



Canadian Naval Memorial Trust Strategic Plan: Charting a New Course

Embracing Canada's Naval Achievements
Through the Preservation of HMCS Sackville

1 July 2023 to 30 June 2026



FOREWARD

On the first Sunday of every May, Canadians commemorate the Battle of the Atlantic, the longest continuous campaign of World War II. Yet, I would hazard a guess that most Canadians are unaware of the momentous role our country played at sea to preserve the freedoms and way of life we enjoy today.

Described as “broad, chunky, and graceless” by Nicholas Monsarrat in his book “The Cruel Sea”, and dubbed by Sir Winston Churchill as “cheap and nasty”, 269 World War II Corvettes were built in Canadian and British shipyards; 123 served in the Royal Canadian Navy. Known to “roll on a wet blade of grass” the Corvette was in fact an excellent sea-keeper, highly manoeuvrable even in the extremes of the north Atlantic. This “little ship that could” evolved over the course of the war into an effective and omni-present protector of the hundreds of convoys that eventually brought salvation to Great Britain. HMCS Sackville is the last of its kind

Ultimately this is not really about the legacy of a ship, but more importantly it is about what HMCS Sackville represents, what Canadians from all walks of life, and from all regions of our country can do in times of peril. From the builders in shipyards to the sailors who served, to the thankless task shouldered by merchant mariners, to the families and individuals so tragically affected by the war at sea. This is the legacy we strive to ensure lives on.

The decision of the Board of the Canadian Naval Memorial Trust to embark on the development of a strategic plan has been a game-changer. Little did we know at the outset, of the depth of discovery we would achieve or the range of discussion we would have. Even more so, we were unaware of the profound changes we would be compelled to consider and adopt if we were to ensure the long-term preservation of the ship and its enduring legacy. I believe it fair to say “we didn’t know how much we didn’t know” about the challenges and opportunities that lie ahead of us. Nor did we fully appreciate the value and inherent benefit of following a planning process that was methodical, comprehensive, collaborative, at times difficult, yet ultimately far-reaching.

A plan however is just a plan, unless it is taken for action and implemented with conviction and due diligence. I have every confidence that the goals, objectives, and action plans we’ve established will serve the Canadian Naval Memorial Trust well in the fulfillment of its mission - to preserve the ship and share in its stories for generations to come. I am very proud of the results of our work and excited about the course that lies before us to ensure a bright and enduring future.



Bill Woodburn
Captain Navy (Retired)
Chair
Canadian Naval Memorial Trust

1 July 2023

Date

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INTRODUCTION – CHARTING A NEW COURSE

1. For 40 years the Trust has been the diligent steward of HMCS Sackville. In that time numerous challenges were faced and overcome. In 2018 there was a growing sense that the Trust was about to enter a new era, filled with new challenges, but starting with conversations about what might be needed. Since 2018 so many things in the world have changed. As discussions took place there was increasing awareness that as part of the Trust's new era, it was going to face the most demanding fundraising challenge in its history in order to be able to replace the hull of HMCS Sackville. It was also clear that the Trust was not insulated from the rapid changes occurring in the world and that many of them would become barriers to its future success. If the Trust was going to ensure it could continue to make HMCS Sackville accessible to the public and share the stories of Canada's navy during the Second World War, it was acknowledged that significant change would be needed.

2. In order to position itself for success over the next decade, the Trust decided to chart its next course for change by embarking on a Strategic Planning process. This Strategic Plan is a product of that year-long effort and reflects the Trust's strategic priorities and states the goals and objectives it has committed to accomplish over the next three years.

3. The flow of this document is intended to show how the past, present day and anticipated future trends informed the strategic planning team's choices for the Trust's:

- a. Mandate;
- b. Mission;
- c. Vision;
- d. Values and Guiding Principles; and
- e. Goals:
 - i. Goal 1 – Establish the Business Organization, Practices and Governance Needed for the Trust's Future;
 - ii. Goal 2 – Leverage Knowledge to Enable, Engage and Educate;
 - iii. Goal 3 – Grow Wealth to Meet Future Needs; and
 - iv. Goal 4 – Engineer Solutions to Preserve the Ship;
- f. Objectives needed to achieve the goals; and
- g. Detailed Action Plans for accomplishing each Objective.

THE DOCUMENT

4. This document is the Canadian Naval Memorial Trust's Strategic Plan for the period 01 July 2023 to 30 September 2026. It is the first in a succession of anticipated 3-year plans that will span a 10-to-12-year period.

5. The document is made up of the following sections:

- a. Introduction – Motivation Behind Charting a New Course
- b. Historical overview of the trust;
- c. Historical context associated with HMCS Sackville;
- d. Summary of critical planning factors that informed decisions about the Goals and Objectives of the Strategic Plan;
- e. The Trust’s Mandate, Mission, Vision and Core Values;
- f. Goals and Objectives;
- g. Outline of the process that will be followed to ensure oversight is provided and Goals and Objectives are achieved; and
- h. Detailed Action Plans for the accomplishing the Goals and Objectives.

THE TRUST

6. The idea of restoring and preserving HMCS Sackville, launched on 15 May 1941, was first proposed by the RCN [MARCOM] in 1975. Over the following decade, several options were considered by the RCN for the possible home of HMCS Sackville. In the years leading up to the eventual transfer of HMCS Sackville to the Trust the Department of National Defence designated Sackville as a Naval Auxiliary Vessel and employed it as a research vessel. It was removed from service officially during a Paying Off Ceremony on 16 December 1982.

7. The Canadian Naval Corvette Trust was formally established in Toronto on 30 December 1982. The Trust created a working group in Halifax that was intended to oversee the restoration of Sackville to its 1944 configuration and pursued fundraising to cover the costs. The Trust considered two options for the restored Sackville, keep it in Halifax or move it to the Great Lakes, finally deciding on Halifax. Ownership of Sackville was transferred to the Trust on 15 August 1983. When taken under the stewardship of the Trust, Sackville was the last of the Allies’ 269 corvettes that served in the war, 123 of which served in the Royal Canadian Navy.

8. On 30 April 1985, the Canadian Naval Corvette Trust was incorporated and registered as a Not-for-Profit Society in Nova Scotia. On 6 May 1987 the Trust submitted a special resolution, which was approved by the province of Nova Scotia, changing its name to the Canadian Naval Memorial Trust (CNMT) which reflected its official designation as the Canadian Naval Memorial that was bestowed by The Honourable George Hees, Minister of Veterans Affairs, on 26 April 1985.

9. Since 1983, the Trust’s work, with the support of various partners, has included the:
- a. The restoration of HMCS Sackville to its 1944 configuration;
 - b. Continuous preservation and maintenance work;
 - c. Fundraising and negotiation of a variety of support agreements;
 - d. Opening of the ship to the public for guided tours several months each year and making it available for special ceremonial and commemorative events; and

- e. Curating, interpreting and preserving a large collection of artifacts and stories that have come into the Trust's possession over the years.
10. All of this has been made possible through the Trust's fundraising and cultivation of support from public and private sector organizations. The goodwill and support of individuals, businesses and government departments have been vital enablers of the Trust's work and success.

HISTORICAL CONTEXT

11. HMCS Sackville is not special simply because of its service in the Second World War or its status as the last remaining ship of its class in the world. Its history reflects a significant part of Canada's history. It is a national historic icon representing many unique and important Canadian stories associated with the Second World War, such as:

The Service and Sacrifice of Canadian Sailors

- a. Tens of thousands of sailors served in uncomfortable ships, in often brutally harsh environments, under constant threat from formidable enemies, while enduring long separations from home and loved-ones. Canada lost 1,990 sailors and 33 naval vessels. RCN sailors were not the only Canadian sailors to serve and sacrifice during the war. 12,000 sailors served in the Merchant Navy of Canada. 1,451 lost their lives on Canadian flagged ships.

Personal Stories of the 100,000

- b. While the inclination is often to focus on the broader and more epic stories, the more personal stories associated with the 100,000 individuals who served in the RCN often are the ones that capture our hearts and minds most easily. Examples of their stories deserve to be developed and shared. They connect families and communities to their past and present.

Royal Canadian Naval Volunteer Reserve (RCNVR)

- c. The RCNVR was used to recruit and build Canada's navy. At the outbreak of the war this force numbered 1,000 officers and men serving in Divisions in 15 Canadian cities. By war's end, over 77,000 Naval Volunteer Reserve personnel were serving alongside 23,000 RCN sailors. The Corvette class of ship was the most numerous in the RCN and it was the class of ship in which the majority of the sea-going RCNVR sailors served.

Notable Canadian Naval Accomplishments

- d. Some examples of notable naval accomplishments include:
 - i. Battle of the Atlantic and Convoys: In the course of the war, Canadian warships escorted over 25,000 merchant ship crossings from North America to Europe and 1,400 ship crossings to the Soviet Union. Additionally, they provided escorts to the ships on their return trips to

North America. The safe escort of merchant ships enabled over 165,000,000 tons of critically needed supplies and troops to reach Europe and made possible the defeat of the Axis powers in Europe;

- ii. Canadian warships destroyed 42 enemy surface ships and, either alone or with other ships and aircraft, sunk 33 submarines; and
- iii. 10,000 sailors and 109 naval vessels were part of the Allied armada that supported the D-Day invasion and liberation of Europe.

Canada's Emergence as an International Naval Power

- e. Canada grew from a small navy of approximately 2,400 regular and 1,200 reservist sailors, with six destroyers and a largely domestic role, to become the fourth largest naval power in the world, capable of deploying anywhere it was needed. By the end of the war Canada's naval fleet comprised 373 fighting ships, plus numerous small auxiliary vessels, 96,000 sailors and 6,500 Women's Royal Canadian Naval Service (WRCNS or WRENS). In March 1943 the Canadian Northwest Atlantic area was established. It was commanded by Rear-Admiral Leonard Murray who was in charge of all convoy operations until the end of the war. It remains the only major theatre in WWII to have been commanded by a Canadian.

Canadian Industries' Massive Production Effort

- f. Canadian industry rose to the challenge of producing ships, munitions and supplies needed for the war effort, surpassing all reasonable expectations. A modest pre-war Canadian shipbuilding industry with three shipyards and employing 4,000 workers expanded to 90 locations on the two ocean coasts, Great Lakes and other inland locations, employing more than 126,000 men and women. Canadian shipyards built 281 escort ships (destroyers, corvettes, frigates) 206 minesweepers, 254 tugs, 3,302 landing craft, 398 cargo ships of various sizes that were capable of carrying between 3,600 and 10,000 tons of cargo.

Halifax, Convoys and Supply Chain

- g. BX convoys originated from the US ports of New York, Boston, Portland Maine and sailed to Halifax to become part of the trans-Atlantic convoys that assembled in Bedford Basin. The RCN contributed to the escort of the BX convoys. HX convoys were the "fast" convoys that were capable of a speed of advance of between 9 and 13 knots. Sydney NS was used for the slower SC convoys. HX 1, the first of 377 HX convoys, sailed 16 September, 1939, and included 18 merchant ships escorted by RCN destroyers HMCS St Laurent and Saguenay. The largest convoy originating in Halifax was HX 300 which sailed for the UK, via New York comprising 167 merchant ships. It departed 17 July 1944 and arrived in Liverpool, UK without incident on 3 August 1444.



Merchant ships assemble in Bedford Basin, Halifax, April 1942.

PHOTO: LIBRARY AND ARCHIVES CANADA—PA112993

The Canadian Merchant Navy

- h. The Canadian Merchant Navy completed over 25,000 voyages across the Atlantic. 74 Canadian merchant ships were sunk or irreparably damaged. While the precise number of Canadian Merchant Mariners who were lost at sea or perished in prisoner of war camps is unknown because many served in other foreign flagged ships, the number is believed to be between 1,600 and 2,000, or over 20% of the merchant mariners lost by all Allied nations in the Battle of the Atlantic.

Women in Non-Traditional Roles / Women Shipbuilders

- i. Over 4,000 women helped build Canada's naval and merchant vessels during the Second World War. 600 women worked in the Pictou shipyard alone. Over 1,000 of the 14,000 Burrard Shipyard work force were women. They proved extremely capable in all trades and figured prominently in meeting the production target of a ship per week. On completion of the war, the women were laid off by their employers to make room for the men who were returning home at the war's end.



Importance and Utility of Naval Power

- j. The Canadian government learned of the importance and potency of naval power during the Second World War. That appreciation has endured in the government's consciousness, resulting in an enduring commitment to fund the RCN and utilize the navy as it did in 1939, more often than not as its first commitment of forces to conflict zones and potential conflict zones, in partnership with allies around the world.

Halifax as a Wartime City

- k. No Canadian city was more impacted or transformed during the war than Halifax. Three days after Canada entered the war on 10 September 1939, 216 survivors from the torpedoed British passenger ship Athena were brought to Halifax. Three days after that the first convoy (HX1) sailed from Halifax harbour. The city would be turned upside down during the war, having to find ways to accommodate tens of thousands of service personnel, civil servants, war workers, displaced citizens from allied countries and families some staying for days, weeks, months and others for the entire duration of the war. The submarine net guarding the harbour was a reminder that the threat lurked nearby. Halifax was arguably Canada's only front-line city.

Allied & Enemy Visitors to Halifax

- l. Halifax was a major staging area during the war. Allied sailors, soldiers and airmen visited the area for varying periods of time throughout the war. Some

stayed. Camp Norway, in Lunenburg, became a temporary home and training facility to over 1,000 Norwegian sailors and whalers who were at sea when the war broke out and were ordered by their king to proceed to allied ports. Enemy visitors were drawn to the area as well. They were mostly covert, like the German submarines that patrolled offshore. One not so covert visitor arrived as early as 1937 when Haligonians were astonished to see the German dirigible Hindenburg loitering over the harbour for some time before continuing on to its destination in New Jersey. It is believed that it had been tasked to take photos and gather intelligence for what was to come.

USN Lends a Hand

- m. The scale of the restoration and preservation effort that has been made to ensure Sackville was kept afloat and accessible to visitors for decades has been immense. It would have been impossible for the Trust to accomplish all that has been done over the years on its own. While the ongoing support of the RCN is well known and has been critical to Sackville's longevity, in 1988, when the USS Hunley was in Halifax, it learned of the Sackville restoration and 30 of its sailors donated almost a week of their time and skills to work on board Sackville to assist with the boiler and engine room restoration. Fitting that Canada's closest ally would want to be part of the Sackville restoration.

Just a Few Examples

- n. These and so many more stories connect our naval history and heritage to Canada's present day— with our democratic government, tolerant and vibrant culture, freedoms and quality of life. They deserve to be shared in order to inspire all visitors. The Trust is committed to sharing them in any way that it can through HMCS Sackville and associated storytelling projects.

THE PROCESS

12. The strategic planning process that has led to the production of this plan and its execution include the following phases:

Preparation

- a. This spanned almost a year of meetings and planning, and most significantly included the review of past planning and governance documents and the production of an Environmental Scan that covered a range of topics and issues that would inform subsequent work;

Learning & Awareness

- b. In order to be able to successfully navigate the strategic planning process, a 1-day Strategic Focus Session was conducted to ensure all participants were introduced to the strategic planning process, participated in discussions that explored the group's capabilities and culture, and various concepts and keys to success;

4-Day Strategic Planning Session

- c. It was during this session that the group learned of the Chair's Positioning Statements (see Planning Factors) and then worked together to determine the Trust's Mandate, Mission, Vision, Values and Guiding Principles, Goals, and the objectives that would lead to achieving the goals and then commenced development of Action Plans for each Objective;

Production of the Strategic Plan Document

- d. On completion of the Strategic Planning Session, Goal teams spent seven weeks researching and developing detailed Action Plans for their respective goals as the remainder of the Strategic Plan was being crafted;

Plan Execution and Sustainment

- e. To ensure that progress continues to be made and monitored over the life of the plan, the Strategic Planning Committee (SPC) was formed comprising key plan stakeholders, and chaired by the Chair. There will be a requirement for monthly progress reporting, quarterly progress meetings and annual plan 1-day refresh meetings at the end of the first and second years of the plan; and

Initiate the Second Strategic Plan Development Cycle

- f. Near the beginning of the third year of the plan, the SPC will initiate the next strategic planning cycle, ensuring lessons learned from the development and execution of this plan are applied.

FACTORS THAT SHAPED CHOICES AND DECISIONS

13. The following factors were identified as items the strategic planning team needed to take into consideration as they worked to create the 3-year plan. Some were discovered through the Environmental Scan process, while others were revealed through discussions during the 1 and 4-day Strategic Planning Sessions.

Must Grow the Trust's Wealth While Spending More Money Annually

14. While the precise cost of the hull replacement project and length of time before the hull replacement would have to commence are technical matters that will have to be determined very early in the execution of the Strategic Plan, for planning purposes it was assumed that the work would cost \$15 million (Future Year 2028 dollars) and work would have to start no later than 2033. The current \$2M cash and investment balance provides sufficient flexibility to conduct the Trust's current level of activities each year. While still to be calculated, it is known that annual expenditures will have to grow to introduce the capabilities and capacity needed for the Trust to raise needed funds. Put simply, the Trust's net worth must grow by \$15M CAD to be able to pay for the hull replacement, and revenues will have to grow, not only to meet that target, but to cover the anticipated growth in annual expenditures. Figure 1 illustrates projected net worth targets over the next ten years.

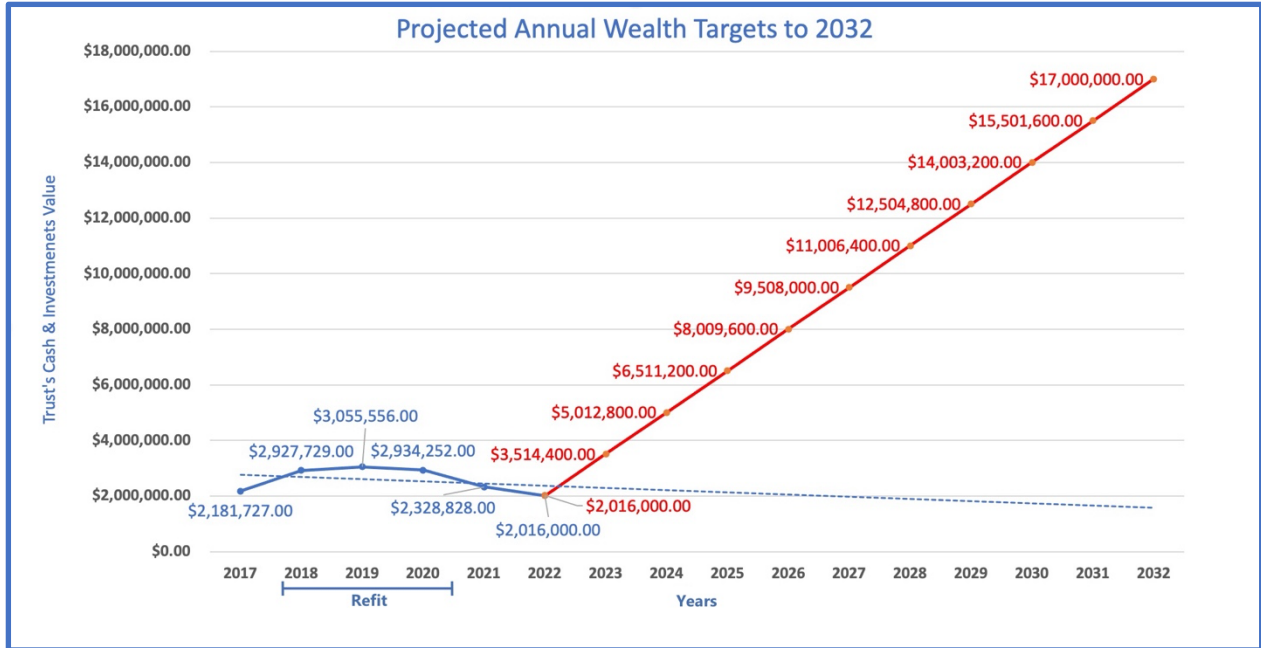


Figure 1

Chair's Positioning Statements:

15. As part of the prelude to the Strategic Planning session, the Chair was invited to provide guidance to the planning team on the factors that he considered priorities for the Trust's future. His guidance was provided in the form of Positioning statements which were:

Need for Hull Plate Replacement

- a. "I believe the continued long-term life of HMCS SACKVILLE as a living ship on the Halifax Waterfront and a Memorial to the RCN for generations to come, will not be possible with the limited expected lifespan of the current double-cladded hull. Therefore, it is imperative we replace the hull before corrosion puts the ship in jeopardy."

Wealth Generation

- b. "I believe our current practices and efforts to raise funds for the replacement of the hull will not achieve the amount we will need in the time we have. Therefore, we must change the way we've been operating as a Trust in order to attain the funding goals we need to achieve."

Refined Hull Replacement Plan

- c. "I believe the data we have on the rate of deterioration of the hull and the cost to replace it are not accurately known. Therefore, we must take steps to properly measure the rate of deterioration, develop a plan to replace the hull locally (i.e.: within Nova Scotia), and establish a detailed estimate of the cost."

Business Transformation

- d. “I believe the Trust will need to become more entrepreneurial in spirit, more innovative, and more sophisticated in its approach to marketing, fundraising, communications and branding in order to improve our wealth generation and enhance the value of what the Trust provides. Therefore, we must continually increase our knowledge, strengthen our business model and increase our capabilities, capacity and appeal to be able to compete more effectively in the Canadian charity domain.”

Membership

- e. “I believe we must reshape how we view membership and the value the Trustees represent to the Trust. Revenue from membership is modest and while recruitment efforts should continue to maintain a healthy Trustee population, we should also recognize that every Trustee represents an untapped reservoir of knowledge, skills and expertise that may prove far more valuable to the Trust than the dues they pay. Therefore, on the recruitment side, we must set realistic recruitment goals, provide effective messaging support to that campaign and consider the use of leveraging data and more sophisticated tools that may be accessible to us to increase joining rates. We also must direct increased effort to identify Trustees with knowledge, skills and talents they would be willing to share with the Trust on short projects and tasks, and develop a relationship through periodic contact that increases their likelihood of volunteering when their help is requested.”

External Elements

Canadian Charity Landscape

16. There are over 86,000 registered charities in Canada all vying for donations and in 2017 they contributed 8.5% of GDP and employed approximately 10% of Canada’s full-time workforce. Charities are big business in Canada: thousands of them run very sophisticated operations for marketing, fundraising and service delivery. The Trust must find ways to compete effectively for support in this increasingly sophisticated and entrepreneurial domain.

Inflation

17. With the emergence of inflationary pressures due to COVID, continuing supply chain issues, war in Ukraine, and other destabilizing influences, the cost of goods and services is on the rise. Inflationary pressures must be taken into account when formulating the Strategic Plan.

Legislation and Compliance

18. All three levels of government have enacted and will add pieces of legislation over time that bear on Canadian Charities and various aspects of the Trust’s daily operations and service delivery. The Trust must be aware of all Acts, statutes, laws, bylaws and regulations pertaining to its operations so it can access all provisions that are beneficial to charity organizations and ensure that it is structured to be fully compliant.

Pushing Beyond Our Comfort Zone – Organizational Change

Corporate Culture

19. The Trust has excelled in the role of steward and keeping operations running smoothly year after year. In light of the daunting fundraising challenges that lie ahead it was agreed that the Trust will need to become more innovative and marketing driven.

Risk Tolerance

20. The Trust has been conservative financially and effective at preserving its wealth over the years. It is understood that greater assumption of calculated risk will be necessary to create the potential for greater rewards. The Trust must be willing to try new things and accept that some may not yield the intended benefits. Becoming more adept at defining and managing acceptable risk will be necessary.

Spend More to Earn More

21. The Trust has been used to a zero-sum approach over the years, meaning conducting operations while preserving its net worth. Things that may have seemed too risky or even an extravagance, such as hiring more staff, are now likely to be essential. Making that shift in thinking and being open to new approaches will be needed. The Trust will have to think and act like a multi-million-dollar national charity organization moving forward.

Acting Proactively

22. It is appreciated that the Trust will have to become more proactive in the areas of innovation, marketing, fundraising and its business practices. One example of how successful change would look in the fundraising area is that the ratio of funds raised proactively should grow to significantly exceed the funds that come from windfall donations.

Acting With Intention

23. This simply means that whatever is being done is done on purpose with forethought and planning preceding action. The Strategic Plan will deliver this at the strategic level, but the same rigor must apply to daily operations.

Business Transformation

Capabilities and Capacity Growth

24. The Trust must ensure it has the capabilities, expertise and capacity necessary to fulfill the goals of the Strategic Plan and effectively conduct all aspects of the Trust's operations. Once the needed capabilities and knowledge have been identified, the best way to fulfill those requirements must be determined. The solution, likely involving a combination of a larger staff organization, contracted services, and engagement of volunteers would then be implemented.

Governance, Policy, Processes and Procedures

25. The Trust must ensure that its governance, policies, processes and procedures are current and well documented. This is not only necessary to ensure the efficient and effective operation of the Trust, but also to make sure that the "corporate" knowledge of what contributed to past success is captured.

Virtual Workspace

26. A virtual workspace with needed applications, collaborative tools, data storage, security and whatever else is needed to support the Trust's operations must be provided. The workspace will be accessible at work and from anywhere outside the office. All of this is intended to provide productivity support for the team's work.

Talent Acquisition

27. Growth in knowledge, expertise and capacity will be needed. It is likely that talent acquisition in the form of new hires, contracted services, in-kind donation of services and engagement of expert private volunteers will require significant time and effort to complete. The Strategic Planning Committee and staff will have to identify how best to tackle this challenge.

Analysis Capability

28. Successful NFPs utilize data, metrics and analytics to gain as clear an understanding of trends, behaviours, and performance, all of which support informed decision-making and investment of resources. They help identify opportunities, and signal where the organization is succeeding, needs improvement, or should stop doing something that isn't delivering desired results. The Trust will have to gain knowledge and capability in this field.

Return on Investment

29. This is a very specific metric, and one that will be critically important because every dollar invested in some endeavour is another dollar that must be raised through individual donations, fundraising or government grants and other support. Learning how to establish, monitor and analyze this metric to provide critically important advice to the Board must be a priority as the plan implements.

Knowledge

Knowledge Acquisition to Enable Success

30. There is a gap in knowledge and sophistication between what the Trust is capable of now and what it will need to be successful in the future. Throughout the strategic planning effort, it became apparent that time to research and learn, as well as investment in training and development should be identified as initial steps in Action Plans, wherever necessary.

Identity

31. The Trust's identity has remained relatively constant since its inception. It was acknowledged that there are opportunities to expand its reach, appeal and relevance to make it more fully national in its scope. Further exploration of this topic was encouraged and will be crucial to solidify before Branding and Marketing strategies and plans can be developed.

Branding and the Trust's Value Proposition

32. Moving forward with the development of the Trust's updated brand was seen as a top priority. It will need to be confirmed before the development of a marketing plan can begin. Linked to both of these is the need to be able to articulate a value proposition that will convince

people with no prior connection to CNMT to care enough to become involved and encourage those who are already committed to care enough to assist even more.

Messaging Challenge-Linking Past Deeds to the Present

33. One thing that the majority of the 86,000 registered charities have that organizations dealing with historical preservation don't is present day, real-time evidence of the good deeds they are performing. That immediacy and obvious positive impact that people see in their lives today makes it easier to create the emotional and caring link needed to win their support. The Trust must find ways in its messaging to demonstrate how the heroic deeds of the past have relevance and a positive impact on the daily lives of Canadians.

Marketing Strategy and Plan

34. The Trust will need expert advice and assistance to develop a sound marketing strategy and plan. Implementing the plan that will support fundraising, membership recruitment and cultivate interest in both younger and traditional audiences as quickly as possible, is viewed as a critically important enabler. We must be sure to include performance measures, including ROI, and a plan to monitor and make needed adjustments.

Communications

35. If the Trust increases its offerings of services and events, it will be important to formulate a more developed communications strategy and plan. There is specialized knowledge associated with growing this capability to more effectively manage communications and event planning. The Trust must grow its ability to deliver effective communications support for both planned events and activities, and when the unexpected occurs.

Bilingualism

36. As part of the discussion about becoming more national in scope, eliminating barriers to participation and making the Trust's work more accessible to Canadians there was strong consensus that the Trust must grow its bilingual capability. Over 20% of Canadians who served in WWII had as their first language French and the percentage of current serving personnel would be somewhat greater than this. The Trust's reach into Quebec and francophone communities across the country must be enhanced.

Become Expert Users of Demographic Data

37. One of the most potent data sets available to charities, most of which is in the public domain, is demographic information. Understanding demographics enables the Trust to tailor its fundraising strategies, influence marketing investment choices, increase the rate at which recipients of marketing information decide to participate, forecast trends and so much more. In order to take full advantage of this and other important data sets, the Trust must seek a smart solution to increasing its analysis capabilities.

What the Statistics We Have Tell Us

38. The Trust understands that its three most significant regional sources of active supporters, its Trustees, are from Nova Scotia (54%), Ontario (23%) and British Columbia (8%). The majority of participants join after age 50. Five times more people join from the private

sector than do those who worked in DND. Other statistics were discussed, revealed opportunities and influenced choices made by the planning team.

Succession Planning

39. It was recognized that there must inevitably be a turnover among the Board and staff. Thought needs to be given as to how best to prepare for those eventualities and to ensure that knowledge and records that uniquely reside with individuals are properly captured as a matter of course.

Challenging Our Mental Models and Assumptions

40. Mental models describe how we perceive things to be. It doesn't mean that it is an objective and verifiable fact, or even that others would share the same perception. Our mental models are informed by our values, beliefs, and experiences. In the case of the Trust, and the Board, with the majority having served in the RCN, and relatively little diversity of backgrounds, perceptions are likely naturally self-amplifying because participants' backgrounds and experiences have tended to be so similar. Mental models can both enable or constrain. It was acknowledged that the Trust's mental models about things like the value the Sackville and Trust represent to Canadians and how well it is known need to be challenged and if warranted, evolved based on feedback through surveys, interviews and research.

Education

41. The potential associated with becoming more involved with education projects is to;
- a. increase the Trust's relevance;
 - b. share artifacts that may be of interest to academics and other researchers;
 - c. enhance the Trust's overall community outreach plan; and
 - d. foster interest and pride among Canada's youth in Sackville and the stories the ship represents in the hope that their interest is sustained as they grow up and eventually some decide to become active supporters of the Trust's work.

Storytelling

42. Storytelling has always been the most effective way to connect hearts and minds and impart knowledge to others. While there are impressive and epic stories to be told, there is benefit to storytelling that is more personal and relatable, especially to generations so separated by time from the Second World War. Incorporating effective storytelling in our marketing, interpretation of the period and as part of the visitor experience on board Sackville has the potential to boost the level of interest and engagement of current and potential patrons and ultimately increase the number of people who decide to become active supporters.

Sackville – The Trust's Nexus

43. Without Sackville, there would never have been the Trust. It is the most visible manifestation of the Trust's work. It is how most people come to know of the Trust and it is the most significant experience we can offer to visitors. Its value is in part linked to its "last remaining" status, but it also serves as a nexus in a variety of ways including that:

- a. it enables storytelling that links Canada's past and with our present;
- b. it profoundly motivates our continuing relationship with the RCN;
- c. it is a link that leads to the engagement and support of private and public sector organizations, and attracts so many individuals who generously donate money, or their time and talent, or both, to support all that the Trust seeks to achieve;
- d. it has enabled us to become part of the worldwide community of historical naval ship organizations and museums, all of which represent opportunities for the Trust to access best practices, mutual support and learn more about preservation and exhibit and visitor experience development; and
- e. as the Trust's single greatest asset, it has connected us to documentary, feature film and video game development projects. And those connections lead to greater visibility, new stakeholder support and opportunities that were never foreseen.

Wealth Generation

Individual Donors and Foundations

44. Data reporting indicates that almost 75% of monetary donations in Canada are made by individuals and Foundations. More individuals are "shopping" for charities to support, often looking for overhead in the vicinity of 10% of a charity's expenditures. Older and wealthier Canadians give more. To be a savvy fundraiser, the Trust must understand all of these things and more to ensure it focuses on the most promising opportunities. In the Trust's case, it must also be able to provide a sound explanation for why its administrative overhead is likely to be higher than normal for some time – in essence this is because of the projected 10-year delay before the major part of the expected expenditure of \$15M occurs.

Corporate Sponsors and Partners

45. While corporations may not represent the largest monetary donor segment in Canada, they do engage in sponsorship and partnership opportunities with charities as part of their community outreach and annual good corporate citizenship objectives.

In-Kind Donations of Professional Services

46. 49% of Canadian professional services business donate the time and talent of some of their workforce to support charities. Soliciting In-Kind donations represents an underutilized opportunity for the Trust.

Diversification

47. As with any portfolio, it is most prudent to diversify income sources so that should returns subside in one area they can hopefully be offset by successes in other areas. Developing a diversified fundraising strategy will be key to the Trust's fundraising success.

Power of the Mailing List

48. The "mailing list!" How many times have you been invited, through a company's website, to join their mailing list? There is a reason they offer to pay you for your email address

by offering enticements such as merchandise discounts. They understand the power that critical and cherished access to you that your email grants them. It enables repeated visits to the user's In Box where relationships are fostered, their brand is inculcated, and campaigns to influence behaviour can be shared. Growing the Trust's Mailing List will enable far greater and more effective sustained outreach and engagement. Every opportunity to grow this list must be pursued.

Ship Preservation & Maintenance

Accurate Assessment of Hull Life and Replacement Cost

49. The two most critically and urgently needed pieces of information that must be ascertained within the Strategic Plan are how long the ship can safely remain in the water before the hull must be replaced and how much the Hull Replacement Project (HRP) is likely to cost. This information is so important because it will affect so much of the Trust's effort in various aspects of the Strategic Plan and ongoing operations.

Detailed Plan

50. A detailed plan will be needed so we understand the process to be followed in order to replace the hull and what it would look like over our current assumption of a 10-year lead time. Additionally, the plan must include an assessment of the shortest possible time needed to move through the process should it be discovered that the hull replacement will have to progress sooner than the 10 years currently anticipated and to precisely identify the minimum time that would be needed to accomplish the hull replacement should the 10-year timeline have to be revised.

Additional Work During Docking

51. Planning should also identify additional work that can be advantageously undertaken concurrent with the HRP when the ship is docked. Cost estimates would be required for the additional docking work packages, should any be identified.

Planned Maintenance Program

52. The Trust must ensure that a formal and documented Maintenance Plan for the ship is in place and followed. It should be designed to best preserve all parts of the ship, ensure continuing safety, provide for enhancements to the visitor experience and enable annual budgeting and work planning.

MANDATE

53. The Trust's mandate comprises enduring pursuits and responsibilities that will not always translate into the goals and objectives of a specific Strategic Plan, but are core activities that the Trust consistently devotes its time and energy towards.

The Mandate

The Trust affirms its enduring commitment to:

1. Ensuring that HMCS Sackville is preserved in perpetuity as a cherished Canadian naval icon and major artefact of one of the country's defining moments, for future generations of Canadians to experience and enjoy;
2. Ensuring that the service and sacrifice of Canadian sailors during the Second World War is commemorated;
3. Promoting education and awareness of the stories associated with the Canadian Navy's extraordinarily important contribution to the Allied effort to safeguard democracy, and secure peace during the Second World War;
4. Continuing to develop, and make accessible to the public, the historical archives held by the Trust (including both physical objects and stories); and
5. Ensuring that the Trust has sufficient resources and support for the fulfilment of its Mission.

MISSION

54. The Trust is dedicated to making sure that HMCS Sackville remains a living and vibrant historical site that commemorates Canada's Second World War naval effort, achievements and sacrifices. It is committed to ensuring that as many of the remarkable stories associated with this extraordinary national endeavour are shared so all visitors understand how their lives today have so profoundly benefitted from the monumental and heroic efforts of all the Canadians who worked so hard to build the third largest navy in the world and conduct naval operations in the Battle of the Atlantic and around the world.

55. The Trust's **Mission Statement** that sums all of this up is:

To preserve the ship and share the stories.

VISION

56. Our **Vision Statement** is aspirational and describes our organization’s desired future state, typically in 5 to 10 years. The Trust’s Vision Statement is:

Inspiring generations of Canadians to appreciate the accomplishments and sacrifices of the Royal Canadian Navy during the Second World War that helped make the world a better place.

VALUES – GUIDING PRINCIPLES

57. Core Values are the preeminent values that are deeply ingrained in an organization’s culture and guide its actions. A value, expressed typically as a single word, is a fundamental belief or trait of an organization. A guiding principle describes how the value is manifested within the organization. The Trust’s Core Values and Guiding Principles are described in Table 1.

TABLE 1 - CNMT’S CORE VALUES AND GUIDING PRINCIPLES	
Core Value	Guiding Principles
Commitment	<ul style="list-style-type: none"> We choose to contribute our knowledge, skills, time and effort to advance and accomplish the Trust’s good works We understand that our act of volunteering includes a promise to work, and to be productive and continuously involved
Knowledge	<ul style="list-style-type: none"> We pursue knowledge to increase our competencies, capabilities and effectiveness We recruit those who have knowledge, talent, expertise and experiences not present within our existing team We share our knowledge, stories and collections enthusiastically with all who are interested in learning about Canada’s naval experiences, contributions, sacrifices and achievements during the Second World War

<p>Stewardship</p>	<ul style="list-style-type: none"> • We strive to carefully manage, conserve and preserve historical items entrusted to our care to extend their life and ensure they are available and accessible to present and future generations • We collect and curate relevant stories, in any form, that when shared enable audiences to gain a richer understanding of the Canadian naval experience during the Second World War
<p>Excellence</p>	<ul style="list-style-type: none"> • We strive to constantly evolve and improve • We set high standards that propel and elevate our performance • When we can't reach the desired high level of achievement on our own, we seek the support of exceptional individuals and organizations • We provide exceptional visitor experiences that leave an enduring impression, and inspires conversations, remembrance and gratitude • We inspire people to care and talk about what they have experienced and learned by visiting with us in person or virtually • We develop and deliver services and products of the highest quality • We run a sophisticated and highly effective not for profit business operation
<p>Honour</p>	<ul style="list-style-type: none"> • We pay tribute to those who served by promoting awareness and appreciation for their service, sacrifice and achievements through the production of high-quality exhibits, displays, and learning activities • We ensure veterans and their families are treated with dignity and respect when they visit or have any dealings with the Trust • We conduct every aspect of our work ethically, responsibly and entirely in ways that we can always be very proud of and that will inspire confidence and trust • Commemorative events we are associated with must be dignified and respectful
<p>Teamwork</p>	<ul style="list-style-type: none"> • We blend our talents, knowledge, skills and energy to work together in support of the Trust's work • We share ideas and perspectives freely to enable the best possible outcomes and informed decision-making • Collaboration, cooperation and effective communication are key enablers of our team's success • We seek to bring Trustees on board to assist with specific projects • Teamwork can extend to outside organizations and individuals when our desired outcomes align

<p>Innovation</p>	<ul style="list-style-type: none"> • We encourage imaginative and creative approaches to enhance any aspect of our operations, services and products • We accept that not every new idea will be successful and, in those cases, we benefit by applying what we learn from it to future endeavours • We monitor and evaluate our performance, trends, feedback and data and evolve our strategies and practices to grow and build future success • We pursue diversification to enhance performance and mitigate risk
<p>Engagement</p>	<ul style="list-style-type: none"> • We are proactive in marketing, fundraising and recruiting various forms of support • We ensure that our team members, donors, supporters and partners feel valued by acknowledging their contributions to our success • We ensure that the team has all the information it needs to make their best possible contribution to success.

GOALS AND THEIR OBJECTIVES

Establishing the Goals

58. After taking into account all of the information and planning considerations, including the Chair’s Positioning Statements and ideas generated throughout the planning process, participants distilled hundreds of ideas down into Goal groups. After careful reflection the four most potent Goals were chosen, all of which were considered vital to enabling the future success of the Trust. Each goal represents significant opportunities for change and improvement in how the Trust conducts its good works, and will be part of the foundation on which the Trust will build over the next decade or so.

Objectives Needed to Achieve the Goals

59. Goal Teams identified the Objectives they determined would have to be accomplished in order to achieve their respective Goals. Each objective statement had to meet the SMART criteria:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-Driven

It is essential that objectives be clearly defined so that the end state is clear and teams know when they have achieved each objective.

Goals and Objectives Tables

60. In the following tables the four Goals and their associated Objectives are listed.

GOAL 1 ESTABLISH THE BUSINESS ORGANIZATION, PRACTICES AND GOVERNANCE NEEDED FOR THE TRUST’S FUTURE	
Objective Number	Objective Statement
1.1	Enhanced Governance Bylaws and required Board Policies are enacted by 31 May 2025
1.2	Design and implement the business organization needed to support the future endeavours of the Trust by 30 April 2024
1.3	Design and implement required business processes, policies and procedures by 30 June 2025
1.4	Ensure the Trust is advantageously positioned in the following areas: Articles of Incorporation, legal agreements, finance, records, inspections, certifications, inventory management, insurance and compliance requirements by 31 March 2024
1.5	Implement IT, IM and KM capabilities, with supporting processes and policies, needed to support Trust activities by 31 December 2024
1.6	The Trust has a mature Communications planning process and Public Affairs capability by 1 April 2025
1.7	Generate 150 additional hours of annually donated work to augment staff capacity, knowledge and expertise by 31 December 2026. 1 st year target 50 hours. 2 nd year target 100 hours

GOAL 2	
LEVERAGE KNOWLEDGE TO ENABLE, ENGAGE AND EDUCATE	
Objective Number	Objective Statement
2.1	Produce and implement a Branding Strategy for the Trust by 31 March 2024
2.2	Produce and implement the Trust's Marketing Plan by 1 September 2024
2.3	Design and implement a Learning Plan that ensures all levels of the Trust's team will acquire the knowledge needed to excel in their respective areas of endeavour and enable the Trust to thrive as a national Not for Profit by 31 March 2025
2.4	Complete a study that recommends the information and data sources the Trust should be utilizing to enhance its effectiveness by 30 June 2024
2.5	The Trust is skillfully employing the most potent Communications Channels in support of its work by 30 September 2024
2.6	The Trust's new Education Program launches by 31 May 2025
2.7	The Trust to offer all of its services and products in English and French by 31 May 2026

GOAL 3	
GROW WEALTH TO MEET FUTURE NEEDS	
Objective Number	Objective Statement
3.1	Raise \$4M by 31 December 2025
3.2	Establish three Private Sector Sponsorships by 31 March 2026
3.3	Establish at least one new Support Agreement with each level of government by 31 December 2025
3.4	Grow membership from outside of Nova Scotia by 200 Trustees by 30 April 2026
3.5	Grow the under the age of 40 membership segment by 200 Trustees by 30 April 2026
3.6	Grow our Non-Trustee Mailing List by 4,500 individuals by 31 March 2026

GOAL 4 ENGINEER SOLUTIONS TO PRESERVE THE SHIP	
Objective Number	Objective Statement
4.1	Determine the current state of the hull and estimate its life with ROM cost by 1 April 2024
4.2	Determine the preferred technical solution and identify options for implementation by 1 April 2025
4.3	Generate initial additional work package to be performed concurrently during the docking for the Hull Replacement Project (HRP) by 1 April 2025
4.4	Receive response to Contract Tender from selected bidders by 15 December 2025
4.5	Contract awarded for the Hull Replacement Project (HRP) and executing by DD MMM YYYY (dated driven by assessed hull life)
4.6	Provide CNMT oversight and management of contract execution until the ship is accepted on DD MMM YYYY (date will be stipulated in the HRP contract)
4.7	Ship Planned Maintenance Program implemented by 30 June 2024

Action Plans

61. Detailed Action Plans for accomplishing each Objective have been produced and will be used to guide the teams and enable progress monitoring. Action Plans will be held separately by the Goal Teams and their progress monitored by the Strategic Planning Committee.

SUSTAINING STRATEGY – ENSURING THE PLAN IS ACHIEVED

62. Ensuring the Work Progresses: The keys to successfully implementing a Strategic Plan are:

Management, Coordination and Oversight

- a. The Strategic Planning Committee has been established to perform these critical functions. Coordination includes things like avoiding duplication of effort, ensuring the sequencing of objectives that impact other goal groups is properly established, priorities are established and resources are available when needed.

Scheduling, including regular meetings

- b. Just as there are plans and schedules for the achievement of each of the four goals, there needs to be a planned schedule for meetings, reporting and collaboration. Essential elements for such a schedule include:
 - i. Strategic Plan and associated projected 3-year funding approval meeting;

- ii. Monthly Strategic Planning Committee (SPC) Progress Reports;
- iii. 3-hour Quarterly SPC Progress Meetings (more frequently when required);
- iv. 1-day Strategic Plan Refresh meetings for all Board and key staff members, conducted at the end of the first and second years of the plan where updates are presented, factors that may require changes and adaptation to some elements of the plan are discussed and plans for the next year are made;
- v. Updated annual funding approval meetings. Goal Teams present updated funding requirements for the next fiscal year to the SPC and a representative of the SPC in turn briefs the Board on the plan's funding requirements and seeks the Board's approval. These will have to align with the Trust's annual budget planning cycle;
- vi. Annual progress report to be presented either in conjunction with a General Meeting or separately following each Refresh meeting; and
- vii. Commence planning early in the third year of the plan for generation of the next Strategic Plan.

Monitoring & Reporting

- c. Effective monitoring starts with well-defined measures. Those typically are found in both the Objective Statements and their associated Action Plans. The use of a Dashboard that is populated and updated by the Goal Leads as part of their monthly progress reporting is an important tool for management and oversight of the plan. It should be accessible to the SPC, staff and Board members. If something more detailed than a Dashboard is desired, project management Gantt Charts have been used successfully by many organizations. They do require significant effort to create.

Recordkeeping

- d. Execution of strategic plans involve significant investments of human and financial capital. So many plans and decisions are made within the overall plan. Documents like contracts, Terms of Reference, project plans, minutes of meetings, presentations, drawings, and so on are generated. For audit, oversight, information and knowledge management, among many other good reasons, it is important to establish a designated electronic record space and set out policy on what records must be saved and preserved as part of the Strategic Plan corporate record.

Communication

- e. Ensure that stakeholders, those who are not members of the SPC are kept abreast of progress. Illustrate how progress toward achieving the goals is benefitting the organization. Celebrate and communicate successes. Ensure

information is flowing effectively between all those who are working to implement the plan.

Accountability

- f. This can feel tricky for many in volunteer-driven NFPs, but really it is about people being responsible for doing what they committed to do. If everyone is doing their best and disappointing news has to be delivered with respect to progress, the team must view it as a shared opportunity to figure out how to get things back on track and provide any support that is asked of them. The organization must show that it values both the good and bad news and regards both as propellants of progress. The monthly and annual progress reporting promotes a culture of accountability.

Adaptability

- g. It is important to remember that a plan, even the most brilliant one, is an expression of intent and a series of predictions of where those intentions will take the organization. The most significant thing a great plan enables is the measuring and assessing how the organization is doing. Things will inevitably change along the way. The key is to recognize and adjust to them when necessary. It would be rare for a Goal or Objective to be changed during the execution of a Strategic Plan. Contemplating it would be an exceptional situation, but if it is needed, be open to adapting the plan when it is absolutely clear it is needed.

CONCLUSION

63. The impetus for this strategic planning effort was the growing sense that the next decade was not going to resemble the previous 40 years of the Trust's existence which had been relatively stable and consistent. In order to be able to deal with the unprecedented need to increase fundraising to meet an anticipated \$15M refit expense, ensure the Trust and its work remained relevant, and the organization was positioned favourably to thrive in the very competitive Canadian NFP sector, it became so clear that changes would be needed in order to succeed in all of these areas.

64. This plan was forged by the Board, staff members and invited guests. The team's shared belief in the value of the Trust's important work, the merits of this plan and their commitment to doing the associated work will propel the organization forward.

65. The Mandate, Values and Mission articulated in this plan reflect the strengths that have, and will continue to serve the organization well over the next decade. Our Vision is ambitious and will lay the foundation for all the future successes that will need to be realized. The Goals address the most pressing areas for change and include focus on the areas of:

- a. Enhancements to our business practices, operations and governance;
- b. Making smart use of knowledge to improve our capabilities and performance, be much more successful in our outreach and engagement of prospective

supporters, and to continue to increase our relevance through knowledge, archives and artefact sharing;

- c. Increasing our capacity to raise needed funds and support; and
- d. Engineering solutions to ensure Sackville is preserved for generations to come.

66. The plan contains well defined Objectives and detailed Action Plans that will enable the goals to be achieved.

67. The Trust and HMCS Sackville exist today because so many over the years have recognized the importance of embracing and commemorating Canada's remarkable naval achievements during the Second World War. They could see how the society we are so fortunate to live in as Canadians is tethered to our nation's naval past. Many have given their support so the work could continue. This plan charts a course to ensure that the ship and the stories associated with Canada's naval legacy will be accessible to future generations. The Trust's team is ready in all respects to launch and get the implementation of the plan underway.