

Scottish Orienteering Event Officials Guidelines and Framework

Version 1.1



Record of Changes

Version	Date	Section	Description of Changes
1.0	Jul 2020	All	Original issue
1.1	Aug 2020	Grade C Controllers	Reference Change



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Scottish Orienteering Association Vision

"To be acting efficiently and effectively, in support of a network of healthy clubs to deliver a challenging outdoor adventure sport for all ages and all abilities in local communities and nationally, and to ensure the success of our athletes at international level."



Introduction

To ensure that all orienteering events are carried out safely and fairly it is necessary to allocate appropriately experienced and qualified individuals to undertake the key roles that are crucial to putting on events. This guide seeks to outline these individual roles, their prerequisites and the essential broad detail of their responsibilities, to enable clubs in Scotland to allocate individuals to these vital tasks.

Officials Required for Orienteering Events

Officials are there to plan, organise and to make sure events are run appropriately and fairly. The following information details the *advised* experience required for the main officials at events. All qualified Organisers and Controllers should be on the Register of licensed Event Officials before undertaking their roles, to ensure that British Orienteering Insurance requirements are complied with, except in the case of Local Level events where a new Event Official should be under the supervision of an experienced mentor.

All events registered with British Orienteering are governed by a set of Rules, and their associated Appendices. Different types of events and competitions are also regulated by a set of Rules, Appendices and Guidelines each specific to a type of event, which give competitors and event officials information about what should be expected from those particular types of events.

There are 3 main event officials required to run an orienteering event; these and their responsibilities, as detailed in the <u>BOF Rules</u> Chapter 15 and Appendix C to those Rules, are summarised in this document and have been clarified for the specific idiosyncrasies of Scottish Orienteering. Responsibilities may be delegated however, ownership and overview of tasks must be retained by the main event officials; the main responsibilities are:

Controller:

- Acting as supervisor for all aspects of the event
- Ensuring British Orienteering Rules and SOA Guidelines are adhered to
- Ensuring that the event is safe
- Ensuring that the event is fair

Organiser:

- Everything before the start line (including ensuring the start is staffed)
- Everything after the finish line
- Publicity (with the help of the club publicity team)
- Event Safety (includes producing the Risk Assessment)
- On the day helpers teams
- Equipment (except controls)
- Pre and post event admin

Planner:

- Responsible for everything that happens between the start and finish lines of the actual courses
- Planning the courses
- Identifying and highlighting hazards on courses
- Printing maps & control descriptions
- Checking control assemblies are all available
- Placing controls
- Collecting controls at the end



It is important to note that not all Organisers and Planners will meet the advised requirements exactly, and equivalent experience may and indeed should be taken into account. However, the training and experience requirements are mandatory for all grades of Controller. Before acting in the capacity of Controller, Organiser or Planner, officials must have completed the Event Safety Workshop unless they are officials at Local Events where they have a mentor who has attended an Event Safety Workshop. It is also important to note that officials of events of a particular format (e.g. Relay, Night, Sprint, etc.) should ideally have relevant experience of competing or officiating in that format.

Development of Officials

Inevitably, everyone involved in putting on orienteering events is a volunteer; however, these Event Officials and helpers are essential enablers for what are inevitably well-run, high quality events for all ages and capabilities. Our volunteers make a huge contribution and it is necessary to actively encourage all participants of all ages to get involved and to tap into what is a huge resource of expertise and knowledge. Volunteering can also be very rewarding as it builds upon life and work skills, builds confidence and has a significant positive impact on both the sport and the individual. It is therefore important that the correct tools and skillsets are provided to enable our volunteers to carry out these essential roles.

These guidelines provide the broad structure that will guide individuals to achieve the experience and qualifications necessary to carry out the most essential roles and offer development pathways that will ensure that they will continue to learn and progress that experience. This will enable orienteering to grow and develop the experience required to continue to put on Major and National level events in the future and safeguard the incredible resource that is our volunteers.

The SOA offers a number of courses (detailed at Appendix) that are available to facilitate this development and clubs are advised that they should encourage their membership to undertake them and to continue to progress their Event Officials through that participation. It is important to note that a number of these courses should be done periodically to ensure that club members remain up to date with current rules and guidelines and to refresh them on important safety and welfare issues. For example, it is recommended that event officials should redo the Event Safety Workshop every 5 years.

The SOA are currently developing online courses that will help to facilitate the delivery of learning and make it easier for members to continually develop and upgrade their volunteering skillsets.

Planner and Controller Advocates

Although the Organiser of an event is a key role in enabling it to take place, the primary work in preparing individuals in this area is effected by clubs. Conversely, there are greater regulatory requirements for Planners and Controllers and therefore there is often a shortfall in availability or a failure of individuals to progress within these specialisations.

The SOA will therefore appoint individuals, each for a period not exceeding 3 years, to champion the cause of preparing volunteers to become Planners and Controllers. Their primary aim will be to support clubs in helping to enable their members to gain the relevant experience and undertake any training required to initially become qualified, and then to encourage them to progress in accordance with the further detail provided within these guidelines to develop and upgrade their skillsets.



Planner Advocate (planneradvocate@scottish-orienteering.org)

The responsibilities of the Planner Advocate include:

- Working in conjunction with the Operations Director to act as a focal point for Planner issues.
- Provide advice to clubs in response to Planner gueries.
- Advising clubs on the necessary experience of Planners for events.
- Working with SOA staff to promote Planning through webinars and training events.
- Encourage the participation of all club members, but particularly younger members, to be Planners for events at all levels.
- Encourage clubs to introduce and develop their own Planner mentor system.
- Encourage existing Planners to progress their skillsets and to become higher level Planners.
- To feedback Planner issues to the Board for resolution.

Controller Advocate (controlleradvocate@scottish-orienteering.org)

Responsibilities of the Controller Advocate (formerly the Controller of Controllers) include:

- Working in conjunction with the Operations Director to act as a focal point for Controller issues.
- Provide advice to clubs in response to Controller queries.
- Working with SOA staff to promote Controlling through webinars and training events.
- Ensuring that and encouraging attendees to, submit Controller Applications after attendance of a Controller Course.
- Maintaining the national list of qualified Controllers.
- Ensuring that the list of qualified Controllers is published on the SOA website.
- Advising clubs on the necessary experience of Controllers for events.
- Assisting clubs in identifying Controllers out with their area if they are unable to provide one.
- Encourage clubs to introduce and develop their own Controller mentor system.
- Encourage existing Controllers to progress their skillsets and to become higher level Controllers.
- To feedback Controller issues to the Board for resolution.

Availability of Officials

Although ideally Controllers are required from clubs other than the organising one, it is important to realise that there is a significant burden on those volunteering for any Event Official role; this can be particularly difficult for smaller clubs or ones with an ageing population in its membership. It is therefore important that clubs share their experience with their neighbouring clubs where necessary and to try to support the larger National events particularly at every opportunity.

Some clubs have also run very successful reward schemes for their volunteers as a means of encouraging their members to become Event Officials.

Currently qualified Controllers are listed on the SOA website; it is important that clubs identify any amendments that may be required to this list periodically and advise the Controllers Advocate (controlleradvocate@scottish-orienteering.org) if any updates are necessary.



Examples of the Roles of Event Officials

ORGANISER	PLANNER	CONTROLLER
DO THE RISK ASSESSMENT	PRODUCE ALL CONTROLS MAP	SUPERVISE ALL ACTIVITIES
DECIDE IF WEATHER FORCES EVENT CANCELLATION	SYNCHRONISE SI CONTROL TIME CLOCKS	CHECK AND COUNTERSIGN RISK ASSESSMENT
ARRANGE SEARCH FOR MISSING COMPETITOR	TAPE DANGEROUS CLIFF	TELL START TEAM COMPETITORS CAN START
SET UP START	TAG SITES FOR WALL/FENCE CROSSINGS	CHECK CONTROLS ARE CORRECTLY PLACED
SET UP FINISH	ARRANGE CONTROL COLLECTION	
RESPOND TO A COMPLAINT ABOUT CONTROL SITING	PUT OUT START/FINISH SI CONTROLS	
CHOOSE STRING COURSE LOCATION		
TAPE OC	NB some taping may be in the competition area, some elsewhere eg on way to start.	
PUT OUT WATER A	The drinks control is the responsibility of the planner but s/he may not have time to move water	
BUILD STILES FOR WA	The planner will 'tag' the sites for stiles but may delegate the construction, though some planners may want to!	

These are suggested examples and in some clubs some tasks are already delegated. However, it is necessary to understand who has the responsibility to see that a particular job gets done.



Controllers

General Responsibilities

There are 3 levels of Controllers (Grade A, Grade B, Grade C) that have slightly different responsibilities, however Controllers are generally responsible for:

- Ensuring the standards required for the event are delivered during the organising, planning, delivery and reviewing of the event
- The event and competition rules are adhered to
- Communicating with event officials using tact to influence the decisions the event officials take regarding the event
- Advice to event officials with regard to the potential pitfalls that should be guarded against
- Checking and advising on all aspects of the organisation of the event with the organiser and the planner
- Ensuring that the event is safe and that the risk assessment has been carried out
- Ratifying the final paperwork for the event (final courses; course lengths and climbs; map corrections; control code allocations; course description sheets; overprinted maps)
- Providing feedback on all aspects of the event to organisers and planner
- Using their knowledge and experience for the dissemination of good practise at every opportunity

Experience Required

Grade	Requirements		
A	Successfully control a minimum of 2 events at National Level within the previous 8 years (one of which within 4 years). Successfully plan or co-plan at least one event at National Level after becoming a Controller Grade B and within the previous 8 years. Successfully organise or co-organise at least one event at National Level within the previous 10 years Have attended an Event Safety Workshop in the last 5 years Be appointed to the Grade by the BOF		
В	Successfully control a minimum of 2 events at Regional Level within the previous 8 years (one within 4 years). Successfully plan or co-plan at least one event at National Level within the previous 10 years. Successfully organise or co-organise at least one event at Regional Level within the previous 10 years. Complete a British Orienteering Grade B Controller course. Have attended an Event Safety Workshop in the last 5 years Be appointed to the Grade by the SOA Board.		
С	Organise a competition registered with British Orienteering within the previous 10 years. Plan a minimum of 3 events, with at least one at Regional Level, and at least one within the previous 5 years. Complete a British Orienteering Grade C Controller course. Have attended an Event Safety Workshop in the last 5 years Be appointed to the Grade by the SOA Operations Director.		



Grade C Controller

Grade C Controllers are appointed by the SOA. If you wish to become a Grade C Controller, you should have the experience detailed above and have completed the Grade C Controllers Course. Once qualified, having submitted a <u>Grade C Controller</u> application form and on appointment, you will be able to Control at a Regional or Local level event.

Pre- Grade C Controller course knowledge you will require includes a working knowledge of:

- Planning guidelines.
- IOF Control Descriptions.
- <u>'Course Planning Practical Guidance'</u> by Hilary Quick is also recommended reading

On conclusion of the Grade C Controllers Course you will understand the role of the controller in carrying out the following tasks:

- Check initial points with the organiser (access, car parking, map, courses) and the planner (timetable, land restrictions, start and finish)
- Ensure an initial risk assessment has been carried out and counter sign the risk assessment
- Check the 'armchair planned' courses, be able to identify courses which infringe the rules or are of poor quality
- Prepare to check control sites
- Practically check control sites
- Check final paperwork (final courses; course lengths and climbs; map corrections; control code allocations; course description sheets; overprinted maps)
- Check arrangements with the organiser (car parking, including back-up for bad weather; safety; cancellation procedures; time keeping and back-up; sufficient officials, communications)
- Check electronic punching
- Check controls
- Using diplomacy to deal with any issues that arise

Grade B Controller

Grade B Controllers are appointed by the SOA. If you wish to become a Grade B Controller, you should have the experience detailed above and have completed the Grade B Controllers Course. Once qualified, having submitted a <u>Grade B Controller</u> application form and on appointment, you will be able to Control at a National, Regional or Local level event, as well as understand the knowledge necessary to act as an Assistant Controller at any level of event

On conclusion of the course you will be able to:

- Demonstrate knowledge of the difference between controlling a Regional Level and National Level events
- Control the planning and organisation of a National Level event.

Grade A Controller

Grade A Controllers are appointed by British Orienteering. If you wish to become a Grade A Controller, you should have the experience detailed above. Once qualified and on appointment you will be able to Control at all levels of events.



Appointing Controllers to Events

Event Level	Responsibility for appointment to event	Requirement
Major	Event and Competitions Committee	Grade A Controller should be appointed; the controller must be from a different club to the organising club.
National	SOA	Grade B Controller or above; the controller should be from a different club to the organising club.
Regional	Club	Any Controller, who should ideally be from a different club to the organising club.
Local	Club	Controller not necessarily required, however as a minimum a different suitably qualified Controller, Organiser or Coach, to the author must review the Risk Assessment Form. Clubs may also like to offer an experienced club member to be mentor to the Planner and Organiser.

Maintaining Controller Qualifications

Controller Grade	Roles, Levels and years to maintain Grade		
А	Controlling:	Major Event	5 years
	Planning:	National Event	10 years
	Organising:	Regional Event	10 years
В		National Event Regional Event Local Event	5 years 10 years 10 years
С	Controlling:	Regional Event	5 years
	Planning:	Regional Event	10 years
	Organising:	Local Event	10 years

It should be remembered that over a period of time skillsets fade if they are not exercised or practised. With the safety and standardisation role of the Controller it is particularly important that individuals use their qualification regularly to maintain the currency of their knowledge, standards and current rules.



Controllers should therefore have fulfilled all three event official roles at the event Levels stated in the table above and within the stated number of years. At the end of each year, the SOA will review the recent experience of the Controllers for whom they are responsible. Where a Controller does not satisfy the requirements, the Controller may be moved down one grade unless there are sufficient extenuating circumstances. Allowance will be made for the practicality of meeting the requirements in the defined timescales, such as in cases where one of the three requirements is not met, but the other two are significantly exceeded, or where the person is actively involved in other relevant areas of the sport.

Controller Availability

To maintain a Controller qualification, it is important that individuals are given the opportunity to actually control events. If you cannot find a Controller locally either at the correct qualification level or who is available for your event, then contact the Controllers Coordinator (controlleradvocate@scottish-orienteering.org) who will assist you in finding someone who is available and potentially needs to cover an event to maintain their currency.

It is equally important that younger club members are encouraged to become Controllers and for all currently qualified individuals to progress through the grades system to ensure that we have suitably qualified individuals at major events in the future.



Planners

General Responsibilities

Planners are able to plan orienteering courses designed to meet the needs of the orienteers who will participate in an event. The Planner is responsible, in accordance with the Rules, for planning aspects of an event, from when a competitor starts their race to when they finish their race. These include:

- Terrain suitability
- Map and printing requirements
- Risk assessment and safety in the terrain
- Format and course planning
- Setting out of and collection of controls and other course markers

Becoming a Planner

If you wish to become a Planner it is advisable to attend a short course which will be organised by a club, group of clubs or the SOA. However, being mentored by an experienced Planner is also an acceptable pathway to becoming a Planner.

An Introduction to Course Planning course is an ideal way to become a Planner; it enables individuals to plan a Regional or Local Level event and to understand the techniques required to plan at this level as well as understanding the potential pitfalls that should be guarded against.

Pre-Course knowledge required includes a working knowledge and understanding of the application of:

- British Orienteering Rules
- British Orienteering Appendices
- Event Guidelines
- IOF Control Descriptions

On conclusion of the course you will be able to demonstrate:

- Knowledge and understanding of the role of the planner
- Knowledge of the roles of the controller and organiser
- The mechanisms involved in planning
- The ability to:
 - Determine the technical difficulty of legs
 - Determine the technical difficulty of courses
 - Use electronic planning software
 - Understand and advise on, the layout of the Start/Finish
 - Tape control sites
 - Draft Control Description sheets
 - Check maps and produce map corrections
 - Hang controls
 - Produce an event timetable



Appointing Planners to Events

Event Level	Responsibility for appointment to event	Experience advised
Major	By Organising Body and to be approved by Event and Competitions Committee	Successfully planned or controlled a minimum of 2 events at National Level or above within the last 10 years (one within the last 5 years). Have experience of the role of the Organiser. Have attended an Event Safety Workshop in the last 5 years
National	Club (Endorsed by SOA Ops Director)	Successfully planned or controlled a minimum of 2 events at Regional Level or above within the last 10 years (one within the last 5 years). Have attended an Event Safety Workshop in the last 5 years
Regional	Club	Successfully planned or controlled a minimum of 2 events at Local Level or above within the last 10 years (one within the last 5 years). Have attended an Event Safety Workshop in the last 5 years
Local	Club	If a novice, then an experienced mentor is required who has attended an Event Safety Workshop in the last 5 years. Otherwise, they should have attended an Event Safety Workshop in the last 5 years and to have completed a Course Planning Course.



Organisers

General Responsibilities

The organising body must appoint an Organiser who is responsible, in accordance with the Rules, for the organisational aspects of an event up to the point where a competitor starts their race and from when they finish. These include the following:

- Land access and permissions
- Risk assessment and safety
- Publicity
- Event systems
- Event facilities
- Eligibility & entries
- Prize giving

There are many aspects to the Organisers role, however Organisers should not be daunted by the lengthy checklist example that follows; many clubs ensure that the initial element of Access Permissions, Assembly and Parking Locations are arranged by other club officials like Event Co-ordinators, and at larger events many of the tasks listed should also be delegated to appropriate Team Leaders.

Appointing Organisers to Events

Event Level	Responsibility for appointment to event	Experience advised
Major	By Organising Body approved by Event & Competitions Committee	Successfully organised a minimum of 2 events at National Level or above. Have experience of the role of the Planner Have attended an Event Safety Workshop in the last 5 years
National	SOA	Successfully organised a minimum of 2 events at Regional Level or above. Have attended an Event Safety Workshop in the last 5 years
Regional	Club	Successfully organised a minimum of 2 events at Local Level or above. Have attended an Event Safety Workshop in the last 5 years
Local	Club	Have attended an Event Safety Workshop in the last 5 years or if a novice official, then an experienced mentor is required who has attended an Event Safety Workshop in the last 5 years.



Organisers Checklist

To do/check first	Risk Assessment Make start Talk to P & C Finish Countersigned Use final column as aide memoire for event day	Volunteers	Equipment
Info for flyer/website Use club template Check with C before finalising	Communications Check if mobiles / radios will work Team Leader names & mobile numbers to all including O, P & C	Signs Existing? Needed? Where? How many? Whose job?	Car Park
Registration	Start Route to start Equipment Maps Control descriptions? Any special info?	In the Forest	Finish
Results/Download	String Course	Toilets Location Hire? Delivery / collection Extra toilet rolls	Prize Giving What? How many? Where? When? Information
Traders Plan in advance Litter?	First Aid Club or outside provision? Nearest A&E location/map Info to competitors	Drinks Yes/No? Water available? Equipment Litter	Protests / Jury Talk to C Have a plan May need a jury as contingency
After event Results - OK with Club & British Or website/rankings Numbers to Britis Return equipmen Reports O, P and officials	ienteering h Orienteering	 Event accounts & money to club Thanks letter/email to everyone involved Incident form to British Orienteering within 1 week Any learning points to club 	

O = Organiser; P = Planner; C = Controller



Appendix - Courses Available to Event Officials

There are a number of courses available for the training and development of event officials and club officers. Please contact the Coaching and Volunteer Officer (denise@scottish-orienteering.org) if you would like to request a course.

Event Safety Workshop (ESW)

- INTENDED FOR: All event officials (Controller, Planner, Organiser)
- USUAL DURATION: 3 hours Online or face to face delivery; discussion, practical learning
- ASSESSMENT: No assessment
- COST: None unless there are trainer expenses. Venue charges if applicable usually paid by club
- MIN/MAX. 4/20
- PREREQUISITES: Awareness of how public orienteering events are organised
- OTHER NOTES: British Orienteering requires all Controllers, Planners and Organisers to have attended this course.

Introduction to Course Planning (ICP)

- **INTENDED FOR:** People with orienteering experience, who have little or no experience of course planning
- **USUAL DURATION:** Variety of session possibilities, can be delivered online over a 2-hour session and can be developed into a multi-session approach. Tutor led and practical activities, home learning and support
- ASSESSMENT: Not assessed
- COST: Usually no charge
- MIN/MAX, 2/20
- MAIN TOPICS: Planning aims, rules and standards, common problems, practicalities, event roles, planning areas and differences
- **PREREQUISITES:** Some experience of participating in orienteering.
- OTHER NOTES: This course can be delivered by an experienced club member, using materials developed by SOA. Equally, the course format can be created to fit the needs of the participants and delivered by a mentor planner.

Condes Workshop (CDS1)

- INTENDED FOR: Orienteers with an understanding of how to plan courses
- USUAL DURATION: 2-4 hours; tutor led or self-pace tutorial using downloadable document
- ASSESSMENT: None
- COST: No charge
- **MIN/MAX.**: n/a
- MAIN TOPICS: All the basics of how to use Condes, plus the main things you need to know in order to produce a full event file.
- **PREREQUISITES:** Knowledge of how to plan courses, competence on the computer. Condes software needs to be installed it only works on Windows, not on Apple machines.
- OTHER NOTES: Usually run in response to specific demand.

Advanced Condes Workshop (CDS2)

- INTENDED FOR: Anyone with a good level of familiarity with course planning and with Condes
- USUAL DURATION: 2-4 hours; peer led
- ASSESSMENT: None



COST: No chargeMIN/MAX.: n/a

- MAIN TOPICS: Various advanced techniques depending on the interest of those present. Topics
 might include gaffling for relays, making alterations to the map for coaching activities, using
 multiple maps and/or multiple scales.
- **PREREQUISITES:** Good level of familiarity with basic use of Condes. Participants will also be encouraged to share their own expertise.

OCAD Workshop (OCAD)

• INTENDED FOR: Orienteers who want to be able to update club maps

USUAL DURATION: 4-6 hours

ASSESSMENT: None

COST: Usually £50 per person; club usually pays.

MIN/MAX.: 4/10

- MAIN TOPICS: Basics of how OCAD does things and how to update existing maps; can be extended to include making maps from outline maps available online
- PREREQUISITES: Good level of understanding of orienteering maps; competence with computer
- OTHER NOTES: It's important to remember that OCAD is just a tool; in the wrong hands it can be dangerous! Clubs are advised to implement effective version control for their maps, and to be circumspect in who they allow to update them.
- MORE DETAIL: Usually run in response to specific demand.

Grade C Controllers (GCC)

- INTENDED FOR: Experienced orienteers wishing to become qualified as a Controller
- **USUAL DURATION:** 1 day (6 hours)
- ASSESSMENT: Assessed through participation and written application
- COST: Usually £20-25 per person, which is usually paid by the club
- MIN/MAX. 2/20
- MAIN TOPICS: Roles of event officials particularly the role of controller, application of BOF Rules, technical & inter-personal aspects, practical exercises
- **PREREQUISITES:** Experience of organising and planning can be completed before or after attendance at this training; applicants must be at least 18 years of age, though because of the people management aspects of the role we recommend that candidates should be at least 25 years of age.
- OTHER NOTES: Grade C is the first level of Controller qualification; to complete the qualification you are required to have organised and planned events as specified on the British Orienteering website.

Grade B Controllers (GBC)

- INTENDED FOR: People with experience as a Grade C Controller
- **USUAL DURATION:** 1 day (6 hours)
- ASSESSMENT: Assessed through participation and written application
- COST: Usually £20-25 per person, which is usually paid by the club
- MIN/MAX. 2/20
- MAIN TOPICS: Update & refresher of Rules, consideration of additional factors involved in National Level events
- PREREQUISITES: Recent experience as Grade C Controller