

Council of Scottish Clans and Associations

Strategic Planning Committee Report

June 2021

*"The definition of insanity is doing the same thing over and over again, but expecting different results."
- Albert Einstein*

Background

The Council of Scottish Clans and Associations (COSCA) Strategic Planning Committee was created in July 2019 at the Annual General Meeting (AGM) at the Grandfather Mountain Highland Games in North Carolina. Chairman John Cochrane wrote in the August 2019 edition of *The Claymore* that the group "will propose to the full Board changes in policies, practices, and procedures to bring our programs and services into the 21st Century." After several teleconference calls, Chairman Cochrane provided a "Strategic Planning Update" in the July 2020 edition of *The Claymore*:

"Specific areas of discussion have centered on social media usage, providing an outlet to our members highlighting their Clans and Organizations, and streamlining our communication between COSCA's members and leadership. Additionally, we are working on providing a survey to both our current and former members. The information which you will provide in the survey is crucial in our plan development; please be as frank and detailed as possible in your responses. Those responses will go a long way in improving our organization."

The committee created and distributed links to three different surveys, targeting COSCA leadership, current members, and lapsed members. Please see a summary of the results in the appendix.

In the January 2021 edition of *The Claymore*, the Chairman noted that the results of the surveys have "allowed us to examine not only our roles and responsibilities to you, our members, but also see where we can improve in order to promote our member Clans, Organizations, and Associations." Specifically, he noted that the committee would recommend strategies for (1) improving our communication mediums and ensuring they are up to date, timely and informative; (2) increasing our outreach efforts to both non-member Clans, Organizations, and Associations and other entities in order to promote Scottish culture; and (3) looking for additional sponsorship in order to provide our members additional benefits, as well as provide COSCA more bandwidth and finances to accomplish our mission.

After two years, the committee has finalized this report that provides specific strategies for COSCA's services, communications, management, and sponsorship opportunities. This completes Phase I of the five-year strategic planning process. If the COSCA board approves this report, the committee will enter Phase II by implementing these recommendations over the next two years. Phase III, in the fifth and final year, will consist of evaluating the results of our strategic efforts and make recommendations to the Board regarding the next Strategic Planning cycle.

Organizational Analysis

External Opportunities

"The worldwide pandemic will change the nature of clanship. There could be opportunities as people retreat into more traditional areas which they understand. There is likely to be an increase in community spirit and activities."

- Leadership Survey Respondent

Popular interest in Scottish heritage is greater than ever before. According to Professor Willy Maley, Professor of Renaissance Studies (English Literature) at the University of Glasgow, "The globally successful Outlander series has triggered more interest in Scotland and its history than any other cultural artefact in recent years. Interest continues to grow as Outlander moves into its fifth season." (Scotsman, December 6, 2019.)

The mainstreaming of DNA testing has also spurred an interest in genealogy. According to the Grand View Research Market Analysis Report (April 2021), "The Direct-to-Consumer (DTC) testing market has significantly grown in the past few years due to the growing interest of consumers and healthcare providers in personalized genetic analysis." The company estimates the market size value in 2021 at about \$2.4 billion.

The COVID-19 pandemic has also accelerated the interest and involvement in online communities. The Governance Lab at New York University conducted an international survey to provide new insights into the importance of online communities. The Lab reported: "In the survey, about a thousand respondents in each of 15 countries were asked whether the most important group they belonged to operated primarily online or offline, or in both those spaces. In 11 out of 15 countries, the largest proportion of respondents reported their most important group as primarily online, and in three of those countries that proportion was 50% or more of respondents." In the United States, 30% of the respondents said that primarily "in person" groups were most important, 46% said primarily online groups were important, and 24% preferred a mixed group.

GWI (formerly GlobalWebIndex) profiles consumers on behalf of its client publishers, media agencies and marketers. It reports "Our data shows that in 2019, 83% of global internet users regularly share this kind of information online on a monthly basis, and this is a truly cross-demographic activity, ranging from 70% of boomers to almost 90% of Gen Z and millennials."

The members of Scottish heritage groups appear to be growing. About 65% of the current member survey respondent "agreed" or "strongly agreed" that their society has increased its paid membership in the past year.

External Threats

"COSCA must find a way to connect and be relevant to Scottish organizations. Too few directors/officers of Scottish organizations are even aware of COSCA given: 1. Turnover of leadership in Scottish organizations, and 2. there is generally one point of contact between COSCA and the organization..."

- Leadership Survey Respondent

The online proliferation of Scottish heritage information, networking opportunities, and small business support has made COSCA's role practically obsolete. With a few Google searches, Scottish societies can find other organizations that provide ancestral tours, support DNA and genealogy efforts, and offer ideas for increasing membership.

While COSCA usually focuses on Scottish culture, many other services such as the Scottish Banner, The Scotsman, and a myriad of popular websites and Facebook groups are far better resources. Competing with these sources is a losing battle.

The reported turnover of officers in Scottish heritage organizations means that COSCA loses touch with its key contacts on a regular basis.

Internal Strengths

*"You provide a great benefit to all the Scottish Societies."
- Current Member Survey Respondent*

COSCA has a unique position. Of the leadership survey respondents, 70% "agreed" or "strongly agreed" that COSCA is the sole American organization representing clan and family organizations.

Of the leadership survey respondents, 70% "agreed" or "strongly agreed" that COSCA currently has leaders with the required professional skills to advance the organization.

Internal Weaknesses

*"This is the first we have heard from COSCA since joining."
- Current Member Survey Respondent*

*"The communications within COSCA are not miserable, they are non-existent."
- COSCA Leader*

Only about half of both the leadership and current member survey respondents "agreed" or "strongly agreed" that COSCA provides a valuable service for clan and family societies. One lapsed member survey respondent suggested more online educational services and resources would assure his/her membership in COSCA:

"Having an active online communication and education program would be very helpful. I expect travel to be restricted for several years yet-- financial concerns (some of us have reduced income) and illness concerns. so focus on online help, online access to resources, online webinars, etc."

COSCA is not perceived as providing any direct services for its members. As one lapsed member survey respondent noted:

"The CRA board voted to join COSCA in order to get assistance with liability insurance. We asked a few times. We got NO RESPONSE from COSCA, nor an agent. You lied. Good Bye."

Communications within the organization and with its constituents is a major weakness. A new edition of *The Claymore* newsletter was sent to COSCA members once in 2021, twice in 2020, once in 2019, and never in 2018. As one lapsed member survey respondent noted: "Communications, with only three newsletters in the last three years, and only been 9 threads on FB page this year, there is substantial room for improvement."

The membership renewal effort is so bad that half of the lapsed member survey respondents thought they were current members of COSCA.

Strategic Services

“Suggestions and guidance on common problem issues. Expert guides on legal and accounting practices. Annual educational seminars. Joint membership in similar organizations. Merchandise buying power.”
- Lapsed Member Survey Respondent

“Educational materials we can share with members, ways to collaborate for better, cheaper online services, training maybe in use of ways to use online services, etc.”
- Lapsed Member Survey Respondent

Both current and lapsed members offered several examples of what COSCA could offer its members that would assist them the most:

Clearinghouse: The most mentioned service was that of providing a clearinghouse of information of success stories and ideas from among the societies. One respondent suggested that COSCA should provide an updated games and festival schedule.

Society Membership: Another frequent suggestion was providing assistance in expanding the member societies' membership, especially with younger adults. COSCA could expand its presence at games and festivals, which typically attract older adults. In order to attract younger adults, COSCA could use its web and social media platforms to direct potential members to the clan and family societies.

Professional Guidance: Respondents recommended that COSCA provide expert guidance in such areas as non-profit organization law, financial accounting, information technology, member management, and general administration.

Group Benefits: Several respondents mentioned group buys and discounts for such services as group liability insurance, cooperative events, group advertising and press services, merchandise buying power, and discounts to third-party organizations such as genealogy services.

Information Technology (IT) Support: Some mentioned that they need direct IT support. Some examples could be offering a COSCA Zoom account for hosting individual clan and family society online meetings, consultation on improving or revamping websites, advising on best online services for membership management and other organizational services, managing a society Facebook page, and directly hosting or managing the society website.

Strategic Communication

“Communications, with only three newsletters in the last three years, and only been 9 threads on FB page this year, there is substantial room for improvement.”

- Lapsed Member Survey Respondent

Website: COSCA will deconstruct the content on the website and past newsletters to create useable modules. This information will be organized into sections for society management (what was once called “Clan Society Boot Camp”), individual clan and family pages based on the updated clan database, and general education on clan and family heritage (now called “Scottish Clans & Families 101.”) This information will be provided in two different levels: general information for the public and more detailed and advanced instructions for the members-only section of the site.

Webinars and Podcasts: Using Zoom, COSCA will host a series of online conferences using speakers from key societies and utilizing MS PowerPoint graphics. Such topics will include conducting ancestry tours, administering FamilyTreeDNA Y-DNA surname groups, effectively using social media, planning gatherings and annual meetings, hosting tents at games and festivals, managing membership, providing genealogy services, etc. Since Zoom automatically records these meetings, we could edit them into a series of YouTube videos and Podcasts. These can also be transcribed and used for blogs and articles.

Social Media: As noted above, 70% of boomers and 90% of Gen Z and millennials exchange information online. Therefore, COSCA must have an active online presence in order to reach younger adults, who are also less likely to attend games and festivals.

- **Branding:** COSCA will create a consistent brand across all platforms that immediately identifies its core mission and makes it unique from other online identities. Therefore, COSCA will create accounts using the handle @ScottishSocieties or some other similar name.
- **Posting:** On a weekly basis, COSCA will post an article about and linking to one of the blogs or pages on the COSCA website. This will be posted on Facebook, Instagram, and Twitter.
- **Group Sharing:** COSCA will join other appropriate Facebook groups and share its posts in order to generate a wider audience for its posts. Such groups include Scotland – Descendants of the Scots (15,555 people), Scotland’s History (60,785), Scottish Clans (12,896), Clans and Scottish Societies of Canada (2,317), Scottish Clans and Families (60,470) and Scottish History and Culture (37,070.)
- **Tracking:** COSCA will track responses through Facebook Insights and Google Analytics to determine interest in the specific posts.
- **Partnership:** COSCA will explore a mutual promotional relationship with Neil King, one of the administrators of the Scottish Clans Facebook page and a producer of “The Scottish Clans Podcast” on Podbean. Currently, he has produced 98 episodes and generated 139,484 downloads.

Newsletter: As it is currently constructed, the current *Claymore* is an academic journal. The material is not particularly timely or news-worthy (being published twice a year) and the length is far longer than a simple “letter.” COSCA will produce and distribute a brief, monthly e-mail newsletter that focuses on the core mission of supporting its member Societies. The newsletter will be timely and promote specific events (such as upcoming Gatherings and Tartan Day), easy to read with graphics and brief paragraphs, and encourage readers to visit the website with longer versions of the materials. This can be easily produced by simply including the four weekly Facebook posts that link back to the longer articles and blogs. In addition to this material, COSCA will encourage its members to send their own newsletters to us and we will scan our members’ websites and Facebook pages for news items. Please see Appendix B for more information and a sample newsletter.

Strategic Partnerships

Once COSCA has established a strong membership based on strategic services and an active strategic communication presence, COSCA will secure strategic partners and sponsors that can advance its mission and provide additional value to its members.

Group Buys: As mentioned above, COSCA should explore group buys for such services as group liability insurance, cooperative events, group advertising, and press services.

Discount Programs: Also mentioned above, COSCA could establish relationships for merchandise buying power and discounts to third-party organizations. For example, FamilyTreeDNA has offered discounts at COSCA's clan and family events in the past and the National Trust for Scotland Foundation USA has established the Clan Partnership Program, in which several clans have participated.

Sponsorships: COSCA will also cultivate general sponsorships, targeted sponsorship, and promotional opportunities. General sponsors could be promoted on the website and targeted sponsors could help fund specific projects. For example, The Scotland Shops has become a sponsor of the Clan Forbes Society's latest publication *House of Forbes for Kids*. With partnerships with other organizations, COSCA could pursue other promotional sponsorships, such as with the American-Scottish Foundation's assistance in securing funding to promote the movie *Robert the Bruce*.

Implementation

This report serves as the complete set of recommendations from the COSCA Strategic Planning Committee. The Committee requests that the Board of Trustees approve this report in its entirety.
