Osoyoos Golf Club

Member Communication

Strategic Planning Document

Updated October 2026

Member Communication

Dear Members,

On behalf of the Board of Directors, I am pleased to share a brief overview of Osoyoos Golf Club's updated Strategic Plan.

Over the past several months, the Board and management have taken time to review where the Club stands today, the opportunities and challenges ahead, and the key priorities that should guide our decisions over the next several years. This process included member and employee feedback, review of operational and financial information, industry trends, and a dedicated Board Retreat focused on the Club's long-term future.

The purpose of this communication is not to provide every detail of the plan, but rather to share the highlights with you: the process we followed, the updated vision and mission, the values that continue to guide us, the major strategic pillars, and the key priorities that will shape the Club's focus moving forward.

As a Board, we believe this updated plan provides clearer direction, better alignment between governance and management, and a practical roadmap for protecting member value while also supporting the Club's long-term sustainability and success.

Thank you for your continued support of Osoyoos Golf Club.

Sincerely,

Alan Bajkov
Board Chair

Strategic Plan Update

Over the past number of months, Osoyoos Golf Club has been working on an updated Strategic Plan to help guide the Club over the next several years. This work included input from member and employee surveys, review of financial and operating results, industry data, the current strategic plan, the 2026 Management Operational Plan, and a full-day Board Retreat focused on the Club's long-term future.

The goal of this process was not to reinvent the Club. It was to take an honest look at where we are today, what we do well, what pressures we are facing, and where we need to focus our time, energy, and resources going forward. The result is an updated plan designed to support long-term sustainability, protect member value, improve course and facility planning, strengthen communication, and keep Osoyoos Golf Club moving in the right direction.

Updated Vision

To be the premier golf club in the South Okanagan, known for great golf, strong community, and an experience that people are proud to be part of.

Updated Mission

Our mission is to create an enjoyable and inclusive golf and social experience for all through sound management, strong financial foundations, a well-maintained golf course that is enjoyable for golfers of all abilities, high-quality amenities and services, exceptional hospitality that attracts customers and builds lasting member loyalty, and a positive workplace culture that makes the Club a great place to work.

Core Values

- Friendly and Welcoming
- Fellowship and Camaraderie
- Respect
- Culture of Excellence
- Innovation
- Transparency
- Fun

Strategic Pillars

- Financial Sustainability and Revenue Growth - ensuring the Club remains financially stable and resilient while continuing to protect member value.
- Course Conditions, Facilities and Capital Planning - protecting and improving the Club's physical assets through practical capital planning and ongoing investment in conditions and infrastructure.
- Member Experience, Access and Communication - improving the overall member and guest experience through better onboarding, clearer communication, improved service consistency, and more intentional management of access.
- Community, Partnerships and Grow the Game - strengthening the Club's role in the community, building relationships, and creating opportunities to attract and develop future golfers.
- Governance, Leadership and Volunteer Succession - supporting strong governance, clearer leadership pathways, and better long-term continuity for the Board, committees, and Club leadership.

Key Priorities Over the Next Few Years

The Strategic Plan has identified eighteen key strategic priorities to support the five key pillars. Here are some examples of the important and immediate tasks that will be the focus of the Board and Management.

- Complete a formal five-year capital plan.
- Review membership categories, pricing, and long-term member value.
- Improve course conditions and prioritize key infrastructure needs.
- Strengthen member communication and overall service consistency.
- Improve the new-member onboarding experience.
- Make better use of data to guide decisions around access, pricing, and operations.
- Grow participation through junior, family, and new-golfer pathways.
- Strengthen Board succession and volunteer attraction planning.

Moving Forward

Osoyoos Golf Club has many strengths: a distinctive 36-hole facility, a loyal membership, committed volunteers, experienced leadership, and an important place in the South Okanagan community. This Strategic Plan is intended to help us protect what already works, make disciplined decisions about what needs to improve, and ensure the Club is well positioned for the future.

Thank you to everyone who contributed feedback and input throughout this process. We look forward to sharing progress as this work continues.

Strategic Priorities and Action Items

The following action tables translate the five strategic pillars into practical goals, strategic actions, leadership accountability, Board role, measures, expected timing, and future review or reassessment cadence.

Pillar 1: Financial Sustainability and Revenue Growth

Ensure the Club remains financially stable, resilient, and capable of funding long-term needs while protecting member value. This includes a stronger connection between revenue growth, capital reserves, capital infrastructure, and long-term investment planning.

Goal	Strategic Actions	Lead	Board Role	Measures	Expected Completion Timeline/Date	Future Review or Reassessment Date
Maximize total Club revenue	Grow revenue through membership, green fees, food and beverage, events, sponsorship, partnerships, and other appropriate opportunities. Particular attention should be paid to underused tee-sheet capacity, shoulder periods, and off-peak inventory. Introduce Dynamic Pricing and Wait List Management System (Noteefy). Introduce AI phone answering system. Introduce Wedding and other outside banquets to grow event and Food and Beverage revenues.	GM, Head Golf Professional & Food & Beverage Manager	Approve strategy and monitor results	Revenue targets achieved; improved revenue mix; increased non-member rounds; stronger event and food and beverage performance.	Ongoing; Dynamic Pricing – May 2026 Noteefy – July 2026 AI – July 2026 Weddings - 2027	Quarterly revenue review; annual strategy reset before budget approval

Goal	Strategic Actions	Lead	Board Role	Measures	Expected Completion Timeline/Date	Future Review or Reassessment Date
Review pricing and membership economics	Review membership categories, dues logic, intermediate and young-professional pricing, green-fee strategy, and overall value proposition. Use benchmarking, member feedback, and internal data to support recommendations. 2027: Intermediate and Non-Resident Category focus. 2028: Survey membership in 2026 for feedback for 2028 dues and categories.	Membership & Finance Committees	Approve policy direction	Board-approved membership and pricing review completed by December 31, 2026 with focus on Intermediate and Non-Resident for 2027; pricing benchmarks to be reviewed annually.	December 31, 2026	Annual review each fall before dues and fee recommendations
Strengthen financial planning discipline	Support the Strategic Plan with annual business plans, rolling forecasts, reserve planning, monthly financial updates, and a clear long-term approach to debt reduction and reserve growth. Implement a standardized reporting dashboard utilizing the Club's accounting software. Create a summary document that outlines our Loans and Lease obligations as well as vendor contracts and agreements. Review insurance coverage. Complete appraisals on buildings and assets.	Finance Committee & GM	Oversight and approval	Annual operating surplus achieved where possible; reserve progress and forecast accuracy reviewed quarterly	October 1, 2026 for dashboard; ongoing thereafter	Quarterly forecast and reserve review; annual long-range financial review
Connect revenue decisions to long-term capital investment	Ensure reserve-building, debt reduction, and annual budget decisions are assessed against capital infrastructure requirements, asset-replacement needs, and long-term funding obligations.	Finance Committee & Board	Set policy direction and review funding strategy	Capital reserve targets established; funding assumptions linked to five-year capital plan; major infrastructure risks identified and sequenced	December 31, 2026	Annual review alongside capital plan and operating budget

Pillar 2: Course Conditions, Facilities and Capital Planning

Protect and improve the Club's core physical assets through disciplined asset management, practical capital planning, and visible improvement to playing conditions.

Goal	Strategic Actions	Lead	Board Role	Measures	Expected Completion Timeline/Date	Future Review or Reassessment Date
Develop a five-year capital plan	Create and maintain a formal five-year capital plan that identifies must-have, need, and want projects. Include estimated costs, timing, likely funding sources, financing assumptions, lifecycle implications, and risk or impact ratings. Prioritize key physical needs that protect the golf and hospitality experience, including irrigation, pump station requirements, equipment replacement, cart fleet strategy, drainage, kitchen roof, and other critical infrastructure items.	Finance Committee & Board	Approve and review annually	Board-approved five-year capital plan completed by December 31, 2026; annual review completed; projects sequenced and linked to funding strategy	December 31, 2026	Annual Board review each fall; mid-year reassessment if costs or risks change
Town of Osoyoos Irrigation Water Strategy	Communicate the needs of consistent irrigation water with the Town of Osoyoos and their staff.	GM & Superintendent	Oversight	Adequate supply of useable irrigation water.	Ongoing	Quarterly review.
Improve targeted playing conditions	Continue visible and practical improvement programs related to greens consistency, bunkers, tees, cart paths, selected tree management, and practice facility enhancements. Superintendent to communicate priority list to Board that will tie back into the 5 year capital plan.	Greens Committee & Board	Monitor outcomes	Improved playability scores; reduced recurring complaints; annual progress visible to members and guests	Ongoing, with annual work plan by March 31 each year	Seasonal review at year-end; member feedback reviewed annually

Pillar 3: Member Experience, Access and Communication

Focus on the overall member and guest experience by improving onboarding, access, communication rhythm, and service consistency.

Goal	Strategic Actions	Lead	Board Role	Measures	Expected Completion Timeline/Date	Future Review or Reassessment Date
Deliver the 3 Cs as an operating standard	Use Conditions, Consistency, and Communication as the guiding lens for the member and guest experience. Continue communications around maintenance work, closures, project timing, service delivery, and other operational impacts that affect how members and non-members experience the Club. Establish a more predictable communication rhythm that includes member updates (utilizing the club newsletter), event and tournament calendars, project updates, and clearer explanations of key decisions. The AGM in the Spring and the Information Meeting in the Fall are key opportunities to communicate these messages. Utilizing the club member online portal to communicate to the membership.	GM / Superintendent / Operations	Monitor member value and risk	Improved member feedback; fewer surprises for members; better communication scores; stronger perception of consistency across key touchpoints	Ongoing	Monthly operating review; annual member survey reassessment
Strengthen the member journey	Formalize new-member onboarding, welcome touchpoints, orientation to Club systems and offerings, and follow-up. Continue exit interviews and annual surveys to better understand retention, satisfaction, and frustration points. Implement a Member Ambassador Program (mentorship) with peer engagement.	Membership Committee	Oversight and monitor	New-member onboarding process launched by December 31, 2026; 90-day follow-up process in place; retention, survey scores, and exit themes reviewed annually	December 31, 2026	90-day follow-up for new members; annual retention and exit theme review

Goal	Strategic Actions	Lead	Board Role	Measures	Expected Completion Timeline/Date	Future Review or Reassessment Date
Balance member access and public-play opportunity	Use data to better manage the relationship between member access, public rounds, tournaments, events, pace of play, and tee-sheet utilization. Define clearer operating parameters around balance and fairness.	GM / Golf Ops & Executive Committee	Set strategic boundaries	Access metrics tracked regularly; rounds mix reviewed; pace-of-play trends monitored; member complaints reduced over time	December 31, 2026 for policy review; ongoing monitoring	Monthly access and tee-sheet review; annual policy reassessment

Pillar 4: Community, Partnerships and Grow the Game

Deepen the Club's role in the community while attracting future golfers, building participation pathways, and strengthening external relationships.

Goal	Strategic Actions	Lead	Board Role	Measures	Expected Completion Timeline/Date	Future Review or Reassessment Date
Support and champion the grow-the-game strategy	Build practical pathways for juniors, families, newer golfers, women golfers, school partnerships, clinics, introductory programs, and future members.	GM / Golf Ops	Champion Message	Annual junior and clinic participation targets established and reported; new-golfer conversion tracked each season	December 31, 2026 for first strategy; then seasonal programming	Annual participation and conversion review
Strengthen external relationships	Maintain strong relationships with the Town of Osoyoos, Destination Osoyoos, tourism partners, hotels, local businesses, sponsors, neighbouring courses, and community organizations.	Board / GM	Participate where useful	Partner activity tracked; sponsor performance reviewed; tourism and community referrals monitored	Ongoing; relationship plan by December 31, 2026	Semi-annual relationship review; annual sponsor review
Increase community value and visibility	Continue community events and support initiatives while better quantifying and communicating the Club's contribution to fundraising, employment, tourism, and community life.	GM / Board	Champion Message	Annual community impact summary prepared; increased visibility through media, digital channels, and stakeholder feedback	Annual summary by Q1 each year, beginning 2027	Annual community impact reassessment
Celebration of Member Success	Look at ways to celebrate competitive success at the club. Club Championship recognition, Champion of Champions tournament, up and coming Junior golfers. Members having individual successes with the game of golf	Club Captain Committee	Champion Message	Highlighting the success of golf by members of the club.	December 31, 2026	Annual participation and conversion review
Volunteer Recognition	Define strategies to ensure member volunteers are recognized for their support of the club and events	Club Captain Committee	Champion Message	Highlighting the support of member volunteerism at the club.	December 31, 2026	Annual participation and conversion review

Pillar 5: Governance, Leadership and Volunteer Succession

Ensure the Club is governed well, supported by capable leadership, and positioned for continuity through strong governance, staff development, and risk planning.

Goal	Strategic Actions	Lead	Board Role	Measures	Expected Completion Timeline/Date	Future Review or Reassessment Date
Strengthen Board succession	Develop a succession and volunteer attraction strategy for directors, committee members. Identify needed skills and create clearer pathways into leadership roles.	Board / Nominating	Lead and approve	Skills matrix developed or updated; candidate pipeline strengthened; volunteer participation tracked annually	July 1, 2026 for initial plan	Annual Board and committee succession review
Keep governance strategic	Clarify Board, committee, and management roles. Keep Board meetings focused on strategy, risk, policy, finance, and long-range priorities rather than daily operations.	Board / Committees	Lead by example	Improved meeting effectiveness; stronger committee outputs; periodic Board evaluation completed	Ongoing; role clarity review by December 31, 2026	Annual governance effectiveness review
Support management and staff development	Treat staff retention, training, communication, and service culture as strategic priorities because they directly influence consistency, hospitality, and the Club's reputation.	GM / Board	Resource and support	Retention monitored; training activity tracked; employee feedback reviewed; service outcomes improved	Ongoing; staff development priorities by December 31, 2026	Annual employee feedback and training review
Strengthen risk and continuity planning	Maintain focus on business continuity, IT security, climate and weather risk, forest fire, water and irrigation risk, infrastructure risk, and reputational risk. Develop an Enterprise Risk Management program.	Board	Monitor and govern	Risk register maintained and reviewed annually; mitigation plans updated; continuity planning strengthened over time	ERM Framework completed by December 31, 2026	Annual risk and continuity review; urgent reassessment as risks change