

JUNIOR CHESS IN SCOTLAND

Report and Business Plan

EXECUTIVE SUMMARY

Prepared for:

CHESS SCOTLAND by

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Chess Scotland (CS), with an Awards for All grant, commissioned this plan for the promotion and development of Junior Chess in Scotland.

Existing research and models in some schools suggest that Chess helps student performance and can be introduced successfully to schools. While the idea of Chess in schools does seem to have wide support, the game is not recognised as a sport and suffers from lack of funding.

CS wishes to obtain a “quantum leap” in opportunities, training and the realisation of potential; and briefed Frances Benton Associates to examine the potential for development and to recommend a way forward.

Aims and Objectives

The work of the project was designed to:

- Examine existing activities and development potential within Junior Chess in Scotland
- Examine the broader context of *Chess Scotland* and other areas /activities relevant to the development of the junior game
- Set objectives for Junior Chess in Scotland, in agreement with the Office Bearers of *Chess Scotland*
- Produce a plan, which demonstrates how these objectives will be met, in terms of necessary human, financial and other resources
- Produce a route map which lays out direction, milestones and time scales, including essential documentation, a financial and accounting framework and a fundraising strategy for gap and deficit finance
- Suggest areas for future development within *Chess Scotland* as a whole.

Methodology

The project was planned and carried out in four stages:

- Consultation with stakeholders and other interested parties, along with associated desk research.
- Initial planning to agree priorities, objectives and actions.
- Detailed planning for all activities, including costs and income projections and other resource requirements, followed by delivery of a draft report.
- Preparation of a full report and recommendations, including appendices.

Findings

In New York, where the American Chess Foundation teamed up with the Manhattan Chess Club to organise tournaments and send instructors into schools, teachers found a much improved attitude to the academic work of children in the programme.

In addition, the project instilled in young players from an inner city background a sense of self-confidence and self worth, improved ability to think rationally, increased cognitive skills and aptitude in recognising patterns, thereby producing higher results, particularly in English and Mathematics.

Where discipline is concerned, chess provides an intellectual, competitive forum through which children can assert hostility in an acceptable way. Chess enables a child to realise that he or she is responsible for his or her own actions and must accept the consequences. It encourages children to try their best to win, while accepting defeat with grace.

From the beginning, therefore, it is accepted that introducing Chess to young people is a worthwhile pursuit. Outside the family, children can be introduced to Chess in school or in a club.

Chess in Schools. The governments of nearly 70 countries have adopted Chess in various ways and some 30 countries provide Chess as part of the school curriculum.

In Scotland, a project for a chess development officer to work with primary schools in Aberdeen indicated that benefits accrued at several levels across a number of social and educational aspects of children's (and their families') lives; and it was the coaching input that acted as a catalyst for development. Significantly, Junior Chess continues to be highly successful in the Aberdeen area.

North Ayrshire took a different approach, with teachers organising participation in Chess, rather than a visiting coach. CS delivered a scheme to train teachers to play, organise and teach Chess, through the Continuing Professional Development initiative. Seen as successful across a number of criteria, this project is on-going.

Chess in Scotland. The game is thought to be "reasonably healthy" despite a gradual drop in numbers playing from a high peak in the Kasparov years of the early 90s. There is a definite drop out of players in the younger age ranges, following a thriving primary school scene.

Activity in clubs and schools is geographically patchy and there are issues around venues, profile, image and costs. There is no meaningful sponsorship or funding in the game.

The relationship between the adult and junior games is sometimes uneasy, because the environment at some clubs can be uncomfortable for both age groups together and difficulties in matching younger players with adults.

Junior Chess in Scotland. Although again geographically patchy, Chess is seen to be healthy at primary school level, with playing numbers on the rise. However, large numbers drop out at secondary due to poor image, teenage distractions and lack of teacher support.

Standards are thought to be dropping, with few opportunities for playing outside school, problems with venues and lack of volunteer organisers and clashes of calendars.

New initiatives, leagues and tournaments organised by *Scottish Junior Chess* (SJC) are approved of universally; but a culture clash between SJC and CS is damaging and threatens to undermine any potential for progress.

Chess Scotland. The official body, affiliated to FIDE and responsible for the organisation and regulation of Chess in Scotland, CS survives on a small Executive grant, affiliation, membership and grading fees and the work of a few enthusiastic volunteers.

Its organisation is seen as clumsy since, despite efforts in the past, there is no paid, professional help with the administrative burden – individual "directors" deal with their distinct functions.

Four strands are evident in CS's approach to the junior game:

- Work with primary schools
- The Junior Board
- International selection and competition
- Coaching at elite levels.

There are significant successes in these strands but no long term strategy.

As with most membership organisations, CS has to deal with conflicting constituent demands and there are some on-going concerns about the membership structure and the value of membership to individuals.

The Scottish Junior Chess Association Educational Trust. A registered charity established in 1969, the Trust is small and largely inactive; but it could provide a vehicle for attracting significant funding. The trustees have indicated their willingness to follow this path, including any necessary change of constitution.

Scottish Junior Chess. Set up following some dissatisfaction over the merger between CS and the former Scottish Junior Chess Association, SJC has taken a stance of distrust of and fierce independence from CS. Some personal and organisational conflict has led to wide criticism of the “silly politics”.

Nonetheless, SJC is praised and appreciated for the range and quality of its tournaments and events; and for the obvious commitment and enthusiasm of its members.

SJC does appear secretive and non-transparent, with the organisation and individuals being unwilling to engage with this project. *The consultants must include here a disclaimer, therefore, regarding some of these findings.*

SJC recently registered a new charity, *Chess Academy – Scotland.*

English Chess Federation. The ECF takes, broadly, the same role as CS but with a major difference in scale, supporting a permanent, paid office.

For Junior Chess, ECF is happy to leave development to the market, where there is a number of independent organisations running successful initiatives. There are three funds, however, supporting young players at different levels and in different ways.

ECF has directed some effort to have Chess recognised in the UK as a “mind sport”, as in many other countries. This might affect the status and profile of Chess and future funding opportunities.

The Potential. Various ambitions have been expressed for Junior Chess in Scotland:

- Eradicate the “geeky” image
- Have chess recognised as a sport (a “mind sport” or another new definition) with a much higher profile and chess in the school curriculum
- Develop a sensible national strategy, bought into by everyone, with successful regional pockets rolled out
- More and better marketing, sponsorship and other fundraising
- Better venues and a more attractive “offer” to players and families
- More opportunities to play, domestically and at international level
- Encourage the social and spectator sides
- Development workers, a regional coordinator; a schools coordinator
- Reduce the secondary drop-out rate, especially with girls
- Scotland to compare with world’s best!

The National Context. The Scottish Executive Education Department (SEED) provides a small amount of funding which is broadly comparable to that obtained by a number of minority sports through SportScotland.

SEED, however, does not take a view about the provision of Chess in schools since, under the new *Curriculum for Excellence* programme, only broad guidelines are to be given to Head Teachers about incorporating previously extra-curricular activities into mainstream teaching. So Chess activity in schools will continue to be based upon good will and individual enthusiasm.

Learning and Teaching Scotland (LTS) is the body delegated by SEED to implement policy in schools with local authorities. LTS has identified three possible opportunities for CS to engage with schools:

- The *Excellence Fund* for out-of-school-hours learning
- The *GLOW* web site
- The *Out-of-School-Hours Learning Network*.

To make use of these opportunities, however, serious promotional effort, financial support, and a wholly professional approach will be necessary, to make an impression in a highly competitive environment.

Chess and Disability. There is no disability in Chess, so there exists an opportunity to create interest in the game among young people who would find it hard to participate in other sports. Computer technology is invaluable.

Conclusions

- The arguments in favour of promoting the playing of Chess by young people are powerful and compelling. There is a general pool of research with case studies relating to particular initiatives. There are anecdotal cases of improved behaviour and performance in schools. A concentrated effort can achieve recognition of this on a wide scale and with particular authorities.
- The image and profile of Chess are poor outside the small circle of players, at both adult and junior level. It is not a great spectator sport (for the non-aficionado) and, even with the attachment of a significant amount of glamour and new technology, the position will be difficult to change (although the Web does increase viewing opportunities massively).
- The high drop-out rate of players in early secondary is important to understand. There is a strong argument that limited resources should be aimed at 13-15 year olds, to retain or 'capture' them at a key stage in their lives. However, it is at primary school that young people can be switched on to the pleasure, satisfaction and challenges of Chess.
- It may be possible to develop and extend the successful models of Chess in schools, to increase the numbers playing and to increase the standards of teaching and performance. However, there are problems associated with Chess clubs outside school for juniors: absence of organisers, impingement on adult territory, local and regional structure. To develop the strength of the best players, it is imperative for juniors to play with adults but this is a difficult problem to solve.
- From the outside and from the unattached inside the game, the schism between CS and (the former) SJC appears idiotic, childish and extremely damaging. It must be resolved for the junior game to progress; otherwise, families will walk away. It seems that there is a relatively small group of people (on both "sides") who may be harbouring historic grievances and mistrust who may be impeding progress.

- Chess Scotland needs to make changes: streamlining and clarification of an achievable management structure alongside a clearer vision of its role and function; a concentration on marketing and communication; a financial overhaul with a concentration on medium-term fundraising against business objectives; (so as to put in place) a professional salaried office; and regional/schools organisers allied to a coaching structure.
- This in turn should address the need to provide a more attractive offer for potential volunteers – an essential component, which is missing in part at present, of any development plan.
- SJC, now Chess Academy – Scotland (CA-S), appears to be looking to become the major body for Junior Chess in Scotland, to raise significant funds to develop and extend its highly valuable and appreciated work with young people. Our view is that, without clarity in its strategy, an open constitution, transparent financial accounting and evidence of partnership working, it is bound to fail in these aims. We surmise that CA-S will continue more or less as it is, if it is unable to grow. (NB: the same disclaimer applies here as above – until we can hear from CA-S we cannot be definitive about these matters.)
- It is clear that a lot more money must be found to make any kind of progress, for: better marketing, tournaments, venues; paid staff; more and better coaching. A better offer must be made to chess players, in terms of environment, image and publicity, prizes and prestige; and to the public, to encourage participation and support. Without improvements in these areas it will be impossible to attract serious levels of sponsorship.
- It appears that the grass-roots adult playing population is content with its lot and resents the idea of spending more for their participation – there is an under-valuation of their own sport. Perhaps some promotional work within the sport is overdue.
- Finally, there are differences in the needs of adult and junior chess, yet there is a crossover in playing and development. So, while an “adult” strategy does need to be developed alongside the junior plan, the latter cannot be constructed in isolation.
- The SJCA Educational Trust seems an obvious focus for development of the game but could find itself in competition with the new Chess Academy – Scotland. It will have to have a new constitution, however, and would have to align itself more closely with Chess Scotland. Either it does this and takes on the role from CS of promoting the development of Chess in schools; or CS must take on charitable status and fundraise itself.
- Developments in the educational environment in Scotland, through *Curriculum for Excellence* and related programmes, certainly present opportunities to introduce activities into schools in a semi-curricular context. There is and will continue to be great competition for scarce resources in individual schools, which will temper the approaches which can be made.
- A major opportunity exists to integrate “disabled” players into the mainstream Chess community. Not only would this normalise the playing of Chess by otherwise disabled people but it also presents a broader market from which talented youngsters might emerge.

Recommendations

For CS to be clearer about what it does and what can be expected of it, it is recommended that a “manifesto” be drawn up and presented to members, players, media and government. While some of the detail associated with this is included in the report, a full review of *Chess Scotland* is outwith the scope of this study, so we conclude here only that such a review is overdue.

It is evident, however, that paid staff will be necessary to carry forward any change process and relieve the administrative burden from volunteers; and the financial implications are equally obvious.

For Junior Chess, the key recommendation is to concentrate on primary schools as a means of maximising returns from scarce resources. Chess in Schools is the easy route to introducing young people to Chess: there is a captive audience, a convenient and familiar environment and, with luck and some promotion, a willing and enthusiastic group of organisers.

The strategy involves raising funds to pay for “schools chess coordinators” to carry out the work of liaison, lobbying, organising and promoting Chess among teachers and local authorities.

Because Junior Chess in clubs presents a more difficult scenario, the recommendation is to leave this area of work to individual clubs and organisations such as CA-S, which have real strength in the club circuit. CS should restrict itself to the preparation and distribution of guidelines and materials for clubs willing to develop a junior section.

The concept of a “Chess Academy”, based perhaps upon the Lothian model, is extremely attractive. However, we can assume that with SJC registering the name *Chess Academy – Scotland*, there will be some activity in this direction. Some discussion with CA-S would be essential before embarking on this course of action.

Of the various scenarios available for dovetailing the activities of CS and CA-S, the following is the recommended course of action.

- In line with the “manifesto” for CS functions mentioned above,
- CS should take control of promoting and developing Chess in schools;
- CS should work with others to promote and develop Junior Chess in clubs; and
- CS should retain control of and promote the National Junior Championships
- But should consider delegating their organisation.
- CS, CA-S and other partners can then promote and manage the calendar of junior events to best advantage.

In summary, the strategy for CS to promote and develop Junior Chess in Scotland would have four components:

1. Concentrate effort and resources on primary schools, with four actions:

- A sustained background campaign of persuasion, aimed at central government and local authorities
- Information packs for individual schools, about setting up and managing Chess in the school
- Teacher training and support
- Paid regional coordinators to liaise with and between schools and clubs and organise league competition.

2. Use the regional coordinators to liaise with secondary schools to minimise the drop-out rate through:

- Secondary school information packs
- S1/P7 competition and coaching
- Teacher training
- Liaison with clubs.

3. Improve public awareness and image of the game of Chess through a concentrated marketing strategy comprising:

- Improving the prestige of and heavily promoting the National Championships
- Publicity highlighting events and successes, particularly on the international stage
- Use a bank of Chess-playing celebrities.

4. Work with partner organisations to develop Junior Chess in clubs:

- Produce a set of guidelines for setting up and running junior sections in clubs
- Work up a set of incentives for clubs to invest in junior sections, such as training and attractive local leagues
- Work up an integrated and staged set of competitions leading up to the National Championships.

An initial estimate of the costs involved suggested that an annual budget of some £300,000 would be necessary to implement the action plan fully across the whole of Scotland. This would be administered by a CS Junior Coordinator whose outline job description would be to:

- Take overall responsibility for the promotion and development of Junior Chess in Scotland
- Develop and promote the National Championships
- Manage the regional coordinators
- Liaise with CA-S and others
- Produce print and web-based material
- Appoint and manage a publicity agency
- Raise the necessary funds
- Report to the CS Council.

The necessary financial resources would have to come from a number of different sources, according to need and appeal:

- The Big Lottery – for project funding over a four year period, probably through the Young People's Fund
- Various private trusts and charities – for core and project funding
- Scottish Executive – for core funding
- Local authorities – for contributions to coordinator salaries
- Private sponsors – for the Championships and leagues.

The SJCA Educational Trust has been proposed as a convenient vehicle, because it is pre-existing, to raise money for the implementation of this plan; and our recommendation is that the Trust should be reconstituted, to enable it better to carry out this role.

Finance

The action plan has been costed over three years, to demonstrate the development of the strategy and the overall fundraising targets.

Year One (2008) – Pilot. The aim is to establish the methodology by targeting a cluster of schools in one region. Mainly through the employment of a Schools Chess Coordinator, the year's budget is estimated at some £70,000.

This should be raised from the Young People's Fund and others and the process of fundraising should be begun immediately, to allow a post starting in January 2008.

Year Two (2009) – Expansion. The aim is to refine and roll out the programme, using results obtained from the pilot and targeting 2 or 3 more clusters. With the addition of another Coordinator, the budget for the year is estimated at some £95,000.

Year Three (2010) – Consolidation. The addition of two further Coordinators (with the original staff member envisaged fulfilling a managerial role) brings the budget for the year to some £175,000.

Alongside this activity, an ambitious programme for the National Championships through a promotion and sponsorship drive speculates great improvements in venue, profile and promotion. A budget of £70,000 is not out of the question.

This leads to the possibility of a fundraising target approaching £1 million over a five year period.

Fundraising

It is vital at the start to establish a target, as above. Then the fundraising plan can be created and the Communications Strategy drawn up, comprising both an internal and external plan.

The Fundraising Plan will be a mix of activities, aimed at attracting finance in a variety of ways:

- Individual giving, such as an annual fund, legacy giving, tribute funds and general fundraising events
- Charities, trusts and foundations, where plans for each project will differ, according to potential income streams.

For all purposes a "Case for Support" statement needs to be drawn up for effective and consistent presentation; and Thank You Management is essential.

Sponsorship can prove a difficult area, because sponsors expect a return on their investment. A deliberate and specific approach is necessary; and a medium term view, since sponsors often plan their budgets 2-3 years ahead.

A selection of trusts for further research, drawn from *Funder Finder* is included at the Appendix.

Conclusion

The basis of this plan is to formalise *Chess Scotland's* development and promotion of Junior Chess, through the SJCA Educational Trust, by concentrating on Chess in primary schools.

To do this, paid coordinators are required: this also provides the start of a permanent central office for the administration of Junior Chess.

Otherwise, Junior Chess in clubs is left to the clubs and partner organisations to promote and develop.

As well as the key role of the schools coordinators, certain other activities are necessary:

- Marketing and public relations
- Missionary work through Learning and Teaching Scotland
- Production of a range of materials
- Development and management of web site packages
- Serious up-grading of the National Championships.

The necessary finance can be obtained by a good fundraising strategy. The process is to begin modestly, with a pilot project employing a coordinator. This person then prompts and manages the growth strategy.

The first steps which should be managed concurrently and immediately are:

- The reconstitution of the SJCA Educational Trust into a body which can apply for and manage receipt and expenditure of considerable funds.
- Application, on behalf of the Trust, for the £70,000 necessary to execute the plan in Year One (2008).

Recruitment of the first Coordinator can then be put in hand: an efficient process could prompt interviews at the beginning of December and someone in post in January.

The Coordinator's task will be to manage the implementation of the schools project, including monitoring its success and using the outcomes to progress the fundraising strategy. At the same time, he/she should be able to work with the Trust's directors to implement a general development strategy for an administrative office.

Finally, we recommend that serious planning is initiated for the re-profiling of the Junior National Championships. This must involve consultation with all potential stakeholders and a sponsorship drive; and must take a realistic view of timescales, with the event in 2010 the ideal target.