



Mapping The Way Forward

Scottish Orienteering Strategy
2020-2024



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Executive Summary

The Scottish Orienteering Association (SOA) 2016-2020 strategic plan comes to an end in March 2020. We have consulted extensively with members and staff and have reviewed our strategy and developed a new strategic plan for the next four-year cycle from 2020-2024.

Our vision is that *“Orienteering is a thriving sport for all, for life in Scotland”* and the SOA’s mission will be *“To support and develop a healthy and sustainable network of clubs to host fun, inclusive and high-quality events.”*

We will seek continued financial support from **sportscotland**, and will operate an effective organisation to deliver this vision. To deliver this we have outlined our strategy in six strategic themes:

- Events - we will co-ordinate and support a balanced calendar of fun, inclusive and high quality events;
- Development - we will support and develop our clubs and volunteers who host these events;
- Performance - we will support and develop our elite athletes so that they can perform on the world stage;
- Communications & marketing - we will support high quality event presentation and effective communication with our members, new orienteers and prospective orienteers;
- Strong partnerships - we will continue to work proactively with our key partners; including British Orienteering & **sportscotland**;
- Effective organisation - we will continue to help our board, staff and volunteers operate efficiently to deliver our vision.

We plan to operate a balanced budget over the next 4 years, while maintaining 6 months of operational reserves. We will seek extra sources of income, but will not make commitments until these are secured.

1. Purpose of this document

The objective of this document is to summarise the main assumptions and the basis for the Scottish Orienteering strategic plan for the period 2020 - 2024.

Once finalised the strategy outlined in this document will be communicated to members and other stakeholders. This document is not to be used directly for this communication.

2. Introduction

The Scottish Orienteering Association (SOA) is nearing the end of its 2016-2020 strategic plan and will be seeking renewed financial support from **sportscotland** from 2020-2024.

The SOA Board has completed a review of strategic options for Scottish Orienteering from 2020-2024 involving extensive consultation with members and staff. The process and the findings are described in this document.

The SOA is a charitable body limited by guarantee, and is recognised by **sportscotland** as the Scottish Governing Body (SGB) for orienteering in Scotland. This covers “foot orienteering” and not the associated sports of mountain bike orienteering or ski orienteering.

The SOA is also one of the constituent associations of British Orienteering (BOF), which is responsible for maintaining the rules of orienteering in the UK. The 24 orienteering clubs in Scotland are members of both BOF and the SOA. All Scottish orienteers are expected to become members of the SOA; approximately 2/3 of Scottish orienteers are also members of BOF.

The SOA is responsible for the governance, development and promotion of the sport in Scotland, mainly through the network of clubs, support of junior and elite squads, the staging of events, and the development of coaches.

The SOA is overseen by a Board of directors, a small staff team with a part time Chief Operating Officer and 8 other part time staff, and a large number of volunteers. It is currently funded by **sportscotland**, member fees, event levies, surplus income from the Scottish 6 Days Company Ltd (which is wholly owned by the SOA) and occasional other grants and donations.

3. Consultation and strategy formulation process

During the last 2 years we have carried out extensive consultations with staff and members. These consultations have included face-to-face interviews, on-line surveys, a club conference, interviews with club chairs & presidents, attendance at club committee meetings and regional consultations. Details are provided in Appendix 3.

Using the information from the consultations we have considered the following areas:

- A renewed vision & mission statement for Scottish orienteering
- Values - which link to culture in the sport

- Strategic options - using framing tools to bring clarity to what we will and won't do over the next 4 years, and to describe the strategy in sufficient detail to develop operational plans.

4. Assessment

4.1 Strengths & weaknesses

SWOT analysis shows that we understand our Strengths, Weaknesses, Opportunities and Threats:

<p>Strengths Outstanding areas in which to orienteer Dedicated and passionate volunteers Capable and experienced staff Lots of experience and knowledge about hosting quality events</p>	<p>Weaknesses Not a large sport (1500-2000 members in Scotland) Not great at event presentation (other than WOC) Complex with too much jargon Can be seen as a middle class sport Not good at selling the sport Orienteers can be overly critical No club bases Demographics (membership dominated by young teenagers or over 50s)</p>
<p>Opportunities Ticks lots of boxes for schools & outdoor education Plenty of potential partners Synergies with other adventure sports British and International orienteering bodies value our skills Really does offer a sport for life</p>	<p>Threats Volunteer overload Demographics Lack of funding Restricted access to some of the best areas ((e.g. due to capercaillie and other environmental issues) Increasing regulatory and legal requirements</p>

In summary we have a lot to offer, but need to address some weaknesses to attract and retain new members.

4.2 Reflections on 2016-2020

We agreed a number of targets with **sportscotland** in the 2016 - 2020 strategic plan. Progress is summarised below:

Effective Organisation

- Achieve an assessment of Satisfactory (with comments) in the Organisational Development audit.
 - This was achieved in August 2019.
- Maintain the Foundation level of the Equality Standard.
 - This is expected to be achieved by March 2020.

Development

- Increase membership by 23% (from 1768 to 2174)
 - Our membership at the end of August is 1880. We notably achieved 6% growth in 2018, however in 2019 we had staff changes and RDO positions vacant for a period of time which impacted our growth.
- Increase the number of active coaches at UKCC L1 and above from 74 to 90 (22%)

- Coach development remains an area we are proud of. We trained over 150 coaches at L1 and above in 2016-2020.
- Accredit 18 clubs with SOA Club accreditation award.
 - We can confidently expect to reach 14 accredited clubs by March 2022. The launch of the club accreditation award was delayed until 2018 so substantial progress has been made in a 2 year period. The club accreditation scheme has been well received by the clubs who have undertaken the awards to date.

4.2.1 Achievements

There have been some notable achievements over the previous strategic cycle. One of the key objectives of the previous strategy was a new organisational model which included:

- a Chief Operating Officer to handle compliance and manage the professional team
- administrative support to take some of the burden off volunteers in the areas of book keeping and membership
- RDOs and a Coaching & Volunteering Coordinator to support development
- an Events Manager to support access and major events

There have been a number of staff changes but we have successfully recruited some talented individuals and this staff team is now established and functioning well.

The Board has changed significantly and has introduced a number of process changes, including splitting the Chair and President roles. We have an Independent Director and an Equalities & Welfare Director from outside the sport and they have brought a valuable external perspective to the organisation.

We have successfully introduced policies and business processes necessary to create an effective organisation, culminating in a Satisfactory (with comments) assessment from the Development Audit conducted by KPMG in August 2019.

Our clubs and members have continued to put on a programme of quality competitions and activities, including the British Orienteering Championships in 2018 and Scottish 6 Day events in 2017 and 2019 which have attracted ca. 3000 competitors and brought benefits of several million pounds into the Scottish economy. Over the past 4 years, our clubs have organised and delivered 2300¹ events and activities. Our event programme, hosted by Scottish based clubs has seen participation figures in excess of 126,000² (this figure represents number of runs completed at events).

And our elite athletes have continued to punch above their weight on the international stage, representing 20-40% of the GB team, winning home international competitions at Junior and Senior level. We are also seeing positive International performances coming from our ScotJOS (Scottish Junior Performance Squad) athletes, with the following notable performances:

¹Events are classed as competitions at local, regional and national level. Activities are non-competitive club-based events or SOA led introductory activities.

²Participants is calculated as total number of completed runs registered on the British Orienteering database for events only. We will look to make our activity participation data more accurate over the next 4 years to give a clear indication of participation levels across all events and activities run by Scottish clubs and SOA.

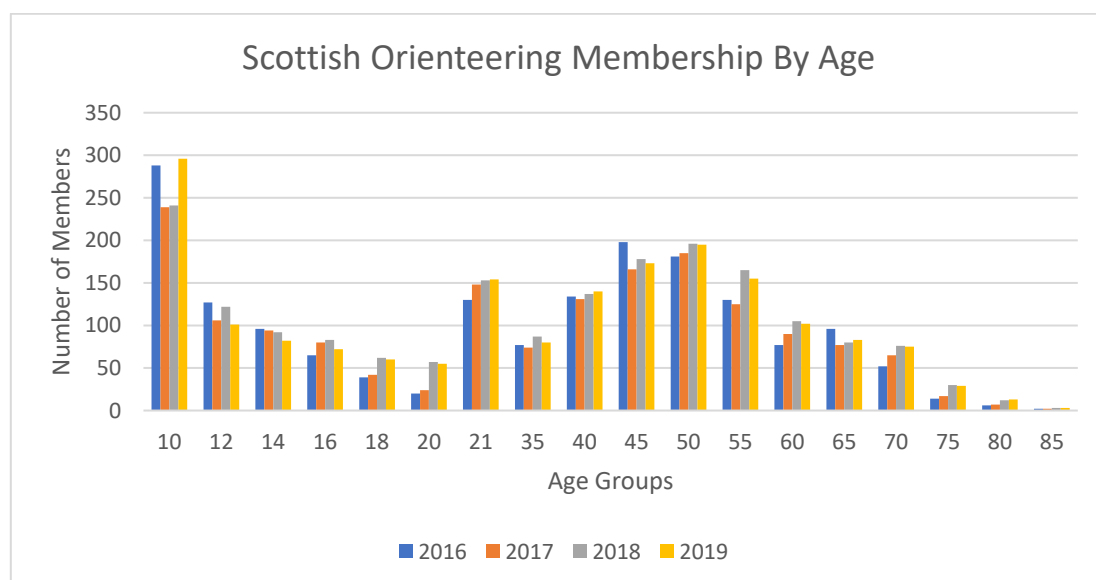
- 2018 European Youth Championships - Megan Keith won GB's first ever female gold medal in the sprint race
- 2019 Junior World Championships - Megan Keith and Grace Molloy formed 2/3 of the team that won GB's first ever female gold medal in the relay
- 2019 Junior World Championships - Grace Molloy took bronze medals in the long distance and the sprint
- 2019 Junior European Cup - Megan Keith won gold in W18 and Grace Molloy won silver in the W20 age categories in the sprint races.

4.2.2 Key learnings

Considerable learning has been taken from almost every aspect of our previous strategy and specifically the way in which long term objectives are set and reached. We have performed well in aspects of effective organisation and believe good progress has been made in aspects of governance across the organisation.

Membership growth has proved hard to achieve. Over the 4 year period membership has grown by about 6% against a target of 23%. We lose about 20-25% of our members each year and need to encourage new members at this rate just to stand still. We have a solid base - about 70% of our members are also members of BOF, and we lose about 10% of them each year, compared to about 60% of our SOA only members.

The time line from instigated development activities in our sport to translation into club membership increase is a challenging one and our levels of growth do not reflect the hard work done by SOA staff and our clubs in their communities. Some of the stalled growth in membership can also be attributed to changes in staff over the last 2 years and the time taken for new staff to embed themselves in their roles to affect positive change.



We have a target of our 18 open clubs to achieve Bronze level accreditation by the March 2020. At the end of September 2019 eight clubs had reached this standard (or above) and we are confident that we will accredit another six prior to end of March 2020. The remaining clubs are either very small, or in one case do not see the benefit of the scheme. Realistically it is probably not a good use of our limited resources to target 100% of clubs, and reaching 91% of our members represents good progress.

Most experienced orienteers put a lot of effort into organising events and activities. Experience shows that it is hard to find volunteers to take on additional volunteer roles (e.g. for the board or the other SOA volunteer roles). In some cases, we are filling these posts using professional help but recognise this is unsustainable in the long run unless we secure additional sources of funding. While we have a strong Board at present, we are also aware of the need for succession planning at Board level as well as our key volunteer coordinator positions.

Securing sponsorship has proved challenging and probably requires dedicated individuals both at board and staff or volunteer level.

Overall the key learning is that we are a relatively small sport and cannot do everything that we'd like to do. We need to make some clear choices to make effective use of our resources and need a targeted approach to our continued development.

5. Strategic options

During the strategy review we took the opportunity to consider a wide range of strategic options. At the highest levels these have included:

- A small association model (similar to the North West Orienteering Association in England) - with club representatives co-ordinating the event calendar in the region and an area junior squad/ team. British Orienteering would handle all membership, finances, compliance issues and would seek development funding from relevant bodies (e.g. Sport England, sportscotland). This would require minimum funding level from the members.
- The current SOA model - continuation of the current model with SOA managed by a board of directors assuming the responsibilities of a Governing Body with a small professional team providing support to run an effective organisation. This is underpinned by **sportscotland** and membership fee/levy funding
- A growth model - this envisages a larger professional team that takes advantage of the orienteering institution (rules, structure, skills) but would be funded from elsewhere as the Scottish orienteering community doesn't have the volunteer or financial capacity

Feedback from members (consultations/ surveys/ levy proposals) showed strong support for the current model, with members recognising the value of the **sportscotland** funded development support.

The option of creating a national SGB, independent of British Orienteering, was also considered but had very limited support owing to (a) the amount of time and effort that would be required to implement such significant change and (b) the impact on elite athletes who are Great Britain team representatives.

The strategic options were considered in detail using an option matrix that considered the actions that we would take for each option by theme. These are detailed in Appendix 2.

6. Vision and mission statement

We believe that for a relatively small sport we are very successful on the UK and International stage. Scottish Orienteers form a disproportionate percentage of the British team, and we have a track record of staging world class events (the World Championships in 1976, 1999 and in 2015), and the renowned Scottish 6 Days event every 2 years since 1977. We have been selected over strong competition to host the 2022 World Sprint Championships in Edinburgh. Our clubs stage over 600 events a year from local to national level with participation figures of over 31,500 annually, and we have active competitors of all ages and abilities.

We want this to continue and our vision is that:

Orienteering is a thriving sport for all, for life, in Scotland.

Orienteering is a club focussed sport, and competitions and activities are at the heart of the sport. As a SGB our aim is to support and nurture the clubs, co-ordinate competitions, train volunteers and coaches and share best practice. Our mission is to:

Help support and develop a healthy and sustainable network of clubs to host fun, inclusive and high quality events.



7. Values

Our sport can only thrive if we make a concerted effort to ensure that all members, volunteers and anyone experiencing our sport are treated with respect, made to feel welcome and we strive to be as inclusive as possible within the constraints of some of our environmental limitations.

Orienteering is also a sport that takes place on public and private land rather than in sports halls or on sports grounds. Some urban events take place in residential streets, and larger events in rural communities that may not be used to large numbers of incomers. It is crucial we are seen to show respect and minimise our impact on this environment.

Recognising this we launched a code of conduct in 2019 and believe that it is important to have a set of values that are part of our strategy and recognise our challenges. Our top priorities will therefore be:

- **Respectful** - of our environment and communities, and to our clubs, members and volunteers.
- **Welcoming** - ensuring a positive experience to those who wish to participate in our sport.
- **Inclusive** - offering a range of experiences and entry points within our sport to enable everyone from all sectors of society to participate regardless of age, gender, sexuality, race or physical ability.
- **Dynamic** - to continue to offer new experiences and development opportunities for all our members, clubs and volunteers.
- **Rewarding** - to recognise those who make our sport happen through valuing our volunteers. To ensuring everyone's experience of orienteering is rewarding in some form.

8. Strategic themes

Essentially our strategy is unchanged. We will:

- continue to focus our development resources on supporting our clubs and volunteers to host fun, inclusive and high quality events for orienteers of all ages and abilities;
- refresh our programme of events/ competitions to support development pathways and the needs of our members;
- continue to provide as much support as possible to our elite athletes;
- communicate effectively with our clubs, members, and prospective orienteers;
- underpin all this by maintaining an effective organisation.

This is outlined in 6 strategic themes.

8.1 Events

Our aim is to support clubs to provide a balanced programme of fun, inclusive and quality competitions and ensure they support pathways through the sport for existing orienteers and newcomers. This is consistent with the feedback we had from our members. The main objectives include:

- redesign and operate a balanced competition calendar;
- set clear standards for Scottish events;
- renew development pathways for event officials;
- provide SOA support to Scottish clubs in areas such as land access, competition co-ordination and advice for event organisers.

8.2 Development

Our development strategy covers 4 areas: clubs, volunteers, engagement and inclusivity and coaching.

8.2.1 Support our clubs

Support will be provided to clubs to help them achieve high standards of governance and operation, ensuring standards of equality and welfare are imbedded within clubs. We will:

- support effective partnerships that enable growth and sustainability of clubs;
- share best practice from within our sport and seek to learn from outwith orienteering;
- expand the use of technology to engage with our target groups, offering events structured to the needs of those groups and providing partnership opportunities;
- provide targeted support through our Regional Development staff. Our Development Team will continue to broaden their reach through partnership, working with Active Schools to engage new young people from all parts of Scotland including areas of deprivation in our sport. We will utilise our IntraO materials to help teachers to deliver orienteering within curriculum time and encourage extra-curricular clubs where possible;
- support our non-elite juniors with opportunities to keep them engaged in our sport. Specifically RDO's will support Regional Development Squads;



- extend the roll out of the Scottish Orienteering Young Leader Award to offer young adults and teenagers the chance to develop their leadership skills and empower them to take on roles within their clubs;
 - support university clubs so that they can offer continued development opportunities for existing orienteers and attract and engage students new to orienteering with fun, social and competitive opportunities.

8.2.2 Support our volunteers

Work on a volunteer strategy is in progress and will provide a clearer framework for progression in the many volunteer roles available within the sport. The strategy will also identify training needs and consider how to recognise and reward our valued volunteers. We expect it to:

- provide a wide range of development opportunities for our members and volunteers;
- offer a clear pathway to ensure continued progression and offer training on a regional basis;
- help clubs develop their local volunteer workforce and ensure they have a volunteer development plan in place covering strategies, management, and rewards;
- outline how we will recognise and reward our volunteers.

8.2.3 Develop our coaches as people and as educators

We will:

- offer high quality, coordinated coach education courses across Scotland to grow our pool of coaches at all levels;
- provide clear pathways for ongoing development to maintain an active and engaged coaching workforce;
- continuously review the content of our programmes to ensure they are relevant and offer our members a meaningful development opportunity;
- embed and promote mentoring at all levels of coach development;
- establish a regular programme of CPD activities to improve skills, share best practise and success stories and innovations throughout our coaching and volunteer workforce

8.2.4 Engagement and Inclusion

We will:

- continue to explore ways of offering meaningful orienteering to groups and individuals with additional needs to widen accessibility and ensure that orienteering is a sport for all;

- extend our links with schools through the Active Schools network to include areas of multiple deprivation and utilise Active Schools monitoring data to identify potential areas of growth within our development plan on an annual basis
- fill an identified gap in orienteering participation between introductory activities and new participants becoming club members by hosting engagement events. Some engagement events will be towards targeted populations which link to our inclusion agenda or focus clubs/geographical areas.

8.2.5 Focus on WOC2022

Our development focus will continue to be on club, volunteer and coaching support across Scotland. However, we recognise that orienteering in rural and urban areas require different approaches. WOC2022 gives us a tremendous opportunity to promote orienteering in a city environment and particularly to the young adult demographic. This is one we must capitalise on. We will therefore have targeted programmes to increase our engagement and provide orienteering in Central Scotland. One key target group identified as currently under-represented in our sport is the 20-40 years age group. Presenting orienteering in urban environments in a sprint format will allow us to engage new audience for the sport and provide the platform to adjust the public image towards orienteering as a sport for young people.

8.2.6 Development Staff

Our development strategy is supported by 3 RDOs (north, east & west ~11-12 days/week), together with a coaching and volunteering officer. These roles are funded by **sportscotland**. We also utilise the development funds to provide support for specific club development initiatives and targeted provision.

8.3 Performance

We will continue provide limited financial support to our elite athletes and juniors to recognise the impact that they have at an international level. We will continue to:

- support the Scottish athletes performing at international level by developing the Scottish Orienteering performance culture;
- work with partners at British Orienteering to ensuring that the British Orienteering Performance Program meets the needs of Scottish Elite athletes;
- increase the pool of Scottish athletes performing regularly at an elite level.

8.4 Communications & marketing

It is critical that we promote our vision, mission and our values within every aspect of our sport. However funding for this part of the strategy is challenging and will require some changes during the next 4 years. We plan to:

- set clear expectations for members about communication and simplify communication processes;
- encourage younger orienteers to take on social media responsibilities;
- develop presentation standards as part of the competition review, including mechanisms for delivery;

- promote our sport externally through our engagement events to raise the profile of orienteering as a thriving sport in Scotland.

SOA professional support for event presentation and marketing will be provided if extra funding (grants or sponsorship) are secured.

8.5 Partnerships

We will:

- revisit the Memorandum of Understanding which documents the SOA/BOF working partnership. This may include representation on the BOF board to foster better strategic working and communications;
- continue to work with **sportscotland** and benefit from its National networks to offer effective development and partnership working opportunities;
- broaden our engagement scope through close partnership with the Active Schools Network in identified areas as part of our development strategy;
- explore corporate partnerships in parallel with the further development of urban orienteering.
- the Scottish 6 Day (S6D) Company is also a critical partner, although it is 100% owned by the SOA. The S6D will be host WOC2022.

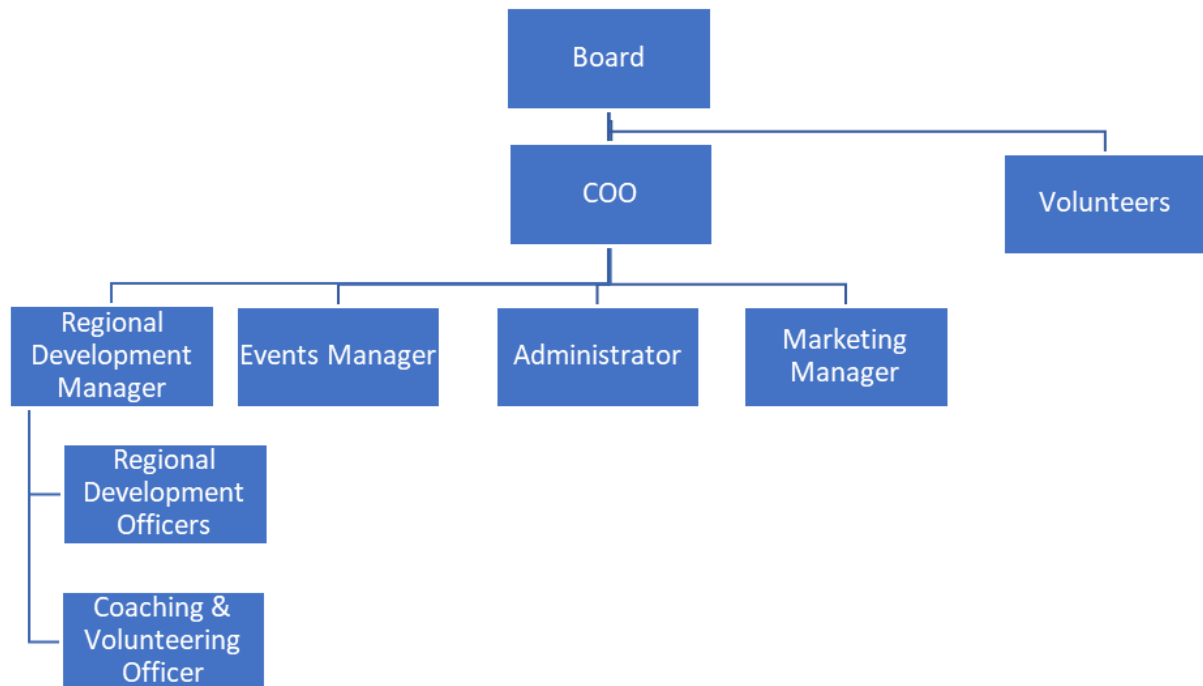
There is no dedicated partnership director on the Board and responsibilities for these objectives will be distributed.

8.6 Effective organisation

We will continue to operate an effective organisation to underpin delivery of our strategy and ensure compliance with regulatory and partnership requirements to underpin ongoing funding throughout the strategic cycle.

We do not plan to change our organisational model which is shown below and includes volunteers and paid staff.





The Board currently has 10 positions. Recruiting board members is a continuing challenge. To address this issue we will develop a succession plan for board positions. This may include a separate marketing position as we recognise that this needs a dedicated resource. We would also like to improve the diversity in terms of age.

The staff organisation will continue in the current form, with the COO acting as line manager for the staff and attending board meetings.

Volunteers are a critical part of our organisation and fulfil a number of important roles (e.g. coaching co-ordinator). They are accountable to the relevant director (rather than a staff member) and we will continue to operate this model.

We will maintain and where necessary improve our policies and processes, and implement any audit findings.

9 Financial forecasts

The financial plan for 2020-2024 is summarised below and in more detail in Appendix 2.

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
<u>Income</u>				
Grants	106,500	100,000	100,000	100,000
Members	16,200	24,200	24,200	24,200
Scottish 6 Day Company	46,800	46,800	46,800	39,300
Other	3,000	3,000	3,000	3,000
Total Income	172,500	174,000	174,000	166,500
<u>Expenditure</u>				
Staff	150,500	144,000	144,000	136,500
Administration	10,000	10,000	10,000	10,000
Development	16,000	16,000	16,000	16,000
Performance	5,000	0	0	0
Communications	2,000	2,000	2,000	2,000
Depreciation	2,000	2,000	2,000	2,000
Total Expenditure	185,500	174,000	174,000	166,500
Surplus / (Deficit)	-13,000	0	0	0
Transfer from General Reserves	13,000	0	0	0

Notes

1. Grant in 2020 includes FVO DCI funding

2. Scottish 6 Day income includes funding for WOC2022 professional staff support and Scottish 6 Day professional salaries

3. Reduced Scottish 6 Day income in 2023 and reduced staff salaries in 2023 due to cessation of WOC2022 work

Our financial strategy is two fold:

- To maintain 6 months of operational reserves
- To run a balanced budget through the period

We forecast surplus reserves of £15,000 (unrestricted) and £20,000 (restricted) at end 2019, and the financial plan envisages utilisation of most of these reserves during 2020.

The financial forecast is consistent with the strategy but assumes the following changes from 2019:

- The Chief Operating Officer is employed for 4 days per week instead of 2.5 days per week and takes on additional responsibilities including communication and grant applications;
- 1 day per week events manager/ competitions co-ordinator position funded from unrestricted reserves in 2020 and from event levies on smaller (regional) events from 2021;
- a reduction in other expenditure, including marketing and internal communications.

Attempts to raise other funds have met with limited success to date, but will be explored using other approaches (e.g. a dedicated marketing director).

11 Conclusions

We have consulted extensively with members and staff and have reviewed our strategy and developed a new strategic plan for the next four-year cycle from 2020-2024.

Our vision is that *“Orienteering is a thriving sport for all, for life in Scotland”* and the SOA’s mission will be *“To support and develop a healthy and sustainable network of clubs to host fun, inclusive and high quality events.”*

We will seek continued financial support from **sportscotland** and will request £85,000pa to support development funding and £15,000pa to support an effective organisation. We aim to raise further income from members from 2021 and will use this to support an effective organisation to deliver our vision. To deliver this we have outlined our strategy in six strategic themes:

- Events - we will co-ordinate and support a balanced calendar of fun, inclusive and high quality events;
- Development - we will support and develop our clubs and volunteers who host these events with a further focus on inclusion and engagement within targeted age groups;
-
- Performance - we will support and develop our elite athletes so that they can perform on the world stage;
- Communications & marketing - we will support high quality event presentation and effective communication with our members, new orienteers and prospective orienteers;
- Strong partnerships - we will continue to work proactively with our key partners; including British Orienteering & **sportscotland**;
- Effective organisation - we will continue to help our board, staff and volunteers operate efficiently to deliver our vision.

We plan to operate a balanced budget over the next 4 years, while maintaining 6 months of operational reserves. We will seek extra sources of income, but will not make commitments until these are secured.

Appendix 1: Strategic choice matrix

Theme	Model			
	Small association	Current'tish	Significant growth	
Events	Major & National	Run by clubs/ areas	Run largely by clubs/ areas SOA assists with Championships presentation (not Leagues) SOA provides guidance & advice (will be formalised by Competitions Review)	As current plus: Major & National events have professional organiser (including SOLs/SOULs) (will be formalised by Competitions Review)
Development - new orienteers	Rural areas	Ad hoc club activity - e.g. MAROC	Schools via active schools; train teachers; hand on to clubs; awareness via a few CATI activities (e.g. for new families)	Primary & secondary schools via active schools; train teachers; teachers in curriculum time; build critical mass area by area. Hand on to clubs and/or add areas to events.
	Urban areas	Ad hoc club activity - e.g. STAG	Primary schools via active schools; train teachers; teachers in curriculum time; build critical mass area by area. Hand on to clubs and/or add areas to events. No secondary effort. Support existing university clubs at freshers & introductory activities 20 somethings targeted via corporates etc	
Development - existing orienteers	Rural areas	Ad hoc club activity - e.g. MAROC	Ad hoc club activity - e.g. MAROC	Subsidised SOA Training weekend for club orienteers
	Big cities	Ad hoc club activity - e.g. STAG	Ad hoc club activity - e.g. STAG	Subsidised SOA Training weekend for club orienteers
	Coaching	Rely on BO with SQA requirements	Develop club coaches, run courses, curriculum (SQA), materials, develop tutors, mentoring within coaching framework	Subsidise coaching courses, RDOs mentor CDOs
	Use of technology	None	RDOs continue to promote Maprun	SOA Maprun equivalent with other links
Development - clubs	Accreditation	Discontinued	Bronze standard (to access dev funding) unless club wishes to go further	Bronze standard (to access dev funding) unless club wishes to go further
	Sharing best practice	Rely on BO website & word of mouth	Rely on BO/SOA website/Score & word of mouth & RDOs transfer knowledge & 80:20 resource database	SOA resource on SOA website
Development - volunteers	Training (adults)	Ad hoc organised by clubs; BO webinars, controllers courses, ESWs, volunteer qualifications	Point volunteers to BO resources; timetable of training courses mapped to requirements; SOA provide free/ heavily subsidised training; conferences for planners, organisers, controllers, technologists (GPS, SI etc)	Point volunteers to BO resources; timetable of training courses mapped to requirements; SOA provide free/ heavily subsidised training; conferences for planners, organisers, controllers, technologists (GPS, SI etc)
	Training (juniors/youth)	As above	SOYL training course in each region each year with follow up mentoring and visibility in the club	SOYL training course in each region each year with follow up mentoring; more specific training e.g. planners
	Succession planning	Use BO guidelines	Promote BO guidelines to clubs; maintain list of experienced volunteers	Promote BO guidelines to clubs; maintain list of experienced volunteers and link to training
	Development pathway	As per BO rules/ guidelines	As per BO rules/ guidelines	As per BO rules/ guidelines
	Volunteer time (adults)	Ad hoc club processes	Ad hoc club processes; recognition on an informal basis so no formal measurement	Ad hoc club processes; recognition on an informal basis so no formal measurement
	Volunteer time (SOYL)	Ad hoc club processes	Ad hoc club processes; recognition on an informal basis so no formal measurement	Ad hoc club processes; recognition on an informal basis so no formal measurement
	Volunteer reward	Ad hoc club processes	Ad hoc club processes, limited number of SOA awards (e.g. Event of the Year, Presidents Medal), and some thank yous, recommendations for honours	Ad hoc club processes, limited number of SOA awards, and some thank yous, recommendations for honours
Performance	SEDS	Current model	Current model	Current model
	SCOTJOS	Current model	Current model	Current model
	Professional support	No - unless specific funding	No - unless specific funding (e.g. for WOC)	Yes
Comms & marketing	Website	Simple version	Current model with some simplification/ redevelopment	Current model with some simplification/ redevelopment
	Social media	Nothing	Ownership by elites/ youth - but only capacity for 2 channels at present	Manage all social media fulltime
	Score	No	Yes - but change to on-line and possibly annual publication	Regular newsletters and app?
	Professional resources	None	No - unless specific funding	Yes
	Other	Ad hoc club events	Maintain development standards, run CATI events e.g. Cairngorms Big Nature	Maintain development standards, run CATI events e.g. Cairngorms Big Nature; more proactive promotion outside the sport
Partnerships	SportsScotland	No	Current model	Current model
	British Orienteering	Rely on BO	Current model; identify duplication; sort insurance	Current model; identify duplication; sort insurance
	LEAs	No	Active schools	Active schools
	Corporate	No	Possible	Yes
Governance & organisation	Organisational model	Committee- Club or area representatives	SOA Board - current model but consider more direct club representation	SOA Board - current model but consider more direct club representation
	Development team	0	3 FTEs	6 FTEs
	Non development team	0	2 FTEs	4 FTEs
Membership	Growth rate (%pa)	Falls gradually (2% pa)	2-4% pa	4-6% pa
	2024 membership	None	Schools, young families, university entrants, 20's	Schools, young families, university entrants, 20's
	Demographic targets	No	Yes - but focused time limited project. Probably 0.5 FTE. Enhance Trail-O visibility ahead of WOC2022. Remain proactive to upcoming charters.	Yes - but focused time limited project. Probably 0.5 FTE. Enhance Trail-O visibility ahead of WOC2022. Remain proactive to upcoming charters.
	D&I	No	SOA membership.	SOA membership. No requirement for club membership
Finance	Membership models	BO		
	Development Investment SS	0	85	150
	Governance Investment SS	0	20	20
	Income from members/ levies	20	30	30
	Grants/ sponsorship	0	0	0
	Development expenditure	0	85	150
	Effective Governance	10	30	50
	Operations, C&M, Performance	10	20	20
	Total	0	0	0
	Reserves target	10	67.5	110

Orange shows selected choices

Appendix 2: Financial Forecast 2020 - 2024

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
<u>Income</u>				
Grant funding				
sportscotland	100,000	100,000	100,000	100,000
Forth Valley Orienteers	6,500	0	0	0
SOA funding				
Membership Fees	12,200	12,200	12,200	12,200
Event Levies	4,000	12,000	12,000	12,000
Scottish 6 Day Company	46,800	46,800	46,800	39,300
Other	3,000	3,000	3,000	3,000
Total Income	172,500	174,000	174,000	166,500
<u>Expenditure</u>				
Staff	150,500	144,000	144,000	136,500
Non-staff				
Development	16,000	16,000	16,000	16,000
National Centre	2,500	2,500	2,500	2,500
Insurance	4,500	4,500	4,500	4,500
Website	2,000	2,000	2,000	2,000
Board / General Meetings	2,000	2,000	2,000	2,000
Independent Examination	1,000	1,000	1,000	1,000
Depreciation	2,000	2,000	2,000	2,000
Elite Performance	2,500	0	0	0
Junior Performance	2,500	0	0	0
Total Expenditure	185,500	174,000	174,000	166,500
Surplus / (Deficit)	-13,000	0	0	0
Transfer from General Reserves	13,000	0	0	0

Table 1: 2020-2024 financial forecast - all income/ expenditure

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
<u>Income</u>				
sportscotland	85,000	85,000	85,000	85,000
Forth Valley Orienteers	6,500	0	0	0
Total Income	91,500	85,000	85,000	85,000
<u>Expenditure</u>				
Staff	75,500	69,000	69,000	69,000
Non-staff	16,000	16,000	16,000	16,000
Total Expenditure	91,500	85,000	85,000	85,000
Surplus / (Deficit)	0	0	0	0

Table 2: 2020-2024 financial forecast - development budget

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
<u>Income</u>				
sportscotland	15,000	15,000	15,000	15,000
Membership Fees	12,200	12,200	12,200	12,200
Event Levies	4,000	12,000	12,000	12,000
Scottish 6 Day Company	46,800	46,800	46,800	39,300
Other	3,000	3,000	3,000	3,000
Total Income	81,000	89,000	89,000	81,500
<u>Expenditure</u>				
Staff	75,000	75,000	75,000	67,500
National Centre	2,500	2,500	2,500	2,500
Insurance	4,500	4,500	4,500	4,500
Website	2,000	2,000	2,000	2,000
Board / General Meetings	2,000	2,000	2,000	2,000
Independent Examination	1,000	1,000	1,000	1,000
Depreciation	2,000	2,000	2,000	2,000
Elite Performance	2,500	0	0	0
Junior Performance	2,500	0	0	0
Total Expenditure	94,000	89,000	89,000	81,500
Surplus / (Deficit)	-13,000	0	0	0
Transfer from General Reserves	13,000	0	0	0

Table 3: 2020-2024 financial forecast - non development budget

Appendix 3: Consultations & surveys

The following consultations & surveys have been held during the last 2 years:

Staff teams (workshops/meetings and ongoing participation)

The staff team have contributed throughout the process, with the COO being part of the strategy team, and other staff members contributing at different workshops. They were involved in a staff strategy workshop in 4Q 2017 and contributed opinions about progress against the 2016 - 2020 strategy, an assessment of the Strengths, Weaknesses, Opportunities and Threats (SWOT) and views about the sport in 10 years' time.

Board meetings (ongoing 2017-2019)

Strategic discussions have been on the agenda at most board meetings, culminating in a review of the proposed strategy in September 2019.

Member survey (2018)

During 1Q 2018 we conducted face to face interviews with approximately 120 members. This focused on:

- Progress against the 2016 - 2020 strategy
- Individual (i.e. volunteer) support from the SOA
- Club support from the SOA
- Areas that the SOA should focus on

The results of this survey were used to develop the agenda for a club conference.

Club conference (2018)

In April 2018 we held a conference attended by approximately 40 attendees from clubs, together with board members and staff. Six themes were selected based on the members survey and discussed in workgroups facilitated by staff or board members. The six themes were:

- Clearer event standards
- More balanced event calendar
- Improved club support
- Improved volunteer support
- Retention of non-elite juniors
- Improved marketing of the sport

The workgroups were asked to better define the theme and recommend short term and long term actions. To date the following progress has been made on the most important actions:

- Volunteer strategy - work in progress. A draft has been developed and will now be tested with clubs and staff.
- Competitions review - this a critical piece of work and the findings should be available in 4Q. The Terms of Reference covers the competition (i.e. event) calendar, and event standards including presentation.

- Non-elite juniors -we have widened representation in teams, increased development of the area junior squads (west, east & north) and held a weekend for non-elites;
- A new website was launched in 2019, and we have been testing the impact of employing a part time professional communications and marketing manager

Club committees/ presidents/ chairs (2018)

Members of the board and the COO either attended club committee meetings or had 1-2-1 conversations with a number of club chairs/ presidents using the same format as the member survey. Findings were similar to the member survey.

Finance survey (1Q 2019)

The finance survey was carried out to check the members' willingness to pay higher membership fees and event levies (equivalent to about £6-10k pa), and to see what mechanism they would prefer.

The survey results were positive. At the AGM in May the proposal to raise membership fees was supported but the proposal to raise levies was defeated. This appeared to be partly due to the mechanism although a sizeable number of members also objected to raising more money from events. This has been put on hold pending the competitions review and we will then repeat the proposal, with a clearer description of the benefits that extra income will support. We are confident that this will be accepted by members.

It should be noted that in addition to the membership fees and levies paid to the SOA Scottish orienteers also contribute approximately £50,000 pa to British Orienteering in the form of membership fees and event levies.

Regional member consultations (2Q 2019)

Three regional consultations were held to test for further opinions. Approximately 10-20 members attended each consultation. The facilitated sessions lasted for approximately two hours. Members were asked:

- what the SOA should focus on in the next 4 years?
- what values we should adopt?

Discussion was fairly wide ranging but generally supported continuation of the current strategy, with continued support from **sportscotland** and with the members continuing to financially support an effective organisation.

Other significant points (in addition to those captured in previous consultations) included:

- family connections (e.g. new adults come along with young children)
- school links, especially at P1
- professionalism at events (welcoming, well presented) and the need for feedback
- use of language ("events" or "competitions"?).
- more SOA help to raise funds (especially grants)
- travel and the environment
- address demographics and diversity & inclusion
- the need for better pathways and succession planning
- communications between SOA and the clubs
- be more obvious in communities



- improve understanding of event costs

Strategy (2Q-3Q 2019)

Over the past 3 months a small cross section of staff and board members has also held 2 strategy workshops. Participants have included:

- Fiona Keir (COO)
- Fran Loots (RDO)
- Sarah Dunn (Development Manager)
- Paul Rayner (Marketing & Communications Officer)
- Anne Hickling (Chair & Development Director)
- Keith Roberts (Operations Director)
- Nick Barr (Marketing & Communications Director)
- Richard Oxlade (Strategy Director & Acting President)