



Op RENEW: Project Discussion Paper

Reference: A. 4230-00(SM) 1 Feb 18
 B. Motion #8, AGM 21 Feb 18
 C. 2150-01-01(SM), Op RENEW Project Proposal, 10 May 18

Background

1. Ref A discussed the recent reduction in the quantity, quality, and effectiveness of the interactions between and among CDA members, and the need for a fundamental and detailed reassessment of the CDA's mandate and its working relationship with the member associations. Ref B directed the CDA National Office to carry out this functional review; and ref C outlined the review process to be used; provided areas for potential reflection and discussion; and solicited responses, comments, and suggestions.

Objective

2. The objective of Op RENEW is to lead a thoughtful, careful, and purposeful review of relationships, responsibilities, and working procedures for the CDA National Office and its Association-members:
 - The review will include as much interaction with associations as possible, and will be collaborative and reticular rather than hierarchical in nature: CDA National Office will seek to lead a discussion, while avoiding any attempt to impose or drive towards any specific solution;
 - The review will attempt to address fundamental issues including the following:
 - The mandate, the role, and the objectives of the CDA,
 - An assessment of ways that CDA National Office can aid and support member associations and of the ways that the member associations can help and support one another, including actions that the CDA National Office can take to facilitate this kind of mutual support;
 - A review of the CDA operating model;
 - Based on the review of the operating model, an identification of the respective roles and responsibilities of the CDA National Office and the member associations, including a set of objectives and desired working relationships between CDA National Office and the member associations, and
 - An outline business model (including funding model and dues structure) required to support those working relationships;
 - Based on the working relationships established, the review will identify specific activities to be undertaken by both the CDA National Office and individual Association-members, and will develop and confirm a realistic and relevant CDA value proposition; and
 - This review is to be complete no later than 30 November 2018 and a mature proposal provided at that time to the Association-members for review and approval at the 2019 AGM or, if possible, at a special AGM convened at an earlier date for that purpose.
3. The objective of this op RENEW Project Discussion Paper is to support and promote the overall Op RENEW project by enlarging on the original Project Proposal to incorporate association comments and responses; and by providing an improved list of topics, ideas, and questions which will be distributed to associations to help inspire discussion, ideas, and further input and comment. The further input and comment will be reviewed in a series of one-on-one or small group discussions beginning about 15 Jul.
4. Op RENEW and the Member Meeting initiative: Op RENEW is being carried out at the same time as a separate program to initiate a series of member-driven meetings which will give an opportunity for individual CDA member associations to discuss issues of interest or concern that cannot usually be discussed at AGM because of time limitations. Although Op RENEW and the Member Meeting initiative are meant to be distinct and separate, and will continue on separate but parallel tracks, it is very likely that some of the discussions will overlap and, in particular, that some of the Member

Meeting discussions will be relevant to RENEW. In order to minimize duplication of effort, the Op RENEW project lead will monitor Member Meeting proceedings and, where appropriate, include Meeting discussion items in RENEW proceedings.

Discussion

The Mandate, Role, and Objectives of the CDA

3. **Strength and Influence:** Associations have strength and influence according to the amount of social capital that they carry. Social capital flows from the perceived importance, relevance, and legitimacy of the association. For the CDA to leverage the strength and influence of the collective member-Associations it is critically important that the CDA, its member associations, and its supporters all work together to demonstrate the importance, relevance, and legitimacy of the Conference and, equally important, that they work to improve general public awareness and understanding of the organization.
 - **Instrumental Versus Expressive Orientation:** Although the two are not mutually exclusive, organizations are seen to generally function in ways that are either instrumental or expressive. Instrumental activities are externally focused, seeking to create some more normative condition or to attain goals outside of the organization itself, while expressive activities are more self-serving, oriented towards generating rewards specifically for those undertaking the activity. This distinction is important because the CDA often does itself a disservice by acting in ways that can be seen as being expressive or self-serving rather than instrumental, even though the Conference has the specifically instrumental function of advocating for members' interests. Any impression of a self-serving orientation like this is doubly unfortunate because such activities on the part of ostensibly instrumental organizations are be extremely damaging to the organization's relevance and legitimacy.
 - Profile and perception are critical enablers of relevance, legitimacy, and importance because it is through our perceived relevance and importance that we generate social capital.
4. **Potential actions related to strength and influence:**
 - Publicize and develop the CDA brand: Find ways to encourage and develop perceptions of relevancy and legitimacy; better promote ourselves and our products to the association membership (ie: A 'push' rather than a passive 'pull' communication system: We cannot rely on members actively connecting to our website to search for your products and services , rather need to 'push' through direct advertising to the associate members);
 - Conduct a joint **strategic review** encompassing National Office, RMA's, and AMA's; and addressing shared values, shared objectives, SWOT. This strategic review would dictate and drive creation of a formal **communication strategy** and (as a subset of the communication strategy), a formal **advocacy strategy**;
 - Both the National Office and the member associations need to do a better job of coordinating how they respectively will be informing the public; including specific efforts to develop activities and a public profile that address the CDA objective of being "The authoritative voice on defence issues". We can do this by cultivating a relationship with industry leaders, selected local politicians, selected academics, and media that encourages them to view the CDA and CDA member associations as authoritative in their particular field, and to utilize CDA and CDA Association-member as issue representatives and spokespersons;
 - Create, distribute, promote, and maintain a SME list by topic and region for media engagements;
 - Ensure Association members, commentators and other representatives, when speaking on behalf of the CDA, identify themselves as much as possible as being part of the CDA network and brand themselves and their presentations accordingly through the use of and the display of the CDA logo;
 - To avoid confusion, when speaking in public, avoid using the term "CDAI", & say rather "CDA Institute", or "The Institute"
 - Have CDA, CDAI and assns consistently ask speakers and presenters "What can CDA do for you", then share these comments on the CDA website and ensure they are acted on as much as possible;

- Establish a physical presence outside of the Ottawa-Toronto axis (Consider regional organization, with designated assns acting as regional co-ord?);
 - Do a much better and more consistent job of targeting and servicing the Francophone community;
 - Maintain a scoreboard to track numbers of interviews, presentations, etc.;
 - Emphasize that with respect to both advocacy and general collaborative programs the CDA will never grow to its potential strength and influence without genuine commitment and active support from multiple assns: Establish:
 - A clear statement of responsibilities to include what the CDA needs/expects from assns;
 - An operating framework for co-operation and mutual support;
 - A **MOU** to be completed by both National Office and individual assns at time of joining to establish:
 - The reason for them joining;
 - What they want or expect from the CDA;
 - What is their own organizational mandate and how can we help them fulfill it; and
 - What they are prepared to do for and with the CDA and its other member assns;
5. **Mandate:** The CDA Constitution describes our mission as being "...to advocate for credible Canadian Security and Defence policy and for the Canadian Government to provide adequate resources for the Canadian Armed Forces".
6. Questions related to mandate:
- Why are you a member of CDA?
 - What do you want/expect/need from CDA?
 - Are you getting what you want/expect/need? If not, why not
 - Have you asked the CDA for anything? What was it? Did you get it? If not, why not?
 - What changes would you like to see with the CDA? With other CDA programming?
 - Are you satisfied with your relationship with the CDA? Why/Why not?
 - Is there something more that you would like to see the CDA National Office do? More services they should offer? What are they?
7. Potential actions related to mandate:
- Survey members to formally discover whether they are getting what they expect, and what add'l services they would like to see;
 - In the interests of improving the CDA's scale, scope, impact, and perceived legitimacy; consider increasing membership to include other associations and/or like-minded professionals from across the Canadian Security, Intelligence, Defence and Public Safety communities¹.
 - Unlike the AF or Navy, the CDA has no single strategic voice for the Army;
 - As part of the overall **strategic review** described above:
 - Determine what other like-minded org could be recruited, & what role they might play in the Association;
 - Clearly articulate the mission and the vision of the CDA;
 - Clarify relative roles and relationships between CDA and CDA Institute (eg: CDA advocates, CDAI informs);
 - Clarify if CDA has/should have control or input into the selection of research topics;
 - Clearly document the ways that CDA and CDAI are different, while emphasizing the ways that they complement and support one another;
 - Work collaboratively with each member assns to help them accomplish their mandates²;

1. Eg: JTF, CCG, CSIS, RCMP, Public Safety, CSEC, Veteran's Affairs, Canadian Association for Security and Intelligence Studies (CASIS), Mounted Police Professional Association of Canada, Canadian Security Association (CANASA), and/or the Communications Security Establishment Canada (CSEC) Retirees' Association, Air Cadet League.

8. Advocacy: The mandate of the CDA is “to promote informed public discourse on national security and defence issues, while advocating for credible security and defence policies and support of...Canada’s Armed Forces” (CDA Webpage). This statement is important because of the relationship it establishes between informed public discourse and advocacy³. Even though much of our advocacy has traditionally been focused towards the political process, it is clear that our efforts should include greater attempts to inform the public and, more particularly, to inform the media and other opinion influencers who have an ability to affect public perceptions, understandings, and opinions. This is especially important in an age when much government policy is strongly influenced by the press and by social media (eg: It has been suggested that “Right now, the most important way to influence the PMO is by Twitter”).
9. Questions related to advocacy:
 - What do you understand advocacy to mean?
 - What are you doing now to advocate?
 - Would you like to do more? What is keeping you from doing more?
 - Are you engaging the media or other opinion influencers in your program?
 - Do you have an active relationship with your local media?
 - Do you work collaboratively with other associations?
 - Do you work collaboratively with CDA National Office?
10. Potential actions related to advocacy:
 - Our prime purpose is advocacy, we have a strong and an important advocacy voice because of our position at the center of a number of important associations, and we have both the opportunity and the moral obligation to speak for serving members and others who are unable to speak for themselves. For all these reasons it is fundamentally important that the CDA speak out with a advocacy voice that is clear, strong, and emphatic;
 - We should have a formalized, documented **advocacy strategy**, formed as an output of a **strategic review** and the related development of a **communication strategy**⁴. The advocacy strategy should:
 - Explicitly describe the scope and the goals of CDA advocacy, and the relationship between CDA advocacy programs and individual member advocacy programs;
 - Should distinguish between enduring and short-term advocacy targets;
 - Should include specific identification of different advocacy objectives (eg: persuasion vs education/sensitization); different advocacy targets (eg: politicians/senior beaurocrats, media/decision influencers, or the general public); and different means of advocacy;
 - Should include specific advocacy documentation, submission templates, and review procedures;
 - Should establish a protocol for tracking and reporting the progress of advocacy projects;
 - Our advocacy on defence should be distinct and different from the advocacy on other issues; should be focused on key defence issues like funding, operations, training, regular and reserve force, veteran’s issues, and public support;

2. CDA has already begun work with RCL on a mutual program, supported by CDAI, to develop an advocacy support program designed to complement and facilitate the work of RCL’s D&S Provincial Command reps.

3. Advocacy as distinct from lobbying: Advocacy is distinct from lobbying in that it seeks to plead for, defend, or recommend policy only in a general way (Oxford Concise Dictionary). While often intended to be persuasive, advocacy can also be educational in nature, and is often directed to members of the general public as well as decision-makers. Lobbying, on the other hand, is more specifically political in nature (ie: “To seek to influence members of legislature or solicit members votes” (Oxford Concise Dictionary) or “To frequent the lobby of an assembly for the purpose of influencing the members’ votes” (Fowler’s Modern English Usage)). The CDA is an advocacy rather than a lobbying organization

4. CDA National Office has already committed to begin development of a advocacy strategy of this kind, beginning with the “Position Paper” approach currently used by RCAFA.

- CDA National Office needs to do a better job of connecting with member associations to discover the causes and concerns that need to be pushed forward;
- Advocacy should include advocating for veterans and for reserves;
- Advocacy should include a program to educate and sensitize the Canadian public about defense and security issues;
- Avoid becoming too Ottawa-centric;

Ways that CDA National Office Can Aid and Support Member Associations

11. Collaboration: Although advocacy will always remain fundamental to the role and the value offered by the CDA; collaboration and sharing of information, programs, and ideas across associations could serve to improve the focus, credibility, and consistency of viewpoint; could help create a critical mass of informed opinion, and could lend legitimacy for Association-members who share a common advocacy cause. Collaboration and information sharing of this kind could thus help improve overall advocacy efforts, and could also help to improve the efficiency and productivity of CDA operations generally (“The real value of the CDA is the opportunity it presents for multiple organizations to meet and discuss the similar challenges and innovative solutions that some have found”). Potentially useful collaboration roles could include the following:

- Act as a clearing house to collect and share ideas and suggestions from Association-members and;
- Publicize association events and disseminate after-action reports after Association-member events;
- Share fundraising and affinity program ideas, association newsletters and annual reports; and
- Provide a centralized service where associations could post questions, share problems, or seek ideas or resources⁵;
- Develop SME on org, admin & governance ;
- Work with and through existing assn activities and publications to promote the CDA, CDAI, and other assns (eg: Advertise the CDA and other assns in individual assn newsletters, encourage wider subscription to individual assn newsletters, invite external participation in selected assn events);

12. Questions related to collaboration:

- How much do you know about the other association members of the CDA?
- What can you do with and for the CDA? For other association members?
- Have you ever worked collaboratively with the CDA National Office? With other member associations? Was that a productive/satisfying experience? Why/Why not?

13. Potential actions related to collaboration:

- Dispense with reading of annual reports at AGM in order to free up time for discussion;
- Provide a forum for improved communication and collaboration among associations⁶;
- Establish a better and more functional CDA website and/or a periodic CDA Newsletter⁷;
- Publicize websites and subscription info for assn newsletters, encourage assns to explore their sister assns;
- Provide a template to improve consistency and utility of annual reports, post annual reports on the web;
- Review and confirm the CDA mandate and mission statements as necessary, ensure wording and format are consistent across the mandate, mission statement, and value proposition;

5. Consultation with other associations was a very useful for CMEA as they transitioned their structure towards NPP

6. Currently being developed through establishment of quarterly dial-in “Member Meetings”, the first of which was held end-May

7. Both done, although both will require time as well as active support and association participation to mature.

- Post the CDA mandate, mission statement, value proposition, and constitution together on the CDA webpage;
- Develop protocols for cross-association sharing of infrastructure and capabilities (eg: Conf rooms, websites, prep and distribute questionnaires & surveys etc)⁸;
- Collect and share written responses to a basic questionnaire on org, programming, & best practices;
- Compile a list of possible services an assn could offer that would be of use/interest to stakeholders, and that could leverage the experience of other assn that have already implemented some of these services (eg: See the list of services contemplated by CFLA);
- Collect & share after-action reports from assns after events; share ideas of good speakers, good topics;
- Have CDA, CDAI and assns consistently ask speakers and presenters “What can CDA do for you”, share these comments on the CDA website;
- Run shared presentations via teleconf, provide archived presentations on website;
- Share info about:
 - Affinity programs, what assns are doing to raise revenue;
 - How to open new chapters; attract new members; the value proposition for individual assns (ie: “What’s in it for me?”, How an assn can retain/attract members);
 - Governance, incl. examples of assn constitutions and by-laws;
 - Different organizational status: Profit/NFP/Charitable (ie: What org have transitioned to NFP? How did they do it? What are the issues & implications?)⁹;

CDA Value Proposition

14. The CDA value proposition is typically described as including the following:
- Professional affiliation with the CDA as the authoritative voice on matters of National Security and Defence;
 - Participation in regular CDA meetings and consultative mechanisms;
 - Multiple opportunities for affiliation and association with a wide range of prominent and professional figures who have a shared interest in security and defence matters;
 - Input into and influence on prospective topics for CDA Institute research, and on discussion themes for CDA and CDA Institute symposia;
 - Representation on behalf of the member association to the Government of Canada in matters of national security and defence;
 - Organization listing, description, and promotion on the CDA website;
 - Support in promoting association goals, objectives, and activities; and
 - Discounted rates at CDA events.
15. Although the value proposition as described does represent substantial potential benefits, some of the benefits listed flow from the CDA Institute rather than the CDA or are not readily accessible for those associations located at some distance from the NCR. The list also fails to adequately emphasize the relative importance of the advocacy function or the way that CDA affiliation can serve to empower advocacy efforts, and it gives very little weight to the potential benefits of collaboration. The value proposition, together with the mandate and mission statement, constitute our foundational organizational documents. It is important that the value proposition be brief, focused, credible, and powerful. As we complete our discussions on the form and nature of our advocacy and on the nature and benefits of our collaborative efforts we will have to develop and socialize an updated value proposition, modified to make sure it is up-to-date, accurate, and reflects all the relevant benefits with appropriate emphasis.
16. Questions related to the value proposition:

8. An initial start has already been made on this with RCAFA and RCMSA collaborating on the creation and distribution of a survey.

9. CDA National Office has already committed to review of this issue.

- Does this adequately encompass what you believe to be appropriate value from membership in the CDA? What is missing, either from your current expectations or from what may be appropriate going forward?
- Are there elements that you believe are no longer relevant for your organisation, or generally for all member-Associations?
- How do the elements of the value proposition align with, broaden or reinforce activities that your organisation conducts for, or on behalf of your individual members?

17. Additional value proposition items suggested:

- Act as at principle interlocutor with government;
- Co-ordination with like-minded org in support of defence issues;

18. Potential actions related to the value proposition:

- Review and confirm the current mandate and mission statements, ensure wording and format are consistent across the mandate, mission statement, and value proposition ;
- Draft a value proposition statement that is brief, focused, credible, and powerful. Post this together with the mandate and mission statements on the website ;
- Clarify the operating relationship between the CDA and CDAI and stress the CDAI benefits that become accessible to CDA members through their CDA membership;
- Develop and identify CDA membership benefits that are accessible and useful to members who do not live in or near the NCR;
- Emphasize the importance of the advocacy function in terms of CDA national office advocacy efforts and also in terms of the ways that the CDA can promote and support advocacy issues from individual associations;
- Develop and describe benefits made available to individual associations through collaborative efforts and information sharing with other associations;

Business Model

19. Business model:

- We needed to share finance reports on the web;
- The current funding model is not clear about how costs are attributed btw CDA & CDAI;

20. Questions related to business model:

- Have you reviewed the financial documents provided by the CDA?
- Do you understand the CDA costs and our funding model?
- Are you clear on the level of dues you are expected to pay? Do you consider that to be fair?
- Can you suggest a better or fairer funding model? A better or fairer dues structure?
 - Identify various CDA activities and programs by cost, & provide assns that do not use those activities the option to opt out of those costs;
 - Distribute cost of supporting CDA more equitably across Army, Navy & Air Force instead of multi "Army" assns all being billed on same basis as single AF or Navy assns.

21. Potential actions related to the business model:

- Post finance reports on the web;
- Establish clear rules for how revenues and costs are shared btw CDA and CDAI;
- Establish a CDA budget clearly identifying sources and amounts of revenues as well as costs of different activities and extent of any anticipated budget surplus or shortfall;
- Situate the current dues structure in the context of the established CDA budget;
- In case of any anticipated shortfall, consider options related to increased dues, recruitment of new members, fundraising, and/or decreasing expenses;