September 7, 2009

TO: See Distribution List

FROM: Glen Schorr – Executive Director

RE: DRAFT 2010 – 2014 USOF Strategic Plan/ Potential Goals & Strategies

DISTRIBUTION/ PLANNING TO ATTEND:

Clare Durand, Robin Shannonhouse, Chuck Ferguson, Linda Ferguson, Greg Lennon, Mike Lyons, Phil Martineau, Stephanie Martineau, Jim Hall, Rick Worner, Linda Kohn, Scott Drumm, Chris Cassone, Clem McGrath, Guy Olsen, Lisa Carr, Gale Teschendorf, Janet Porter

DISTRIBUTION/ UNABLE TO ATTEND BUT EXPRESSED INTEREST:

Gary Kraght, Eric Tullis, David Irving, Rosemary Johnson, Eric Bone, Tom Carr, Frank Kuhn, Mary Frank

To all,

First of all thank you for taking the time out of your schedule to attend the meeting in Rochester. The work that we do now will help create a solid foundation for the next five years of our organization and our sport.

Meeting details

* Saturday, September 19, 2009
* Approx 6:00 to 9:00 pm (will start one hour after the ice cream social)
* West Lodge (site of the social)
* Rochester, NY
* Dinner will be provided

Meeting objective

* To discuss the draft, agree on general prioritization of strategies and amend strategies as group determines appropriate.

The purpose of this document is to provide an initial point of view in the strategic planning process. Traditionally, we would all meet for a weekend and determine potential goals and directions. However, it has been suggested by multiple individuals that I prepare a draft document for reaction. Here it is.

This draft is intended to be a starting point in the planning process, not the end result. It will require a lot of discussion by all of us, and others, before it is finalized and can become reality.

Your homework

* Please read the draft and be prepared to actively participate toward reaching our meeting objective. For those not able to attend, please forward your comments to me by no later than Wednesday, September 16th.

Should you have any questions prior to the 19th, please give me a call.

See you in Rochester.

Sincerely,

Glen

SUBJECT: USOF 2010 – 2014 STRATEGIC PLAN WHITE PAPER

DATE: September 7, 2009

AUTHOR: Glen Schorr, Executive Director - USOF

**DRAFT**

Overview

The purpose of this document is to provide initial thoughts as to the 2010-2014 goals and strategies for the United States Orienteering Federation (USOF). Over the next few months these goals and strategies will be discussed, revised, prioritized and quantified by those close to the sport as well as the federation.

Situation Analysis

Since orienteering was introduced in 1946 in the United States the sport has lived on the fringes of the American sporting mindset. While we have a small, but loyal, band of followers; our sport is hardly considered “main stream”. An example of this is that the Sporting Goods Manufacturers Association (the trade association that measures sporting goods consumption for scores of sports and activities) does not acknowledge orienteering in its extensive list of measured sports.

However, due to the success of local clubs (and is some cases due to the dedication of a few individuals), there are small pockets of orienteering strength scattered throughout the country; including but not limited to: Philadelphia/ Southern New Jersey (DVOA), Houston JROTC (HOC), Seattle (COC), Southwest Ohio (OCIN), San Francisco (BAOC), Washington, DC (QOC) and others. But these pockets are isolated.

The sport has potential if developed and marketed correctly: older Americans are staying active longer and looking for leisure activities, the rise in adventure racing and long trail running provide a potential base for athletes looking to cross-over and try something new, and high school age boys and girls that aren’t necessarily going to make the soccer, basketball or lacrosse teams are looking for opportunities to compete and participate.

Currently there are two key areas standing in the way of the growth of the sport of orienteering.

Barrier # 1: Lack of a cohesive effort among the orienteering community.

The comic strip character, Pogo Possum, once said,

*“We may meet the enemy, and not only may he be ours, he may be us.”*

As mentioned above, there are pockets of strength for this sport. Some are tied to commerce, some are not. But they are pockets at best. This can also be seen at the national level as well where there are individual pockets of efforts and budgets to match (O in Schools, Junior teams, etc.). This is how the sport has grown in the United States…organically…at a grass roots level. The pervasive feeling is that while the majority of orienteers may say that they want the sport to grow throughout the country, in practice they care about the segment of the sport they participate in and predominantly at the local level.

We must respect, and embrace, the local nature of our sport. Its strength is in our club system. Its strength is in elements of the USOF structure. But until we agree that we must work toward common national goals that can be easily implemented at a club level, we must acknowledge that we are standing in our own way of moving our sport forward.

To quote Benjamin Franklin,

*“We shall all hang together, or assuredly we shall all hang separately.”*

Barrier #2: Lack of awareness of the sport…in a culture that **currently** does not know we exist.

The sport of orienteering is not part of the American culture. It never has been. It is not loud. It is not boisterous. It is not brash. It is not football. It is not NASCAR. It is not even cheerleading. American’s like their sports super sized. They like to know that they can start at 10:00 am and finish at noon. Then they are on to their next item on their schedule. They like the concept of “team”.

We run in the woods by ourselves with maps and compasses…sometimes investing whole weekends.

But, as noted above, there are segments of American society, that like to run or hike in the woods and as I said in my remarks at the 2009 Annual General Meeting, “The woods are big enough for everybody.”

For the past few years we have focused our efforts solely on the development of orienteering at the junior level. While that is a sound strategy and one that should continue over the next five years, we must realize that it is a long, slow, expensive build. In reality, many of the juniors we cultivate as middle- and high schoolers will leave the sport when they go to college. Will they return to the sport when they reach their 20’s? Some will. Some won’t.

The key moving forward is to expand our current acquisition strategy to include those groups who are in a position to express the interest, and have the time, to do so.

**Current USOF Mission**

USOF’s mission is to:

* Provide orienteering as a viable and attractive recreation choice of US outdoors enthusiasts.
* Promote orienteering for education, personal development, and environmental awareness.
* Improve the competitive performance of US orienteering athletes to world-class levels.

**Recommended revised USOF Mission**

*Serving as the national governing body of orienteering, USOF works in partnership with our member clubs to grow participation. This is done through generating awareness to targeted markets, promotion of competitive excellence and advancement of educational interests.*

**Our foundation moving forward – The Hedgehog**

In Jim Collins’ Good To Great – Why Some Companies Make the Leap…and Other’s Don’t as well as the accompanying monograph Good To Great and the Social Sectors, Collins introduces the concept of the “hedgehog”.

The hedgehog (as it pertains to organizations) “Simplifies a complex world into a single organizing idea, a basic principle that unifies and guides everything.”

In the hedgehog there are three interlocking circles:

1. What can we be the best in the world at?
2. What are we deeply passionate about?
3. What drives our resource engine?

With discipline and focus, these three circles drive the actions of the organization.

**Development of the Vision – USOF’s Hedgehog**

What can USOF be the best in the word at?

Through our position as the NGB for the sport of orienteering, we can be the best at “providing a unified orienteering community”. The current national state of orienteering is for the most part stagnant. We have separate areas of interest and no unified effort. There is even debate as to whether it is an activity or a sport. Everyone is focusing on their individual issues and not worrying about the greater whole.

Like the sport of lacrosse in the mid 1990’s (which faced a similar issue), this is an area of tremendous opportunity. With partnership from the local clubs, USOF is uniquely poised to lead this initiative.

What are we deeply passionate about?

We all must continue to be deeply passionate about driving awareness of the sport of orienteering, and translate that awareness into starts. Starts drives participation, drives membership both at the national and club level and drives income.

One of the strengths of orienteering as a sport is that it is not one size fits all. Different competitions (foot, trail, ski, mountain bike) and different approaches (competition vs. activity) create a sport for many different ages and abilities. The challenge is to take what makes the sport great in each area and optimize it for potential growth. Embrace the differences and make them all work toward the common goal.

What drives our resource engine?

If we were a for-profit business, our goals would solely be income generation and profitability. As a non-profit generation our goal is to take any profits and reinvest them back into the mission of the organization. People often confuse non-profits as “not making money”. That is not the case. We like money. It will help us do what we want.

For non-profits it is a little more complicated. What drives our resource engine will be income, the focused time of key volunteers at a national and club level, and the development of a brand called “orienteering”.

Finally…the Goal

The final part of the hedgehog concept is the goal. A goal should be inspirational… but with time, focus and effort…attainable. It cannot, and should not be achieved tomorrow. It will take time…maybe five, ten or even twenty years. But with focus, desire and determination it can be reached.

**Recommended USOF Goal/ Vision**

*We envision a future where orienteering is celebrated as an American sport.*

**Potential Strategies**

Note: These strategies are roughly prioritized. Their content, order and applicability is for further discussion.

Generate starts through targeted marketing efforts

* Refine junior strategy to focus in proven effective regional tactics including: development of regional youth leagues, JROTC and junior national team development.
* In order to broaden the appeal of the sport reach out to current active adults including adventure racers, trail runners and road racers.
* Continue to embrace the individuals who enjoy orienteering as an activity as opposed to a sport. Focus these efforts on adults 50+ (defined as “seniors” by the AARP). These individuals have the free time and disposable income that their children do not. Potential links to their grandchildren/ families to support junior initiative.

Generate, and retain, membership through establishment of value added programs for clubs and members

* Work with clubs to provide the services they require to grow orienteering at the grass roots level.
* Development and execution of a national grants program to help promote the sport at a grass roots level.
* Respond to members needs to provide programs and materials to allow them to learn more about the sport.
* Convert current club members to USOF members as well.

Creation of national identity for the sport of orienteering…identifying USOF as central in developing materials to promote that brand.

* Creation of a brand campaign to generate a “rallying cry” for the sport.
* Establish and implement effective communication strategies for internal and external audiences.
* Establish targeted and low cost public relations, social media and marketing strategies/initiatives to expand national awareness of orienteering – translating to starts at the club level.
* Establish [www.us.orienteering](http://www.us.orienteering) as the national orienteering clearinghouse. Including a club/ event search engine to generate local activity.

Create a financial plan and income generation model to ensure the organization’s financial stability and viability while supporting defined strategic priorities.

* Grow membership and participation nationwide.
* Develop and implement a sponsorship program focusing on USOF and closely related third-party properties in the events, media and national teams’ categories.
* Identify and access federal, state, and private funding available to promote orienteering.
* Develop a single, coordinated fundraising calendar focusing on agreed upon goals.
* Move away from current fund administer model to a single federation budget. Program and team budgets would still be developed and approved as part of the annual budget process.

Establish a strong United States presence in the world orienteering community by 2015.

* Establish a regular and meaningful presence at IOF level including full representation at the World Congress beginning in 2010 and the President’s conference in 2011.
* Establish a single Team USA structure and philosophy by 2011.
* Deliver excellence across all disciplines at the World Orienteering Championship level.
* Successfully host either a JWOC or WOC event.

Change the rules of engagement from defending remaining land access to acquiring land rights.

* Establish relationships with appropriate federal departments and draft language to create federal land use agreement(s) that member clubs can implement at local or regional levels.
* Work with third parties (e.g. Boy Scouts, Girl Scouts) to develop similar national letters to be utilized at local levels.
* Provide the appropriate tools and leadership to support clubs on land use issues.
* Utilize orienteers “love the land” philosophy to differentiate us from other adventure based sports.

Begin the transition from a volunteer based organization with a self-funded national headquarters, paid staff and volunteer leadership and support by 2014.

* Led by the Tech committee, set up a new member database system in 2010. This would allow USOF to expand with its membership and utilize that membership for financial gain (registration, donations, and retail sales).
* Conduct an independent audit in 2010.
* Begin to reach interim financial benchmarks to achieve this goal.

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