

Whitevale Golf Club

Strategic Plan – 2023 - 2027



The Strategic Plan contained in this document deals with the Whitevale Golf Club's Vision/Mission (what is our core purpose, our reason for being, who are we, and what we value and what we want to be) and our future Strategic Direction (marketplace positioning, key success factors, membership goals and priority projects). It is anticipated that the Long Range Planning Committee (LRP Committee) will review this plan each fiscal year and ensure it is updated, refreshed, and approved by the Whitevale Board of Directors (the "Board"). Management and other Board committee roles are to develop operational and annual plans consistent with the priorities outlined in the Strategic Plan.

Updated September 2023 by the Strategic Plan Sub Committee of LRP Committee:

- Dave Leonard - Board Member, LRP Committee Chair
- Neil Downs- LRP Committee Member
- Dee Steinwall - LRP Committee Member
- Darryl Brown - LRP Committee Member, Government Relations Committee Chair
- Bob Tennyson - Board VP and LRP Committee Member
- Stephen Spiers - Board Member
- Dan Campbell - GM/COO

1.0 INTRODUCTION:

At Whitevale Golf Club, we will provide the members with a high quality golf course, facilities, and services in a fiscally responsible manner. To achieve this goal and attract the next generation of members, the Board will review and approve a rolling five year Strategic Plan recommended by the Strategic Plan Sub Committee of the LRP Committee.

We will use the Strategic Plan to set priorities, focus our energies and resources, and ensure that we are working towards a common goal. It will also identify the Mission, Vision, and the long-term values of the Club. Lastly, it will lay out Strategic Goals as well as potential solutions and recommended action items for each goal.

The Strategic Plan is intended to serve as a framework to guide current and future Boards, Committees and Management as they carry out their governance and operational responsibilities.

Leveraging the input from the Club membership, the Strategic Plan is a living document, against which our progress is reviewed and updated on an annual basis.

2.0 WHITEVALE CLUB HISTORY:

Whitevale Golf Club was founded and opened on June 14, 1958, by Jack and Winnie Boyes.

Course construction began in the spring of 1955 with Jack Boyes as the architect and Bill Diddel, an accomplished course designer, as consultant.

On July 31, 1974, an Expropriation order was issued by the Government of Ontario with a possession date of November 6, 1974, for the proposed Pickering Airport. The Whitevale Golf Club was able to secure a lease on the properties in the interim. The Provincial Government eventually sold the lands and facilities back to the club for \$3.5 million finalized on April 29, 1999. At that time 531 transferable memberships were created at \$5,000 each to raise half of the required funding and the remainder covered by a mortgage.

In 2003, the Board and membership commissioned Thomas McBroom and his architects to complete state-of-the-art course renovations that were completed by 2006. In the fall of 2011, a developer purchased two small parcels of land at the north end of the property for \$4 million, which was used to offset some costs for a future new clubhouse. On December 9, 2012, the membership approved the construction of a new clubhouse, which was officially opened on April 16, 2015.

Whitevale has a long History of golfing accomplishments as shown by those who have played on the Canadian, LPGA and PGA tours, played on a World Amateur winning team, plus participated in International Matches as well as amateur competitions across Canada. The Club also has recognized a group of members, who over the years have made major contributions to the success and growth of Whitevale Golf Club. A Wall of Fame plaque in the entrance hallway recognizes each of these members and their contributions.

In 2004, Whitevale Golf Club hired its first GM, which allowed the Board to focus on governance and strategic initiatives leaving operations to be managed by the GM. Committees, sub committees and working groups are created by the Board in response to the current needs of the Club.

The Club is celebrating its 65th anniversary in 2023.

For an in depth and very interesting read, there is a book covering the history of WGC titled: *"Fore 9!"*, authored by Club Historian and long-time member, Walt Lemon.

3.0 OUR DEMOGRAPHICS:

Whitevale has a variety of membership and membership categories resulting in a very diverse golfing community.

2023 Observations:

After reviewing the demographics, it is important to note that we will need to attract new members as the current membership ages and moves on. The profiles below show that, in 2023, the number of members under 60 is roughly 46% and over 60 in 54%. This ratio indicates that with good retention of the under 60 group members, we will have a healthy pipeline for the over 60 group. Our recruitment strategies should outline specific plans to meet the requirements of this age group. Success will mean a healthy and stable membership going forward.

Other insights this data provides are as follow:

- We have a solid Junior Program with approximately 100 juniors
- a) Our largest age group is 60 plus but as noted above, there is a strong under 60 group as well

Recommendations:

- Target our new membership marketing plans at 40-59 age group
- Address the current restrictions as majority of younger members want to play on the weekends
- Provide incentive for Associate Members/Spousal's to move to full membership
- Capitalize on the quality and location of our golf course
- Leverage our number one source of new members: Member Referrals

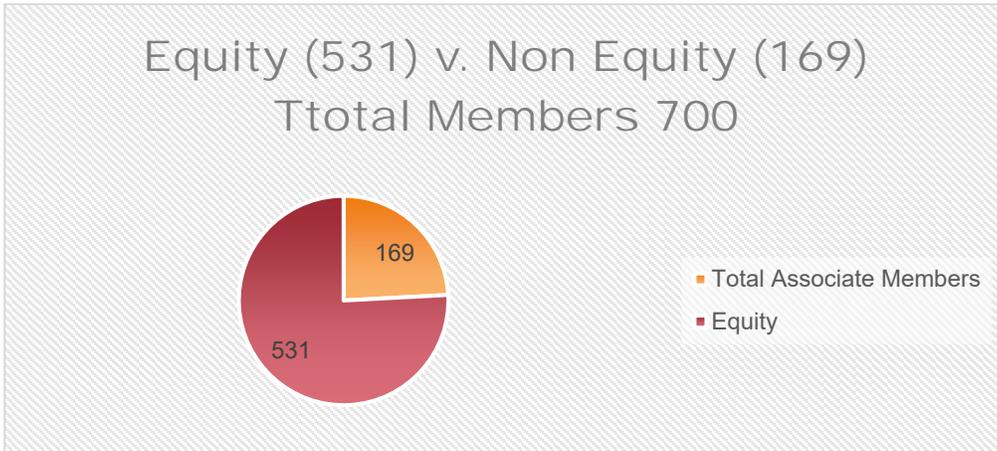
Other Insights:

The Club's Equity Members by Category (A, B, and C) was established on purchase of the lands and facilities in 1999. Our member demographic profile has changed since then and it's time to review.

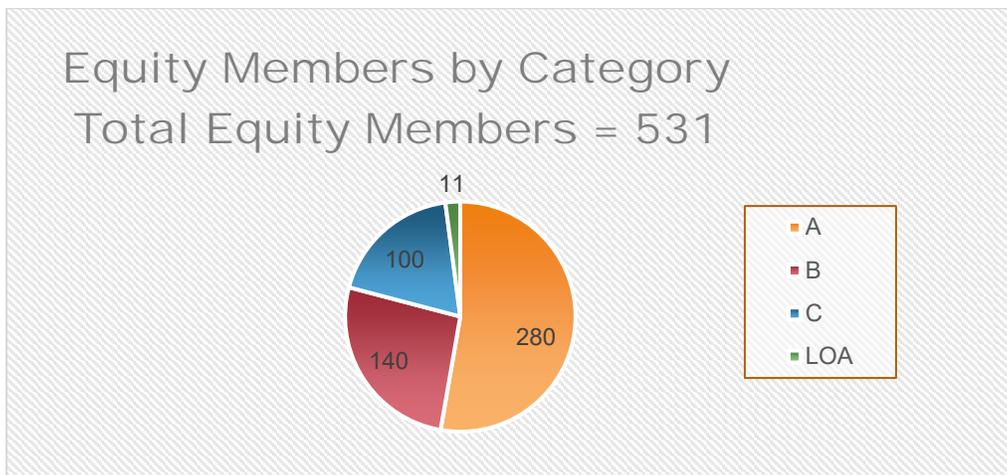
The Board has established a Working Group to review our current membership Player Categories and playing restrictions for each Player Category.

Equity Membership Information:

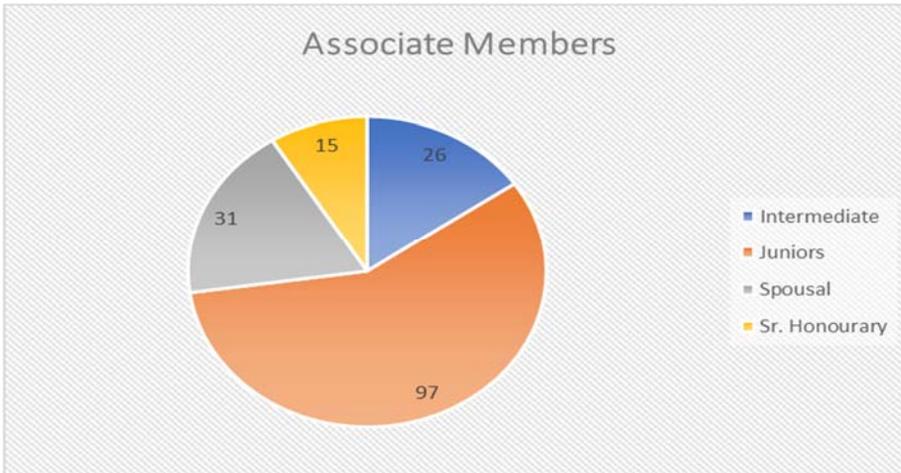
Membership Equity vs Non Equity



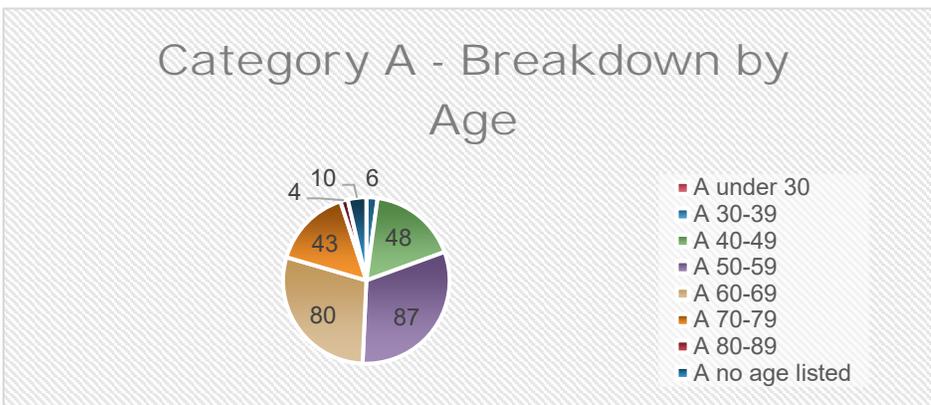
Equity Membership by Category:



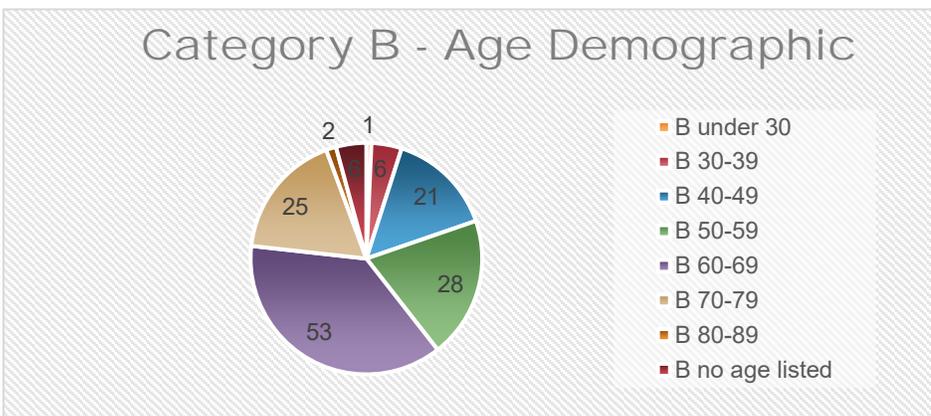
Associate Members by Category



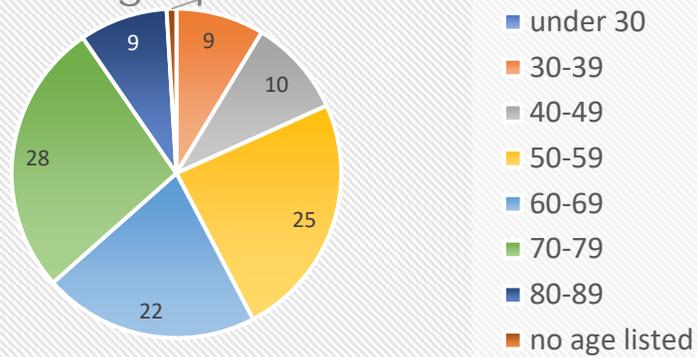
Age of Members



Age of Member

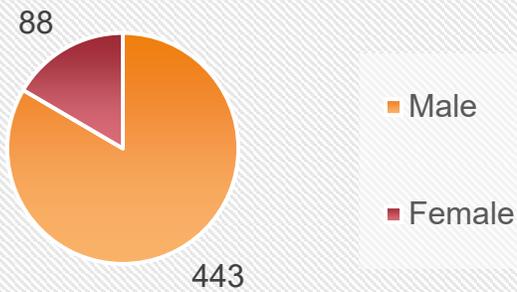


Category C - Age Demographic



Gender Makeup of Equity Membership

Gender



4.0 WGC STRATEGIC PYRAMID:



5.0 MISSION STATEMENT:

A mission statement is a declaration of an organization's core purpose, its reason for being, who it is, and what it values.

"The mission of Whitevale Golf Club is to provide its members, families, and guests with high-quality golf club, facilities, and services, managed in a professional manner."

6.0 VISION:

A Vision Statement identifies what an organization should strive to become in the future. It serves as a basis for the evaluation of the existing situation and the development of the strategies and action items for future improvement and development.

"The Vision of the Whitevale Golf Club is to be the private golf club of choice in the eastern GTA by attracting and retaining members through a high-quality golf course, exceptional golf programs for all skill levels and outstanding hospitality services, at an attractive financial proposition."

7.0 CORE VALUES:

Core values are an organization's fundamental beliefs.

At Whitevale, our Core Values include:

a) Golf

- Promote the game of golf thru a wide range of casual and competitive golf programs for all skill levels and interests.
- Provide a well maintained and playable golf course appealing to all skill levels
- Respect for sustainability and environmental issues in the maintenance of the golf course
- Maintain and foster a family-friendly membership

CORE VALUES (Cont'd)

b) Integrity:

- Respect for our history, traditions, members, staff, and guests
- Accountability thru transparency, good governance, asset sustainability, and sound financial management

c) Communications:

- Fair, open, and responsive to concerns and suggestions
- Continual, candid, and factual feedback to the membership

d) Leadership:

- Good corporate citizen within the city of Pickering, Durham Region, and the Village of Whitevale
- Respect for our members, staff, guests, and suppliers
- Diversity and equality in everything we do
- Provide our employees with a safe, enjoyable work environment where they are empowered to voice their opinions

e) Respect:

- Respect for our members, guests, environment, neighbors, partners, and key stakeholders by promoting a club that is free from harassment and promotes inclusive policies and programs that support diversity.

8.0 WHITEVALE MEMBER PLEDGE TO STAFF:

At Whitevale Golf Club, we are part of something special: a club culture that challenges, champions, and celebrates our people. To maintain and promote this culture, Whitevale pledges that they will endeavor to provide our staff with the tools to collaborate and share in the provision of positive experiences to our members and guests; and interact and communicate with staff in a courteous and respectful manner.

9.0 STRATEGIC GOALS:

The Board and Long-Range Planning Committee have identified five strategic goals/plans to guide our actions over the next five years:

- a. **Preserve and Enhance the Club's Facilities**: apply the necessary resources to maintain the Club's facilities including the main clubhouse, kitchen, out buildings, and other support structures to provide a healthy and welcoming facility to our employees, contractors, members, and guests.

- b. **Maintain a Strong Membership**: offer a range of services as well as programs that will attract and retain a strong membership base . We will take advantage of the changing demographics and the needs of our members and guests. The Board and GM/COO will implement comprehensive, consistent communications programs to ensure that the membership is continually updated on all current activities, Club Policies/Procedures, Strategic Plans, and Governance Structure.

- c. **Practice Sound Financial Management of Club Assets**: provide sound financial management and reporting to members, ensuring the club's assets are always maintained in a fiscally responsible and sustainable manner through a rolling 5 Year Capital Plan.

- d. **Provide Responsible Governance**: provide the Club with sound governance and ensure that Strategic Five (5) Year Plans, By-Laws, Club Policies, and proper communications are established, followed, maintained, up to date and meet all government (ONCA) and any other legal requirements. All documents requiring retention based Legal and/or Government requirements will be achieved in a responsible manner.

- e. **Ensure that the Long Range Planning Committee has Measurable Objectives** in each of their major foundational “pillars”: the Asset Management Plan, the Club’s Strategic 5-Year Plan, the Golf Course Master Plan (from the Golf Committee), and the 5 Year Capital Plan (from the Finance Committee). All pillars will be updated and refreshed on an annual basis and presented to the Board for review/approval.

10.0 MANAGEMENT'S STRATEGIC INITIATIVES:

Management's Strategic Initiatives include planning, setting goals, and implementation both in current and future years consistent with Whitevale's Strategic Plan.

Based on Section 9.0 Strategy

Board Driven Objectives	Measurements	Action(s) Required	Owner(s)	Frequency
Preserve and Enhance the Club's Facilities	Maintenance Schedules	Review all contracts	Management	Annual
Satisfied and Engaged Membership	Operational Survey	Update survey	Management	June & September
	Event Participation	Promote & Monitor	Committees & Management	Monthly
Membership Share Transfer	Lead to Sale Conversion	Lead Generation and Response	GM/COO	Weekly
Financial Management	Annual Budgets	Prepare	Finance Committee & Management	Monthly
	Annual Capital	Assess	Finance Committee & Management	Monthly
	Capital Assets Management	Prepare	Club Benchmarking & Management	2023 Season
Governance	Strategic Plan	Review & Update	LRP Committee & Management	Annual
	Golf Course Master Plan	Review & Update	Greens/Golf Committee & Management	Annual
	By-Laws	Review & Update	Board & Committee	2023 Season
	Club Policies	Review & Update	Board & Management	Annual
Measurable Objectives	KPIs	Monitor	Management	Monthly

11.0 "SWOT" ANALYSIS (Strengths/Weaknesses/Opportunities/Threats)

A SWOT analysis for the club has been performed using a general questionnaire to the Board and Committees. Representing the broader membership, the questionnaire asked Committee members to comment on our Club's Strengths, Weaknesses, Opportunities, and Threats. A summary of our 2023 SWOT analysis is presented in Appendix "A" of this document. Based on annual surveys and feedback, the Strategic Plan/SWOT Analysis will be updated to bring additional focus to the goals and objectives, which guide the actions of current and future Board of Directors.

12.0 STRATEGIC PLAN REVIEW/APPROVAL PROCESS:

The Strategic Plan will be updated and presented to the Board on an annual basis by the Long-Range Planning Committee. The Board will approve the Strategic Plan and include the highlights in the Board presentation at the Annual General Meeting (AGM).

Appendix A: SWOT. ANALYSIS:

To be reviewed and updated on an annual basis by the Long-Range Planning Committee.

Strengths: What are the club's strengths?
What are our advantages over other clubs in the community? What do we do well?

- Welcoming atmosphere in a secluded setting
- Highly rated and well maintained championship golf course and practice facilities
- Wide variety of golf events for every skill level
- Offers individual and group instruction
- Competitive Annual Dues
- Club has a strong financial position
- Clubhouse ambiance encourages dining and socializing activities
- Variety and quality of social events
- Communications – Sideline 30, Info Tee, Website, Blog, Twitter
- Environmental Stewardship
- Solid Professional Management Team

Opportunities: What opportunities might move the club forward? What could we improve? (i.e., new, or revised methods of recruitment or other such opportunities)

- Extend golf related offerings and dining for the entire year
- Consider offering additional indoor winter golf activities (simulators)

Weaknesses: What are the club's weaknesses? What are we not so good at? What drives away potential members?

- Bunker playability
- Social media content
- Often difficult to get preferred tee time
- Non-flexible playing categories (A B, C, Etc.)
- Lack of a more proactive marketing program and new member targets

Threats: What are the threats or obstacles that we face? What factors prevent us from getting better or growing memberships?

- Ability to attract new members
- Attracting and retaining Employees
- Cost of golf – both money and time
- Other options for physical fitness
- Deviating from core values
- Ability to finance future capital projects

- Documented Plan to attract new prospective members
- Additional game/dinner packages
 - On Course amenities
 - Review club tournament formats
 - Large local housing developments provide potential new members
 - Focus on inclusivity and diversity
 - Develop Succession Plans for the Board of Directors, Committees, Working Groups, and professional staff

- Future economic downturns

Appendix “B” - FINANCIAL RESULTS

2022 Audited Reports can be found on the Club website>Reference Materials>Financial Information or click on this link:

<https://members.whitevalegolfclub.com/Reference/fin2022.pdf>

Appendix “C” - KEY STRATEGIC ACHEIVEMENTS

A motion was passed at the July 2023 meeting of the Board of Directors requiring each Committee and Working Group established by the Board to prepare an “Executive Summary” covering their current year’s highlights.

2023 will be the initial implementation for some of the Groups/Committees with full participation by all groups expected in 2024

The files will be included as links to the Reference Section on the WGC Website.

At a minimum, they will contain Goals, Accomplishments, and Activities to be Carried Over to the following year

Each of the following groups would submit an outline of their accomplishments for that year (in time for inclusion in the AGM agenda)

- Board of Directors
(Executive Committee)

- Management
- Finance
- Golf Committee
- LRP Committee
- Member Experience
- Membership
- 2023 Workgroups:
 - Bell Tower
 - Bunker Renovation
 - Bylaw revision (ONCA)
 - Technology

This section of the Strategic Plan will contain a rolling 5-year set of Priorities/Results - add the current year each year and archive the oldest set.

Coordination and assembly of these documents would rest with LRP Committee.

LRP COMMITTEE:

2021 LRP EXECUTIVE SUMMARY LINK:

(insert link)

2022 LRP EXECUTIVE SUMMARY LINK:

(insert link)