

2024 Review of the 2021 Strategic Plan

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The development and maintenance of a Strategic Plan is considered a best practice for organizations as it helps focus energy and resources. The intent of the RPBO Strategic Plan was to set Goals, and provide direction for achievement that were in line with our Mission Statement. Actions, Measures of Success, and Next Steps were developed to guide the activities of RPBO over the term of the Plan. Annual priorities are set by the RPBO Board of Directors.

Periodic review of our Strategic Plan is crucial to ensuring that Rocky Point Bird Observatory is on track making progress toward our goals, and adapting to any changes or challenges we may face. Review provides an opportunity to make sure that the Strategic Plan remains relevant and effective in promoting our conservation mission of birds and their habitats, and strengthening our standing as the knowledgeable resource for birds on Vancouver Island and in Western North America.

Key Considerations During the review

1. Confirm that each Goal and each Objective are still valid and relevant.
2. Ensure that RPBO's activities and accomplishments throughout the past year(s) were in alignment with our mission and core values. Identify any that were not.
3. Review the Measures of Success indicators that were established to evaluate the success of the strategic initiatives - determine relevance, effectiveness; or alternatives
4. Review each Next Step and evaluate progress - identify which milestones have been achieved or are still in progress, note successes and challenges, and identify lessons learned and best practices that can be applied moving forward. (The Stages of Success are described below.)
5. Review any risks (local or global) that have arisen throughout the past year(s) . Evaluate how well RPBO has managed these risks, and whether adjustments to the Plan are needed to accommodate these, or other such risks in the future.
6. Consider whether any changes or adaptations need to be made to the Strategic Plan based on the new information gathered during the previous year(s).

Based on the above considerations, the following is the outcome of meetings with the Board and the Strategic Planning Committee. While each of the four Goals and twelve Objectives remained the same as the original 2021 version, this Amendment includes review, revisions and additions to the Actions to accommodate RPBO's growth, needs and wants.

Revision 2024 - Amendment to the 2021 RPBO Strategic Plan

GOALS, OBJECTIVES, ACTIONS, MEASURES OF SUCCESS & NEXT STEPS

The Goals, Objectives, and Actions below are not listed in priority order. Priorities will be set by the Board in the annual work plan based on factors such as immediate needs and availability of resources, including project champions.

Goal #1 - Organizational Capacity

Strengthen RPBO's organizational capacity through funding, management, and volunteers

Since 1994, RPBO has grown from a committee of the Victoria Natural History Society to a small grassroots organization with a small number of volunteers and one operational site, to one of the most significant bird observatories in North America by almost every measure. This has occurred largely due to the commitment of volunteers and supporters who have championed new programs and expansion, but without a stated vision or growth plan. RPBO must ensure the financial and administrative structures are in place to secure existing programs and support planned growth of the organization. RPBO must also look ahead to the possibility of losing field sites, as these are currently accessed only through the benevolence of the site land managers.

For the purpose of this plan, “communications” will refer to sharing of information within and outside the organization, primarily for the benefit of RPBO. “Outreach” will refer to making information, products and services available to the community to increase knowledge of birds and promote bird conservation.

GOAL #1: Organizational Capacity <i>Strengthen RPBO's organizational capacity through funding, management, and volunteers.</i>		
Objective 1.1 Support the needs, development and retention of human resources (staff and volunteers).		
Actions	Measures of Success	Next Steps
1.1.1 Increase staff capacity to reduce reliance on volunteers for operational programs	Full-time equivalent (FTE) of staff for operational programs - measure workloads of staff Sustainable funding to support staff positions	Acquire a Biologist on staff for compliance Hire an Executive Director to focus on staff and their deliverables Source funding specific to salaries and staffing Hire a Bookkeeper to reduce Treasurer workload
	Document clear responsibilities for all staff and Board positions	Create formal job descriptions for all staff positions Maintain an up-to-date organizational chart
	Itemize current work being done by volunteers	Determine workload of current core (top contributing) volunteers Identify areas where additional resources are needed Define existing opportunities for Volunteer placements

	Staff Recruitment and Retention Strategies are successful	Develop a Staff Recruitment & Orientation policy Develop a Staff Succession Planning policy
1.1.2 Support staff needs, development and retention through initiatives such as: professional development staff recognition job satisfaction surveys	Number of staff participating in professional development initiatives	Offer professional development opportunities to staff Meet the identified professional development needs of staff
	Employee retention rate	Create staff recognition events, annually and seasonally Develop a Board Orientation Manual
	Numerical index(ces) related to the results of the job satisfaction	Develop job satisfaction survey for hired office staff (Administration/Development/Education) Develop job satisfaction surveys for banding team Develop job satisfaction surveys for Board members
	diversify our staff	Increase Accessibility exposure
1.1.3 Support succession planning through knowledge transfer and training initiatives	Number of knowledge transfer initiatives Number of staff training initiatives	Create staff training strategies & resources Offer staff training opportunities Create separate Bookkeeper and Treasurer responsibilities
1.1.4 Maintain volunteer capacity through recruitment, job-skills matching and meaningful engagement opportunities	Number of volunteers Longevity of volunteers	Diversify and Detail volunteer opportunities (from Action 1.1.1. <i>Define existing opportunities for Volunteer placements</i>) Develop a Volunteer Recruitment Strategy Develop a Volunteer Screening Policy Develop a Volunteer Orientation Policy Develop a Volunteer Training Policy Develop a Volunteer Retention Strategy
Objective 1.2 Develop and maintain good donor and stakeholder relations.		
Actions	Measures of Success	Next Steps
1.2.1 Manage stakeholders information	Ability to accurately report on stakeholders: <ul style="list-style-type: none"> number of donors by year (new, contributing, life) number of interactions 	Develop a Stakeholder Engagement Strategy Develop a Donors' Privacy Policy

<p>1.2.2 Build and strengthen relationships and strategic partnerships with relevant stakeholders</p>	<p>Retain contributing donors</p> <p>Number of new contributing donors</p> <p>Number of new one-time donors and amount donated.</p> <p>Number of indigenous groups with who we have engaged</p>	<p>Develop a National / Provincial recruiting campaign</p> <p>Seek a part-time contractor with above experience to assist the Development team</p>
<p>1.2.3 Communicate and consult regularly with donors and stakeholders</p>	<p>Database of contacts</p> <p>Develop communications materials</p> <p>Develop consultation process</p>	<p>Continue to populate CanadaHelps database with donors and stakeholders</p> <p>Follow Communications Plan (Development)</p>
<p>Objective 1.3 Ensure governance is diplomatic and impartial, providing organizational oversight, planning and decision making.</p>		
<p>Actions</p>	<p>Measures of Success</p>	<p>Next Steps</p>
<p>1.3.1 Review (or develop) and implement policies and procedures in RPBO's governance documents (within the last 5 years)</p>	<p>Constitution and Bylaws</p>	<p>Review Constitution and Bylaws at the end of 2026</p>
	<p>Strategic Plan</p>	<p>Review Strategic Plan at the end of 2026</p>
	<p>Fundraising/Revenue</p>	<p>Review Fundraising Plan annually</p>
	<p>Donor Database</p>	<p>see Action 1.2.3</p>
	<p>Work Planning Framework & Operational Procedure</p>	<p>Develop RPBO's overall operating procedure</p>
	<p>Communication Plan</p>	<p>Review Communication Plan annually, by Development</p> <p>Develop Indigenous Communication Plan, to include an Indigenous contacts database</p>
	<p>Evaluate Risks</p>	<p>Develop a Risk Management Policy (Development)</p>
<p>1.3.2 Ensure Board of Directors is elected or appointed through the procedures outlined in the Bylaws</p>	<p>Board of Directors is reviewed annually</p>	<p>Elect Board of Directors annually</p>
<p>1.3.3 Decision-making is impartial, informed and consistent with long-term objectives of the organization as outlined in the Strategic Plan</p>	<p>Year-over-year change in Measures of Success outlined in the Strategic Plan</p>	<p>Note compliance with and/or completion of Measures of Success</p>

1.3.4 Ensure equitable practices for situations of conflict, non-compliance or lack of consensus	Qualitative measure of successful dispute resolution (if any)	follow BC Natures Dispute Resolution Policy
1.3.5 Transparency of governance and decision making	Accessibility of governance documents either through the website or by request Documentation of decision making and access to Board meeting minutes through the website	Itemize governance documents to be made accessible to public Develop a procedure for providing additional reporting documents when required.
1.3.6 Ensure the organization's compliance with the BC Societies Act	Qualitative measure of compliance, reviewed annually	Itemize documents required for compliance Submit such documentation annually

Objective 1.4 Ensure financial stability and growth.

Actions	Measures of Success	Next Steps
1.4.1 Set up and contribute to a fund for capital acquisitions	Year-over-year contribution, principal and growth amounts Investigate pros/cons and processes associated with real property ownership/leasing	Create and promote an internally-restricted Capital Acquisition fund Develop financial planning strategies with financial advisor Create Policy & Procedure to manage large donations
	Add to the Board a Director with financial background	Recruit Board Directors for AGM 2025 Recruit a Treasurer for AGM 2025
1.4.2 Increase revenue through fundraising, revenue-positive initiatives and solicitation as outlined in the Fundraising/Revenue Plan	Year-over-year amount of revenue generated from fundraising Year-over-year amount of revenue generated from revenue-positive initiatives Year-over-year amount of revenue generated from solicitation	Develop a Fundraising/Revenue Plan (see Action 1.3.1) Build relationships with corporate organizations

Objective 1.5 Operate with financial accountability and transparency.

Actions	Measures of Success	Next Steps
<p>1.5.1 Operate in accordance with the procedures outlined in our Accounting Framework</p>	<p>Qualitative measure of compliance within framework</p>	<p>Develop Accounting Framework documentation</p> <p>Clarify roles and responsibilities of Treasurer and Bookkeeper</p> <p>Arrange a Compliance Review of RPBO's financial statements by a CA/CPA.</p>
<p>1.5.2 Ensure documentation of all financial activities</p> <p>Ensure accessibility of financial statements</p>	<p>Financial statements are received and approved by the membership annually</p>	<p>Complete an internal review of RPBO's financial documentation - readiness and completeness</p>
<p>1.5.3 Ensure compliance with Canada Revenue Agency's Registered Charity requirements</p>	<p>Completed annual tax returns and all employer-related forms and payments</p>	<p>Provide annual Tax returns</p> <p>Provide annual employer-related forms and payments</p>

Goal #2 - Education and Outreach

Sustain and grow a variety of programs that build awareness of, and enthusiasm for, conservation of birds and their habitats.

Sustain and grow a variety of programs that build awareness of, and enthusiasm for, conservation of birds and their habitats. Whether through formal courses or ad hoc consultation, RPBO is in a unique position to share the results of our own observations and research and to interpret information from other similarly-focussed organizations for the general public. Over recent years, its reach has increased significantly through mainstream and social media. To use current terminology, RPBO is an influencer in the local community and beyond, but has not yet taken full advantage of this role. There are also opportunities through educational program development to fund existing and new programs that should be investigated.

GOAL#2 Education and Outreach		
<i>Sustain and grow a variety of programs that build awareness of, and enthusiasm for, conservation of birds and their habitats.</i>		
Objective 2.1 Increase and broaden the audience for education programs		
Actions	Measures of Success	Next Steps
2.1.1 Expand school and youth programs and develop targeted education events and programs for a variety of audiences	Number of participants youth programs (school programs are a subset of youth programs)	Develop formal Outreach & Education Plan / Framework.
	Number of adult education programs developed; number of participants	Formally track Outreach & Education events
2.1.2 Increase resource capacity for education programs	Number of education and outreach staff and volunteers	Recruit volunteers specifically for education and outreach
2.1.3 Publicize education resources and programs more broadly	Number of media releases on education programs (i.e. social media posts, news articles, email distributions etc.)	Develop strategy for tracking media releases
	Number of groups or organizations contacted regarding education programs	Track education and outreach contacts
2.1.4 Indigenous Engagement	Committee	Maintain an Indigenous Relations Liaison on the Board Create a committee to support the Liaison
	Number unique indigenous interactions	Create knowledge exchange opportunities with Indigenous Groups

2.1.5 Expand and create Adult Education programs	revenue generated number of presentations number of participants in programs	Maintain current adult education programs Develop new adult education programs Focus Volunteer Recruitment on 55+
Objective 2.2 Increase RPBO's public profile; be recognized as the "go to" organization for information on birds in BC		
Actions	Measures of Success	Next Steps
2.2.1 Increase online presence and brand awareness	Number of visits to website and what is viewed (monthly Website Analytics data provided with Website Care Plan)	Track and analyse website traffic Develop plan to respond to Website Analytic results
	Number and type of social media comments and other forms of feedback	Track and analyse social media traffic Develop plan to respond to Social Media Analytic results
2.2.2 Build connections and exposure with other environmental organizations	Number and quality of partnerships with other environmental organizations	Continue to Identify new potential partners, and assign an RPBO representative to each
	Number of external resources that reference RPBO	Review references to RPBO on other websites or in sources not managed by RPBO
2.2.3 Increase participation in regional, provincial, national and international events	Number of Regional, Provincial and International events participated in	Identify new events and determine how RPBO can participate Identify Indigenous events - see Action 2.1.4

Goal #3 - Science (Monitoring and Research)

Maintain and strengthen RPBO as a resource for professional and general knowledge of the birds of Vancouver Island and Western North America.

Science is the pursuit of information and understanding gathered following an objective, systematic and repeatable methodology. The application of knowledge gained through this process is based on evidence. RPBO carries out science through both research and monitoring under the guidance of the Science Advisory Committee.

Monitoring is the systematic process of collecting, analyzing and applying information to track progress and/or identify trends with respect to stated objectives. This information can support/advocate informed decision-making. Monitoring programs gather baseline data (on bird populations or other relevant environmental or biological indicators) and, over the long-term, repeated measures through consistent data collection and analysis can help to track changes regarding bird populations and relevant ecological health or conservation efforts.

Research, through experiment and/or observation, can serve to test specific hypotheses and to answer pertinent questions. Results are shared through “peer reviewed” or “popular” publications and can be applied to identify further research needs and to educate, influence or advocate for decision-making that promotes positive conservation actions/outcomes.

GOAL #3 Science (Monitoring and Research) <i>Maintain & strengthen RPBO as a resource for professional and general knowledge of the birds of Vancouver Island & Western North America.</i>		
Objective 3.1 Share RPBO scientific data to promote conservation		
Actions	Measures of Success	Next Steps
3.1.1 Contribute knowledge on birds and bird conservation to the science and policy community through utilization and accessibility of RPBO’s scientific data (new Action; previously Objective #9)	Amount of data shared annually Number of data sharing requests received and approved Data completeness and accuracy	Collect bird population parameters, morphometric and observation data during migration
3.1.2 Publish in scientific journals using existing data by creating a data inventory, identifying relevant questions that can be addressed with existing data, prioritizing publications, and identifying publication leads and resources	Number of scientific publications Number of citations Number of research collaborations	Identify potential authors for new publications Identify opportunities to include RPBO data in outside research Identify potential new collaborators

<p>3.1.3 Make science results accessible by publishing articles for a general audience</p>	<p>Number of general audience publications</p> <p>Number of distribution outlets</p>	<p>Identify potential authors</p> <p>Identify Distribution Outlets</p>
<p>3.1.4 Make RPBO's existing data more accessible through improved inventory, scrubbing and management practices of existing data.</p>	<p>Number of successful shared data agreements</p> <p>Number of publications or materials produced from shared data</p>	<p>Promote data sharing opportunities</p> <p>Revise data-access procedures</p> <p>Update data inventory</p>
<p>3.1.5 Develop data management practices, post data inventory on the website and develop a template data sharing agreement.</p>	<p>current data available for viewing</p>	<p>Prepare data for posting on the website</p>
<p>Objective 3.2 Conduct scientific research to fill priority knowledge gaps within the scope of RPBO's operational framework and interests.</p>		
<p>Actions</p>	<p>Measures of Success</p>	<p>Next Steps</p>
<p>3.2.1 Science Advisory Committee to develop and implement a long-term research plan identifying knowledge gap, priority research areas and questions</p>	<p>Number and progress of research projects</p>	<p>Complete in-progress research projects</p> <p>Identify new research projects</p> <p>Develop long-term research plan</p>
<p>3.2.2 Conduct successful research through identifying project lead(s) and team roles, developing a comprehensive research plan and timeline and acquiring resources for implementation.</p>	<p>Number of scientific publications</p>	<p>Complete and publish in-progress papers</p> <p>Identify authors and project leads for new publications</p>
	<p>Science Advisory Plan and Research Plan guide RPBO's agenda.</p> <p><i>"What we think we can do well, and how we can do it."</i></p>	<p>Assess the viability and longevity of SAC plan</p> <p>Refine long term Science & Research Priorities</p> <p>Refine short term Science & Research Priorities</p> <p>Create a Wish List for future planning</p>
<p>Objective 3.3 Establish and develop academic partnerships to increase science and research capacity, build networks and support students.</p>		
<p>Actions</p>	<p>Measures of Success</p>	<p>Next Steps</p>
<p>3.3.1 Contact principal investigators/academics/professionals for collaboration who are interested in RPBO's priority areas of focus and</p>	<p>Number of collaborations</p>	<p>Identify potential collaborators</p> <p>Create presentation materials to promote collaborations</p>

data		
3.3.2 Seek cash and in-kind (e.g. student/staff time, equipment, consumables) contributions to science and research projects	<p>Number of students supported through collaborative projects</p> <p>Amount of in-kind or matching funds</p>	Identify resources to support research
Objective 3.4 Maintain RPBO's role as part of the Canadian Migration Monitoring Network and other collaborative and/or independent long-term monitoring programs.		
Actions	Measures of Success	Next Steps
<p>3.4.1 Maintain current capacity of all operational monitoring programs</p> <p>Maintain membership in the CMMN</p>	<p>Number of effort hours per program</p> <p>Quantitative measure of data acquisition per program</p> <p>Submission of data to long-term collaborative projects</p>	<p>Calculate the number of effort hours per program</p> <p>Identify data repositories and document procedures for data sharing with USGS, CMMN</p> <p>Assign a volunteer to the CMMN Steering Committee</p>

Goal #4 Conservation

Support local, regional, and national organizations on bird and bird habitat conservation initiatives.

Southern Vancouver Island has more than 100 conservation organizations but none that occupy the same niche (bird monitoring) as RPBO. As such, RPBO is in a unique position to support the work of many of these organizations by providing information on bird populations, habitat and behaviour, arising from the synthesis of our science and education activities and relevant work from others in the field of bird conservation. Whether by advocating for habitat restoration (e.g., Island View Beach Park Plan) or reduction of physical harm (e.g.

responsible pet ownership bylaws, restriction of rodenticide use), improved conservation outcomes are the ultimate goal of RPBO's efforts.

GOAL #4 Conservation		
<i>Support local, regional, and national organizations on bird and bird habitat conservation initiatives.</i>		
Objective 4.1 Develop participation in bird conservation through advisory, advocacy or supporting roles.		
Actions	Measures of Success	Next Steps
4.1.1 Provide access to conservation resources and information	Number of conservation resources made available	Identify resources and make accessible
	Number of times RPBO is consulted or data is used in conservation efforts	Track consultations
4.1.2 Participation in conservation efforts	Number of partnerships with conservation organizations	Identify potential collaborative conservation organizations or projects (not exceeding CRA regulations for advocacy)
	Number of conservation projects participated in	
	Track indigenous initiatives Number of Letters of Support	Develop strategy for tracking Letters of Support and other RPBO Participation
4.1.3 Produce list of specific conservation priorities	Measure of real-world successes related to these priorities	Identify conservation priorities