

UPEI STUDENT UNION SOCIETY STRATEGIC PLAN

DRAFT

Section I: Preamble

Clubs & societies have always been a cornerstone of campus engagement. With academic-based, culture-based, faith-based, and special interest-based clubs & societies, there is something for everyone.

Over the past few years, the number of ratified clubs & societies has increased significantly. We have grown from 26 ratifications in 2013-14, to 42 ratifications in 2014-15, to 63 ratifications in 2016. While growth in the number of ratified clubs & societies is a reflection of the increasing vibrancy of campus life at UPEI, it does present challenges for the Student Union. There is less time to help each club or society, and it becomes more difficult to develop a nuanced understanding of each club or society. Furthermore, many of the issues that affect clubs & societies become visibly consistent from group to group, prompting the development of long-term solutions.

Ultimately, the UPEI SU maintains a role in ensuring the wellbeing of its ratified clubs & societies. Thus, the initiatives in this plan are designed to promote the success of UPEI SU-ratified clubs and societies. By ensuring the success of its clubs and societies, the UPEI SU will also succeed by fulfilling its mission to enhance the student experience at UPEI.

Strategic Planning Process

In September 2015, the executive mandates of the UPEI SU executives were presented to the UPEI SU Council. During the Vice President Student Life's mandate presentation, it was announced that the UPEI SU would be working to make itself a leader in clubs & societies in Atlantic Canada. As a step towards achieving that vision, a society strategic plan would be written.

Four questions were developed to facilitate the planning process:

1. Why do we have a clubs & societies system?
2. Where do we want to go with our clubs & societies system?
3. How do we get there?
4. How will we know if we've gotten there?

The first question made the UPEI SU reflect on the purpose of offering support to ratified clubs & societies. Through this question, a mission statement, vision statement, and pillars of club & society success were developed. The second question was used to identify the key areas or goals that need to be addressed and accomplished over the next three years. The third question was used to establish the actions that would result in successful completion of those goals. The fourth question was used to develop measures of success for the goals listed in this plan.

In November 2015, a society general meeting was held. At this meeting, clubs & societies were informed of current SU initiatives, and also participated in visioning activities and provided feedback.

Following this meeting, a clubs & societies working group consisting of club & society executives and SU office staff was formed¹. Feedback and suggestions generated from the society general meeting were brought to the working group to be reviewed and discussed. The feedback and subsequent discussions are reflected in the objectives and actions present in this plan. With the continued assistance of this committee, a draft of this document was prepared.

In April 2016, the draft of this document was presented to the UPEI SU Council, and shared with club & society executives for review.

Understanding the context of this plan

Upon its ratification, this plan will be in effect until April 2019. Although the ultimate responsibility for the completion of initiatives in this plan rests on the Vice President Student Life and Clubs Coordinator, it is expected that they will work with UPEI departments, external organizations, and ratified clubs & societies to complete said initiatives.

For every year that this plan is in effect, the VP Student Life will organize at least one society general meeting each year to report on the progress being made in regard to these initiatives. The club & society working group will ideally be reconvened to meet to advise and assist the VP Student Life in the completion of the initiatives outlined in this plan.

Additionally, the VP Student Life will present their progress in regard to the initiatives each year to Council at the beginning of the second semester and at its conclusion.

¹ The members of the Society Committee were Ryan Kelly, Pre-Med Society President; Lujain Qureshi, Biology Society Vice President; Anouk Paradis, French Club President; Kaylee Blackett, Applied Human Sciences Vice President; Dante Bazard, Association of the Caribbean Society President; Jenna Arbing, PASS President; and Megan Rix, UPEI SU Clubs Coordinator.

Section II: Identified Purpose

A: Statement of Strategic Intent

Our intent is to promote club & society development through the involvement of traditionally excluded student groups, the optimization of access and centralization of information, resources, and benefits, investment in leadership development, and the facilitation of partnerships with groups and individuals with similar mandates.

B: Mission Statement

The mission statement of the UPEI SU Clubs & Societies System is as follows:

The mission of the UPEI SU Clubs & Societies System is to support student groups in building and fostering a sense of community and belonging on-campus, and to assist and empower students to achieve their full potential as individuals.

C: Vision Statement

The vision statement of the UPEI SU Clubs & Societies System is as follows:

The UPEI Student Union aspires to be a leader in the area of campus clubs & societies through our long-term approach. Clubs & societies will prosper at UPEI because...

D: Fundamental Pillars

The success of the UPEI Student Union's clubs & societies is supported by four pillars:

1. Membership Growth & Development

Clubs & societies' ability to build their membership base and promote their members' personal growth and their ability to act as key agents of student engagement at UPEI

2. Operational Sustainability

Clubs & societies' ability to develop and implement systems and processes that ensure good financial practices and the long-term sustainability of their organizations

3. Community and Organizational Relationships

Clubs & societies' ability to build relationships between other clubs & societies and similarly mandated organizations & individuals on campus and in the external community

4. Educational Opportunities and Experiences

Clubs & societies' ability to foster and promote student learning and skill development through participation in clubs & societies

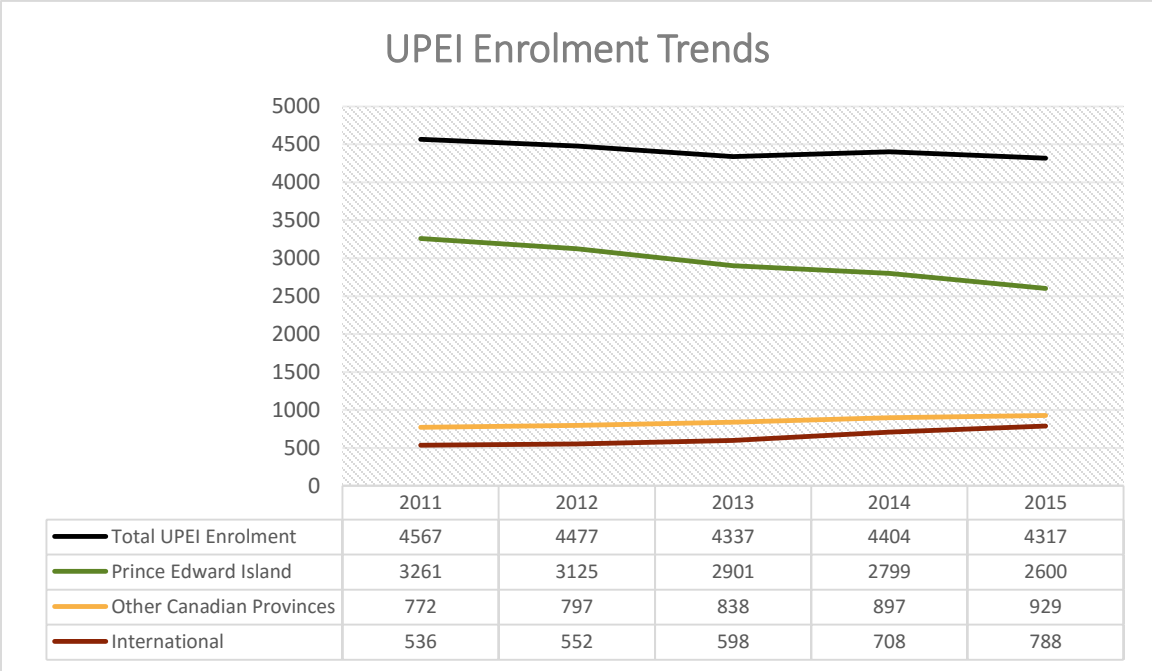
Section III: Key Challenges Facing UPEI Student Union’s Clubs & Societies System

There are three main challenges the UPEI Student Union’s ability to support a vibrant clubs & societies system:

A: Demographics

Currently, UPEI is experiencing considerable change in its demographics. As a result of external factors like a decreasing number of students graduating from PEI high schools, and in line with postsecondary enrollment rates in the Atlantic Canadian region, enrolment at UPEI has the potential to remain stagnant or decrease over the coming years. With fewer students attending UPEI, there would be less students to engage in clubs, potentially making membership growth in clubs & societies more difficult.

Contrary to the general trend of decreased enrolment, the numbers of students from other provinces and other countries continue to grow. Given that many clubs & societies feature an overwhelmingly Island student membership, particularly at the executive level, this will require the UPEI SU and its clubs & societies to take specialized approaches towards integrating off-island students into the UPEI community.



B: SU Investment in Clubs & Societies

Compared to the entirety of the budget, only a small portion is allocated to the clubs & societies system. Club and society-related budget lines add up to \$6250 in 2015-16, up from only \$4000 in 2014-15. The office of the VP Student Life acknowledges the challenges of

providing and maximizing services of the highest quality to ratified clubs & societies on a limited budget.

C: Executive Turnover in Clubs & Societies and the UPEI SU

Executive positions are generally served in one year terms. This makes it difficult for both the Vice President Student Life and club & society executives to plan for the future and ultimately execute their plans successfully. In response to these difficulties, this plan provides initiatives geared at facilitating beneficial executive transitions and enhancing and expanding the resources available to clubs & societies as they plan. Furthermore, this plan provides future Vice Presidents Student Life with a clear direction when they enter their role.

Section IV: List of Strategic Initiatives, Objectives, and Scheduled Completion

The objectives listed under each strategic initiative will allow the SU to make considerable progress in accomplish each strategic initiative. Each objective is highlighted in either red, yellow, or green, with each colour representing the timeframe in which the objective should be completed. Red suggests that an objective be completed within the first year of the plan's ratification, yellow suggests that an objective be completed within the second year of the plan's ratification, and green suggests that an objective be completed within the third year of the plan's ratification.

Enhance Society Operations & Planning

1. Develop a financial framework that promotes effective financial management and sustainability (Other?)
2. Develop a handbook for club & society executives (Executive Training?)
3. Develop a framework for clubs & societies to produce annual reports
4. Create and contribute to an open-source event plan bank
5. Create a centralized information source for clubs & societies to share and access information (would contain everything above)

Student Union Internal Operations

1. Review the UPEI SU budget as it relates to clubs & societies
2. Review the ratification benefits provided by the SU and increase their use by clubs & societies
3. Develop a system to track membership numbers and trends in clubs & societies

Executive Training

1. Develop and maintain an executive transition guide for clubs & societies
2. Develop a standard program of workshops for club & society executives
3. Expand the Future Executive Development Program and review its effectiveness

Citizenship and (Interdisciplinary) Collaboration

1. Connect clubs & societies with a staff or faculty advisor
2. Implement society nights at the Wave
3. Encourage and, where possible, connect clubs & societies with organizations in the external community with similar mandates
4. Connect clubs & societies with past alumni
5. Foster a stronger relationship between the Student Union and clubs & societies (SU Internal Operations?)
6. Foster collaboration between clubs & societies on events, projects, and initiatives

7. Foster increased club & society programming, presence, and visibility off-campus

Membership Expansion and Recognition

1. Establish society awards to recognize the achievements of clubs & societies
2. Increase the number of first-year students participating in clubs & societies
3. Increase the number of off-Island Canadian students and international students participating in clubs & societies
4. Develop society membership cards

Section V: Strategic Initiatives

Enhancing Society Operations & Planning

The UPEI Student Union must help clubs & societies to plan ahead and operate efficiently by providing the appropriate resources.

Objective 1: Develop a financial framework that promotes effective financial management and sustainability.

Rationale: Many clubs & societies currently do not have a clear picture of their finances, and many more do not have the financial controls in place to ensure proper and effective financial management. It is critical that the SU develop a framework to reduce issues that arise from improper financial management. This framework would include bank accounts for all societies as well as resources

Actions:

- a. Quantify how many societies have bank accounts
- b. Write support letters for clubs & societies to open a bank account
- c. Assist clubs & societies with budget development (not measurable)
- d. Develop a template for finance executives (what does this mean?)

Measures of Success:

- 1) Number of societies with an active bank account
- 2) Creation of a finance guide for executives

Fundamental Pillar: Operational Sustainability

Objective 2: Develop a framework for clubs & societies to produce annual reports

Rationale: Despite a year-long of hard work, it can be difficult to demonstrate what was accomplished at the conclusion of an executive's term. Annual reports can provide institutional memory to new executives, and also be used to promote the club or society to prospective members or the community.

Actions:

- a. Develop an annual report template
- b. Work with each club & society to ensure each one submits an annual report
- c. Compile each report into a document that highlights yearly accomplishments
- d. Work with UPEI Recruitment to explore feasibility of clubs & societies becoming a part of UPEI promotional material

Measures of Success:

- 1) Number of societies producing annual reports

Fundamental Pillar: Operational Sustainability

Objective 3: Create and contribute to an open-source event plan bank

Rationale: As it was revealed in consultation sessions during the development of this plan, many clubs & societies plan the same standard set of events for a number of reasons. The SU can assist in diversifying club & society programming by introducing an event plan bank. This event plan bank would also help clubs and societies to share information on how to execute certain events.

Actions:

- a. Develop an event plan template
- b. Develop/designate an online location for event plan bank submissions
- c. Contribute plans to the event plan bank
- d.

Measures of Success:

- 1) Creation of an event plan bank
- 2) Number of event plans submitted

Fundamental Pillar: Operational Sustainability, Community & Organizational Relationships

Objective 4: Develop a handbook for club & society executives (Executive Training?)

Rationale: Handbooks are an easy way to provide answers to common questions and to provide general information to club & society executives. Handbooks are generally common at other student unions and student associations across Canada.

Actions:

- a. Interview club & society executives to gather input on what should be included in the handbook
- b. Examine the handbooks of at least five other Canadian student unions/associations
- c. Using information from the above actions, draft a handbook

Measures of Success:

- 1) Creation of a society handbook

Fundamental Pillar: Organizational Sustainability

Objective 5: Create a centralized information source for clubs & societies to share and access information

Rationale: The UPEI SU must ensure that all information pertaining to clubs & societies is easily and readily accessible in one location.

Actions:

- a. Communicate with other Canadian student unions/associations to understand what they use
- b. Connect with ITSS to evaluate feasibility of creating such a source
- c.

Measures of Success:

- 1) Creation of a centralized information source
- 2) Number of clubs & societies sharing/accessing information

Fundamental Pillar: Educational Opportunities and Experiences, Operational Sustainability

Bolstering the Student Union's Internal Operations

The UPEI SU needs to review what it is offering to students, and implement improvements wherever possible. It must also develop the capability to monitor membership in clubs to understand trends.

Objective 6: Review the UPEI SU budget as it relates to clubs & societies

Rationale: Currently, the SU allocates \$2000 for club & society initiatives and \$3500 for society funding. The SU must ensure that it is providing enough resources for the competition of its initiatives.

Actions:

- a. Examine the use of current club & society budget lines
- b. Look at the budgets of five other student unions/associations to compare club & society spending
- c. Develop an invest plan
- d. Provide recommendation to Budget Committee on future funding

Measures of Success:

- 1) Recommendation provided to Budget Committee regarding clubs & societies budget

Fundamental Pillar: Operational Sustainability

Objective 7: Review the ratification benefits provided by the SU and increase their use by clubs & societies

Rationale: The SU provides a number of benefits as per its sub-organization bylaw. The benefits provided have not undergone a formal review.

Actions:

- a. Survey club & society executive on the benefits they've used
- b. Consult with other student unions/associations to identify potential new benefits
- c. Provide recommendation(s) to Council on any changes to benefits

Measures of Success:

- 1) Recommendation provided to Council

Fundamental Pillar: Operational Sustainability

Objective 8: Develop a system to track membership growth and trends in clubs & societies

Rationale: Currently, the UPEI SU has no way to follow the membership growth of clubs & societies on campus. While many clubs & societies have Facebook groups, many of these groups have students who have graduated or are no longer active in the club. This creates difficulty for clubs & societies who are trying to gain an accurate picture of the size of their membership. The system created from this objective would grant clubs & societies an accurate estimate of their size.

Actions:

- a. **Develop a Google form template that clubs & societies can use to electronically register members.
- b. Consolidate the information from each form into one master spreadsheet
- c. Create annual reports from membership information collected

Measures of Success:

- 1) Development of membership tracking system

Fundamental Pillar: Membership Growth & Development

Expanding and Improving Executive Development

Objective 9: Develop and maintain an executive transition guide for clubs & societies

Rationale: Clubs & societies currently have little resources available to facilitate transitions between outgoing and incoming executives. The UPEI SU must ensure that its incoming executives are as well-prepared as possible as they enter their term.

Actions:

- a. Identify the essential information that new club & society executives would need to operate their organization.
- b. Identify problem areas with current transitions.
- c. Develop and circulate a transition guide to club & society executives

Measures of Success:

- 1) Creation of an executive transition guide
- 2) Number of clubs & societies producing transition reports

Fundamental Pillar: Operational Sustainability

Objective 10: Develop a standard program of workshops for club & society executives

Rationale: Club & society executives can benefit from continued professional development over the course of their term.

Actions:

- a. Look at five other Canadian student unions/associations to see the workshops they provide
- b. Consult with club & society executives to identify which workshops would most benefit clubs & societies
- c. Develop a core set of workshops that will be offered
- d. Contact members of the University community to present the workshops

Measures of Success:

- 1) Creation of workshop series.

Fundamental Pillar: Educational Opportunities & Experiences

Objective 11: Expand the Future Executive Development Program and review its effectiveness

Rationale: The Future Executive Development Program was initiated to provide first-year students with the skills necessary to become club & society executives.

Actions:

- a. Develop marketing strategy for Future Executive Development Program
- b. Expand events at the end of the program
- c. Develop event plans from the program
- d. Compare results of program with initial

Measures of Success:

- 1) Number of students participating in FED Program
- 2) Number of events hosted by FED participants

Fundamental Pillar: Membership Growth & Development, Educational Opportunities & Experiences

Encouraging and Facilitating Citizenship and Collaboration

Objective 12: Connect clubs & societies with a staff or faculty advisor

Rationale: Advisors, although not required for ratification, can be excellent resources for clubs & societies. Advisors can provide institutional memory and can assist in the transition of new executives. Advisors could also play a role in setting up and overseeing the elections of their particular club or society, and they could serve as a consistent signing authority. It is important that the Student Union encourage clubs & societies to select a society advisor.

Actions:

- a. Identify clubs without advisors
- b. Contact clubs & societies without advisors to assist them in finding one

Measures of Success:

- 1) Number of clubs & societies with advisors

Fundamental Pillar: Community & Organizational Relationships

Objective 13: Implement society nights at the Wave

Rationale: Although they did occur years ago, society nights are no longer a common occurrence at the Wave. Society nights provide an excellent opportunity for the membership of clubs & societies to come together. With certain clubs & societies having arrangements with other bars in Charlottetown, it is imperative that the Wave makes itself an integral piece of the club & society experience.

Actions:

- a. Review old UPEI SU files to identify previous format for society nights.
- b. Contact five other student unions/associations to learn about their society nights.
- c. With the Wave Bar Manager, explore potential deals or discounts that could be provided to clubs & societies for society nights.
- d. Identify potential themes for society nights.
- e. After hosting society nights, review results to determine long-term feasibility.

Measures of Success:

- 1) Creation of Society Nights
- 2) Number of clubs & societies participating
- 3) Number of total students participating
- 4) Financial performance of Wave on society nights

Fundamental Pillar: Community & Organizational Relationships

Objective 14: Encourage and, where possible, connect clubs & societies with organizations in the external community with similar mandates

Rationale: Clubs & societies can benefit from collaborating with external organizations to achieve their goals; for example, they may gain access to additional resources or personnel.

Actions:

- a.
- b. Conduct a scan of the PEI community to identify potential partnerships for UPEI clubs & societies
- c. Connect clubs societies

Measures of Success: Number of students who successfully complete the program

Fundamental Pillar: Community & Organizational Relationships

Objective 15: Connect clubs & societies with past alumni

Rationale: Clubs & societies are one of the easiest ways for students to participate on the UPEI campus. As a result, many clubs & societies would have a large number of past members. In partnership with the UPEI Department of Development & Alumni Engagement, the UPEI SU must establish a framework that ensures that clubs & societies are able to connect with past members.

Actions:

- a. Work with the Department of Development & Alumni Engagement to develop a database for tracking previous club & society executives.
- b. Collect the student IDs of graduating club & society executives to submit to the Department of Development & Alumni Engagement.

Measures of Success:

- 1) Number of events with alumni present

Fundamental Pillar: Community & Organizational Relationships

Objective 16: Improve relationship between the Student Union and clubs & societies (**SU Internal Operations?**)

Rationale: The Student Union provides numerous benefits and services to support the success of clubs & societies. The Student Union must work to improve existing relationships.

Actions:

- a. Quantify satisfaction clubs & societies have with the SU

Measures of Success:

- 1) Satisfaction with ratification

Fundamental Pillar: Community & Organizational Relationships

Objective 17: Increase collaboration between clubs & societies on events, projects, and initiatives.

Rationale: Collaboration is important. Foster an atmosphere where clubs and societies are open to working together on events, projects, and initiatives

Actions:

- a. Quantify the number of clubs & societies that currently collaborate
- b. Design incentives for collaboration

Measures of Success:

- 1) Number of clubs & societies collaborating
- 2) Number of events executed through collaboration

Fundamental Pillar: Community & Organizational Relationships

Objective 18: Increase club & society programming, presence, and visibility off-campus

Rationale: Represents a chance to diversify their programming.

Actions:

- a. Identify events that have already been held off-campus

Measures of Success:

- 1) Number of events hosted off-campus
- 2) Number of times clubs & societies appear in off-campus media

Fundamental Pillar: Community & Organizational Relationships

Assisting with Membership Expansion and Recognition

Objective 19: Increase the number of first-year students participating in clubs & societies

Rationale: First-year students are the future leaders of campus life at UPEI. As such, it is important to integrate them quickly into clubs & societies so that they can develop a nuanced understanding of campus life and can work to improve it when they accede to leadership positions.

Actions:

- a. Quantify the number of students involved in clubs & societies
- b.

Measures of Success:

- 1) Number of first-year students that actively participate in clubs;
- 2) Number of clubs being established by first-year students;
- 3) Number of Future Executive Development Program participants that become club & society executives.

Fundamental Pillar: Membership Growth & Development

Objective 20: Increase the number of off-Island Canadian students and international students participating in clubs & societies

Rationale: UPEI has experienced a decrease in the number of Island students attending UPEI, while simultaneously experiencing increases in the numbers of students from other provinces and countries. The UPEI SU must work to ensure that our campus clubs & societies are reflective of our student body.

Actions:

- a. Quantify the number of international students involved in clubs & societies
- b. Quantify the number of international students involved in clubs & societies
- c. Work with societies to develop a strategy to welcome more off-island students to participate in clubs & societies

Measures of Success:

- 1) Number of international students that actively participate in clubs;
- 2) Number of clubs being established by international students;
- 3) Number of international students as club & society executives;
- 4) Number of off-Island Canadian students that actively participate in clubs;
- 5) Number of clubs being established by off-Island Canadian students;
- 6) Number of off-Island Canadian students as club & society executives.

Fundamental Pillar: Community & Organizational Relationships

Objective 21: Develop society membership cards

Rationale: Club & society membership cards are a great way to provide value to societies. Society cards can be used as tool to quantify and demonstrate membership in a club, and, if they are sold at a consistent price, they can provide start-of-the-year capital for societies to pursue their initiatives for the year.

Actions:

- a. Consult with campus and community organizations to identify benefits that could be offered with the card
- b. Contact printing companies to determine the cost of the printing membership cards
- c. Collaborate with societies

Measures of Success: Development of Society Cards, Meeting with

Fundamental Pillar: Membership Growth & Development, Operational Sustainability

Objective 22: Establish society awards to recognize the achievements of clubs & societies

Rationale: Clubs & societies host numerous events that invite the participation of hundreds of UPEI students, and also launch initiatives that benefits the UPEI community as well as the external community. Despite this, there exists no formal recognition for clubs & societies. Society awards would assist the Student Union in celebrating the achievements of its ratified

clubs & societies and could be used by student groups in their branding. Furthermore, society awards could be used strategically to promote certain desired outcomes, like increased collaboration between student groups.

Actions:

- a. Develop the award categories.
- b. Develop criteria for the awards.
- c. Explore the possibility of creating a funding arrangement for winners of the awards.
- d. Examine the feasibility of hosting an event at which award winners would be recognized.
- e. Review the award categories annually to ensure that they are still relevant.

Measures of Success:

- 1) Development of Society Awards
- 2) Number of applications received

Fundamental Pillar: Community & Organizational Relationships