

SOVEREIGN LAKE  
NORDIC CLUB

# Strategic Plan 2022-2026

*Draft (22-12-13)*

*Prepared with assistance from  
Finley & Associates Ltd.*

**Vision:** *World-class, year-round mountain destination for recreational and sports experiences.*

**Mission:** *We deliver a world-class Nordic destination offering year-round mountain activities in an environmentally responsible manner*

## Values

Values are fundamental principles and beliefs that serve as implicit criteria guiding all actions and decision-making.

- Community-driven
- Collaborative
- Inclusive
- Excellence
- Wellness
- Environmental Protection
- Accountability

### Vision

*The vision articulates the desired future state of Sovereign.*

**World-class, year-round mountain destination for recreational and sports experiences.**

### Mission

*Sovereign's mission articulates what is done everyday to achieve the vision.*

**We deliver a world-class Nordic destination offering year-round mountain activities in an environmentally responsible manner.**

### Strategic Priorities

*To focus the efforts, three strategic priorities were identified for action over the next 36 months*

1. **Organizational Excellence**
2. **Year-Round Destination**
3. **Outreach**

### Goals

*Goals are ideal states to be achieved at some time in the future by Sovereign.*

1. Offers a variety of programs that are accessible, inclusive, and affordable.
2. Ensures financial sustainability through innovative endeavours.
3. Recognized as a community leader and contributor to the economic success of the Okanagan region.
4. Provides outdoor recreation while protecting the natural environment by operating in an environmentally sustainable manner.

### Key Performance Indicators

*Key Performance Indicators (KPIs) are measures used to gauge performance.*

1. **Strategic Alignment**
2. **Board Effectiveness**
3. **Market Focus**
4. **Organizational Excellence**
5. **Profile, Collaboration & Strategic Partnerships**
6. **Green Index**
7. **Financial**

FINLEY / ASSOCIATES

# 1. Situation Assessment

## Overview

Sovereign Lake Nordic Club (Sovereign) operates a world-class cross-country ski venue located within Silver Star Provincial Park, adjacent to the town of Vernon in British Columbia. Sovereign is dedicated to the promotion of cross-country skiing as an inclusive lifelong activity for all ages and abilities<sup>1</sup>. Sovereign is a membership-based club that offers a variety of recreational and competitive programming and events for Youth and Adults. There are currently 3,000+ members of Sovereign, 600 of which are actively engaged with the Club; meaning they are involved with Programs, volunteer, donors and/or regularly visit Sovereign.

As the organization looks to the future, it recognizes that a balance between being a membership-based organization and a tourism destination is necessary for the club's survival (see Appendix 1 & 2). It is important to note that Sovereign will never forget its Nordic Club roots; however, it is anticipated that membership will stabilize around ~3,000 members that only account for 40% of the Club's overall revenue and Season Pass sales account for 35% of sales. The proposed shift enables the Club to explore the opportunity of offering year-round events and programming.

## Key Accomplishments

Sovereign has accomplished a lot over the last few years<sup>2</sup>:

### Infrastructure

- ✓ Upgraded Biathlon Range to top 3 range in Canada
- ✓ New equipment: Two new Pisten Bully 400 snowcats
- ✓ Trail expansion and grooming capacity

### Programming

- ✓ Spirit North Program (Indigenous youth)
- ✓ Youth and Adult Ski Programs
- ✓ S'Cool Ski Program, delivering outdoor experiences to 1600 regional youth annually,
- ✓ Providing safe outdoor fitness during COVID
- ✓ Organizing Nationals

### Financial

- ✓ Staying open with strong financial management (while maintaining reasonable fees) during COVID

### Staff & Volunteers

- ✓ Living wage employer
- ✓ Approved 4 new Programs staff positions and successfully hired outstanding staff
- ✓ Nurturing volunteer development opportunities by offering free coaching and officiating courses
- ✓ Improved coordination and recognition of volunteer development
- ✓ Maintaining returning staff

### Governance

- ✓ Leadership. Sovereign won the 2022 Greater Vernon Chamber of Commerce Tourism Excellence Award

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<sup>1</sup> Sovereign Lake Nordic Club website accessed September 2022.

<sup>2</sup> Sovereign Strategic Planning Retreat – July 27, 2022.

- ✓ GM has created a culture of positivity and forward momentum; local leader and voice. Won 2022 Greater Vernon Chamber of Commerce Business Leader of the Year Award.
- ✓ Ability to manage themselves and their membership
- ✓ Growing Membership base (one of the biggest in North America)
- ✓ Ability to lead and manage through growth

### **Profile**

- ✓ Recognized as one of the top cross country ski destinations in North America!!
- ✓ High safety standards
- ✓ Community awards
- ✓ Brought Sovereign back to community parade
- ✓ National & International recognition (Amazing Race, Continental Cup Series & S2S)
- ✓ Hosted Mexican National ski competition + inaugural ladies' category
- ✓ Hosted first high-level race in Canada after COVID and turned around and hosted 2<sup>nd</sup> race the next weekend
- ✓ Partnership/building relationship with SSMR

## Strategic Priorities

Sovereign identified four Strategic Priorities to focus effort around over the next 2-3 years.<sup>3</sup>

### 1. Organizational Excellence (Strategic Planning, Responsibility & Governance)

- Sustainability (take advantage of the club growth and financial boom to prepare for the future)
  - Create 3-year Capital planning model
    - Strong fundraising initiative over the next few years
- Future growth opportunities
- Stable Governance at every level
- Excellent [Staffing] Experience
  - Maintain supportive culture
- Succession Planning (Board; Staff; Volunteers; Coaches)
- Maintain today's organizational standards (e.g., staffing, grooming)
- Maintain focus on all Nordic & winter activities

### 2. Year-Round Destination (Exploratory)

- Excellence [Customer] Experiences
  - Market Segmentation (e.g., skill development)
  - Self-scanning stations/check in on mobile app
- Explore, investigate, and pilot various year-round activities
- Carrying Capacity
- Lodge upgrades/build a new lodge
  - Indoor facilities are a priority
- Improve Sovereign access road for long-term use
- Plan for a “green” & sustainable organization (e.g., trail maintenance; protection of wildlife; decrease carbon footprint)
- Increase inclusivity
  - Accessibility and inclusive opportunities

### 3. Outreach (Build Brand Awareness)

- Better job at branding BC Parks
- Better storytelling (Sovereign is world class!! General public doesn't know this)
- Partnerships (SilverStar; KalTire; Vernon; Nordiq Canada; etc.)
- Prioritizing social media

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<sup>3</sup> Sovereign Strategic Planning Retreat – September 8, 2022.  
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## 2. Strategic Direction

### Values

Values are fundamental principles and beliefs that serve as implicit criteria guiding all actions and decision-making<sup>4</sup>.

#### Sovereign's Values

- **Community-driven:** *Sovereign is guided by the vision and the needs of the community.*
- **Collaborative:** *Sovereign collaborates with government, sport governing bodies, local business and industry partners in the realization of its mission.*
- **Inclusive:** *Sovereign promotes an inclusive environment with a focus on quality programming for all age groups including youth, people with disabilities, all genders, and Indigenous population.*
- **Excellence:** *Sovereign promotes an accessible, affordable, high-quality experience.*
- **Wellness:** *Sovereign contributes to broader community health objectives through the promotion of active lifestyles and friendships in the mountains.*
- **Environmental Protection:** *Sovereign will operate in an environmentally sustainable manner.*
- **Accountability:** *Sovereign is governed with integrity, openness, and transparency.*

### Vision

The vision states the desired future state of the organization<sup>5</sup>.

#### Sovereign's Vision

***World-class, year-round mountain destination for recreational and sports experiences.***

#### **Key Concepts:**

- Year-Round Destination
- Accessible, inclusive and affordable
- Variety of outdoor experiences
- World class destination
- Community collaborator/builder
- Economic contributor

### Mission

The mission describes the organization's distinctive identity in the sector<sup>6</sup>.

#### Sovereign's Mission

***We deliver a world-class Nordic destination offering year-round mountain activities in an environmentally responsible manner.***

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<sup>4</sup> Sovereign Strategic Planning Retreat – September 8, 2022.

<sup>5</sup> Ibid.

<sup>6</sup> Ibid.

## Goals

Goals are ideal states to be achieved at sometime in the future<sup>7</sup>.

### Sovereign's Goals

1. Offers a variety of programs that are accessible, inclusive, and affordable.
2. Ensures financial sustainability through innovative endeavours.
3. Recognized as a community leader and contributor to the economic success of the Okanagan region.
4. Provides outdoor recreation while protecting the natural environment by operating in an environmentally sustainable manner.

## Key Performance Indicators

Key Performance Indicators (KPIs) are measures established to gauge performance. Focus areas for future KPIs are listed below with context for KPIs shown in [Table 5](#).<sup>8</sup>

### Sovereign's Key Performance Indicators

1. Strategic Alignment
2. Board Effectiveness
3. Market Focus
4. Organizational Excellence
5. Profile, Collaboration & Strategic Partnerships
6. Green Index
7. Financial

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<sup>7</sup> Sovereign Strategic Planning Retreat – September 8, 2022.

<sup>8</sup> Ibid.

## Key Performance Indicators

KPIs	Rationale for Measuring (link to Strategic Priority)	What will we analyse and measure?	Discussion Frequency	Committee
1. Strategic Alignment	<i>Ensure the organization is focused and aligned to meet the Vision.</i>	Strategic Planning Process	Annual	Governance
		Current Strategic Plan	Annual	
		Budget aligned to Strategic Plan	Annual	
2. Board Effectiveness	<i>Ensure the Board is high-performing.</i>	Succession Plans	Annual	Governance
		Board Evaluation	Annual	
		GM Evaluation	Annual	
3. Market Focus	<i>Ensure the organization is focused on its target market and can meet the evolving needs.</i>	Customer Satisfaction/Retention	Annual	Stakeholder Engagement
		Member Satisfaction/Retention	Annual	
		Programs Participation/Development	Annual	
		Volunteer Satisfaction/Retention	Annual	
4. Organizational Excellence	<i>Ensure the organization is operating at an optimal level.</i>	Staff Satisfaction/Retention	Annual	Operations (Human Resources/Lodge)
		Infrastructure (e.g., Trail Maintenance; New Lodge)	Annual	
		Safety	Annual	
5. Profile, Collaboration & Strategic Partnerships	<i>Ensure the organization is growing its profile and reputation strategically within the community(ies) it's serving.</i>	Formalized Strategic Partnerships	Annual	Stakeholder Engagement
		Community Engagement	Annual	
		Marketing Plan (incl Social Media)	Annual	
		Brand Visibility	Annual	
6. Green Index	<i>Ensure the organization is acting in an environmentally responsible and sustainable manner.</i>	Ability to meet set-out Sustainability Goals (Biosphere)	Annual	Operations (Board)
		Ecological/Sustainability Footprint	Annual	
		Priority on low-carbon strategies	Annual	
7. Financial	<i>Ensure the organization is financially sustainable.</i>	Variance Report	Quarterly	Finance (Fund Dev)
		Revenue Mix (Grants; Donations; Fee-for-Service)	Annual	
		Capital Budget	Annual	
		Budget	Annual	
		Salary-Wage as % of total expense	Annual	



# 3. 3-year Implementation Plans

## Strategic Priority #1: Organizational Excellence

Strategic Priority #1: Organizational Excellence	Champion	Target Date
<b>1. Governance</b>		
1.1 Clarify definition of Member and the value proposition.	Governance	Year 1
1.2 Develop a Succession Plan for General Manager and additional Staff positions.	Governance	Year 1-2
1.3 Develop a Succession Plan for the Board and Board Committees.	Governance	Year 2
1.4 Ongoing Strategic Planning.	Governance	Ongoing
1.5 Review and refresh Mandate of the Board and its Committees.	Governance	Year 2
1.6 Review and refresh all Governance documents (Bylaws and Policies + Procedures etc).	Governance	Year 2-3
<b>2. Financially Sustainable</b>		
2.1 Create 3-year Capital Planning Model.	Finance/Fund Dev	Year 1
2.2 Develop and operationalize a Fundraising Strategy.	Finance/Fund Dev	Year 1
a) Develop a Case for Support.	Finance/Fund Dev	Year 1
b) Develop supportive infrastructure (e.g., Policies; Technology Platform?).	Finance/Fund Dev	Year 1-2

## Strategic Priority #2: Year-Round Destination

Strategic Priority #2: Year-Round Destination	Champion	Target Date
<b>1. Infrastructure &amp; Facilities Strategy</b>		
1.1 Undertake Environmental Impact Study	Lodge	Year 1
1.2 Develop comprehensive long-term site development plan (e.g., outline and assess facilities options).	Lodge	Year 1
1.3 Market Assessment and Target Market Definition (includes benchmarking).	Lodge	Year 1
1.4 Develop a Case for Support.	Lodge	Year 1
1.5 Self-scanning stations/check in on mobile app.	Operations	-
<b>2. Sustainable &amp; Green Organization</b>		
2.1 Trail additions & infrastructure maintenance.	Operations	-
2.2 Protection of Wildlife.	Operations	-
2.3 Evaluate ways of decreasing carbon footprint & alternative sources of energy.	Operations	-
<b>3. Programs</b>		

<b>Strategic Priority #2: Year-Round Destination</b>	<b>Champion</b>	<b>Target Date</b>
3.1 Develop a Programs Strategic Plan (includes Outreach Strategy to underprivileged kids etc.).	Head Coach (Programs)	Year 1
<b>4. Year-Round Activities</b>		
4.1 Explore, investigate, and pilot various year-round activities.	Stakeholder	Xx
4.2 Develop a Competitions Strategic Plan.	Competitions	
4.3 Develop an Events Strategic Plan.	Events	

### Strategic Priority #3: Outreach

<b>Strategic Priority #3: Outreach</b>	<b>Champion</b>	<b>Target Date</b>
<b>1. Strategic Partnerships</b>		
1.1 Develop a Strategic Partnerships Strategy (e.g., Silver Star; KalTire; Thompson Okanagan Tourism Association; Tourism Vernon; Nordiq Canada).	Governance & GM	Year 2
<b>2. Improve Brand Identity</b>		
2.1 Clarify distinguishing attributes of Sovereign.	Governance & GM	Year 1
2.2 Develop a Social Media Strategy.	Governance & GM	Year 1-2
2.3 Develop a Community Outreach Plan (including Lodge Outreach).	Governance & GM	Year 1

# 4. Governance

## Sovereign’s Governance Structure

Sovereign is comprised of 10 Directors.<sup>9</sup> The Board has seven Standing Committees: 1) Governance; 2) Fund Development; 3) Events; 4) Human Resources; 5) Finance; and, 6) Programs. There are five Sub Committees: 1) Strategic Planning; 2) Awards; 3) Communications; 4) Competitive; and, 5) Recreational. There is currently one Ad Hoc Committee – Lodge. There are two Operational Committees: 1) Health & Safety and 2) Environmental Sustainability.

### Sovereign's Governance Structure



<sup>9</sup> RMSO website accessed December 22, 2021.  
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## Committee Mandates

Committee	Mandate	Members
<b>Governance</b>	<i>Enhance the effectiveness of organizational governance at Sovereign. The Committee will develop a long-term vision and governance framework to support Sovereign's success including policies designed to provide for effective and efficient governance, TOR development and refreshment in partnership with each Committee (including mandate, roles, membership, terms, reporting, structure), championing Board and Director orientation and development and ensuring appropriate accountability mechanisms are in place for Directors and Staff.</i>	<i>Chair Vice-Chair Secretary Treasurer BOD Member</i>
<b>Fund Development</b>	<i>Leads the Board's participation in resource development and fundraising. Develops and sustains long-term relationships with Donors, Sponsors, key community partners, and volunteers.</i>	<i>Accountant Lodge rep Finance Committee rep General Member GM</i>
<b>Stakeholder Engagement</b>	<i>Ensures that Sovereign understands and effectively communicates with the various stakeholders that engage with the organization. Identifies and develops Strategic Partnerships and oversees Volunteer management.</i>	<i>Chair GM General Member/Lodge rep General Member</i>
<b>Events</b>	<i>Leads the development of competitions and social events to build and enhance the organization's community.</i>	<i>(Comp Committee)</i>
<b>Human Resources</b>	<i>Assist the Board of Management in fulfilling its oversight responsibilities by reviewing the management of human resources within the organization and providing recommendations and advice on the organization's human resources management strategies, risks, initiatives, and policies.</i>	<i>Board Member x 3</i>
<b>Finance</b>	<i>Provides the financial and leadership oversight for the organization by proactively developing and monitoring processes to ensure financial accountability and sustainability.</i>	<i>Finance Chair BOD member GM Accountant</i>
<b>Programs</b>	<i>Ensures that Sovereign is providing programming that is relevant to the community through evidence-based decision-making and data collection.</i>	<i>Head Coach BOD Member Programs staff</i>
<b>Lodge</b>	<i>Oversee and lead the development of a new lodge.</i>	<i>BOD Members General Members (as needed)</i>

Committee	Mandate	Members
<b>Health &amp; Safety</b>	<i>The primary purpose and role of the Health &amp; Safety Committee is to ensure the safety of our staff and operational volunteers. Within this mandate, the committee shall exercise oversight in the core responsibilities of Reporting / Mitigating Workplace Hazards, Maintaining Proper Documentation, Ensure Proper and Effective Training in all areas of Operations and provide a sounding board for staff to voice safety, and workplace concerns.</i>	GM BOD member SLNC staff General member(s)
<b>Environmental Sustainability</b>	<i>Actively promote initiatives to the board and other committees on recommended actions that would improve the near/long term environmental impact of operations. Advise the board on issues of environmental importance to stakeholder groups and to the community at large. Promote environmental awareness amongst visitors to encourage adoption of sustainable practices beyond Sovereign Lake Nordic Centre.</i>	BOD member GM SLNC staff General member(s)

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