trained or otherwise, the control of the main liquor stock.

For their own protection and that of the branch, the Executive Committee shall ensure that all officers, employees or agents responsible for branch funds are adequately bonded. This policy is established within individual branch by-laws.

References:

- Branch By-laws
- *General By-laws*
- BC/Yukon Command By-laws
- House Rules – Staff
- Liquor Act
- Terms of Reference for Existing Branch Salaried Positions
- House Rules – Members
- Cash Handling Procedures
- Branch Manual

Liquor Primary – Terms and Conditions – a Guide for Liquor Licensees
<https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/business-management/liquor-regulation-licensing/guides-and-manuals/liquorprimary-handbook.pdf>

Liquor Act
<http://www.bclaws.ca/civix/document/id/lc/statreg/15019>

PUBLIC RELATIONS OFFICER

Branches through their PR Committees should establish good relations within their communities by informing the leaders and general public of their involvement in the community; i.e. supporting local charities, sponsoring of youth sports, bursaries, and seniors' housing.

The Committee should cooperate with all Branch Committees to advertise events or social functions held in the branch and have a template made up for Media releases and a list of media outlets with contact names for their area. It is the responsibility of this committee to ensure the branch has an active presence on Facebook even if there is no website. Often having a Facebook page replaces the need to pay for a website. It is free and easier to keep current.

The PR Chairperson should have a copy of the Legion Magazine Snapshots - Guidelines for Submitting Photos and News booklet, which explains every facet of preparing submissions and photographs to the Legion Magazine and local papers.

Due to the high cost of advertising in the larger daily newspapers it is impossible for most branches to advertise. However, there are community newspapers published on a weekly, biweekly, or monthly basis, which are far less expensive. In some of the smaller communities the Legions have been able to submit articles free of charge. Branches should also look at opportunities for advertising on local cable stations. Where possible the Committee should also look at establishing a web page. It is a good way to get our message out.

The Committee should be comprised of a Chairman and a minimum of two (2) members: -

- Responsible for promotion of publicity and public relations that furthers the purposes and objects of The Royal Canadian Legion, in accordance with page iv of the *General By-laws*.
- Recommend to the Branch Executive, for approval when the occasion demands, any improvements that could be made in promoting publicity and public relations, particularly in the matter of information on Legion activities or branch affairs being given the widest publicity through the media of the press, radio and television.
- Responsible for issuing media releases to the local media and the forwarding of information on branch activities to the Command News Correspondent for the Legion Magazine.
- Responsible for the compiling and editing of the branch bulletin and moving the branch to an e-newsletter for as many members as possible.

A branch may be in an isolated area but despite its location, small membership or size of the community, it must keep informed on all "Command activities." The works of the branch and the Command must be publicized whenever possible. Local publicity of a Legion project or activity even if the branch itself is not intimately involved can gain the Legion many friends in the community. It will also serve in acquainting non-members with the work of the Legion and may be instrumental in inducing them to join. How often have you heard the remark - "I didn't know the Legion did this kind of work?"

If possible, branches should have a column in their local newspaper where branch and other Legion news is published. Editors will not go after branches for news but are usually happy to receive news. An effort should be made to have the annual fact sheet on "The Legion at Work in BC" printed. For other than local news, the Executive Council minutes are available to branches to supply newspapers with information on general activity. The Council minutes can't be turned over to any outsider but extracts can be made. The Command will also assist in providing material suitable for publication.

A branch should never lose the opportunity to supply speakers at club or school functions, public meetings or any large gatherings. Examples of such opportunities are - anniversary celebrations; schools concerning the poppy campaign; school functions for bursaries or community gatherings. Background information is found on the Dominion Command website under "About Us" where you can find very good material to help with speeches and you can always contact BC/Yukon Command for added help.

It is desirable that at branch and zone levels, a member is appointed as Public Relations Officers. It will be their responsibility to keep the work and achievements of the Legion before the public. It is the Public Relations Officer's duty to forward to BC/Yukon Command reports of branch activities for publication in the Legion Magazine. He should also keep in close contact with local newspapers.

Branches that publish monthly bulletins should send a copy to the Command News Correspondent and the Command Office. They are also encouraged to submit copies for the Newsletter Contest run by the Command Public Relations (PR) Committee.

The PR Committee developed the following guidelines to assist PR Chairmen at branch level:

Action Points and Guidelines for Branches

This document is exactly what it says in the heading "*ACTION POINTS AND GUIDELINES FOR BRANCHES.*" The suggestions we have included as action points may be appropriate for your branch or you may have already figured out a better way to get the publicity your branch deserves. The intent is to help branches improve what they are doing to advance community awareness of the aims and objects of The Royal Canadian Legion.

Presenting a positive image to the public is the biggest challenge that is faced. The responsibilities of the PR Committee or publicity Chairman at branch level are no different than the responsibilities for that position at zone or the Command levels. The member responsible for PR has to be involved in the work of almost every committee. Whether it is promotion of the poppy campaign, seeking recognition for the

charitable donations made by the branch or promoting the membership drive, PR is involved in most branch activities.

If the branch by-laws do not currently allow for a PR Committee, then take steps to change your branch by-laws. In the opinion of the PR Committee the only way to ensure the branch has the best person for the job of PR Chairman is to appoint that position. Not everyone has the necessary skills and talent to be a successful PR Chairman and it could be the best person for the job wasn't elected to the Executive. Branch by-laws should give the President the opportunity to appoint someone off the Executive to be the PR Chairman, keeping in mind that the PR Chairman will have to work closely with the Branch President. **Remember - the President is the Senior Officer and they are the one that should be making statements to the media on behalf of the branch or they also have the authority to delegate those duties. The PR Chairman cannot go off on their own accord and make public announcements or statements not previously authorized by the President or the Executive.**

Accepting that the branch needs a PR Chairman is the first step - the next step might be even greater! That is admitting that the PR Committee needs a budget. Promotion of the positive image of the Legion isn't done for nothing! You get what you pay for. If you don't dedicate funds for the PR Committee, you won't get any PR. If a good solid effort is going to be made to promote the image of the branch in your community, you have to be prepared to give the committee a reasonable budget. Resources need to be dedicated. However, like other committees, the PR Committee must develop a business plan and detailed budget for consideration of the general membership.

In establishing the committee members, it is encouraged that the PR Chairman include a representative from the Ladies Auxiliary. The Ladies put forward a positive image in the community that only enhances the image of the branch. It only makes sense to have a LA member on the committee.

Guidelines

- **Designate people.** Each branch should designate a member, who will in turn strike a committee (one to three members), to design and establish public relations capability for the branch. These individuals should be responsible for designing **as well as carrying out** the program and must report to the Branch Executive. Persons designated may wish to divide the functions; e.g. in terms of liaison with different target groups.
- The PR Committee should "liaise" with all of the remaining committees in the branch. Members should attend meetings of these committees and explain how to advertise what they do and the results they want to achieve.
- **Use available resources – see listing of references under heading.** If you are promoting a specific Legion project make sure you gather all material that relates to that subject. As an example, if you were helping the Poppy Committee promote the annual poppy campaign, it would be a good idea to read the Poppy Manual. You need to get an idea of what the poppy fund campaign is all about and how the funds can be spent and how they are raised.
- **Contact list.** The PR person/team should, make up a list of local organizations, groups, media outlets (local newspapers, radio, TV), local politicians and senior civil servants in their area (municipal, provincial and federal) with individual names and contact points. Keep the list current.
- **Activity list.** Make up a list of upcoming local events with which the branch is involved (those associated with financial donations and grants to local individuals or enterprises).
- **Make contact.** Ask for meetings with senior media personnel in your area; newspaper publishers and editors-in-chief, general managers of television and radio stations - **people who set policy.** Go in with a basket of information as to what your branch is doing or planning. Try to get them to designate one individual, reporter, columnist, commentator or editor, with whom you can liaise on

an on-going basis. Ask for meetings with your local MLA and your MP. You have every right to do so. Never forget that the Legion is a large and highly respected organization and is responsible for putting millions of dollars into communities across Canada.

- **Follow-up.** Maintain the connection. The effects of a wonderfully positive meeting can evaporate within 48 hours if your contact doesn't hear from you again. The world moves on. Try to end the initial introductory meeting with agreement on follow-up action, e.g. they will designate a liaison person or point, you will deliver some material. Do not take a lot of information material, brochures etc. to the first meeting. Better to:
 - i. generate a request for more information and,
 - ii. Have someone designated to receive/read it.
- **Be persistent.** "Politely assertive" sums up the necessary approach. Today's society is a mosaic of special interest groups, each screaming for attention. Every day journalists and editors face a torrent of events, "breaking"; stories, scandals and possible scandals; local, national and international issues; which must be dealt with. Most media news outlets operate with a bare minimum of staff, limited budgets, are under unremitting pressure, have deadlines and are in a highly competitive environment. If they don't respond immediately, don't give up.
- **Think "event."** Do not simply mail out a cheque and hope somebody notices. Wherever possible try to create an "event" which will draw public interest and thereby engage the attention and attendance of politicians and media interest. They don't have to be spectacular. Look for and invent opportunities. Follow the "Quality of Life" ceremony established by Command. If you want to talk about how that program is arranged call the Command office or talk to your Zone Commander. Parades to the town cenotaph and associated ceremony on May 8 (VE Day) or August 15 (VJ Day) are surely mandatory. Plan events commemorating other significant dates (they don't all have to be in 1945). Collaborate and co-operate where feasible with other service organizations and other branches.
- **Give them something to remember you by.** Pins, Canadian flags, T-shirts, coffee mugs; there's a lot of inexpensive (sometimes-free) paraphernalia out there and people love it, younger children particularly. While much of it is thrown away, a good deal ends up on shelves and bedroom dressers. They become a frequent reminder to anyone that walks by. One item that was well liked by one branch was balloons with the RCL crest, inflated on a stick and given out by Legion members to the crowds at annual Community Days. This is inexpensive and a big hit with kids in particular, but a great PR exercise.
- **Be imaginative.** Think of ways to project a positive image; promote new kinds of events and events for all age groups, which give you visibility in the community. Fund-raisers for local causes, sporting events, community facilities, youth sports groups, etc.
- **Involve the membership. Identify the talent.** In every branch there is bound to be someone who enjoys promoting and marketing, someone else who enjoys dealing with media, someone who enjoys working with kids, someone with extensive ties to the business community, someone with good political connections. Find out who they are and get them on board. It's amazing what people will do if they are given a challenge, a mandate, a little direction, and, if they feel they're part of a special team with a unique mission.
- **Exchange information.** Sound won't travel in a vacuum. You can multiply the PR effect of your branch's activities hundred-fold by letting other branches know about them and in particular, BC/Yukon Command. BC/Yukon Command's ability to promote a positive image for the Legion in BC is very much dependent on the information it gets from the branches. Without that information, there is not enough of good news to share with the media.

- **Remember what's behind you.** The Legion is a respected organization with a distinguished tradition of national and community service. It has an honourable mandate, a huge communications infrastructure (in terms of over 1,450 branches nationally, 150 of them in BC/Yukon Command) and it is perceived as having considerable wealth (certainly in terms of capital assets.) It is not an organization to be taken lightly. In representing it at the branch level, you have considerable clout.
- **Watch your flanks.** Identify where you are vulnerable, and take remedial action. All the good work in the world can be undone in an instant by one perceived "scandal" or impropriety. As the media sees its job, it is to spot and probe those weaknesses, **not** to report your good works.
- **Make the effort.** Make it happen. Long gone are the days when an organization could assume a high positive public profile and approval by simply doing good work. Today, good public relations require extensive thought, planning, knowledge of your market (not to mention of your product) and intensive effort applied steadily over time. One of the most significant points brought forward at a PR meeting in Ottawa was that there is a lack of communication throughout most levels of the Legion - not just PR people, but all members of branch/zone Executive are RESPONSIBLE to become more knowledgeable about all aspects of Legion work and should spread the word both to members of their branches and the public. They should be aware of all levels of Legion participation in projects from branch support of local charities to BC/Yukon Command supported endeavours and of course to all of the major events sponsored by Dominion Command, i.e. Terry Fox Youth Centre, Encounters with Canada, RCEL, Dominion Track and Field Championships, Guardians of Unity" and all of the other ongoing programs.
- **Legion dress - That first impression.** Remember every time you put on the uniform you are on inspection. You represent the organization and it is imperative that proper protocol be observed with respect to the full Legion uniform. The official description of what constitutes "Legion Dress" is included in Section 1 of the *Ritual, Awards and Protocol Manual*.
- **Recognition of supportive media.** If you are a branch that has a good working relationship with any outlet of your local media - make sure you recognize their services. *The Ritual, Awards and Protocol Manual* carries information on how to apply for a Media Award. You can also give Certificates of Appreciation to local media. Everyone likes to be thanked and what better way to ensure good future coverage than by publicly recognizing the contributions made by the media.

The Legion Magazine

The Legion Magazine subscription is included in the per capita tax. Continued delivery depends on prompt payment of dues by a member. The magazine is not continued to members not paid up by 31 January. There are forms available from the Legion Magazine to report deaths of members for the Last Post column.

We want to make it clear that neither Command Office Staff nor the News Correspondent edit submissions for inclusion in the Legion Magazine. BC/Yukon Command's policy is that every submission received is forwarded to the Legion Magazine. The address for the Command News Correspondent is found in the front of each edition of the Legion Magazine, www.legionmagazine.com. Guidelines for Submissions

Almost 100 percent of complaints received have proven to involve situations where the material was not submitted in the first place. If you believe your branch or Auxiliary is not having its news items included in the Legion Magazine, before complaining to BC/Yukon Command, be sure that the items were submitted for inclusion.

References:

- Branch Manual
- Legion Magazine Snapshots: Guidelines for Submission
- *General By-laws*
- RCL Public Relations Manual & Speaker's Guide.

YOUTH COMMITTEE

The Youth Committee is responsible for the promotion of Legion sponsored youth programs at the local, Command and Dominion level. These programs include:

1. National Track & Field Championships
2. National Poster, Essay and Poem Contests
3. BC/Yukon Remembrance Video Contest
4. Bursaries and Scholarships
5. Legion Cadet Medal of Excellence
6. Legion Youth Leader Pilgrimage of Remembrance
7. Duke of Edinburgh Awards
8. Cadets, Scouts, Girl Guides (other local youth groups)
9. Community Youth Sports
10. Other Community Youth Programs sponsored by the branch

Every year, the Youth Committee should develop a plan on how they will promote and support the Legion youth programs. The plan should include regularly scheduled meetings throughout the year, with youth groups, parent associations and school authorities. At these meetings, the Committee should make presentations about the Legion youth programs. As well at these meetings, the Committee should ensure that there is a good understanding about all the support the branch gives to youth in the community. It is also important to recognize and honour the youth who have been supported by the branch. This can be done at the scheduled meetings or at special honour and award events planned by the branch.

The Chairman is usually the branch liaison with youth groups, parent associations and schools. However, the full Committee should be involved in the promotion of the Legion youth programs.

Many schools have a credit program for youth to volunteer in the community. The Youth Committee should discuss this with school authorities and develop a plan that meets the needs of the credit program as well as the branch. This may include such things as: assisting at branch fundraising functions with the Ladies Auxiliary, upgrading the grounds of the branch, planting a Garden of Remembrance on the branch grounds, assisting with the Poppy Campaign, visiting Veterans in care, having a youth choir sing at branch events, and/or whatever is appropriate in your community. In this way youth come to learn about the Legion in a meaningful way and are mentored in the values of community volunteerism.

Legion Youth Leader Pilgrimage of Remembrance

Every second year (odd years) Dominion Command organizes a Pilgrimage with ten (10) youth leaders from across Canada. The Pilgrimage perpetuates the remembrance of Canadians who fought and died for our country. The youth leaders on the Pilgrimage visit First and Second World War Battlefields, memorials and cemeteries where our Canadian fallen rest.

The nomination process starts with a branch Circular advising of the Pilgrimage dates and criteria. The criteria is available from Command office. If the branch wishes to nominate a youth leader, the Youth Committee should be part of this selection. The branch nomination is then submitted to the Zone Commander. There is only one (1) nominee for each zone. The zone nominations are then reviewed by BC/Yukon Command Youth Committee, who will then determine the BC/Yukon Youth Leader representative for the Pilgrimage.

Legion Cadet Medal of Excellence

National Defense organizes the Legion Cadet Medal of Excellence in partnership with Commanding Officers of all Cadet Corps/Squadrons. The Commanding Officers initiate the nominations and may involve the branch in the selection process, but this is at the discretion of the Commanding

Officers. If the branch has a good working relationship with the Cadet Corps/Squadron, it is likely the branch will be involved.

There is one (1) Cadet Medal for each Cadet Corps/Squadron per training year. The criteria is based on an authorized national standard to ensure prestige and significance is maintained across Canada. The Cadet Medal may be awarded only once to any one person.

When a suitable candidate is identified, the Commanding Officer advises the Area Cadet Office by April 15. The Area Cadet Office sends the selection list to BC/Yukon Command. Command then notifies the branches of the selected candidates for their area and sends the medal, certificate and congratulatory letter addressed to the Cadet. Once received, the branch and Youth Committee will organize a formal presentation with all appropriate agencies.

Cadet medals are to be worn on the left side. The only exception to this rule is when a cadet is awarded a National Medal; all cadet medals are moved and worn on the right below the nametag while the National Medal is worn on the left.

National Poster and Essay Contest

This is covered in the *Poppy Manual* and in addition the Youth Committee issues a mailing to all schools in the Command with copies to branches. Remember the deadline dates:

- Branches 15 November
- Zone 15 December
- Command 15 January

For those branches who receive entries PRIOR to November 11 and that have separate halls into which the public is invited after the cenotaph services, it would be a wonderful opportunity for the public to get a chance to view any of your entries.

When visiting the schools to promote the Poppy campaign, branches can extend invitations to students to bring their parents to the branch to view the entries on Remembrance Day. Obviously, some caution will need to be taken in how the entries are displayed because you will have to ensure they aren't damaged.

Guidelines and Entry Forms

Guidelines for judging are available from Dominion Command and are included with each package to branches in September. An official entry form must be attached to each submission. The form requires completion by the student, the teacher as well as the branch and the Zone Commander.

Branches are to remit only the **first place entries** to zone. The zone then submits only **first place entries to Command**. When branches submit their First Place Entries to zone they must include for the branch First Place Winners Entry Form. Deadline for submission is 15 December.

Prize Money

There is generally an award given to the 1st, 2nd and 3rd place winners of the Poster and Literary Contests. In past years' branches have awarded a monetary prize to the winners in the form of a cheque. This has often caused many difficulties with cheques not being cashed by the winners. As a result, branches are now able to give cash awards instead of a cheque for the Poster and Literary Contests. This would avoid the accumulation of outstanding cheques each year for this item.

Statistical Reporting

All Commands are required to remit statistical reports to Dominion Command on the number of entries received, therefore branches are relied on to submit the numbers of entries received by way of a Statistical Reporting Form. The cooperation by branches is critical because at the zone and Command levels they can only report on the number of first place entries received. The proof of the program and the

success of the program can only be evaluated based on the number of entries received at branch level. **Branch assistance is crucial.** Deadline for submission to Command is November 30.

The Youth Committee has a specific report form that must be included with the zone submission for the competition. The form details how many first place entries are being submitted by zone and for which level of competition.

We realize this is a lot of reporting, but these requirements must be met by each level.

Mailing of Contest Information to Schools

Branches are encouraged to contact all schools in their area in mid-September. All schools are provided with the contest material by mail by the end of August. Branches are sent the exact same mailing and as soon as this is received at branch level, personal contact with schools should be made.

Experience has shown that the zones that had the most success with the contest had branches making that "personal" contact with their schools.

There has been a struggle for years with respect to the timing of our mailing. Advice has been obtained from the Ministry of Education, the BC Principals and Vice Principals Association and the Teachers Federation. The mail is sent before the end of August so that the material is on hand at the schools when the teachers start preparation of the year's curriculum.

The addresses of the schools come from the Provincial Government which are supposed to be the most current addresses available for schools in BC and the Yukon. Mail is sent to both public and private schools and material will be sent electronically to the home school site on the internet.

BC/Yukon Remembrance Video Contest

In mid-August branches and Schools are provided with promotional material about the BC/Yukon Remembrance Video Contest. As soon as school starts, the Youth Committee should meet with school authorities to ensure the contest is well promoted. If there are parent associations or teacher associations in the area, the Committee should also make presentations to these groups. The Committee should also make presentations to other youth organizations such as the Cadets, Girl Guides, Brownies, and any youth sports groups sponsored by the branch.

The entries come direct to BC/Yukon Command and **the deadline for submissions is November 15.** Late entries will not be accepted. Prizes for 1st, 2nd and 3rd place are awarded. Submission forms along with Parental Consent must be filled out. Information is posted on the Command Website under Youth Contests.

The BC/Yukon Command Youth Committee will judge the Remembrance Videos, advise the branch Youth Committee and arrange for the prize awards in March of every year.

BURSARY COMMITTEE

Many branches support youth through local bursaries within their community. Branches can use their gaming money to support local bursaries or scholarships. Poppy Fund money can also be used to grant bursaries to financially needy children, grandchildren and great-grandchildren of Veterans.

Information on how to use poppy fund money is found under the Terms of Reference for "Poppy Fund Chairman." To use poppy funds for a bursary the branch must sign the Poppy/Bursary Agreement with BC/Yukon Command. Obtain a copy from the Command Office. It is suggested that when a bursary applicant comes to the branch that the applicant be given an application for membership. If applicant is over the age of 19 It's never too soon to recruit new members!

Undergraduate Nursing

The Executive Council established a bursary for undergraduate nursing. A bursary is made available to a geriatric nursing undergraduate each year. Simon Fraser University helps with the selection of the eligible candidate. This bursary is funded from the interest on the Command Care Trust Fund.

Benevolent Funds for Educational Assistance

The benevolent funds for educational assistance also provides educational assistance. Enquiries should be directed to BC/Yukon Command Service Officers or District VAC offices, as should enquiries on the educational bursary program sponsored by the Canadian Army Welfare Fund. This latter program is open to applications from dependents of former members of the Canadian Army with service between 1 October 1946 and 31 January 1968.

Education Assistance Loan Program - Canadian Forces Personnel Assistance Fund

This program helps dependants of personnel who served or are serving as members of the Regular Force to obtain post-secondary education. Loans are made to and repaid by the service member or widow/widower. Interested parties should contact CFPAF Education Assistance Loan Program, 245 Cooper Street, Ottawa, Ontario K2P 0G2 - 1 (888) 753-9828. Deadline date is June 30.

References:

Bursary Guidelines – available from BC/Yukon Command Poppy Manual POPPY workshop INSTRUCTORS NOTES Located at www.legionbcyukon.ca; <https://www.legion.ca/communities-youth/youth-education/scholarships-and-bursaries>

References:

- Branch Manual
- Youth Auxiliary By-Law Pro forma
- BC/Yukon Command bylaws, Section 80

SICK AND VISITING COMMITTEE

There is no function that is closer to the aims and objects of the organization, than the work of this committee. No matter whether a branch is successful in every other phase, if it neglects the sick and hospitalized Veterans, then that branch is also sick. Thankfully, this seldom, if ever occurs. There are always some Comrades dedicated to this vital and humane work.

The Chairman must organize his work so the committee functions efficiently. The committee can be as large as the volunteers make it. There can never be too many hospital visitors. The Chairman, at the first meeting, should draw up a schedule of regular hospital visits in the area and then allocate Comrades to visit each institution. There should be a Sick Members Notice Board in every clubroom or meeting place, listing not only members in various hospitals, but those who are recuperating at home as well. This must be kept up to date so those members can rely on the information entered.

It should be the objective of the committee to visit any Veteran, whether a Legion member or not. The general membership should supply the names of hospitalized patients or persons who are sick at home. This is especially vital at Christmas time, when effort is made to comfort those who are alone or away from home.

The committee should have a Vice-Chairman. Too often the Chairman himself becomes a victim of illness and someone is needed to take over.

The hospital visitor is often asked by a patient to give assistance or to advise in some matter the sick person cannot look after. It is important such requests are handled correctly. It may be necessary to enlist the assistance of the Padre, the branch or Command Service Officer or Veterans Affairs Canada. Visitors

must always be impartial in any assistance given, and at no time should accept remuneration or compensation.

It should be the duty of the President to ensure that this committee's report appears on every agenda, regardless of the pressure of other business. Any requests from this committee must have high priority on allocation of branch resources. Some money is available through gaming to assist with the costs associated with Sick and Visiting.

Hosting Luncheons for Hospitalized Veterans

This can be a most rewarding experience for both the residents and the Legion members. Care providers tell us the residents look forward to these luncheons. In some cases, this is the only outing residents have because they have no local family. It is important to make their time at these luncheons as enjoyable as possible. Those branches that are the most successful ensure that the Veterans are treated like guests in their homes. They are greeted at the door upon arrival and seated at tables with a branch host. The branch host ensures each person at his table is made to feel welcome. Encourage involvement from as many of your members as possible. Efforts are also made to provide entertainment. This doesn't have to be an expensive venture. Even taped music such as Vera Lynn is appreciated. Some branches have a member play the piano and there is a little sing along. It doesn't take much to make the Veterans feel welcomed but it can mean so much to them.

References: Time, Patience and Compassion

ENTERTAINMENT COMMITTEE

The committee should comprise of the Chairman and a minimum of two additional members.

The committee shall work in conjunction with each other and their committee shall:

- Develop an entertainment program to assist in promotion of Comradeship and participation in the social activities.
- Organize and supervise the operation of all Special Events. Plan and produce entertainment for special events, (i.e. Vimy night, LA Appreciation Dinner, November 11, Veterans' Week, New Year's Eve etc.) and assist other committees (i.e. Ways and Means) with special functions (i.e. Hospital Pub Nights; Legion Week celebrations; Installations).
- A written report must be presented to Executive and general meetings following each event. The report will include an income and expense sheet.
- Monitor use of bands to ensure sufficient sales justify the expense. There is no point in bringing in a band if sales aren't increased enough to cover the expense. If the same sales occur, regardless of the band, the expense isn't justified.
- Remember – bands can't be paid in cash – branch by-laws have a limit on the amount that can be paid out in cash.
- Don't run more than one special event at the same time. If you have entertainment planned this is not the time to have a member appreciation night with a reduced price for draught beer. Reducing bar prices requires major investigation by the House Committee/Finance committee to establish the true cost of the reduced prices.

WAYS AND MEANS COMMITTEE

Note: The Gaming publications have been listed here because in most branches, it is the Ways and Means Committee that manages licensed gaming activities within the branch, (i.e. meat draws, raffles, 50/50s and bingo). All these publications are maintained on the web site for Gaming, Policy and Enforcement (<https://www2.gov.bc.ca/gov/content/sports-culture/gambling-fundraising/gambling-licence-fundraising>). You can also obtain copies by contacting your local gaming office or local Government Access office. See Section 4 of the Manual for more information.

The committee should comprise Chairman and three to five members. The committee should: -

- In consultation with the Finance committee devise ways and means for the purpose of raising the necessary funds to assist in maintaining community activities of the branch (i.e. extras needed over and above a particular committee's approved budget and such other expenditures as might arise such as Convention expenses, etc).
- Supervise and co-ordinate any fundraising projects (other than normal special events) within the branch, regardless of sponsorship.
- Prior to the end of the term, a summary of funds raised and cost incurred during the past year's operation will be prepared for referral to the incoming committee to assist in budget preparation.
- After each event submit a written report to Executive and General Meetings to show income and expense.

Remember to keep notes of all the steps in planning each event, so there is a reference manual for the following year.

References:

- Branch Manual
- Gaming Control Regulations
- Standard Procedures for Ticket Raffles
- Gaming Control Act

SPORTS COMMITTEE

At BC/Yukon level branches participate in curling, darts, crib, euchre and 8 ball. In the fall BC/Yukon Command issues the rules for the various play downs. Many branches are involved in additional member participation sports such as golf, horseshoes, pool and shuffleboard, however, these events are not played on a Command level.

In December, zones must commit in writing to participation in the various Command level play downs. Payment of registration fees must also be made at that time. Zone Commanders are given these forms in July/August. Any branch with questions concerning participation should contact the Zone Commander.

The branch Sports Chairman will establish a committee structure in keeping with the number of sports to be administered. A calendar of events should be posted together with eligibility requirements, rules, dates and venues, entrance fees and other anticipated costs. Committee members should encourage participation by membership in the activities being offered.

Responsibilities and duties for committee members would include determination of event requirements. Costs associated with individual events, from rentals to banquets to trophies should be prepared, together with income from entrance fees, concessions; and banquet fees. Accumulation of anticipated expenditures and income should be received and checked by the Chairman before submission to the Finance committee for the establishment of a budget for each event. The budget needs to be included in the overall budget for the branch as approved by the general meeting.

Duties of committee members must include understanding the general and technical rules for each sport. Committee members must understand the eligibility rules established at other levels of the organization. A clear understanding of the regulations will minimize difficulties for players/teams advancing to Provincial or Dominion championships. If eligibility does not conform to Provincial or Dominion level play downs participants risk disqualification at those levels.

For each event a Head Referee will be appointed and identified and will be the final determiner of rule interpretation, dispute resolution and will ensure fair play in competition. In addition, an outline plan for the term of office, the events to be held, dates to remember, and the considerations (for the

current year) should be placed in a 'how to' file which can be updated after each event/tournament and be in place for use as a guide to future incoming committee members.

With respect to BC/Yukon Command level, Member Participation Sports events circulars are issued in the fall to all branches. Branches are encouraged to submit bids to host Command level events. It's a great way to get extra revenue for the branch through the operation of the licensed premises.

Hosting a Play down

The BC/Yukon Command Sports Committee has guidelines to assist whether you are hosting a branch, zone or Command play down. These are available upon request from the BC/Yukon Command office.

References:

- Branch Manual
- BC/Yukon Circular re Participation in Command Level Events
- Youth Leadership and sports

www.legionbcyukon.ca; <https://www.legion.ca/communities-youth/youth-leadership-and-sports>

SERVICE OFFICER

Branch Service Officers are responsible for three main tasks:

1. Assist eligible persons with the completion of the Legion Claim Form (the first step in obtaining disability benefits through Veterans Affairs Canada (VAC))
2. Investigate and consider Poppy fund applications and
3. Advise and refer persons in need to available community resources.

Often, particularly in the large branches, the Branch Secretary is also the Service Officer. In others the Service Officer is appointed. It is recommended that branches not elect a Service Officer because the person nominated may not possess the needed skills and talents required to be a Service Officer. The manner in which a branch arranges for the position of Service Officer is contained in the individual branch by-laws.

Any benefits problem and all cases of distress or sickness of Veterans and their dependants should be directed to the Service Officer. With respect to the processing of disability benefits claims Branch Service Officers are encouraged to make direct use of the professional Command Service Officers. If you think that a Veteran may be entitled to a disability pension or benefits under Veterans Affairs Canada (VAC) have them fill in a Claim Application form and send it to the relevant Command Officer, along with a copy of the applicant's government issued photo ID. After receiving this form, the Command Service Officer will work directly with the client to process any disability benefits. Submission of a Legion Claim Form should be done in a timely manner and should not be held up for any reason.

If there is a Veteran within the community who is homebound and needs assistance in home care by all means, contact VAC immediately. Keep in touch with the client about the services provided as a result of the visit and if there are problems in getting benefits in place don't hesitate to contact a Command Service Officer for further information and direction. If financial need is a problem, don't forget the availability of your own poppy fund to assist needy Veterans and their dependents. For information about assistance from the poppy fund refer to the section under Poppy Chairman. Also, there are benevolent funds available. Application forms are available through the Command office and are available at www.legionbcyukon.ca. Every situation is different and the Command Service Officers work together with branches to get the Veteran the required assistance.

Please note: The Dominion Executive Council (DEC) approved mission for Branch Service Officers is to act as referrals for Command Service Officers. One of their primary roles should be to assist Canadian Armed Forces (CAF) members, RCMP, Veterans and their dependents to fill out the Legion Claim Form and forward this form to the appropriate Command Service Officer. In dealing with individuals who appear to be exhibiting symptoms of Operational Stress Injury/PTSD, the Branch

Service Officer should do an immediate referral to a Command Service Officer (see separate listing under Service or at Dominion Command Toll Free 1-888-435-4466), a Peer Support Coordinator with the Operational Stress Injury Social Support Program (go to www.osiss.ca under Peer Support Coordinator or Family Support Coordinator), a VAC representative (ideally the Resource Case Manager) at 1-866-522-2122 (English) or 1-866-522-2022 (French), or the Canadian Forces Member Assistance Program at 1-800-268-7708.

New Service Officers are encouraged to contact the Command for a Service Officers kit, which includes all of the resource material available with respect to services and benefits available to Veterans. Many of these resources are also available on the website.

Branches used to be encouraged to have standing committees on Seniors Programs. However, over the years it has become evident that by far the vast majority of branches give this duty to the Branch Service Officer. We offer the following suggestions to help with support to local seniors and Veterans.

The Chairman and the committee should: -

- Find out what services and programs are available for seniors within your community.
- Find ways in your community to cooperate with other voluntary organizations to establish and/or support.
- Day care facilities, day hospitals, boarding home, low rent housing and other community projects directly related to housing.
- Programs to enhance the quality of life of seniors and to help them remain independent, living in their own homes with assistance of such programs as Meals on Wheels, handyman maintenance, telephone assistance, transportation to services (doctors and dental appointments, etc.). Recreational day programs such as darts, shuffleboard, cards, carpet bowling etc.
- Maintain up-to-date knowledge of seniors' issues and to report to the Zone Coordinator any issues that should be forwarded to the Chairman, Veterans and Seniors Services Program, BC/Yukon Command. Forward to the Zone Coordinator monthly reports including suggestions that will then be condensed and sent to the Chairman, VSS, and BC/Yukon Command.
- Identify and promote community projects that will be useful for all senior citizens. Make seniors aware of Provincial and Federal programs and benefits.

Terms of Reference for Zone Seniors Chairman

- Meet with Branch Coordinators within your zone.
- Familiarize yourself with seniors' programs in each branch.
- Familiarize yourself with a variety of programs that could be successfully conducted at branch level. Assist branches, if requested, in instituting and operating any program(s) they select.
- Impress upon the branches the need for some viable seniors' programs in their branch, stressing that a branch program should not compete with any existing Senior Citizens group or organization in their community. However, cooperation and involvement with others should be encouraged if mutually acceptable.
- Attend and submit a report to zone Council meetings on activities reported to you by Branch Seniors Chairman.
- Report the progress of branch programs to the Chairman, Veterans and Seniors Services Committee, BC/Yukon Command regularly.
- Organize seminars that will assist branches in initiating new seniors' programs.

Note: It should be noted that some branches have experienced rejection and resentment from established community-based seniors' groups as it is felt that the Royal Canadian Legion is interfering and drawing away their current members, even though these outside groups have been assured that they are not in competition. You must work hard to overcome such attitudes.

Privacy Policy for Service Officers and Poppy Chairpersons: **Who gives assistance to Veterans/Dependents in Financial Need?**

The March 2011 PEC meeting approved the following policy to govern at each level within the Command:

- Each branch is free to establish the procedure on how assistance is provided to Veterans/dependents in need within their respective communities. Authorities for providing poppy fund assistance is contained in section 1104a of the *General By-laws*.
- The by-laws of the branch determine who the signatories will be for all accounts and in order to keep the confidence of the client's it is suggested that at least one of the decision makers be a signatory for the branch account.
- Decisions on providing direct assistance do not go to an Executive meeting or to a General meeting. Clients would not come to the Legion for financial help if they thought their personal circumstances were going to be discussed at a meeting.
- If a report is required for an Executive or General meeting, the person given the responsibility of reporting – merely indicates that assistance “this month was provided to one or two families” but remember no details are offered and no amount is mentioned.
- Any and all information that is deemed personal is protected from unauthorized disclosure by the *Privacy Act*. The access to any and all client information must be considered confidential and/or privileged information.
- Any Service Officer or Poppy Chairperson who assists a client must maintain the confidentiality of that Client and cannot disclose or otherwise use the information for any purpose other than in the assistance of the Client.

Remember, special use expenditures as outlined in the 1105 through 1115 require the approval of the general body before submitting the request to BC/Yukon Command for final approval.

Eulogy

As members of The Royal Canadian Legion some will be called upon to give eulogies upon the death of a fellow comrade. This can be particularly difficult if the deceased was a close personal friend. An appropriate eulogy should be delivered between eight and ten minutes. But what should those eight to ten minutes include? To begin with, pay tribute to the person's life by citing their valuable qualities. Then show how these qualities contributed to the lives of others. The focus should be on the person's personality, not on cold facts such as the various levels of achievement within the Legion.

Refrain from expressing your own religious opinions and don't try to offer reasons to justify the person's death. Speak slowly and clearly with vocal variety, voice control and good body language. Your words will undoubtedly project heightened emotions within the congregation so be sure to control your own emotions. Remember that you want to keep the audience focused on your words rather than on you.

Keeping emotions under control as the presenter is probably the biggest challenge. The following tips were included in an edition of the Toastmaster magazine. We pass them along to you with the hopes that they will help:

- **Speak as you always speak.** If you normally use a microphone, then use one - if not, don't. The idea is to get into your normal speaking comfort zone as best as you can.
- **Don't take any drugs** such as tranquillisers, anti-depressants or alcohol to help stay calm. A pharmacist once told me there is nothing **that** will dim your emotions without dimming your brainpower. During an emotional encounter such as this, you need to call upon all the speaking skills you have available.

- **Elevate your eye contact** a few degrees above your normal level - that is, don't look at any familiar faces in the audience; this may elicit an uncontrolled emotional response in you. The audience will not notice if your eye contact is slightly elevated.
- **Have an escape route.** You may not be able to continue or even start, and someone should be there to rescue you. (You could ask the minister to stand by. If you take an exceptionally long pause, nod to him and he can come and take over.)
- **Begin by talking about someone or something** other than **the deceased** - perhaps quote a poem. This will allow you to **'warm-up'** and get going before addressing the specifics.
- **Prepare a short introduction** to be read by the padre or person in charge of the meeting.

Although the occasion is solemn, there may be an opportunity to include humorous tales or events. This is perfectly acceptable as long as they reflect the personality of the departed and respect the feelings of grieving family and friends.

Finally, keep in mind that the purpose of the eulogy is not only to pay tribute to the departed, but also to comfort, console and offer solace to those who attend the service.

References:

- Branch Manual
- Poppy Manual
- *General By-laws*
- Branch By-laws
- Service Officer Handbook

SERGEANT-AT-ARMS

Some branches elect the Sergeant-at-Arms. However, the most desirable situation is appointment by the President of someone particularly well suited for the duties. Individual branch by-laws outline how the position is filled. At meetings their position of office is at the entrance door to ensure only authorized persons are allowed to enter and to monitor the signing of the attendance register. They preserve order at the direction of the presiding Officer. They are usually in charge of Colour Parties and Parades.

The importance of the office of Sgt.-At-Arms is often not recognized. A new member or a visitor often judges the branch on appearances. The way the meeting is conducted; the way rituals are carried out, and the Sgt.-At-Arms and a Colour Party are the means to present a good image. The Sgt.-At-Arms should not be expected to fill any other office. If the Sgt.-At-Arms carries out their duties and responsibilities satisfactorily, they will have more than enough to do.

The Sgt.-At-Arms is not a member of the Executive Committee except in those few branches where this is an elective position. Because of the nature of the duties, it is not considered practical for the Sgt.-At-Arms to participate in discussion and debate. There is nothing that prevents them from exercising their voting rights. In fact, as a member they have the right to do so. If they do wish to take part in debate, they must temporarily vacate the position and may not resume the position until the subject under discussion has been disposed of or resolved.

Duties

- Establish a quorum is present and to convey this information to the Presiding Officer.
- When a vote is taken either by a show of hands or by standing, to count and report to the Presiding Officer the number voting for and the number voting against the motion.
- Under the direction of the Presiding Officer, to evict from the meeting any members who are unruly or intoxicated.
- Ensure proper protocol is observed with reference to Colours, including their proper placement. (Here is where you hear the snickers as someone makes a wrong move. The poor President, concerned with their own part in the opening ritual, is often embarrassed, especially when visitors are present.)

- Ensure during election of officers that the door(s) is tiled and that no person is allowed to enter or leave during the vote or collection of ballots.
- Set up the chairs for general meetings and initiation ceremony/put chairs away following events.
- Set up the Last Post Stand (if one is used).
- Pre-post the Colours if no Colour Party used.
- Have music available re national anthem, God Save the Queen, etc.
- Have guest register displayed at entrance to meeting hall.
- Read the Honour Roll (not done in all branches).

Newly initiated members can also be influenced in a very negative way by a disorganized meeting. A meeting opened smartly will often turn out to be a good meeting that in time will build up attendance.

The Sgt.-At-Arms should pick out several smart Colour Bearers and drill them in their roles. A piper is beyond the reach of most branches but a March played on the piano or a recording could be used. The branch should equip its Colour Bearers with gloves and flag carriers -this is not a great expenditure and is a one-time outlay.

The Sgt.-At-Arms, together with the membership Chairman, is responsible for the Initiation Ceremony and both should cooperate to make this an impressive and meaningful ceremony.

The Annual Ceremony of Installation of Officers is probably the most important ceremony in terms of the part played by the Sgt.-At-Arms in relation to the image of the branch. In addition to members of the branch where the Installation is taking place, there are usually, at least in the more closely knit zones, representatives from other branches and invited guests from outside the organization, such as the Mayor or their Representative and perhaps MLA's and MP's.

The Sgt.-At-Arms should assume the responsibility to arrange for appropriate seating arrangements for the Newly Installed Officers and Executive Committee Members. The Sgt.-At-Arms has a very significant responsibility to ensure that the Ceremony of Installation is dignified and impressive. The Sgt.-At-Arms should ensure that prior to the Ceremony proceedings the installing officer be provided with a written list of those to be installed. The list must be clearly written and include the respective offices. The list is referred to when the Officers are introduced for installation.

Something else that should be remembered is to ensure the head table guests have a place to sit after the head table has been cleared. It is poor protocol to leave guests unattended. This situation can occur after the head table has been removed to make room for dancing. Make sure you remember to have reserved seating arranged ahead of time so that head table guests can move from one table to another. Taking care of simple arrangements like this helps to create an atmosphere of a well-organized event. Visiting dignitaries will look forward to returning to a branch if they are treated courteously. We mention this under the Sgt.-At-Arm's duties, although it isn't necessarily the duty of the Sgt.-At-Arms, the Sgt.-At-Arms is expected to know about protocol and they should ensure that the Branch President doesn't forget these details.

At Annual Elections or Elections during the year to fill vacancies, the Sgt.-At-Arms has the responsibility to ensure that only those who are eligible are allowed to vote. In co-operation with the Secretary and after perusal of the branch by-laws, the Sgt.-At-Arms should ensure only eligible candidates are permitted to offer themselves for election.

Wearing of Poppies by Members of Colour Parties

Legion policy requires the lapel poppy shall be part of the Legion Dress for Colour Parties and to be worn by Colour Parties for all events in which they participate. **References:**

- Ritual and Insignia Manual
- General By-laws
- Branch Manual

STANDING AND SPECIAL COMMITTEES

There are two types of committees - standing and special and they serve different purposes. A Special Committee does the preliminary work on matters to be prepared for action. Standing Committees are appointed annually. Unless the presiding Officer appoints a Chairman, the first named usually becomes a Chairman. A committee by majority vote may elect its own Chairman if not already appointed.

A Special Committee is appointed for a specific purpose and continues to act until the duty assigned has been completed and the committee dissolved. It should report to the body that made the appointment. In small committees the Chairman usually acts as Secretary. In large committees the committee usually elects a Secretary. When the committee has completed its investigation, a report is prepared and signed by the members for presentation to the higher body.

References

- Branch By-laws
- *General By-laws*
- BC/Yukon Command By-laws
- Branch Manual

COMPLAINTS AND APPEALS COMMITTEES

Suspension and Expulsion of Members

The *Liquor Control and Licensing Act* does not supersede the provisions of the *General By-laws* in the case of voting members. A member can be evicted from the licensed premises under the *Liquor Control and Licensing Act* for a period of 24 hours only. Any suspension for more than a 24-hour period must involve specific action under the *General By-laws*.

Members

Refer to Article III of the *General By-laws* with respect to complaints involving members. Branches are advised to make use of the complaint form available from BC/Yukon Command. Use of the form ensures a complaint is constitutionally valid and can properly proceed. Please note that a branch cannot refuse to accept a complaint because this form isn't used. Use of the official complaint form is not mandatory. The form can be found at [Appendix N](#).

References:

- *General By-laws*
- BC/Yukon Command by-laws
- Branch Manual

RITUALS & AWARDS CHAIRMAN

Committee Composition

- Chairman - as appointed by the Branch President and preferably, though not necessarily, a member of the Branch Executive Committee.
- Committee members - an odd number 3 or 5 (including the Chairman) is recommended to prevent tied votes and to maintain a quorum for meetings in case of absence by members.
- Consideration should be given to choosing committee members from the general membership who, as far as possible, reflects the experience, age range and activity interests of the branch.

Ritual Awards and Protocol

- The criteria for all awards are found in the *Dominion Command Honors and Awards Regulations*.
- All committee members should be provided with the latest editions of the publications and should familiarize themselves with the pertinent contents.

- Awards are based on service(s) rendered over and above what is normally expected at a particular level. The committee should be totally objective and judge each recommendation solely on its merits of service.

Committee Function

To encourage the recognition of continuous and/or special services rendered to the Legion Branch by:

- Branch members
- Members of the Ladies Auxiliary
- Person, organizations and/or businesses outside of the Legion branch
- Local media (radio, newspaper, television)
- To initiate recommendations for awards.
- To encourage branch members to make award recommendations to the committee.
- To present committee recommendations to Branch Executive and/or general meetings for motions of approval.
- To submit branch approved award applications to BC/Yukon Command for approval.

Submissions to BC/Yukon Command

- Award applications should be submitted to BC/Yukon Command as soon as possible following branch meeting approval (MSM, Palm Leaf and Life Membership).
- It is incumbent upon the committee to ensure that all applications are complete in every respect. They should be double-checked for the following details:
 - Current application forms are used; found on Dominion Command's website
 - Intended recipients are eligible.
 - Any required time intervals have been properly observed.
 - All details required on the application have been completed in full noting especially;
 - Date and type (executive or general) of branch meeting at which application for the award was approved and,
 - The exact wording of the motion of approval as noted in the branch minutes is included on the application. (**Note:** it is no longer required to include the names of the mover and seconder of the motion of approval).
- Applications have been duly signed by the branch President (or senior Officer) and branch Secretary.
- Supporting citations are fully detailed in order to justify the award.
- In the case of an application for the next highest award, a copy of the citation for the previous award is attached to the current application.

Branches should establish a policy through adoption of a motion at a general meeting that all recommendations for meritorious awards will be channelled through the branch Honours and Awards Committee. If this policy is in place, then, if a question is raised at a general meeting with respect to nominating an individual for an award, the Chairman can refer the member to the Honours and Awards Chairman. It then becomes the responsibility of the Honours and Awards Committee to investigate the services of the member and where appropriate develop a citation and proceed to get the necessary approvals.

Refer to the Dominion Command Ritual Awards and Protocol Manual for information on processing approved applications through to Dominion Command.

The policy set by convention allows for applications for meritorious awards to be approved and referred by an Executive meeting to the BC/Yukon Command Honours and Awards Committee. After BC/Yukon Command approval they must be referred to a general meeting for ratification before submission to Dominion Command for approval.

By following this procedure any embarrassments can be avoided should questions come back from the Command Honours and Awards Committee with respect to citations. If the general body has approved

the application and questions come back from Command with respect to some aspect of the application, embarrassment can be caused to the intended recipient because word soon spreads the “application was denied” when in fact only additional information was being requested. By putting the application through the Executive and then to the Command Honours and Awards Committee the branch is assured the application has been approved when it finally presents the application to the general body for ratification.

Awards for Legion Members

Please note that the BC/Yukon Command Honours and Awards Committee will not give consideration to applications for two types of awards submitted simultaneously. The application you submit should be for one award only and the award should be appropriate to the service rendered up to the time of the application.

Dominion Command has a national standard for the time period between major awards. The time-frame involves a period of ten (10) years in the Legion for Life Membership Award and five (5) years between Life and the MSM, and a further five (5) years between MSM and the Palm Leaf.

MSM Applications

There is a specific application for this award and copies are available from Dominion Command. Council also set the policy that members must have received a Life Membership Award before being eligible to receive an MSM at branch level. The exception to this is, when awarding the MSM at zone level or a MSA at branch Level it is not required that the intended recipient have a life membership.

MSA Applications

For the MSA or Palm Leaf to the MSA must be approved by the LA at branch level. There is no requirement for the branch to give consideration to these awards. Applications submitted to the LA Command Administrative Assistant will be processed through to the LA Command Honours and Awards Committee for consideration. MSA applications must also include a copy of the LA Life Membership citation.

Life Membership Award Application

A member should not personally request life membership. Approval by the BC/Yukon Command Honours and Awards Committee is necessary. One Copy of the application must be sent to BC/Yukon Command along with a supplementary payment form. The approved supplementary payment form will be returned to the branch for submission along with a cheque to Dominion Command.

Past Officer Awards

Past officer awards are awarded at branch discretion and ordered from Dominion Command. BC/Yukon Command no longer needs to approve these applications. See *Ritual, Awards and Protocol Manual* for eligibility. Past Officer Awards require general meeting approval involving individual motions for each individual. **"Blanket" motions are not acceptable** at any time. A branch cannot adopt a motion such as "all past branch Officers in future will be given past Officer medals," or "all last year's Officers be awarded medals."

Citation for Awards

The following is to be used for life membership award, MSM, MSA or Palm Leaf. It is unacceptable for the recipient to write their own citation for a meritorious award.

Citation: The meritorious service performed by the intended recipient is as follows:

Branch Executive offices held in branch 300 by years: 1985-86 Service Officer: 1987 Sgt.-At-Arms; 1988 First Vice-President.

- Comrade Smith joined the Legion in Winterberry branch 99 in 1955. He was one of the first members to realize the necessity of carrying the Legion work and principles to the rural areas and using his home for organizational meetings. He was largely instrumental in forming Seaview branch 300. The charter was obtained in 1975 with Comrade Smith as a charter member.

- Comrade Smith has been a member of the Executive without interruption since the formation of the branch. It is in service work he has excelled. He gives freely of his time and remarkable abilities to all Veterans in the area and serving in such a manner, which has left very little to be desired
- He has served continuously on several committees including poppy and welfare. The Poppy Committee in particular claimed a great deal of his time. He is still Poppy Chairman, although he has had to curtail some of his other Legion activities in recent weeks owing to deterioration in his health.
- In a branch of this size and location, it is apparent that fund raising is at a minimum, with socials and entertainment almost the sole method available. Comrade Smith has been predominant in helping to organize and carry out these efforts. His self-appointed job was to ensure that only those who were a credit to the Legion were admitted to the functions.
- Comrade Smith has had almost perfect attendance at branch meetings since its formation and at almost all zone meetings.
- With his military background, he was a perfect choice to act as Parade Marshall at all branch Parades as well as Judge and Chieftain of the Day at the Legion Highland gathering.
- His background has singled him out as a member of the reviewing stand, formally representing the Legion at both Legion and non-Legion functions.
- This branch, being small and limited in executive material and dependable workers, has consistently called on Comrade Smith to carry out multiple duties and to his credit that he has never failed to carry out what is asked of him.

Long Service Badges - Qualification

Eligibility for long service badges (25, 30 etc.) is based on the nominal roll provided by Dominion Command. As an example, if the nominal roll shows 25 years of membership, application can be made immediately for a 25-year pin. If the nominal roll shows one year less, application for the badge cannot be made until payment of dues for the following year. See the Dominion Command *Ritual Awards and Protocol Manual* for more information. Long service pins are ordered from the Dominion Command Supply Department.

Awards to other than Legion Members – Branch Honorary Membership

Any branch may honour local dignitaries and community leaders by granting honorary membership for outstanding service. No per capita tax shall be payable in connection with honorary membership and no records will be maintained at Dominion Command. Branch Honorary members have social privileges in the granting branch only. Branch Honorary members have no vote and may not hold office. They cannot attend General meetings or Executive Committee meetings unless invited for some specific purpose.

Certificate of Appreciation

See Dominion Command *Ritual, Awards and Protocol Manual*

Certificate of Merit

Actioned at the level they are submitted. Branches will review and award their own Certificates of Merit, as will the zones. See Dominion Command *Ritual, Awards and Protocol Manual*.

Media Award

See Dominion Command *Ritual, Awards and Protocol Manual*. The BC/Yukon Command Honours and Awards Committee must approve. Send the completed application to the Command office.

Friendship Award

See Dominion Command *Ritual, Awards and Protocol Manual*. The BC/Yukon Command Honours and Awards Committee must approve. Send the completed application to the Command office.

Founders Award

See Dominion Command Ritual, Awards and Protocol Manual. Nominations are to be submitted to recognize the achievement, of those from outside the Legion. This is a new section.

50 Year Long Service Medal

Any member awarded a 50-year medal can by request from the branch; receive a letter from the BC/Yukon Command President and Membership Chairman. Provision of the letter can take up to 4-6 weeks. If the branch presents a 50 year pin to a member, a congratulatory letter from the BC/Yukon Command President should be requested.

References:

- Ritual, Awards and Protocol Manual
- Branch Manual

POPPY CHAIRMAN

The *Poppy Manual* contains detailed instructions on how to run a poppy campaign. In addition, each year BC/Yukon Command issues Poppy Workshop Notes to Zone Commanders to use as a guide in setting up their annual poppy workshops.

POLICIES

Poppy Fund Assistance

Some Service Officers are under the misconception that Legion membership has something to do with assistance from the poppy fund. This is entirely untrue. Legion membership is absolutely irrelevant. What is relevant is the area in which the needy ex-serviceman or dependent lives. Poppy fund money is trust money raised within the community for use within the community. Poppy funds have to be used to help the clients within the area where the poppy funds money were raised.

If the Poppy Chairman is in doubt about whether a person qualifies for assistance or if there is concern that the person requesting funds is giving false information you can call a Command Service Officer for more information and assistance. PEC members needing assistance are required to apply through the Command Service Officer.

The money collected during the annual Poppy and Remembrance Campaign does not belong to the Legion but the Legion is responsible for these funds. These funds have been contributed by the public in your community to honour the memory of those who paid the supreme sacrifice. In short, the funds are Public funds and the Legion is charged with the trust of overseeing their disbursement in accordance with the *General By-laws* (Branches should refer to the Poppy Manual for information as to proper and improper uses of poppy funds. The *General By-laws* also covers disbursements from the poppy fund). Poppy funds must be well spent, BUT THEY MUST BE SPENT. There is no place for the thrifty Poppy Chairman whose sole ambition is to accumulate poppy funds for when they may be needed in the future. At least 90% of the funds collected each year should be expended.

The most common problem found when conducting poppy audits is that branches still seem to misunderstand the need for prior approval from Command when it comes to ANY special use expenditure under the *General By-laws*. The other common practice is provision of a blanket amount each month to the Service Officer to cover mileage. A chit showing the number of km driven and the rate that is reimbursed for km driven must support reimbursement for mileage. If you have any questions about the process of reimbursing for out of pocket expenses, please contact the Command Accountant.

The BC/Yukon Command conducts poppy audits as a means of ensuring that poppy trust money is handled according to the *General By-laws*. Commands are required to ensure that every poppy fund can stand the scrutiny of the public and the media when it comes to distribution of poppy fund money. If negative

publicity occurs as a result of improper handling of any branch poppy fund the whole organization could feel the impact. Branches are asked to cooperate fully when the Command contacts the branch about an internal poppy audit.

Poppy Canvassing

The *General By-laws* state distribution will commence no earlier than the last Friday in October and conclude on 11 November.

Poppy Campaign Modernization

In recognition of the reality that increasing numbers of people do not carry cash, we know that this will begin to impact overall collections. Poppy money is public trust money. All branches are expected to include the information about mobile cell phone donation in their Poppy Campaigns. It is not acceptable for a branch to assume that this method of donation collection is in competition with local fundraising, it is to support the overall giving of all communities into the poppy fund. The target audience for cell phone donations is a fast growing number of people and our organization is recognized as a leader in modernization for offering this option.

Poppies/Wreaths - Exemption from Provincial Tax

Poppies and wreaths are exempt from HST.

Poppy Funds - Registration of Poppy Fund for Income Tax Purposes

Policy established by the Executive Council gives guidelines for branches to apply to BC/Yukon Command for authorization to register poppy funds as a charity. **It is discouraged by Command due to the stringent legal filing requirements and penalties for those who do not file the necessary returns.** The branch must sign a Memorandum of Understanding with Command confirming that they are taking personal responsibility per the specific regulations set by the Canada Customs and Revenue Agency.

Poppy Trust Account

The branch poppy fund MUST be kept in a separate account (this must be a "Trust" Account) in a bank and collections from the campaign deposited in this account. (NOTE: cash deposits during the poppy campaign are to be done daily). Signatories for the poppy account must be the same as for the general account as outlined in individual branch by-laws. The annual poppy campaign statement must be submitted to BC/Yukon NO LATER than October 31. A final reconciliation of all poppy funds in BC/Yukon Command must be forwarded to Dominion Command. This is vital because the poppy fund is made up of money received from the public and we must be in a position to give an accounting of our Trust.

Accounts covering purchase of poppy and wreath supplies must be paid to BC/Yukon Command by December 15. Branches should refer to the *Poppy Manual* for further information. The branch is responsible for the administration of its poppy fund and must have control over its disbursements. THE BRANCH MAY NOT ALLOCATE THIS DUTY TO ANY SUBSIDIARY.

Ineligible Poppy Fund Expenses

See *Poppy Manual* for a list of expenditures NOT authorized for poppy funds.

Use of poppy fund money for the operation of "Legion Service Bureau" at the branch level is not permissible. However, it should be noted that the long standing policy of BC/Yukon Command is: concerning the payment of expenses for the operation of a Branch Service Bureau, it must be remembered The Royal Canadian Legion was formed for the specific purpose of service to the Veteran. The operation of the Service Bureau is the primary responsibility of the branch and not of the poppy fund.

When it comes to expenses surrounding Remembrance Day and its promotion within the community do not forget that Gaming has given us all kinds of examples of how gaming money can be used for community events including Remembrance Day. If you have any questions, contact BC/Yukon Command.

Guidelines with Respect to Awarding Bursaries from the Poppy Fund

The Executive Council established a procedure for use by branches if they wish to use Poppy Trust Fund money for bursaries. Guidelines are available from the Command office upon request.

Eligibility

Recipients must be children, grandchildren or great grandchildren of ex-service personnel as specified in the *General By-laws*. These are bursaries given on the basis of financial need as opposed to scholarships given on the basis of scholastic ability. Command has a generic type of bursary application and a copy can be provided upon request.

A member of the Executive must interview each applicant. Legion membership within the family is NOT a requirement. Poppy Fund money can be used only to assist students in your geographical area. Remember poppy trust money is to be expended in the community in which they are collected.

You have to use common sense – in most instances you know the families in your communities and their circumstances (particularly in the smaller branches) so exercise common sense. If the community learned you were giving bursaries to students from families with incomes above \$50,000 – the worst we have seen is \$80,000, then perhaps criticism is justified. Whoever is making the decision on selection of candidates has to feel comfortable in their knowledge that “financial need” is a factor.

Cheques for authorized bursaries should be sent directly to the learning institution. Make your cheque payable to that institution and send a cover letter. The reason you should send the cheque to the school is to avoid situations where the student, for whatever reason, has a change in plans and fails to register at the school but has already been given the bursary directly. It is almost impossible to get the funds back under those circumstances. Should the student fail to complete the term, careful consideration must be given to any future applications.

Branches are encouraged to include their bursary poppy fund recipients in any awards ceremony the branch has planned for other donations made to the community.

Bursaries awarded at branch level under these guidelines are reported on the annual Poppy Fund statement filed with the Command office by 31 October. Command reviews the annual statements. If a branch exceeds the authorized amounts, or fails to comply with these guidelines, the branch may be required to reimburse the Poppy Trust Account.

Branches MUST safeguard against any conflict of interest or even the perception of a conflict. You have to be particularly careful if an application is received from the family of a member who is on the selection committee. On occasion when this happens the branch member specifically involved is well advised to completely withdraw from any of the selection or decision-making processes. Participating in the selection process only allows for allegations of a conflict of interest at a later date.

It is hoped that in spite of the decision of the BC/Yukon Executive Council to discontinue the Command level Bursary program that through local bursaries given by branches and auxiliaries that the Legion can ensure all children, grandchildren and great-grandchildren of ex-service personnel will get help with their education.

Before a branch can use poppy funds for local bursaries the Certificate of Understanding on the Poppy/Bursary Agreement must be signed and registered with the Command office. If you don't know if you are registered contact the Command Office.

Remembrance Day - Order of Parade

Refer to the *Dominion Command Ritual and Insignia Manual*.

Remembrance Day - Order of Laying Wreaths

Refer to the *Dominion Command Ritual and Insignia Manual*. It is not regular practice for representatives of the Ladies Auxiliary to lay a wreath at a cenotaph on Remembrance Day. It is considered the wreath laid on behalf of The Royal Canadian Legion represents the organization in general. As far as proper protocol, the position of a Ladies Auxiliary representative presents some difficulties. However, it would be acceptable if the L.A. representative and the Legion representative laid their respective wreaths together. The matter is left to local autonomy.

National Essay, Poem and Poster Contest

Schools and branches are provided with promotional material at the beginning of September of each year. Branches are provided with a copy of the mailing as well. The zones that have the most successful level of participation do personal follow-ups. It is suggested that as soon as you receive the mailing you make immediate arrangements to follow-up. The deadline date for submission of entries is:

November 15 - schools to submit to branches
December 15 - Branches to submit to zones
January 15 - Zones to submit to BC/Yukon Command

Zones submit to Command Office only the 1st place entry in each event. Because of the long-standing policy adopted by the BC/Yukon Executive Council it will not be possible for BC/Yukon Command to accept late entries. After January 15 no submissions will be accepted at this office.

BC/Yukon Command Central Poppy Fund

This fund is derived from branch poppy fund assessments on Poppy fund revenue for the Poppy Year. The percentage assessment rate is currently 4.5% and is remitted to Command in two installments: due January 31st and October 31st.

These poppy funds are held by BC/Yukon Command in a Trust Fund and the General By-laws governs expenditures in the same way branch poppy funds are governed.

The purpose of the central poppy fund is to:

- Encourage more liberal expenditures on assistance at the branch level.
- Provide a central fund, from which any branch that conducted an annual poppy campaign and had through proper usage depleted its funds, could apply for and receive immediate replenishment.
- Operate the Command Service Bureau

The central poppy fund is available to replenish branch poppy funds that are depleted through proper usage before the following annual poppy campaign. Grants to individual branch poppy funds cannot be requested for the sole purpose of the branch's wish to make its own special use expenditures.

Replenishment of Branch Poppy Fund

If the branch poppy fund is limited and there isn't enough money to support needy ex-service personnel and their dependents you should apply for a grant from the central poppy fund. You must provide the following information:

- balance at November 1 of the previous year
- receipts from November 1 to the date of application
- breakdown of expenses for same period
- present balance
- amount disbursed in previous year for the period similar to date of application through to 15 November
- an indication of the amount required to support the poppy fund until receipts start coming in from the next poppy campaign

A branch cannot apply for a grant from the poppy fund in order to make special use expenditure under the *Poppy Manual*, replenishment must be for the sole purpose of assisting ex-service personnel in need and their dependants. Requests for reimbursement are processed quickly. There is no delay as long as the above information is provided.

Poppy Trust Funds - "Special Use" Provision

All expenditures involving "special use" provisions require prior approval by a branch general meeting. The branch must provide written confirmation of the authorizing date along with a description of how the funds are to be used. Depending on the applicable section of the *Poppy Manual*, BC/Yukon Command must be provided with the appropriate balance in the poppy trust account.

ALL special use expenditures require the PRIOR approval of BC/Yukon Command – regardless of the amount. The Executive Council has delegated authority to the Executive Director and the Command Treasurer to deal with requests of less than \$5000. Any expenditure involving more than \$5000 must be considered by the BC/Yukon Admin Committee. Approval is all done electronically so approvals are normally processed within a week. This is a requirement of the *Poppy Manual*. To assist branches in making sure full details are provided at the time of request Command has developed a request form. Copies are available upon request from the Command office.

A policy was adopted at the October 2011 PEC meeting that within 30 days of a special use expenditure (SUE) being passed at the branch level, the SUE has to be submitted to BC/Yukon Command office for approval.

The largest portion of the Command Poppy Fund provides the funding to support the Command Service Bureau which includes two professional Service Officers. Both Service Officers carry full workloads in their positions. Between the two they each manage on average 66 active cases in addition to the daily calls on available housing, death benefits, VIP benefits and a myriad of questions related to seniors' issues. These Service Officers also provide direct support to the Branch Service Officers who phone for advice and direction to help the Veterans and seniors in their communities.

The support we provide to Veterans and seniors is the Legions reason for existing. As an organization it is committed to meeting the needs of Veterans, RCMP and their families both serving and retired.

In addition, the Central Poppy Fund is used to cover the expenses of the national literary and poster contest. That means mailing costs to more than 2200 schools in the Command. In addition, there are monetary prizes for the Command winners in each of the categories. There is also a Two Minute Wave of Silence campaign and run the required ad in the Vancouver Sun and Province with respect to the notice to the general public as required by the *Poppy Manual* with respect to potential special use expenditures as authorized under the *Poppy Manual*

References:

- Poppy Manual
- Branch Manual
- Rituals Awards and Protocols Manual

MEMBERSHIP CHAIRMAN

Command has software for managing membership at branch level. Contact the Command office to access this software, it is free of charge.

The Branch Membership Committee duties are vital to the survival of the branch and to the continuity of The Royal Canadian Legion. Because there are so many different membership programs and duties to maintain it is essential a branch has two sub-committees – a Renewals Committee and a New Members Committee. The two sub-committee Chairmen should always coordinate their activities.

Each sub-committee will have different goals to attain but need to work together to achieve maximum efficiency.

When using any of the above sources of information, be sure you have the latest up-to-date copy. The Membership Manual contains general information on membership as well as rights and privileges, proof of eligibility requirements and the history of membership categories. The *Membership Manual* is full of information on membership such as processing, forms and materials, reports, administrative duties and helpful hints. The *Membership Manual* is a must have for each Membership Chairman and provides information on the responsibilities of a Membership Chairman as well as information on recruitment, retention, promotional material, communication and administration. Membership bulletins from BC/Yukon Command also provide up-to-date information to branches as new programs and ideas are developed.

The first task for the newly formed sub-committees is to review the calendar for the coming year's activities. Membership work goes on every month, all year long. The calendar is a list of "Important Dates" pertaining to membership such as the early bird campaign, deadlines for renewals and per capita tax payments in the Membership Processing Guide.

The second task for each sub-committee is to set goals on your calendar in percentages and numbers. Use last year's figures to set reasonable goals that can be attained and yet will increase the rate of renewal and the number of overall members. (i.e., what percentage of renewals can the branch attain by January 31 or how many new members can be initiated by June 30, etc.) It is important to keep the figures up-to-date and report progress at each general meeting.

Member Benefits

As a non-profit, membership supported, volunteer organization, the Legion enjoys an actively engaged strong membership. As a service to our members, we are proud to offer our BC/Yukon Member Benefits Program. You can find a current list of our member benefit partners on our Command website at <https://www.legionbc yukon.ca>.

Some of the Command partners offer products and services to Legion members in good standing; often with discounts or extra benefits. Make sure you promote our Member Benefit Program to your new members. This program is meant to help branches with both retain of members and recruit new members.

RENEWALS COMMITTEE

The following programs and related duties are to be maintained by the Renewals Committee.

Renewal Campaign

By mid-January, the committee should be writing to members who have not fully paid their dues to remind them of the January 31 deadline. Anyone who has not paid the full amount by this date becomes a delinquent member, which means they cannot hold any office, they must be signed into the lounge as a guest, their Legion magazine will be cancelled and any other privileges will cease. Per capita tax payments for January must be RECEIVED by Dominion Command by February 6, or the member's Legion magazine will be cancelled. By mid-February, the committee should be phoning any members not yet paid up to check and see if everything is all right.

Non-Renewals Mailers

All non-renewals should be contacted to see if they have a problem that can be overcome. Sometimes a little misunderstanding can be cleared up which would otherwise cost the branch a member.

Proper deceased notices (either Last Post Notice or change of status form) must be sent to Dominion Command. For more information on the proper use of deceased notices, check the *Membership Manual*. It is very embarrassing to be confronted by a widow/widower with a non-renewal

mailer in their hand addressed to their deceased spouse. Non-renewal mailers contain a notice informing the recipient their dues are not yet paid and an envelope addressed to the member's branch. The Command Membership Committee can assist in printing dues notices. Contact the Command office for information.

Early Bird Campaign

This job should be much easier now that branches receive all their membership cards prior to the start of the Early Bird Campaign, which runs from September 1 to November 30. Notices should be sent out to all members encouraging them to be an Early Bird; emphasizing the fact their new card is waiting for them at the branch. Some incentives can be offered such as a monthly draw for prizes or cheaper dues, etc. Set a reasonable goal, compared to last year's percentage, of how many Early Birds your branch should be able to attain. Keep the 3R Branch Membership Chart up to date and report progress at general meetings. Set up a membership table in the branch whenever possible to promote the campaign and collect dues.

Be sure to remit per capita taxes to Dominion Command at least once a month. Dominion Command must RECEIVE your final remittance of Early Birds by December 15 in order to qualify as Early Birds. See the *Membership Manual* for more Early Bird info.

Mandate

Statistics show the greatest loss of membership is attributed to non-renewals. Deaths account for only a small percentage of non-renewals. Although branches sign up many new members each year, there are more members who don't renew, causing the overall membership to drop. Sometimes these non-renewals were new members who were not encouraged to participate or perhaps did not see any activities that appealed to them, so they lost interest. Sometimes they are older members, even Veterans, who are not able to participate as much anymore or are institutionalized for their comfort. Offering services and paying attention to them can retain these members. The Renewal Committee should refer any problems or need of non-renewals to the appropriate Branch Committee Chairman to encourage member's interest by offering the necessary activities or services and thereby keeping the member in the Legion family.

New Member and Affiliate Committee

The first two steps for the New Member and Affiliate Committee is to make up a joint calendar with the Renewals Committee, and set goals to be achieved as the year progresses. The following guide will help the New Member and Affiliate Committee to plan their calendar and explain how to process a new member or affiliate through the system smoothly and as quickly as possible.

Membership/PR Campaign Booth

Setting up a membership information booth in public places such as malls, fairs, etc. is a good way to start recruiting new members and affiliates. The BC/Yukon Command Public Relations booths are a good tool to use, and are available upon request in writing. There are theme booths with photographs on subjects such as youth, seniors, military, Ladies Auxiliary, membership, sports, Foundation and Aboriginal.

BC/Yukon Command covers the expense of shipping the booth to the branch and the branch is responsible for the expense of returning the booth. It is a good idea to put in the request for the booth as far in advance as possible so as not to be disappointed should it be previously booked. This is especially necessary during November. If the booth is not available for when you need it, you can set up your own booth using membership pamphlets and brochures, the latest "Legion at Work in BC News Release", information on your own branch activities and accomplishments, etc. If possible, try to have a member of your branch Service Officer's Committee on hand to answer questions. It would also be a good idea to include an LA member as well. If you are in a community where you are targeting serving personnel please tell Command as there are specific handouts for serving personnel and specific PR Booths that feature serving military.

Information Cards

You should have information on hand of the different membership categories at a campaign booth and encourage interested parties to complete the appropriate forms. Should time not permit and/or required documentation is not available, use the Information Card provided by the BC/Yukon Command Membership Committee to get the interested party's name, address and phone number. If possible, set up an appointment with the potential applicant or call later to do so. The Information Card should also be used in the branch for guests who are interested in joining the Legion. Do not attempt to fill out an application until you can sit down and talk to the applicant who has brought all the information necessary for proof of eligibility/relationship. Applicants for membership must be investigated as required by the *General By-laws*. The information cards are available upon request from the Command office.

Statutory Declaration of Military Service/Relationship Form

The form can be used to sign up new members who are unable to immediately produce documents for proof of service/relationship. It is recommended that the applicant should still pursue the channels to obtain the necessary proof, in the meantime, and put copies of the originals in the member's file to satisfy any challenges. The Statutory Declaration Form must be administered and signed by a Commissioner of Oaths. Branches can have their own Commissioner of Oaths, which is usually a role taken on by the Service Officer. Application forms for Commissioners are available from BC/Yukon Command.

Membership Dues and Per Capita Tax

Per capita tax must be submitted weekly during heavy renewal times and then at least once a month the rest of the time. Dues should be collected at the time of application and held until approved by a general meeting. The timely and accurate submission of this information is critical as delays cause issue with members.

Accepting New Members

Application forms can be found on Dominion Commands website. New Member applications now include the initiation process on the application form. A general meeting has the right to vote non-acceptance of anyone applying for membership or a transfer. No one has an automatic right to membership. Pending their investigation, the Membership Committee should make a recommendation to the general meeting to accept. If any application for membership or a transfer is rejected the recommend procedures is to thank the member for the interest; indicate that at the present time the application has not been approved and return the dues payment. If you give a specific reason for the rejection, you could be subject to a libel suit. If the Membership Committee is not prepared to recommend acceptance of an application, contact BC/Yukon Command can be made for further specific advice. You want to avoid Human Rights challenges.

Transfers

The branch to which the member wishes to transfer must initiate the transfer. Transfers require general meeting approved before submission to Dominion Command. Branches do not have to accept application for transfer. Branches have the same rights of refusal as with new applications for membership. Secretaries, Membership Chairmen, etc., do not have the authority to authorize transfers. No forms should be submitted to Dominion Command until appropriate approval is given.

Transferring members must have paid the current or previous years' dues. If the previous year has not been paid, payment can be made at the old branch before transferring or at the new branch when transferring. If dues for the previous year are not made continuous years of service will be lost. Once notice of transfer is sent to Dominion Command a card in the name of the new branch will be issued if you return the old card stapled to the transfer application. Otherwise a new membership card in the name of the new branch will be issued after the first submission of per capita tax from the new branch.

If you accept a transferee and per capita tax has to be paid by way of a member registration form, staple the transfer application and member registration form together. The date of general meeting approval of a transfer is the effective date of transfer.

Membership – Transfer While Under Suspension

There is nothing to prohibit a member, pending a hearing, from transferring. Transfer will not interfere with the scheduled hearing according to the by-laws. No branch shall accept a membership or transfer application from any member currently under suspension or from any person who has been expelled.

Initiations

Voting Rights – New Members

Applicants become members with all privileges and voting rights upon general meeting approval, initiation and payment of dues. If the membership was approved at a general meeting for example in November, but the dues are paid for the following year, then they do not become members or have any privileges until January 1.

Branches should carefully monitor their own situations to ensure those who vote or run, as candidates at general meetings, are legally members in good standing. They must be in possession of membership cards for the current year or at least the nominal roll must show they are paid up for the current year.

Affiliate non-voting members are allowed to attend branch meetings and participate in debates but cannot enter into the voting process, including motions.

When a general meeting approves an application, the Member Registration Form is sent to Dominion Command with a covering branch transmittal form and the appropriate amount of per capita tax. Dominion Command produces a print out for each branch that shows membership activity in a month. BC/Yukon Command contacts any branch with no activity. Dominion Command will not refund per capita tax for members who pass away after paying their dues and before the start of the New Year. Branches must ensure that forms are fully completed. Problems and delays occur when branches do not provide indication as to Command code or branch number.

Mentor Program

A mentoring program is where someone with experience helps to teach new members by working with them for a certain period of time. Assigned mentors would work with new members on committees and projects, attend meetings with them, and keep them informed of what is going on and why. The mentor shows the ropes to new members, gently encouraging them to become productive members in a comfortable environment. The New Member and Affiliate Sub-Committee would be responsible for maintaining a list of volunteer mentors. Ideally, the mentors should be present at the Initiation Ceremony of their new charges. Mentor guidelines are available from the Command office upon request.

New Member and Affiliate Committee Mandate

As you can see there are a lot of responsibilities for the committee to maintain. Basically, the responsibilities boil down to the following:

- The committee is to ensure qualified new members are encouraged to join, are initiated and welcomed into the branch family with proper training. It is also necessary to ensure all record keeping and per capita taxes are processed accurately and on time.

Needless to say, the more committee members you have, the more spread out the workload will be. Committee members will work for you provided you don't overload them and you let them know they are an important part of the branch. Membership is the very foundation of every branch.

Applications for Voting Membership

The branch must maintain a file on every member containing a complete history of the member's activity in the Legion. If a member transfers the file must be forwarded to the new branch. Dominion Command does not maintain individual member files and cannot provide historic information pertaining to a member's Legion activities. Applications are available through Dominion Command's Membership Department. The Membership Processing Guide issued by Dominion Command explains the processes involved in submitting per capita tax.

Do not overlook the significance of the information on the application. This is how you recruit volunteers. Know the personal background of your members so you know their strengths and skills. Get them active on committees as soon as possible.

For specific membership qualifications refer to the *General By-laws* and the *Membership Eligibility Guide*. You must ensure that the Certificate on the bottom of each application is properly signed. Signature certifies that satisfactory proof of service was submitted. The application must be proposed and seconded by voting members of the branch. The branch Membership Committee must check the documentary proof of qualifying service of all ex-servicemen.

Dual Membership

No person except a member of a TVS or OSI branch can belong to more than one branch.

Years of Continuous Membership

Correction on membership cards is made by submission of a Member Data Change Form to Dominion Command. The years of continuous membership are corrected and a new membership card is issued. Dominion Command records the number of years of continuous service a member may be recognized with by showing this number on membership cards and on the Branch Membership Registers. All categories of membership listed earn years of service for continuously supporting the Legion without interruption of payment of dues; however, this was not always the case. Some categories such as Fraternal Affiliates, Honorary and Meritorious Life members did not accumulate years of service. These members only began accumulating years of service when their category changed to one that did earn years of service. For information on years of continuous service please refer to Dominion Command's *Membership Manual*. Long service pins are ordered from the Dominion Command Supply Department.

Per Capita Tax Submission – Reduced Rates - New Members At 30 June and 31 August

See *General By-laws* section 1203.

Reinstatements - Payment of Arrears

Description of Reinstatement is outlined in the *Membership Manual*.

"Good Standing" Deadline Date

A member not paid up by 31 January is not "in good standing" for any purpose. Such member is constitutionally prohibited from holding office and has no right to attend general meetings. Such member cannot be a voting delegate at zone meetings or enter the licensed premises of a Legion unless signed in by a member who is in good standing. Once the yearly membership dues have been paid, the member is considered to be "in good standing." A member may not hold office if dues are not paid by 31 December of the year prior to taking office.

Centralization and Computerization Basic Outline

Full details of procedures are set out in the *Membership Manual*.

References:

- General By-laws
- Branch Manual
- Membership Manual
- Renewal Calendar

PART VI - CAMPAIGN STARS AND WAR MEDALS

Enquiries with reference to issue or replacement of awards involving Imperials should be directed as follows:

Medal Contact Information

Veterans Affairs Canada's website: <https://www.veterans.gc.ca/eng/remembrance/medals-decorations/contact-information>

Service Records:

Library and Archives Canada

395 Wellington Street

Ottawa, Ontario

K1A 0N4

Telephone: 613-996-5115 or 1-866-578-7777 (toll-free in Canada and the United States)

Fax: 1-613-947-8456

Medal Information (First World War, Second World War, Korea-Army, Navy, RCAF, Merchant Navy):

Veterans Affairs Canada

Honours & Awards Section

66 Slater Street Ottawa, Ontario

K1A 0P4

Telephone:

Local: 995-5003

Toll Free: 1-866-522-2122

Fax: 1-613-947-3844

E-mail: vac.honoursandawards-decorationsetcitations.acc@canada.ca

Service medals related to the Canadian Forces:

Directorate of Honours and Recognition

National Defence Headquarters

101 Colonel By Drive

Ottawa, Ontario

K1A 0K2

Telephone: 1-877-741-8332; E-mail: DH&R_DDHR@forces.gc.ca

United Nation medals, Special Service Medal, Somalia Medal, Gulf Kuwait Medal, International Commission medals, NATO Service medals, Canadian Forces' Decoration and all Long service and good conduct decorations and medals, Canadian Peacekeeping Service medal, Chief of Defense Staff Commendation, OP Wings:

Directorate of Honours and Recognition

Building 347, Uplands Site

National Defense Headquarters

101 Colonel By Drive

Ottawa, Ontario

K1A 0K2

Telephone: (Toll free) 1-877-741-8332

Other Medals

Canadian Volunteer Service Medal for Korea, 125th Anniversary Medal, Jubilee Medals, Civilian Bravery Awards, Protocols for Wearing Foreign Awards: Government House Chancellery of Orders & Decorations

1 Sussex Drive
Ottawa, Ontario
K1A 0A1

Telephone:

Local: 993-3538

Toll Free: 1-800-465-6890

British Forces:

Ministry of Defense Medal Office
Service Personnel and Veterans Agency
Building 250
RAF Innsworth
Gloucester, UK
GL3 1HW
E-mail: medals@spva.mod.uk
Website: www.gov.uk/the-ministry-of-defence-medal-office

Murmansk Run Medal:

Embassy of Russian Federation

285 Charlotte Street
Ottawa, Ontario
K1N 8L5

Telephone: (613) 235-4341

Thank You Canada Medal (50th Anniversary of the Liberation of Holland)

Embassy of the Royal Netherlands
Constitution Square Building
350 Albert Street, Suite 2020
Ottawa, Ontario
K1R 1A4

Telephone: 1-877-388-2443; E-mail: info@dutchhelp.com;

Website: www.ottawa.the-netherlands.org/

Ambassador for Peace Medal (60th Anniversary of the Armistice of the Korean War)

Embassy of the Republic of Korea
150 Boteler Street
Ottawa, Ontario
K1N 5A6

Tel: 613-244-5010

E-mail: canada@mofa.go.kr

Website: <http://overseas.mofa.go.kr/ca-en/index.do>

Attention all Canadian Veterans of the Persian Gulf War (2 Aug 1990 - 27 June 1991)

The Embassy of Kuwait has commenced the distribution of the Liberation of Kuwait medal. To determine if you qualify for the medal and to complete the application form, visit www.embassyofkuwait.ca and fax or email application and proof of service to: Embassy of Kuwait, 333 Sussex Dr. Ottawa ON K1N 1J9 fax: 613-780-9999, email: info@embassyofkuwait.ca.

Replacement of War Service Badge Certificates (Mfm 95)

- If replacement of worn-out certificate is desired return original to War Service Records Division, VAC, Ottawa, Ontario.
- If replacement of lost certificate is desired it is necessary to supply full name, service number and serial number of badge.

A specific application is available from the Command Office for applying.

Application for Statement Of Service - Canadian and British

Forms are available from the Command Office with reference to obtaining a Statement of Service to replace lost or destroyed Discharge Certificates. A small fee is charged with respect to replacement of British documents.

Decorations and Medals - How to Wear Them

See *Ritual and Insignia Manual* on how to wear.

The order medals are worn in is important. Please follow the order of precedence link [here](#).

Wearing of Medals

Only the following medals and decorations are approved for wearing on a Legion uniform:

- Military medals and decorations authorized by the Government of Canada to be worn by Canadian citizens and to which the wearer is entitled.
- Royal Canadian Legion medals authorized by Dominion Command to be worn on Legion uniform and medals of other Veterans' organizations awarded to a specific member for service or special recognition.
- Awards received by Legion members from Veterans' and other organizations as authorized by Dominion Command, should be worn on the right breast after all Legion awards. These awards as authorized by Dominion Command are worn in the order they are received.

Decorations and Medals - Wearing by Next-Of-Kin

A question that often arises is whether or not widows or sons and daughters and other next-of-kin are permitted or entitled to wear decorations and medals awarded to their deceased husband or father or other relative who earned the awards. This matter was taken up with some appropriate federal government officials some years ago by Dominion Command and the answer was that the only persons legally entitled to wear decorations and medals are the persons to whom they have been awarded.

Official Dress (Uniform) of the Legion – Prohibition against Unauthorized Insignia, Badges, Etc.

The *General By-laws* prohibits, on the official Legion dress, any insignia, badges or designs not authorized by Dominion Command.

There is clearly an increasing tendency for members to adorn their blazers with various types of insignia that have not been approved. These include embroidered badges or shoulder flashes that identify a Colour Party or a Pipe Band, etc. In one case, members of a branch Colour Party have been wearing rank designations for lance corporal, corporal, sergeant, etc. This is not authorized and is not acceptable according to the constitutional provisions of the *General By-laws*.

Unofficial Medals

The "Normandy Medal," "Dieppe Medal," "Murmansk Medal," "Monte Cassino Medal", "Malta Anniversary Medal" and other "unofficial medals" being promoted by an organization called Federation des Combatants Allies en Europe are unauthorized medals. None of these medals, sold by FCAEE, are recognized for wearing on the Legion uniform, either on the right side or the left side. These unauthorized medals include several designated as "military service medals" the awarding of which is attributed to the Polish Government in Exile.

Memorial Cross

The Memorial cross is awarded to mothers and widows (including foster mothers) whose son or husband died in war. It is not awarded to mothers or widows of servicemen killed during peacetime - just those who served in WW I or WW II killed in action or died while on active service or died subsequent to discharge from causes attributable to service. Also applies to Korean service. Where death occurs subsequent to release award is made to widow if she were married to the Veteran at time of discharge.

The Memorial Cross authorized in 1919 was issued with a purple ribbon from which the cross was suspended. In 1952 a brooch bar was added from which the cross itself is suspended. A length of purple ribbon is still issued with the cross and the recipient decides whether to wear it with the ribbon or suspended from the bar.

A recipient of the cross can donate it to anyone on her death and this second person can then wear it. Once a person has properly been awarded a cross, she can wear it any time and in any manner despite the fact she may have remarried.

Appendix A



BC/Yukon Command Performance Standards Policy

The Performance Standards describes operational characteristics which Legion branches are expected to have in order to effectively carry out the programs and purpose of the Royal Canadian Legion and protect the members and communities which branches serve. In general, a branch performing to the standard mentioned below actively participates in zone meetings, activities and training opportunities, communicates responsively with the public and Legion community, and operates a financially stable branch including the Licensed Premises.

Specifically, these Performance Standards expected of branches in order to maintain their Legion charter are identified as the following:

1. Submission of annual audited financial statements to BC/ Yukon Command by April 30th of the following year – sect. 133b
2. Submission of annual poppy fund statements to BC/ Yukon Command by October 31st (i.e. one month after year-end) – sect. 133c
3. Submission of membership per capita tax to Dominion Command on a regular basis – sect. 1205
4. Submission of complete list of executive members to BC/ Yukon Command in a timely fashion
5. Maintaining adequate branch accounting and financial reporting systems – sect. 133a
6. Maintaining current payments of all liabilities in all funds
7. Maintaining current remittances of amounts due to the Federal and Provincial Government
8. Maintaining appropriate insurance coverage through the Command Group Commercial insurance program
9. Compliance with Gaming regulations¹
10. Compliance with Liquor regulations
11. Compliance with Lottery regulations²
12. Compliance with The General, BC/Yukon Command, and Branch By-laws
13. Compliance with Dominion and BC/Yukon Command approved Policies³
14. Compliance with [Zero Tolerance Policy](#)
15. Compliance with all agreements entered into by the branch
16. Obtaining general meeting approval for all branch expenditures, in accordance with branch by-laws

17. Obtaining BC/Yukon Command approval for all financing or refinancing relating to the branch and involving property held by the branch, including lines of credit and credit cards and redevelopment plans

¹ Submitting of proper forms and obtaining proper licenses.

² Including the Lottery Retailer Code of Conduct

³ General By-Laws sect. 103.b. and 106.a - i.e. not preparing budgets, not having monthly financial statements.

18. Obtaining BC/Yukon Command approval for all financial agreements entered into by the branch for:

- a) a dollar amount more than \$5,000
- b) the purchase or sale of real property – sect 120
- c) a commitment to build or change branch property – sect 120
- d) a new branch building – sect 120
- e) undertaking major alterations to branch property and assets – sect 120

19. Obtaining BC/Yukon Command approval for the transfer of branch funds into a Society

Note: Federal or Provincial Collection of unpaid trust funds

The Federal and Provincial Government both have the ability to freeze bank accounts of any branch with outstanding payments on their account. They will withdraw funds owing from any account without regard for restrictions on gaming and poppy accounts if not appropriately protected by your banking documents.

In this garnishee scenario, the Canada Revenue Agency has the right to seize all branch monies. The risk is as a non-profit operation; the Legion could lose the ability to function as a non-profit if deemed to be incompetent regarding financial reporting.

In order to protect the best interests of the branch, the members and the organization as a whole, the BC/Yukon Command continues to take a proactive role to help keep branches in compliance with all government agencies.

Graduated Procedures when Performance Standards are not met

The Performance Standards Policy operates most effectively to help a branch achieve its potential when the following progression is followed, never the less, in severe situations a branch may be placed directly at any level of this process depending on the circumstances.

Action to place a branch under Trusteeship requires approval of the Admin/Finance Committee upon recommendation of the Branch Advisory Operations Committee.

Level I – Flagging

The purpose of flagging is to communicate and address issues when a branch is not meeting the BC/Yukon Command Performance Standards. Alternatively, a branch is able to initiate this process by requesting assistance from Command. During the flagging process the Zone Commander, under the mandate of the Branch Advisory Operations Committee BA(O), is the Command contact who will guide the branch in improving operations to the expected level of performance. The Zone Commander has a wealth of experience and resource material to help troubleshoot issues that stand in the way of the branch attaining this goal. The Branch Operation Advisors are available and willing to help in any way they can in the process. Once the flagging process has been initiated the branch will receive an official letter that the branch is flagged or has requested assistance from the Branch Advisory Operations Committee. During this process the branch must submit monthly financial statements and all executive and general meeting minutes to the BC/Yukon Command's Branch Advisory staff. This flagging process is an opportunity for the branch to receive support from the Zone Commander in order to achieve the Performance Standards.

The following is the flagging process from a branch perspective:

- a) An official letter from the Branch Advisory Operation Committee is sent to the Branch President and Executive outlining the Performance Standards not being met and includes:
 - i. a suggested plan to remedy the issue
 - ii. a description of the Zone Commander's role in monitoring progress and assisting the branch
 - iii. a time frame within which the performance standard is to be achieved
- b) A record of receipt of this letter must be included in the executive committee meeting minutes. The membership must also be made aware of this action at a general meeting. Minutes of both meetings are to be provided to the Branch Advisory Operations staff within 7 days of the meetings.
- c) Steps taken by the branch to achieve the Performance Standards will be monitored by the Zone Commander in consultation with the Branch Advisory Operations Committee and if required, a representative from the Branch Advisory staff.
- d) At the end of the time frame, the Zone Commander will prepare a report to the Branch Advisory Operations Committee which upon review decide either:
 - i. the branch has met the Performance Standards
 - ii. the branch has not been able to achieve the Performance Standards within the time frame and needs to be advanced to Level II - Probationary Management

Level II - Probationary Management

The purpose of the Probationary Management process is for Command to become more involved in assisting and supporting a branch that is experiencing difficulty in meeting Performance Standards.

During the Probationary Management process, a Probationary Manager will be assigned to generate a list of corrective actions and to guide the branch in addressing the issues at hand. Branch Advisory staff are available to help based on geographic location and or topic expertise. They possess experience in branch operations and can provide guidance to the branch in determining the steps required to move forward in fulfilling the specific requirements provided by the Branch Advisory Operations Committee.

During this process the branch must submit monthly financial statements and all executive and general meeting minutes to the BC/Yukon Command's Branch Advisory staff. The branch's members and executive will take responsibility for the operations of the branch in achieving the Performance Requirements with oversight from the Probationary Manager. Consequently, the Branch may be invoiced for letter mailings and travel costs incurred by their Probationary Manager. Probationary Management is an integral opportunity for the branch's Membership and executive to rise up and address shortfalls in meeting the Performance Standards and take ownership of branch operations. The decision to place a branch on Probationary Management can only be actioned upon by the Branch Advisory Operations Committee.

The following is the Probationary Management process from the branch perspective:

- a) A letter from the Branch Advisory Operations Committee is sent to the Branch President, Executive and possibly the General Membership outlining performance standard issues and advising them of the action being taken to place the branch on Probationary Management. The letter will include:
 - i. a description of the probationary management process, including the necessity for an initial meeting with the appointed Probationary Manager who will work with the branch on corrective actions related to the resolution of the issues at hand. The process also includes a follow-up meeting to evaluate progress and determine if the issues have been successfully resolved
 - ii. if applicable, the process of invoicing the branch for expenses related to Probationary Management
 - iii. the requirements to submit monthly financial statements and monthly meeting minutes
 - iv. the possible outcomes of the Probationary Management process
- b) The Probationary Manager meets with the branch executive to discuss the Performance Standard issue and executive committee liability. The outcome of the meeting is:
 - i. a list of corrective actions to address the performance standard
 - ii. a timeframe that the directives must be implemented
 - iii. a date for the follow-up meeting with the Probationary Manager
- c) The branch sends a copy of the executive committee meeting minutes covering the above meeting and the general membership meeting minutes to the Branch Advisory staff.
- d) The branch takes steps during the timeframe established to become compliant and their progress will be under the Probationary Manager's scrutiny.
- e) A report is given by the Probationary Manager with their findings and recommendations to the Branch Advisory Operations Committee that the branch:

- i. be removed from Probationary Management
- ii. remain on Probationary Management and receive a second directive letter resulting from the meeting
- iii. be escalated to Trusteeship

***Any of the above decisions can only be actioned upon recommendation to the Admin/Finance Committee through the Branch Advisory Operations Committee.**

Level III Trusteeship

The purpose of a Trusteeship is for BC/Yukon Command to take control of a branch when an executive is not able, for whatever reason, to meet the Performance Standards. In order for a branch to escalate to Trusteeship the operational deficiencies must be severe enough to compromise the interests of the branch members in carrying out the mission and purpose of the Royal Canadian Legion. The branch will bear all the costs related to the Trusteeship as it is the responsibility of the branch to operate to the level that the Performance Standard requires.

All details relating to the Trustee's authority will be included in the letter from the Command President. The aim of a Trusteeship is to restore the branch's operations to a level consistent with the Performance Standards. The Trusteeship process provides an opportunity for members to support the Trustee(s) and revive the branch.

- a) An official letter from the Command President is sent to the Branch President, Executive and Membership outlining performance standard issues and advising of action to place the branch under Trusteeship. The letter will include:
 - i. a description of the shortfall(s) in meeting the Performance Standards and the failed attempts by the executive to repair the situation
 - ii. the appointment of a Trustee who reports to the Branch Advisory Operations Committee
 - iii. a description of the specific levels of authority being assigned to the Trustee
 - iv. a time frame set by the Admin/Finance Committee
 - v. the process of invoicing the branch for expenses related to the Trusteeship.
- b) BC Yukon Command President appoints a Trustee to carry out the mandate outlined in the above letter and conduct meetings for volunteer management positions and general membership with costs paid by branch.
- c) The Trustee reports directly to the Branch Advisory Operations Committee. The frequency of this reporting will be determined based on the severity of the shortfall.
- d) At the end of the time frame set by the Admin/Finance Committee the Trustee reports his recommendations to the Branch Advisory Operations Committee, either:
 - i. returning the branch to an elected executive
 - ii. continuing the current Trusteeship under a new time frame (issue a new letter to the branch)
 - iii. closure of the Branch.

Approved at April 2017 PEC meeting, amendments approved Oct 2018 PEC meeting

Appendix B



Branch Advisory Requirements Checklist

now

Expenditures of ~~\$5,000.00~~

10,000 —

TO: Branch #XXXX
FROM: Veronica Brown, Deputy Executive Director
SUBJECT: Branch Expenditure Over \$5,000

Please forward all documentation to the Branch Advisory Coordinator at info@legionbcyukon.ca

The following documents are required in order for Branch Advisory Operations Committee to consider approving any expenditure over \$5,000.00. This includes any money relating to a grant (ie. New Horizons)

- A letter outlining the project(s) and expenditures planned.
- A copy of the year-end financial statements to December 31, 2017 which will include the balance sheet and income statement, along with the schedules for both breakopen ticket sales and canteen sales.
- Year to date Financial Statements for the previous three months.
- Copies of the minutes of the General Meeting approving the expenditure(s).
- Copies of the competitive bids for the project(s) as required by your branch by-laws.
- Confirmation that the Branch has Directors&Officers Liability Insurance coverage for the Executive Committee and it is paid up to date.

When undertaking a renovation project, such as re-carpeting, it is important to consider if the actions of individuals physically working are insured:

- For paid contractors, ensure that the companies or individuals are insured with WorkSafe BC by obtaining a clearance letter from the WorkSafe BC website; if they are not insured, then contact WorkSafe BC directly for advice on determining who is responsible for paying WorkSafe BC premiums.
- When volunteers are used in the renovation process, then please contact the Branch's insurance provider to inquire if they will be covered by insurance if an accident were to occur involving the volunteer in question.

Appendix C



Branch Advisory Requirements Checklist Requesting a Loan

TO: Branch #XXX

FROM: Veronica Brown, Deputy Executive Director

SUBJECT: Branch Financing

Please forward all documentation to the Branch Advisory Coordinator at info@legionbcyukon.ca

The following documents are required in order for Branch Advisory Operations Committee to consider before approving a loan request:

- A brief report describing the need for the loan, amount requested and details of intended use.
- Documentation from the bank
 - The amount of the loan requested
 - Terms of borrowing
 - Interest rates
 - Security required (if any)
- Year-to-date financial statements for the previous three months
- Financial Statements from the previous year
- Minutes of approval from a general meeting
- Insurance coverage showing that the branch has the appropriate Directors and Officers (D&O) liability insurance.
- A business plan which demonstrates how the branch will pay back the loan

Please work with your Branch Operations Advisor (BOA) if you need assistance completing a business application.



Branch Advisory Requirements Checklist Requesting a BRASS Loan

TO: Branch #XXX
FROM: Veronica Brown, Deputy Executive Director
SUBJECT: Branch Financing

Please forward all documentation to the Branch Advisory Coordinator at info@legionbcyukon.ca

The following documents are required in order for the Branch Advisory Operations Committee to consider recommending a BRASS loan to the Admin/Finance Committee:

- A report demonstrating why the branch needs a loan
- If the request is for a capital purchase, please include 2 quotes as required by your branch by-laws
- Year-to-date financial statements for the previous three months
- Financial Statements from the previous year
- Minutes of approval from a general meeting
- Insurance coverage showing that the branch has the appropriate Directors and Officers (D&O) liability insurance
- A business plan which demonstrates how the branch will pay back the loan

Please work with your Branch Operations Advisor (BOA) if you need assistance completing a business application.

Appendix D



Branch Advisory Requirements Checklist Sale of Property

TO: Branch # XXX

FROM: Veronica Brown, Deputy Executive Director

SUBJECT: Sale of Branch Property

Please forward all documentation to the Branch Advisory Coordinator at info@legionbcyukon.ca

The following documents are required in order for Branch Advisory Development to consider approving or considering a sale of branch property.

- A brief report which describes why the sale of the building is in the best interest of the branch and an explanation of how the proceeds will be managed (use of funds) i.e. A business plan documenting how the branch will manage the funds received from the sale
- Property appraisal (performed by a professional appraiser)
- Most recent property tax assessment
- A copy of the proposed Real Estate Listing Agreement with your Realtor, for approval, before you sign it
- A copy of the contract of sale, or the party indicating interest to purchase the property
- Year-to-date Financial Statements for the previous three months
- Submitted Financials Statements for the previous year
- Documentation related to the compliance with Section 121.c of the General By-Laws:

Copy of written notice to members for the Special General Meeting which was mailed to members at least 14 days in advance of the meeting;

Minutes from the Special General Meeting which shows that at least two-thirds of the members who were present voted in favor of the motion to sell the property (you will need to count votes and record these in the minutes for and against)

The Branch Advisory Development Committee will review the information package, and get back to you as soon as possible, to not hold up on your listing.

Very Important: Once you get an offer, your branch has to come back to Branch Advisory Development Committee, to get final approval to sell, at the agreed price.

Appendix E



Branch Advisory Requirements Checklist Property Redevelopment

TO: Branch # XXX

FROM: Veronica Brown, Deputy Executive Director

SUBJECT: **Branch Property Redevelopment**

Please forward all documentation to the Branch Advisory Coordinator at info@legionbcyukon.ca

The following documents are required in order for Branch Advisory Development Committee to consider approving redevelopment of a branch property.

- A brief report which describes why the redevelopment of the property is in the best interest of the branch and an explanation of how the branch is looking to redevelop
- Property appraisal (performed by a professional appraiser)
- Most recent property tax assessment
- Year to date Financial Statements for the previous three months
- Submitted Financials Statements for the previous year
- Documentation showing that the branch has the appropriate Directors and Officers (D&) liability insurance

Once this information is submitted to Branch Advisory, it will be sent to the Branch Advisory Development Committee for pre-approval. When pre-approval is granted, the branch can begin engaging with Property Development Managers. Each company will

be required to submit a proposal to the branch which must be voted on at a Special General Meeting.

- Documentation related to the compliance with Section 121.c of the General By-Laws:
 - Copy of written notice to members for the Special General Meeting which was sent by post to last known address of the members, at least 14 days in advance of the meeting;
 - Number of voting members present shall be recorded
 - Minutes from the Special General Meeting which shows that at least two-thirds of the members who were present voted in favor of the motion to select a Property Development Manager.

Once a Property Development Manager has been selected, the entire package of information will go to the Admin/Finance Committee for approval. Once the Admin/Finance Committee has approved the selection of a Property Development Manager, the branch can sign a contract with them and begin the process of selecting a development company.

Each developer will be required to submit a proposal to the branch which must be voted on at a Special General Meeting.

- Documentation related to the compliance with Section 121.c of the General By-Laws:
 - Copy of written notice to members for the Special General Meeting which was mailed to members at least 14 days in advance of the meeting;
 - Number of voting members present
 - Minutes from the Special General Meeting which shows that at least two-thirds of the members who were present voted in favor of the motion to select a development company.

- A business plan documenting how the branch will manage the funds received from the redevelopment
- A copy of the Development plan, contracts, and supporting documentation.

Once a development company and proposal are selected, the final complete package of information will go to the Admin/Finance Committee for final approval. If the Admin/Finance Committee grants approval, the branch can sign a Joint Venture Agreement (JVA) with the property developer and work with their property development manager throughout the process.

Appendix F



Branch Sustainability Fund Terms of Reference

The Branch Sustainability Fund (the Fund) is a pool of funds restricted by the Provincial Executive Council (PEC), for the purpose of providing assistance and programming to branches. It was created for funding innovative ideas supporting sustainable branches within the BC/Yukon Command (Command). This Fund is not meant for the direct administration of the Command office.

The Fund generates from two sources:

1. Excess of the Command Care Fund (2014 Fall PEC motion and 2015 Provincial Convention Resolution)
2. 25% of net assets received as a result of Section 124.1. (2014 Fall PEC motion and 2015 Provincial Convention Resolution)

The Fund can be used for the following disbursements:

- To fund regional Branch Operations Advisors and other supports for the purpose of providing direct assistance to branches¹
- To fund other innovative initiatives promoting branch sustainability up to a combined annual maximum disbursement of \$50,000.00 ²

¹ One year contracts commencing June 10, 2015; to be reviewed for continuance for 2016 budget approved by PEC

² The Admin/Finance Committee reserves the right to determine which initiatives shall be eligible to receive funding under this clause.

Appendix G



BC/Yukon Command Branch Liquor License Class Policy

Purpose

This policy specifies the guidelines for branches to convert their liquor license from Liquor Primary Club (LPC) to Liquor Primary (LP).

No branch in BC/Yukon Command is authorized to transition from a LPC to a LP unless or until all conditions and requirements have been satisfied. Any change to a branch license will be at the recommendation of Branch Advisory to the Admin/Finance Committee for final approval.

Objective

Allowing branches to convert their licenses from LPC to LP has implications for membership which can impact the long term sustainability of the Legion as a whole. The overall objective of the policy is to allow branches to change their license if it improves their overall operations, while at the same time ensuring we can remain a membership driven organization that meets the mission and objectives of the Royal Canadian Legion.

Policy

Effective January 23rd 2017 there will be changes to the Liquor Act and as a result the LPC license will see three major changes:

- Ability to lease their kitchen.
- Ability to engage a third party operator.
- Liquor Control and Licensing Branch (LCLB) will not consider the standing of a veteran's club with its parent organization, however if Command revokes a branch's charter and the assets revert to the central organization the branch would no longer qualify to hold a liquor license.

This policy aims to address one of the major changes, namely that the (LCLB) no longer requires approval from the parent organization to change a license. Note that failure to receive prior approval from Branch Advisory shall result in a branch being placed on any level of Performance Standards³

ADDITIONAL RESOURCES

Requirements for Branch Advisory Approval for Liquor License Change

- **Liquor Primary Terms and Conditions:** <https://www2.gov.bc.ca/gov/content/employment-business/business/liquor-regulation-licensing/publications-resources/liquor-licensee-terms-and-conditions-handbooks>
- **Liquor Licence and Permits:** <https://www2.gov.bc.ca/gov/content/employment-business/business/liquor-regulation-licensing/liquor-licences-permits/applying-for-a-liquor-licence-or-permit>
- **Changing a liquor licence** <https://www2.gov.bc.ca/gov/content/employment-business/business/liquor-regulation-licensing/liquor-licences-permits/changing-a-liquor-licence>
- **Municipal Government/First Nations Approval Q&A** <https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/business-management/liquor-regulation-licensing/guides-and-manuals/lqnfqa.pdf>

³ Branches who hold a LP license on or before January 23rd 2017 will be permitted to keep their license as such. These licenses were in place prior to the changes to the Liquor Act and as a result will be grandfathered in under the new policy.



BC/Yukon Command Requirements for Branch Advisory Approval for Liquor License Change

Business Case

A requirement for changing a liquor license from Liquor Primary Club (LPC) to Liquor Primary (LP) is to provide a business case to the Branch Advisory Operations Committee. In this business case please outline to the committee how this change to your license will improve your branch operations. A strong business case will also address membership recruitment and retention, and show that changing your license will not impact your membership numbers. This could include offering incentives for members such as two-tiered drink pricing or a “members only” lounge. Please work with your Branch Operations Advisor on your business case. Applications to change a liquor license are approved on a case by case basis, and at the discretion of the Branch Advisory Operations Committee.

Additional Requirements For Approval

- Minutes from an SGM showing membership approval
- Submitted financial statements for the previous year
- Proof of municipal government/First Nations approval
- Year-to-date Financial Statements for the previous three months

Any additional information deemed necessary may be required by Branch Advisory Operations Committee.



Branch Advisory Requirements Checklist Liquor Licence Transition

TO: Branch # XXX

FROM: Deputy Executive Director

SUBJECT: Branch Application to Transition Liquor Licence

Please forward all documentation to the Branch Advisory Coordinator at info@legionbcyukon.ca

The following documents are required in order for Branch Advisory to consider allowing a branch to change their liquor licence from a Liquor Primary Club to a Liquor Primary.

- A business plan which addresses how this change will improve branch operations. The plan will also address membership recruitment and retention
- Minutes from an SGM showing membership approval
- Submitted financial statements for the previous year
- Proof of municipal government/First Nations approval
- Year to date Financial Statements for the previous three months

Appendix H



Branch Advisory Requirements Checklist Sublease Branch Kitchen

TO: XXXXX

FROM: Deputy Executive Director

SUBJECT: Sublease Branch Kitchen

Please forward all documentation to the Branch Advisory Coordinator at info@legionbcyukon.ca

The following documents are required in order for Branch Advisory to consider approving any subleasing contract of a branch kitchen.

- A letter outlining the proposal.
- A copy of the lease agreement.
- If the branch does not own their building, a letter from the landlord or property owner stating they are okay with the branch subleasing the kitchen.
- Proof that the sublease is WCB compliant
- Proof of insurance from the sublessee
- Legal document which states that the branch is subleasing the kitchen and are not assuming any liability. The sublessee is responsible for all risk and liabilities arising out of the use of the kitchen. (Indemnity clause)
- Local health authority approval
- Year to date Financial Statements for the previous three months.
- Copies of the minutes of the General Meeting approving the expenditure(s).
- Documentation related to the compliance with Section 121.c of the General By-Laws:

- Copy of written notice to members for the Special General Meeting which was mailed to members at least 14 days in advance of the meeting;
 - Minutes from the Special General Meeting which shows that at least two-thirds of the members who were present voted in favor of the motion to sublease. (you will need to count votes and record these in the minutes for and against)
- Confirmation that the Branch has Directors & Officers Liability Insurance coverage for the Executive Committee and it is paid up to date.
- Other information deemed necessary by Branch Advisory as required

When considering a sublease, it is important to find out if your lease allows for such an arrangement. It is also important to understand the value of the space and how much the branch should charge.

Important: For any questions on this, please contact the BC/Yukon Command office or your Branch Operations Advisor (BOA) PRIOR to entering into any negotiations.

Appendix I



BC/Yukon Command Property Tax Exemptions

Property Tax exemption for branches

Legion branches are legally recognized as non-profit charitable organizations through the *Act to Incorporate The Royal Canadian Legion*. The Community Charter of British Columbia allows municipalities the option to grant property tax exemptions to non-profits and community organizations. Submitting a strong application to your local municipality will increase your branch's chance of being approved.

Review your cities rules regarding permissive exemptions

Many cities have different policies regarding property tax exemptions. In order to best position ourselves to get a property tax exemption we should review these policies and identify how best to demonstrate our ability to meet these policies. This means that if a policy is that if a policy requires the organization to provide a benefit to members of the community we need to demonstrate how we have benefited the community in the past and will continue so in the future. Anytime you can provide numbers to back up your claim (such as donations made to certain community groups) you should as this will improve the quality of your argument.

Procedure - Applying for a property tax exemption

When applying for a property tax exemption, it is important to submit all the items below as one package to your municipality.

Below are the most commonly or recommended requested documents with a definition of each item outlining what the items are, why the document should be sent, and a breakdown of what each section should have.

- Letter to City Hall explaining why a tax exemption will benefit your branch**
 - This is a letter addressed to the members of City Hall. The intent of this letter is to introduce yourself and outline why this exemption would benefit your branch. The goal is to show City Hall that an exemption would benefit the community as a whole by having your branch exempted.

- Letters of community support (2-3 letters of those who support the Legion)**
 - Ask organizations your branch supports with donations to tell City Hall how your donation helped them and your community
 - This letter should be written by those outside of our organization that have been impacted by the Legion in a positive way. The goal of this letter is to show that there are those in the community who truly benefit from the Legion and without the Legion in our community would have a worsened quality of life due to our absence.

- A list of charitable donations your branch made over the last 5 years; including the groups and the amounts.**
 - City Hall wants to see a commitment to the community and veterans. Demonstrating past donations will help show City Hall that we have in the past donated heavily to the community. Identifying different groups that you donated to will also show the direct beneficiaries. The goal is to show that the Legion's presence is important to those in the community and assistance of City Hall will only further benefit the community and veterans.

- Financial Statements for the most recent year (comparative with the prior year is recommended)**

- Information on events and projects your branch does which benefit the community (example – your branch Poppy Campaign), providing documentation outlining upcoming projects.**
 - What City Hall is looking for is the future benefits an exemption would provide to the community and to veterans. In order to do this we need to demonstrate that future projects can take place that will provide a benefit. It is best that we show how these projects will benefit the community and veterans. In order to do this we should create a separate letter showing the projects:
 - i. Goals;
 - ii. Needs;
 - iii. Anticipated outcomes;
 - iv. How the project will be conducted;
 - v. Timetable for completion;
 - vi. How you will evaluate the results;
 - vii. Staffing needs; and
 - viii. Expected revenues and expenses

If you have any questions on this process, please contact Sandra Moromisato, Branch Advisory Coordinator at sandra.moromisato@legionbcyukon.ca

Appendix J



ZERO TOLERANCE POLICY

BACKGROUND

The BC/Yukon Command Executive Council at the March 2002 meeting approved the implementation of a Zero Tolerance Policy. This policy applied to misappropriation of funds and/or Legion assets at each level of the organization within BC/Yukon Command.

POLICY

Upon receipt of a written allegation concerning misappropriation of funds within a branch or zone the information shall immediately be brought to the attention of the Command President.

When misappropriation of funds is alleged based on reasonable and probable grounds, the branch, zone or command will initiate a complaint against the member in accordance with Article III of The General By-Laws under Section 304.a.iii and 304.a.vi.

In all formal hearings where a decision of “guilty” is established, PEC recommends that the Complaint Committee rendering the decision give serious consideration to a decision of expulsion as part of this command’s Zero Tolerance Policy. A decision of expulsion is the only way this organization can deny a member to hold membership in any branch which may reduce the risk of a member moving on to another branch in Canada.

The branch or zone must notify local police authorities of the alleged theft. Upon investigation by the local police authorities if the evidence supports the charge the Crown may lay civil or criminal charges against the accused. Branches and zones must do their due diligence in providing documentation to the police so that a criminal file can be opened.

PEC members and senior command staff*, at the beginning of their term/employment are required to complete a Criminal Record and Credit check.

Criminal Record Review checks will be performed at the expense of command and through an established process and direction of command.

*Senior Command staff defined as: Executive Director, Assistant Executive Director, Controller, Branch Advisory Coordinator and Bookkeeper.

Amended March 2015
Approved at March 2015 PEC

Appendix K



Legalization of Cannabis

With the legalization of Cannabis on October 17th we have received a few questions from branches inquiring about their obligations and rights. This is what we found out.

Can we sell cannabis?

Cannabis currently can only be sold in stand-alone licensed retail locations or on-line.

How much can a person possess?

A person can possess up to 30 grams in a public space. 1 cannabis cigarette = roughly 0.5 grams

Where can people consume?

In general, the rules for consuming cannabis in public mirror the rules for consuming tobacco. For example, citizens will be free to consume cannabis on public sidewalks, but not on any sidewalk/boulevard adjacent to a school property.

Smoking/vaping is also banned in municipal, regional, and provincial parks, except for designated campsites. You are also not allowed to smoke or vape within six meters of doorways, windows, air intakes of public buildings, bus stops, or bus shelters.

Smoking or vaping is prohibited in vehicles, as well as in indoor public places—except in a designated room at assisted living or retirement facilities or hospitals; or in a hotel room by registered guests (the hotel may choose to prohibit).

Can customers consume on my licensed patio?

No, it is illegal to consume cannabis on a patio that is open to the public. Even if your patio is licensed to permit tobacco smoking, cannabis consumption remains prohibited.

Do I have to have a designated smoking area for cannabis?

No. Although cannabis is legal, you are under no obligation to allow consumption on your property.

If you already have a smoking area, we strongly recommend you do not allow smoking/vaping of cannabis in this area. It is currently unclear how consumption of cannabis could impact a licensee's potential liability or duty of care to a patron if you

allow them to consume cannabis in your property while you are also serving them alcohol.

If you already have a smoking area, we strongly recommend you do not allow smoking/vaping of cannabis in this area. It is currently unclear how consumption of cannabis could impact a licensee's potential liability or duty of care to a patron if you allow them to consume cannabis in your property while you are also serving them alcohol.

If you have a designated smoking area, we recommend posting a sign to clearly indicate smoking or vaping cannabis is strictly prohibited on your property.

Do I need to update my house and employment policies?

Yes, your employment and house policies need to be updated to include cannabis.

Just because cannabis is legal does not mean your employees are allowed to smoke/vape at work. As with alcohol, you can and should prohibit employees from consuming at work.

Will Serving It Right need to be updated?

Yes. The new version is being launched on October 17th and will incorporate new material covering potential changes to risk and duty of care, as well as information on how to detect visible signs of intoxication from patrons who have consumed cannabis.

Employees are not required to re-certify in SIR, but we recommend that they do. They will have to re-certify in a year or so anyway, and cannabis legalization is a good reason for your team to bone up on the principles of responsible beverage service.

Appendix L



Example of a Notice of Motion

NOTICE OF MOTION

Branch 000, Somewhereville, is proposing the following changes or amendments to the current Branch By-laws.

Section 613

From: To be elected President you must be a member in good standing of Branch 000 and have served one previous term on the Branch Executive Committee.

To: To be elected President you must be a member in good standing of Branch 000, and have been a member of Branch 000 for a minimum of one year.

Section 701

From: Branch delegates to Zone, who must be members in good standing, shall be elected at a General Meeting of the membership.

To: Branch delegates to Zone, who must be members in good standing, shall be elected or appointed either at a General Meeting, or by the Executive Committee.

The Notice of Motion should have the entire wording of the old section written out, as well as the entire wording of the proposed new wording to the Section.

More than one section can be on the same Notice of Motion.

Appendix M



BC/YUKON COMMAND THE ROYAL CANADIAN LEGION OFFICIAL INVITATION

**Please complete this form if your Branch wishes to invite
a Command Officer to officially attend a Branch function.
Give 30 days' notice so that priority consideration
may be given to your request. SUBMIT TO COMMAND**

Command Executive Officer, Comrade _____ is invited to attend the
following Branch function:

DATE _____ TIME _____

The Command Officer may bring a spouse/guest. YES NO

If the above Executive Officer is not available on this date, list order of preference for
an alternate Executive Officer:

The Command Officer will be the main guest. YES NO

Names of any other Executive Officers who may be in attendance:

The Command Officer will be the main speaker YES NO

Will there be other speakers YES NO

How long do you wish him/her to speak _____?

If you have a preference of subject matter, please indicate: _____

Please list any other duties you wish him/her to perform during the visit:

PLEASE TURN PAGE OVER

Signature of Secretary

Branch Name and Number

The Command form must be sent to BC/Yukon Command for consideration by the President. If the visitation is approved, the Branch will be notified.

Please ensure BC/Yukon Command receives this form 30 days prior to the event so that priority consideration can be given.

If a Command Officer is asked to present a meritorious award he/she must be provided with a copy of the full citation so it can be read to those in attendance during the presentation. The citation must be clearly written (preferably typed) so that a professional job of the presentation is done.

If a Branch fails to provide the Command Officer with the proper citation, the Command Officer will have no alternative but to decline to make the formal presentation. The Command Officer will not know the individual on a personal enough basis to allow him to make reference to the member's worthwhile contributions. Therefore, the presentation will have to be done by a Branch member. We ask for the cooperation of all Branches when it comes to presenting these meritorious awards.

Please ensure that the Command Officer is given a meaningful role in your proceedings and not be there for "decoration."

Remember, Command Officers are like Branch Officers, volunteers who give up their free time on behalf of The Royal Canadian Legion. When they are your guests, use them well and be good hosts.

If the Officer is arriving by air, he should be met at the airport. If he/she is driving, he/she should be met at their hotel.

The Officer is to be properly introduced at the function, recognizing his specific position on the BC/Yukon Command Executive Council. If the Command Officer is the main speaker (key note speaker) a brief bio will be sent from Command for formal introduction purposes.

The program is to allow adequate time for the Officer to not only perform the duties required by the Branch but also to give time to present a brief talk on behalf of BC/Yukon Command.

Note: If you wish to invite on a personal basis other Command officers you may contact them direct – do not use this official invite for personal invitations.

APPENDIX O - DONATION INFORMATION CHART
Everything you need to know about making charitable donations

Item #	Program or Initiative	Description	Funding Source	Additional Source	Special Note
1	BCIT Legion Military Skills Conversion Program	Program to convert military career experience into educational credits or entrepreneurial opportunities - Legion funds program and student bursaries.	Poppy	Gaming	SUE form section 403ii.l ; Poppy cheque made out to Legion Foundation . Gaming money is allowed to fund student bursaries - cheque to the Legion Foundation .
2	Cockrell House	Veterans transition residence to house homeless Veterans.	Poppy		SUE - 403ii.l - cheque to Legion Foundation marked for Cockrell House.
3	Veterans' Transition Program	Counseling programs for veterans to assist with PTSD and transition into civilian life - also includes funding of PTSD research, training of counselors and cost of Veterans participating in programs. Open to Veterans from all Communities in BC & Yukon	Poppy	General	SUE form section 403ii.l; Poppy cheque made out to the Legion Foundation . Branch donations from Poppy funds can ensure there is no waiting list.
4	Legion Service Dogs	Delivery and training of service dogs that help Veterans suffering from PTSD.	Poppy	General	SUE form section 403ii.m; Poppy cheque made out to the Legion Foundation .
5	National Youth Track and Field Camp and Staff	To help BC Athletes participate in National Meet and Uniforms for athletes.	Gaming	General	Cheque to Legion Foundation marked for Track & Field.
6	Brock Fahrni	Veterans' care home - medical equipment	Poppy	Gaming	SUE 403ii.a/403ii.b Poppy cheque made out to Tapestry Foundation for Health Care. Gaming is allowed - cheque should be made to the Legion Foundation .
7	George Derby Centre Burnaby	Veterans' care home - medical equipment	Poppy	Gaming	SUE 403ii.a/403ii.b -Poppy cheque made out to George Derby Centre. Gaming cheques are written to the Legion Foundation and marked for the George Derby Centre.
8	Lodge at Broadmead	Veterans' care home - medical equipment	Poppy	Gaming	SUE 403ii.a/403ii.b cheque made out to Broadmead Care Foundation for the Lodge at Broadmead. Gaming cheques should be made out to the Legion Foundation and marked for Lodge at Broadmead.
9	New Chelsea Society's Winch House	Winch House located in South Vancouver that offers free temporary accomodation to Veterans, First Responders, Canadian Forces members and Legion members receiving medical care in Vancouver	Poppy		SUE 403ii.a cheque made out to Legion Foundation marked for Winch House
10	Bursaries	Post Secondary education only - for Veteran's children/ grandchildren/ greatgrandchildren	Poppy	Gaming	Section 402vi.a and b. Poppy cheque issued direct to school. Gaming cheque can be written to the student directly.
11	Cadet Corps	Support to units which have assisted with poppy campaign	Poppy		SUE form section 403ii.f (refer to this section of the Poppy Manual for funding restrictions)
12	Cadet Travel	To support the cost of travel essential to the direct delivery of Cadet programs (ie. summer camps, leadership training and corps training).	Gaming		Licensed gaming proceeds can be used for this cost; any grant funds (ie. direct access, bingo affiliation) cannot be used for this purpose.
13	Cadet Medal of Excellence	The cost of medals for cadets.	Gaming		Cheques must be written to BC/Yukon Command with invoices retained to support the cost. The Corps approves recipients and makes a request to the sponsoring branch for medals.
14	Candlelight Ceremonies	Community events - cost of candles, programs and light refreshments for community.	Gaming		Cheques can be written directly to reimburse the host of the events; supplier's receipts must be provided before writing the reimbursement cheque.
15	Cenotaph Upgrades	Improvements and upgrades in branch communities for local cenotaphs - not for initial construction	Poppy		SUE - 403ii.e refer to this section of the Poppy Manual for funding restrictions)
16	Christmas Gifts - Brock Fahrni and George Derby	Gifts for hospitalised Veterans	Poppy		SUE 403ii.c - cheque must be payable to the LA to the BC/Yukon Command and mark for Veterans gift fund.
17	Christmas Parties at Brock Fahrni and George Derby	Christmas Party Food and Beverages for Veterans in their care.	General		Cheque must be made payable to BC/Yukon Command marked for the Veterans' Christmas parties.
18	Community Remembrance Day Services	Purchase of: PA system for Cenotaph for public services & programs; lapel Poppies for school assemblies; and refreshments for community.	Gaming		Cheques written directly to suppliers with invoices (or receipts) kept on file.
19	Crime Stoppers Memo Boards	Purchase of emergency information memo boards for local seniors centres.	Gaming		Cheques written directly to suppliers with invoice (or receipt) kept on file.

Item #	Program or Initiative	Description	Funding Source	Additional Source	Special Note
20	Disaster Relief	These must be declared by the federal or provincial governments	Poppy	Gaming	Poppy SUE 403ii.d. Gaming can be used for disaster or emergency in BC only if the Gaming Branch lists the emergency or disaster as an approved program.
21	Handicap Accessibility in branch for persons with disabilities.	Assistance is available for a branch to install/ repair/ maintain personal lifting devices/ ramps/ handicapped electric door operator by installing	Poppy		SUE 403ii.i - cheque made out to suppliers
22	Hot, sit-down meals for Veterans	A hot meal for Veterans in the community once a year (note: max \$25 per meal; does not cover alcohol or entertainment). Details of the event and receipts are required	Poppy		SUE 403ii.g - cheque made out to supplier (can be a branch's ladies auxiliary).
23	Legion Care Facilities & Housing for Veterans	Housing registered as Veterans Housing. Includes expenses, ex: purchase, construction, maintenance, repairs, furnishing etc.	Poppy		SUE - 403ii.a - cheque made out to the organisation or supplier
24	Local Drop-in Centres	Support for elderly as long as provide known support to Veterans in the community	Poppy		SUE 403ii.c - cheque to providers
25	Meals on Wheels	Program delivery	Poppy	Gaming	SUE 403ii.c. Gaming cheques are written directly to suppliers or as a reimbursement to the organization; invoices and receipts to support cheque must be kept on
26	Medical Equipment Loan Cupboards	purchase of publicly available medical equipment for loan	Poppy	Gaming	SUE 403ii.b Branch Loan Cupboard. Gaming cheques are to be written directly to recipient and must be based on financial need or hardship. Please check and see if a local Red Cross program is already in place in the community.
27	Military Family Resources Centres	Projects identified and agreed to by the Branch.	Poppy		SUE 403ii.l. Poppy cheques made direct to MFRC Location once SUE approved
28	Minor Sports Organizations	To support financially in need children to participate in training camps/programs.	Gaming		Gaming cheque can be written to the local sports organizations to pay for registration fees for need children or to the Kidsport Program in their community.
29	National Poster, Essay & Video Contests	Prizes	Poppy		Poppy cheque to the recipient.
30	Red Maple Leafs	To purchase maple leaves to distribute July 1st and at other commemorative community events.	Gaming		Orders and payment should be arranged directly with the BC/Yukon Command; invoice should be kept on file to support the gaming expenditure.
31	Remembrance Day Fly Past	Cost of fuel for volunteer aviators for Nov 11 community fly pasts	Gaming	General	Gaming cheques can be written directly to flypast groups to reimburse for the actual costs (ie. fuel).
32	Royal Commonwealth Ex Serviceman's League (RCSE)	Donations to assist ex-service personnel of Commonwealth or allied countries. CUE not required	Poppy		Section-401 & 402 - appeal normally at Convention - delegates must have prior branch approval to pledge money at convention
33	Scholarships	Post Secondary education only	Gaming		Refer to guidelines for types of gaming funds allowable; gaming cheque direct from branch to recipient
34	Seniors Recreational Activities - (Bizone Bingo)	Bingos at Brock Fahrni and George Derby each year that usually occur between July and August	General		Cheque written directly to the Vancouver/Burnaby Zone earmarked for this purpose.
35	Sick and Visiting Program	To purchase chocolates, candies, magazines etc. for hospitalized patients delivered by Legion volunteers.	Gaming	Poppy	Poppy Section 402iii.c - expenses must be supported by receipts. Gaming checks can be written directly to suppliers; invoices and receipts must be kept on file.
36	Track Clubs	Funding for eligible track clubs in local community - for equipment	Gaming		Cheque written directly to track club; verify that track club is eligible with the Gaming Branch prior to issuing the cheque.
37	Transportation for Veterans	As needed for medical appointments & compassionate reasons.	Poppy		SUE 403ii.h
38	Vet International Memorial Day Parade		General		Cheque direct to VIMDP Committee
39	Wheelchair Afternoons	light refreshments and entertainment for visiting seniors and Veterans	Gaming		Gaming cheques must be supported by receipts from the supplier for the purchase of supplies; also visitor tracking is required by Gaming. Please note that a ladies auxiliary cannot be reimbursed by a branch or vice versa

Version: February