

EGS Strategy 2019 to 2023

1. Strategic Objectives and Policies

EGS's first Strategic Plan ran for the five years from 2015 to 2019 inclusive. Council has reviewed that Plan, including an online survey of members' views, and this second Strategy for the years 2019 to 2023 is the outcome. The Strategy will be reviewed annually and revised as necessary, not least in the light of current discussions on setting up a Scottish Geology Trust which could have significant implications for the Society.

The two main objectives of the Society, laid down in the Society's Laws, are “the **stimulation and encouragement of public interest in geology** and “the **advancement of geological knowledge**”. These two primary objectives remain appropriate, but the second objective is now interpreted to include not only support for geological research but also the advancement of geological understanding by members of the Society and indeed the public.

The previous Strategy envisaged a significant increase in Council's public interest work, the principal justification for the Society's charitable status along with the educational focus of the Society's other activities. A substantial increase in public outreach was achieved and Council intends that this higher level of public interest activity be built on through the next five years. In addition there will be an increased emphasis on the advancement of geological knowledge, through the Society's publications, the Society's lecture and excursion programmes, and by continuing with modest grants for funding research.

Council will maintain its drive to promote the Society and geology more widely, and extend its programme of new events commenced during the last Strategy. It will also continue to mount special initiatives, some with a major profile and often in partnership with other bodies; the proposed Scottish Geology Trust is one such example.

In pursuing its activities the Society regards its main geographical target area as Edinburgh, east central Scotland and the Borders, and decisions will be taken with this priority in mind. Where appropriate, however, this will extend to the rest of Scotland.

Finally the Society has a wide audience, in three main categories – professional geologists, amateur geologists and the general public. It needs to ensure that all three client groups are catered for in planning its individual events, making clear at which group or groups the events are targeted, and striking an appropriate balance between them. The Council will seek to increase the number of the Society's younger members and to engage more with younger age groups in its activities, from primary schools through to university level and beyond.

2. EGS Strategic Plan for 2019 to 2023

With these objectives and policies in mind the Council will take forward the following activities. The funding of these activities, and the human resources required to deliver them, are addressed in sections 3 and 4 of the Strategy.

2.1 Lectures

The annual series of lectures, aimed at members both professional and amateur but also open to the public, are a key component of EGS activity. These lectures are well-attended and will continue. The details of the lecture programme will, however, be reviewed in light of the helpful comments received in the members' survey. The new annual Public Lectures for a wider audience and on popular themes have been a major plank of the Society's public outreach programme and will also continue.

2.2 Excursions

The Society's day excursions are popular. They are designed primarily for its members but are also open to the public. Excursions for new members will continue as will guided walks for the public, often in conjunction with other organisations such as the Edinburgh Science Festival. As some EGS members are new to geology, excursions at an introductory level will be considered. The annual weekend and long excursions are very popular and will continue. The excursions programme will also be reviewed in the light of suggestions received in the members' Survey.

2.3 Publications

The Excursion Guides are a cornerstone of EGS's output and this activity will be continued, subject to the availability of authors prepared to invest the time required. Some of the Guides are, however, now out of date and require revision. Given the amount of work involved in writing excursion guides Council will consider measures to encourage authors to come forward. Council will also explore new models for the production and publication of the excursion guides. This might include on-line publication of individual excursions more detailed than the leaflet guides but capable of print on demand. And production of audio-guides and self-guided excursions will be considered.

The Edinburgh Geologist is highly-regarded by the Society's membership, containing articles of interest to both professional and amateur geologists. It will be a priority to ensure this successful bi-annual publication continues in this vein, often including articles by EGS members themselves, for example on their own geological activities.

The Geoconservation leaflets are very successful in reaching the public audience. In recent years the Society's funding of these has increased and this will continue where needed.

The Council's newsletters, replacing the former Billets, have been a great success and will be continued.

The Society aims, in conjunction with its partners the Geological Society of Glasgow and the Geological Society Publishing House, to secure the Scottish Journal of Geology as the "journal of choice" for those publishing research on Scottish geology. It is an important means of meeting the Society's objective of advancing geological knowledge. Council will review the future for the SJG with these partners, including issues such as its promotion, its content, its impact factor, its turnaround time for authors, its accessibility to other parties and the increased use of the digital version in place of hard copy.

2.4 Grants

Geological fieldwork grants are available each year from the Society's Clough and Mykura Funds. These Funds have grown in size in recent years and Council will consider whether more grants can be made available. The Council will also review the criteria for making these grants to ensure they are compatible with modern trends in Earth Science research.

Council also has a general grant scheme to assist individuals and organisations with other geology-related activities which will further the aims of the Society, especially the stimulation of public interest in geology. Several grants for public outreach projects have been made and this will continue to receive priority. Further efforts will be made to promote the scheme, and consideration will be given to increasing the size of awards in deserving cases. Council will also review whether specific types of geological research might be funded from this scheme. Awards will continue to be linked to recipients providing lectures, articles for the Edinburgh Geologist or the SJG.

2.5 Events

In the last two years Council has mounted a number of new events for members, such as a workshop on the Northwest Highlands Geopark, a workshop on mapping, and an Earthcache Weekend. Council will mount more of these events such as the forthcoming session on geological photography and possibly short conferences with a diverse audience – academic, industry, government, the public – across a spectrum of topics like the impact of climate change. Suggestions for new events made in the members' Survey will be followed up.

2.6 Special Initiatives

Council will continue to take forward selected one-off initiatives, often in collaboration with other partners, such as the production of interpretation boards/plaques, geology posters for schools, and perhaps a multi-partite conference. Work will continue with other partners in preparing for the tercentenary of Hutton's birth in 2026.

2.7 Promotion

A major thrust of the last four years has been to promote EGS and its public interest activities more energetically. The EGS now has a new website and biannual newsletters, membership drives have resulted in a substantial increase in membership, and a number of events for the general public have been successfully mounted, such as two annual public lectures and the running of geological walks for the general public during the Edinburgh Science Festival. These activities will continue and be built upon.

2.8 EGS as an organisation

During the course of this Plan Council will review whether its Laws and structures are still fit for purpose, and in particular will consider whether to convert from an unincorporated voluntary association to a Scottish Charitable Incorporated organisation (SCIO), as have many other charities. Council also aims to move increasingly to use of digital means of communication and publication. Particular attention will be given to attracting new younger members to the Society, especially undergraduate students, and to reaching out to school-age audiences, including primary schools.

3. Financing the Plan

3.1 Income and Expenditure

After a period of years when the Society generated substantial surpluses of income over expenditure, Council reaffirmed in the previous Strategy its policy of aiming to break even on ordinary income and expenditure. But it also decided to finance the employment of a Promotion Secretary from its financial reserves, i.e. to run a deficit on its income and expenditure account. In the last four years both these objectives have been achieved.

The increase in membership numbers, following the success of the promotional work, and the continuing healthy levels of sale of publications mean that the Society is in a position to continue with this financial strategy. Accordingly Council will continue to aim to break even on ordinary expenditure - through increased grant funding, increased expenditure on publications, the mounting of public interest events etc. In addition Council reaffirms its policy of funding time-limited posts (such as promotion coordination and other short-term contracts) and special initiatives, from its financial reserves.

On occasion Council receives donations by way of bequests. Where such bequests have no formal restriction on their use (in which case they are retained in Restricted Funds) Council will nevertheless endeavour to attach the use of such bequests to particular initiatives where this seems appropriate.

3.2 Capital Reserves

Despite the funding of the Society's Promotion Secretary's contract from deficits, its Unrestricted Reserves have continued to grow over the last four years, from £84,570 at the end of 2013-14 to £93,384 at the end of 2017-18. This has been due to capital appreciation in the Society's stock market investments. Reserves do produce investment income for the Society, amounting to some £2,000 per year (out of total annual income of £33,000). Nonetheless Council continues to feel that Unrestricted Reserves as high as £90,000 are unnecessary and that it can afford to reduce that level if suitable spending proposals are presented, in pursuit of its high-level objectives. This includes special initiatives and the use of contracted assistance if that is necessary to deliver the Society's objectives.

Council also considers, however, that to guard against financial risk, for example from the stock market, the Society needs to maintain minimum unrestricted reserves of £50,000. As before this will be kept under annual review.

Restricted Funds now stand at £40,000, having grown from £28,000 in the last four years, due in part to a legacy of £10k but also to stock market appreciation. Financial policy on these funds is to restrict spending to the annual investment income. Council will consider whether to relax this restriction to some degree.

4 Delivering the Plan

A key challenge in implementing this Strategy is the availability of human resources. The time which individual Council members can devote to the EGS is limited and Council will therefore:

- continue with a Promotion Coordinator to drive forward the promotion of EGS, until such time as the promotion subgroups currently being formed can take this over.
- continue with the successful policy of delegating the lead on certain initiatives to individual members or subgroups of Council
- contract out support services on an ad hoc basis where additional help is required with particular initiatives or activities
- seek to find out, and draw on, the interest, expertise and enthusiasm of members of the Society for assistance with specific events.
- where appropriate, seek partner organisations with whom to take forward specific initiatives.