

# RSCDS TORONTO ASSOCIATION STRATEGIC PLAN REVIEW – March 2017

In 2012, a Steering Committee met with Ron Purcell of Ron-Cell Marketing to develop a Strategic Plan for the Toronto Association (TA). The Committee worked under the leadership of then Board members, Margaret Rieger, Chair, John Clark, Vice Chair, and Jean Lindsay, Program Director. The purpose of creating the Strategic Plan was to thoughtfully and constructively assess the current and future dance environment and create goals and objectives that would support the Association in continuing to be a vibrant organization.

Ron Purcell volunteered his services as a consultant under the auspices of Management Advisory Services. For a donation, this service provides not-for-profits and charitable organizations with consulting services as requested.

As the project manager, Ron facilitated a series of meetings with the Board, as well as members. The outcome was a confirmation of our Mission Statement and the development of the Strategic Plan, articulated as a series of Goals and Objectives. An article about this process was published in the February 2013 Set & Link.

Over the years that followed several changes have been implemented to address action items that were identified in the Strategic Plan. Now 5 years later, in 2017, the Board has done a review, Goal by Goal, of the Strategic Plan and is happy to report that there have been many achievements. Numerous objectives have been met and continue to be relevant. However, others have yet to be addressed, or are now in need of realignment given our new board structure.

The following report provides commentary on the status of each of the Goals and Objectives set in 2012, and provides a base for future planning for the TA. Jean Lindsay reported on this review at the 2017 Annual General Meeting. If you would like more information after reviewing the 2017 Strategic Plan, please contact her at [jclind.1949@gmail.com](mailto:jclind.1949@gmail.com)

(Note: Within the context of this document, Goals were outlined as general areas of focus for the Association, while Objectives were identified as specific action items.)

## **OUR MISSION**

AS ONE OF THE WORLD'S LARGEST SCOTTISH COUNTRY DANCE (SCD) BRANCHES, WE PROVIDE LEADERSHIP AND COORDINATION IN THE PROMOTION AND DELIVERY OF SCD RELATED EVENTS, PROGRAMS, AND TRAINING WHICH:

ARE WELCOMING, ENJOYABLE AND APPROPRIATE FOR PARTICIPANTS OF ALL AGES AND ALL LEVELS OF ABILITY

AND PROVIDE THE MENTAL AND PHYSICAL BENEFITS OF SCD

WHILE MAINTAINING THE STANDARDS OF THE SCD FORM OF DANCE.

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## OUR GOALS / OBJECTIVES

### GOAL 1 – TO INCREASE EFFECTIVENESS OF **COMMUNICATIONS** WITH MEMBERSHIP AND WITH/BETWEEN SOCIAL GROUPS AND OTHER BRANCHES

- 1.1 Review & enhance ongoing communication with membership  
*This is chiefly accomplished via Set & Link and through the website. The Communication Director transmits Board/membership concerns to the S&L editorial group. Both S&L and the website act as bulletin boards for TA activities and events.*
- 1.2 Identify and implement opportunities to increase ongoing two-way communication between Branch & social groups  
*A yearly meeting between social group contacts, teachers and Board members has become an important opportunity for sharing problems and concerns. Action points from this meeting are revisited by the Board and distributed to specific Board members when appropriate. E-notes summarizing key policy decisions from Board meetings are distributed monthly to social group contacts.*
- 1.3 Develop leadership strategies to encourage communication between social groups  
*The Social Group Liaison meeting noted in 1.2 provides a forum for social group leaders. It was suggested that, on its own, this objective is vague and could be deleted/ incorporated in 1.2.*
- 1.4 Continue to develop and implement leadership strategies to encourage branches to work cooperatively and develop opportunities for synergies/partnerships  
*One notable success has been the TA Chair's attendance at the Southern Great Lakes Group, a semi-annual meeting of representatives from RSCDS branches in southern Ontario.*

### GOAL 2 – TO DEVELOP AND IMPLEMENT “**MARKETING**” PROGRAMS TO COMMUNICATE AWARENESS OF THE PURPOSE OF THE RSCDS TORONTO ASSOCIATION AND THE SOCIAL, MENTAL AND PHYSICAL BENEFITS OF SCD TO TARGETED AUDIENCES WITH A FOCUS ON THE INCREASED USE OF TECHNOLOGY

- 2.1 Revamp website to include content developed in 6.4, 6.9, 1.2, 5.1, etc.  
*Our Webmaster, Rob Lockhart has been instrumental in developing the TA website and posting material up-to-date material. Objectives 6.4 and 6.9 refer to TA's By-laws and Operations Manual both of which have been posted on the website in the most current version (2016). The “What's On: Near” page provides a well-used forum for communicating upcoming Branch and Social Group activities (as per Objective 1.2). Objective 5.1 regarding skill development at different dancing levels has been shared among TA SCD teachers.*

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- 2.2** Identify & implement ways to upgrade website to increase user friendly nature of access to all event & program information

*This objective overlaps somewhat with Objective 2.1. The website has been organized into easily accessed tabs clearing outlining Classes, Events (Near and Far), and TA's two main programs: the Tartan Ball and the Toronto Workshop. Again, thanks go to Rob Lockhart's graphic talents.*

- 2.3** Identify & implement ways to upgrade website to promote the global nature of SCD, the opportunities to dance worldwide and the availability of events programs for all ages and abilities

*The current Welcome page of the website offers several videos and links that achieve this objective. The marketing of TA activities is currently well served by the website. Maintaining the architecture of the website so that it continues to keep up with technology and user expectations needs to be an ongoing activity.*

- 2.4** Determine & implement other ways technology may be used to achieve the purpose of RSCDS Toronto including regular and ongoing advertising & event listings in a variety of websites and communities that serve the geography of the Toronto Association

*Advertising for major TA programs such as the Tartan Ball and the Toronto Workshop are regularly circulated to RSCDS branch website administrators across North America. Advertisements in non-SCD related local media, which typically would need to be purchased, have not met with much of a public response. Canvassing in local neighborhoods with postcards and the annual Culture Days event that draws in participants at street level have both proven to be successful in enticing new dancers to classes. The personal touch seems more effective and determining how technology can be of benefit needs to be continually assessed.*

- 2.5** Assure the website is "mobile friendly"

*To date the website is not mobile friendly. As per comments in Object 2.3, keeping website architecture/ infrastructure current with user expectation is an ongoing activity needing consideration.*

- 2.6** Determine & implement non-online marketing materials as needed (e.g., brochures, signage etc.) In conjunction with Goal 3 aimed at targeted groups in 3.4, 3.6, 3.7, 3.8, 3.9 etc. and develop teams to post regularly in community centres, libraries, retail bulletin boards etc.

*Postcards specific to classes and ceilidhs have been developed and distributed on a few occasions with reasonable success. Brochures and a flipbook have also been developed and distributed at events such as the St. Andrew's Ball. Brochures with blanks areas for Social Group info were printed and holders were ordered and distributed to Social Groups so they could be set up at local venues. The Board is continually looking for opportunities to market to specific target groups as outlined in Goal 3 Objectives. A team charged with regularly keeping printed handout materials available at community locations has not been implemented and is currently not considered best use of TA resources.*

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- 2.7 Review name/motto branding (RSCDS Toronto, Dance Scottish etc.)  
*The website address was changed to [www.dancescottish.ca](http://www.dancescottish.ca). Other re-naming benefits have not been explored.*

### GOAL 3 – TO DEVELOP AND IMPLEMENT STRATEGIES TO INCREASE MEMBERSHIP RETENTION AND RECRUITMENT

- 3.1 Develop and communicate “benefits of membership” package  
*A “Benefits of Membership” communications package has been developed and distributed on paper and on the website. It is reviewed annually and changed accordingly.*
- 3.2 Revise membership application and assure availability at all events and programs  
*Membership application has been updated and will be modified yearly, if necessary. Membership forms are available in paper copy, online website and via personal email to members.*
- 3.3 Develop and communicate membership Code of Conduct and Ethics  
*A formal Code of Conduct and Ethics seems unnecessary at this time.*
- 3.4 Develop and implement strategies to target age 50+ potential members  
*Attracting new dancers is at the forefront at all events the TA organizes. (e.g. Ceilidhs, St. Andrew Ball practices. etc.) and is a shared task with Marketing. Developing strategies to entice membership of our core participants, those that are 50+, is ongoing through promoting the benefits of membership in Association beginner class packages, as well as combining the enjoyment of SCD classes with membership requirements in participants’ second season.*
- 3.5 Develop & implement strategies to encourage retention of current members & return of lapsed members  
*This ongoing strategy involves reasonably frequent individual email to all members during the membership drive. Lapsed members are reminded of their membership status and a survey of the reasons for non-renewal solicited. The time line for renewal is generous and accommodating.*
- Initiatives that encourage and acknowledge volunteerism are also considered as ways and means of encouraging membership retention. Volunteer activity helps develop a more useful and richer relationship with the TA. The Volunteer program has incorporated such strategies as a Volunteer Appreciation Night Dance, a Dance Devisor competition for that dance, more inclusive criteria for Volunteer Awards and the devising of a Signature dance aptly named The Toronto Volunteers.*
- 3.6 Identify and pursue opportunities in public/private/secondary/university to promote SCD  
*Some consideration has been given to offering SCD within the Toronto District School Board, possibly through Continuing Education; however, the coordination of SCD teacher and school availability has proven to be a challenge, as has the bureaucracy of the school*

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*systems. Continued pursuit of this objective should be transferred to Education and Training, and will likely be most fruitful if undertaken by SCD Teachers who have existing connections within the school system.*

### **3.10** Develop & implement programs to reduce “fear” (i.e., I can’t dance, need special clothing etc.)

*There is a concerted effort supported by TA in general to allay the dancing anxieties of new members/dancers. There is a greater awareness of the importance of attracting new members. The New Members Tea and the extra Tartan Ball classes for beginners are examples of this effort.*

***Some Objectives may be better described as “ideas” which may or may not result in successfully attracting SCD participants or membership. When the Objectives were originally developed, the Marketing Director position and portfolio did not exist. Several Objectives were assigned to Membership (Goal 3) but are better assigned to Marketing (Goal 1) including the following:***

### **3.7** Identify and pursue opportunities for SCD programs in Parks and Rec/ Board of Ed etc.

### **3.8** Identify and pursue opportunities with dropouts/grads of ballet schools, highland dance etc.

### **3.9** Identify & pursue opportunities with seniors’ centres, seniors’ residences and other retirement related associations

### **3.11** Capitalize on our “demo at events capability” and increase the communication of our availability for such events

### **3.12** Explore opportunities to build upon the “team” aspects of SCD by demonstrating SCD as a tool for dealing with dysfunctional organizational teams

## **GOAL 4 – TO DEVELOP AND IMPLEMENT STRATEGIES TO INCREASE BEGINNER INTEGRATION**

### **4.1** Develop and implement event welcoming strategies (including options of greeters/signage) *Several welcoming strategies have been implemented including the following:*

- a) The New Members Tea continues to be a very important initiative for the TA and for new members, most frequently those that have become members as they continue with Association classes. Each year in early March these new dancers are invited to attend the Tea with TA volunteers, convenors, teachers and Board members. Here the new members have an opportunity meet others to learn more about the organization.*
- b) Volunteer greeters have helped at several dance events, especially the Monthly Dances in December (Family/ Christmas theme) and March (Beginners theme). This has helped beginners who have attended Association Classes to feel welcome and part of a larger organization at these events.*

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- c) *Ribbons are provided for beginner dancers and/or new members to wear at Monthly Dance events. This helps our intermediate and advanced dancers know who is new to the organization so they can offer assistance if needed – including being a dance partner.*
- d) *Appropriate signage is used to help beginners or new dancers find their way to and around venues used by the Monthly Dance, Toronto Workshop, Dancing in the Park, etc.*

### 4.2 Develop and communicate guidelines for running effective SCD events

*The TA's Bylaws, Procedures and Operations Manuals ("Yellow Book") were reviewed and updated over a 2-year period. The 2016 edition of the Yellow Book has been posted electronically on the Members Page of the website and is accessible by all. This new edition of the Operations Manual reflects the new Board positions that were instated in 2014/15 as well as guidelines for each Convenor running events or classes.*

### 4.3 Develop and implement "buddy system" (experienced dancers with new member through first few visits.)

*Upon reviewing this initiative, assignment of experienced dancers to beginners is impractical and may create unwarranted expectations, within an organization focused on sociability and volunteerism. Developments in Objective 4.1 are doing quite well to create a welcome atmosphere, as well as introductions to leaders within the organization, which new dancers and members are encouraged to contact as needed.*

## **GOAL 5 - TO DEVELOP AND IMPLEMENT A PLAN TO IMPROVE THE BRANDING AND THE COMMUNICATION OF THE SKILL DEVELOPMENT PROCESS IN SCD**

### 5.1 Develop and communicate definitions/competencies/performance expectations etc. for each of our 6 levels of activities (introductory, beginner, intermediate, advanced, mastery and low impact)

*Expectations for Introductory and Levels 1, 2 & 3 (beginner, intermediate, advanced) have been developed and a Formations list that assigns formations to the Level at which it can be taught has been developed and circulated to teachers. Teachers will continue to have discretion, as the abilities of a particular class, as a whole, can vary. Level 4 (mastery) is not offered and no class is designated as Low Impact at this time. Expectations for these levels have not been developed.*

### 5.2 Develop and implement branding for the 6 levels of activity

*At the time of writing the Strategic Plan there was a thought that the use of the terms "Beginner, Intermediate and Advanced" were pejorative and students may self-select an inappropriate instructional level. There was consideration put to renaming levels to Bronze, Silver & Gold to have class names that did not reflect the level of ability; however, this re-naming, or revised branding of Levels 1, 2, and 3 has not been implemented.*

### 5.3 Develop capacity to communicate these 6 levels both in written and visual/video formats *This Objective could be combined with 5.1.*

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- 5.4 Identify and pursue opportunities for online, DVD, downloadable skills development and demonstration

*Development of electronic media specific to demonstrating skill development has not been addressed. However, Rob Lockhart, at his own initiative, has recorded and posted over 100 dances on YouTube. Recordings are made at Monthly Dances, Broadlands classes and other TA events. Membership has been informed that these videos are being made. On the Monthly Dance and Ball programme briefing notes posted on the website, Rob has embedded web links to videos of the dances. Videos are very helpful in assisting dancers in learning the dances and unfamiliar formations, and are very well used and appreciated.*

### **GOAL 6 – TO DEVELOP AND IMPLEMENT ORGANIZATIONAL STRUCTURE AND PROCEDURES TO INCREASE EFFICIENCY AND EFFECTIVENESS AND OVERALL COORDINATION TO ALLOW ASSOCIATION TO INCREASE ITS LEADERSHIP ROLE**

- 6.1 Investigate option of ex-officio (Chair of Teachers Panel) Board position

*See below*

- 6.2 Review & modify as needed current committees

*See below*

- 6.3 Update Membership list & distribute consistent with privacy laws

*Membership lists and privacy laws (membership communications and list distribution) was investigated and implemented by Wayne Fraser, Membership & Volunteers Director and Jean Lindsay Vice-Chair*

- 6.4 Review & modify as needed By-Laws

*See below*

- 6.5 Identify & pursue partnership opportunities with local businesses, Scottish community groups, charitable organizations, government bodies

*Each Board member has raised discussion and implementation opportunities as they have arisen over the past 5 years. John Clark (Past Chair 2013-2015), Deirdre MacCush Bark (Chair) and Jean Lindsay (Vice Chair) have all participated in the Southern Great Lakes Group which brings together RSCDS Branch Chairs and representatives to coordinate, and have others in the province aware of, upcoming events and to discuss broader Society issues as they arise.*

- 6.6 Review & modify as needed event, membership and program fee structure/amounts/timing  
*Events and fee structures are discussed by the Board on an ongoing basis and are reviewed in detail annually during the presentation of the upcoming Budget.*

- 6.7 Review & modify as needed AGM/board meeting procedures

*See Below*

- 6.8 Review & identify our geographic boundaries

*Identifying geographic boundaries was not considered relevant.*

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### 6.9 Review & modify all other operating procedures as necessary

*See Below*

*Many of the items under Goal 6 regarding maintaining an effective organizational structure for TA have been achieved (Objective 6.1, 6.2, 6.4, 6.7 and 6.9). Changes in the assignment of Board Director responsibilities has occurred to better articulate the needs of the organization including:*

- *the naming of a Marketing Director (previously Director at large),*
- *the expansion of the Membership Director's responsibilities to include Volunteer Recognition, and*
- *the division of the large Program portfolio duties between Program Director and the newly named Education and Training Director (also previously Director at large).*

*These organizational changes prompted an extensive review of the "Yellow Book", which began in 2013 and was completed in 2016 by a subcommittee lead by Jean Lindsay as Vice Chair.*

*In the updated Operations Manual, the duties of all Board positions, committees and convenors has been outlined and updated as assigned in 2016. This review process also lead the Board to update the TA Procedures Manual. Extensive changes were made, and presented to, and approved by, the membership at the 2016 AGM. No changes were required in the By-laws at this time, so they remain as last updated in 2006. The documents making up the updated Yellow Book: the By-Laws, Procedures Manual and Operations Manual have been posted on the website and are accessible to members.*

## **GOAL 7 - TO DEVELOP AND IMPLEMENT STRATEGIES TO ASSURE CONSISTENCY OF SCD STANDARDS/EXPERIENCE AND AVAILABILITY OF QUALIFIED TEACHING RESOURCES**

### 7.1 Identify and implement program to develop ongoing supply of applicants for SCD accredited teacher training

*The Dancing Achievement Awards Classes have been put in place to raise awareness in dancers of the importance of consistency in technique. The Advanced Level was successfully completed during the 2015-2016 season. Skilled dancers are being encouraged to attend St. Andrew's Summer School, to inspire in them a desire to want to share their passion of Scottish country dance through teaching.*

### 7.2 Identify and implement teaching options for accredited SCD teachers with changing life needs.

*This objective was not addressed.*

### 7.3 Identify and implement program to increase/recognize the value of the "Teacher" in the SCD experience.

*A Teachers' Meeting was held in September of this dance season, the results of which were shared with the Board. The results of the Teachers' Survey, distributed at that meeting,*

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*will be compiled by the end of this season. The various workshops offered locally, nationally, and internationally, provide dancers the opportunity to experience different teaching styles. As with attracting new dancers, there are challenges to attracting dancers to become teachers. There is also the question of where a teacher, once qualified, teaches.*

- 7.4** Identify and implement process to assist teachers in communicating with members around levels and performance expectations based on 5.1.

*An updated description of the Association Class levels was printed in Set & Link for the 2015-2016 dance season. The Teachers' Panel continues to revise the list of formations into Levels 1, 2, and 3 as new formations are created. The Chair of the Teachers' Panel has been diligent in sharing any revised/updated dance vocabulary originating in Edinburgh.*

### **GOAL 8 - TO DEVELOP AND IMPLEMENT SUSTAINABLE FUNDING MODEL**

- 8.1** Identify list of purposes/tasks for which funding is required  
**8.2** Develop & implement strategies to achieve funding for 8.1  
**8.3** In conjunction with 6.6 determine need for fee modifications needed to achieve 8.1

*The TA endeavours to offer activities which “pay for themselves”; however, over the past few years the successful promotion of Association classes has created revenues that have covered a few activities that are run at a slight loss. Overall, the Association remains financially strong.*

*Goal 8 will always be a ‘work in progress’, with an annual check during the budget development process. Changing multi-cultural, economic, and demographic influences demand that any organization in the realm of cultural and recreational activity adapt as needed, and recognize the increasing competition for participation, time and resources needed to be sustainable.*

### **GOAL 9 – TO DEVELOP AND IMPLEMENT STRATEGIES TO ACCOMMODATE THE CHANGING NEEDS OF EXISTING MEMBERS**

- 9.1** Review current distribution/frequency of events/programs including by geography, age and skill level and identify gaps to be filled.

*The Program Committee reviews the distribution and frequency of the events including Dancing in the Park, Tartan Ball, Monthly dances and Workshop. The majority of our events are centrally located and are reasonably well attended. We have recognized an increase in newer dancers.*

- 9.2** Develop & implement strategies to fill gaps identified in 9.1

*Programs have been adapted to be novice friendly. Additional dance practices for the Tartan Ball have been added to encourage newer dancers to attend.*

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**9.3** Identify & develop opportunities for low impact social dancing, afternoon tea dances etc.  
*Experiments with afternoon Tea Dances in place of evening dances have been offered however they are not as well attended.*

**9.4** Review & modify Workshop format (i.e., consider ½ day format)  
*There is a review meeting after each Workshop to determine the best format for classes in the subsequent year. The current full day format has been successful for the last number of years. There has been a recommendation this year (2016) to offer a half day option next year.*