

QUESTIONS FROM COUNCIL MEMBERS V4 – 3 May 2021

- *Question 5.2 updated*

(1) Annual report

Please could you expand on what is meant by "Use Salesforce to grow income through optimal supporter experiences" (page 8) and on the use made of "a professional Telephone Fundraising Agency (Stratcom UK)" (page 18)? It would appear that a recent telephone campaign to boost legacy income has annoyed a number of members; is there any evidence that the (long term) benefits of the campaign are likely to justify the costs (including possible resignations of annoyed members)? The current facility for members to state their contact preferences does not allow members to opt out of fundraising appeals whilst permitting contacts for other purposes; are there any plans to change this?

Response

Salesforce

Our current (very old and creaking-at-the-seams) database is being replaced by Salesforce – a highly efficient supporter relationship management and communications tool used by many charities. Salesforce will enable us to be much more efficient and effective in how we communicate with both new and existing members and supporters. Instead of a 'one-size-fits-all' approach when it comes to communications, our staff team will be able to tailor messaging more effectively to meet the needs, wants and interests of different types of walkers. This in turn will mean that over time, new and existing members and supporters will receive communications about joining the Ramblers, campaigning with us, or supporting us financially in a way that is most relevant to their interests. We believe this will increase the number of new members who join, and their likelihood to keep engaged with us as a charity, get involved in our walking, volunteering and to donate to the Ramblers' causes that they are most passionate about.

Legacy campaign

Our members are incredibly generous. Income from gifts in wills alone averages more than £1m per year – a vital income stream to sustain our mission for today and for future generations. Legacy marketing is a core part of our fundraising, to prompt supporters to consider leaving a legacy gift in their will. All the marketing and fundraising activity that is used to grow our membership and income is based on data-led evidence and insights to ensure that the funds that are invested deliver a good level of return in income for the Ramblers. We are continually reviewing results, and refining to ensure we invest charity funds in the best possible way. Where some elements of a campaign are not working as expected, or need refining, or our supporters give us feedback that we can use to pause or adapt our approach, we do so.

We recognise that leaving a legacy gift is a highly personal decision and respect the wishes of any member that would prefer not to receive a legacy ask. Members and supporters who have questions or want to opt-out from future fundraising communications can (and do) contact our supporter care team – we will always welcome feedback and will act on any concerns. Contact details can be found on the Ramblers App, website and membership card.

(2) Pathwatch

Looking at the Annual Report only a brief mention is made of Pathwatch (or Path Watch). During the past year we have only seen the usual relatively small number of reports coming

through Pathwatch. Mention has previously been made about the 'Son of Pathwatch' but the system seems to be unchanged. We suspect, but we have not seen it in plain simple words that the local authority is ignoring Pathwatch reports, because of a lack of resources.

What is the future of Pathwatch? We suspect that the way to get something repaired is for you to send an email about a problem to the local authority and hope that all your friends will do the same. Issues in the popular walking areas seem to get progressed, whilst those in less frequently visited rural locations just seem to get added to the backlog.

Response

The current Pathwatch tool continues to be used by some volunteers and local authorities. However, the picture is mixed across England and Wales. For example, certain local authorities do not accept path reports received through Pathwatch and prefer issues to be reported through their own local systems. There are also limitations for the user, for example, the lack of functionality for members to 'check' a previously reported issue and report if it still exists or has been resolved.

Rather than simply upgrading the existing tool, our preference is to develop an improved solution that better connects reported path issues to our footpath officers, Path Maintenance Teams and Local Authorities. However, this is complex as the relationship between the data and our volunteers and the Local Authorities varies in every area.

Over the last year we have been required to prioritise the development of some of our other digital products. However, over the next year, we plan to consult volunteers on the development of improved mechanisms for path reporting, as part of our paths strategy project, funded by PPL. We will be able to share more information with volunteers on this project very soon.

(3) Goals / Website

I would like to ask where members can view a progress report on the goals as listed in the business plan 2020-2022 on pages 5-8, and in particular, which agency has been selected for the website design (2020 goal) and are we on target to achieve the goal of launching the website in 2021.

Response

Unfortunately the illustrated business plan on the website is not the most current version, having been updated last year. Our goals remain the same, but the revised business plan for the year recognises we are operating in a time of major change due to the pandemic. Progress on goals is reported in the annual report. The agency appointed is Nomensa and the website is on track to be delivered in the autumn.

(4) Insurance

Is it a requirement now or in the near future for all walk leaders to complete the online training course in order to be covered by the Ramblers civil liability insurance? How many claims have been made on the Ramblers insurance over the past 3 years?

Response

Walk Leadership Foundations is our new e-learning course for volunteers leading Ramblers group walks and Ramblers Wellbeing Walks.

Walk leaders are not required to complete the course in order to be covered by the Ramblers insurance, and there are no plans to change this. However, we do recommend the e-learning to all walk leaders – to support volunteers in their role, and to develop the skills and confidence to lead safe, enjoyable and inclusive walks for everyone.

The e-learning covers what it means to be a Ramblers walk leader, the practical steps needed to plan and lead walks, and the essentials to keep walks safe – including what to do in an emergency. You can find out more about the course in this short video.

Since February, more than 390 volunteers have completed the course, and over 90% would recommend it to other volunteers. It is available to all walk leaders on Assemble.

Ramblers insurance is in place to protect our members, volunteers and staff. We've notified our insurers 245 times over the last three years.

(5) Accounts

1. I cannot see in the accounts a figure for the total of the membership fees paid by Members, and assume this forms part of the £4.96 million shown as "Donations and Legacies" on page 35. For the year in question, what is this membership income, in absolute terms and as a percentage of total income?

2. In the "Notes to the financial statements", point 6c on page 34 puts the expenditure on "Information technology" as £0.7 million. If the expenditure is apportioned between:

- *The Membership system*
- *GWEM*
- *The main website Ramblers.org.uk*
- *Insight Hub*
- *Assemble*
- *Pathwatch*
- *Development of the Ramblers app*
- *Provision of and support for Area and Group websites*
- *Other*

What are the approximate amounts in each case?

3. On page is a figure of £1.2 million for "Finance, administration and human resources". Financing of what? The "human resources" component seems to exclude the staff cost broken down on page 35, so what does it include?

Response

1. We are not quite clear what your source on page 35 for the £4.96m donations and legacies income that is referred to in your first question. It may possibly be the unrestricted £4.96m of donations and legacies for 2019, which relates to part of the income for the prior year. However, income from membership for 2020 (without the associated additional gift aid that is also claimed) is shown on in note 2 of the Notes to the Financial Statements on page 32, and is £2,953k for the current year, this relates to circa 25% of total income.

2. The £0.7m for IT-related central costs, includes both the staff and non-staff running costs associated with the provision of existing IT equipment, systems, upgrades, and support. In addition it will include the non-capitalised elements of the development work for some of the systems that you mention in your question. In line with most other charities, we do not apportion staff time etc across the various systems. To do so would require some

form of timesheet and overhead allocation tool, which in itself would require additional cost and resource.

Update from Michael Penny, honorary treasurer, following a question raised at the AGM on 17 April.

As agreed at the General Council AGM, I have revisited the initial response provided to the question which was raised about IT-related central costs reported in the notes to the financial statements. The follow-up question at the AGM related, in particular, to costs for the Insight Hub and Assemble.

With regard to the apportionment of £0.7m between the various IT projects, the challenge of apportioning overhead costs across all of the Information Technology function's costs, which includes infrastructure, licensing, staffing for all of the Data, Digital and Technology activity across Ramblers, is difficult and will provide little benefit considering the time and expense to introduce an apportionment method.

I am confident that there are robust governance and internal controls in place, confirmed this year by Crowe LLP during the 2021 audit process, to ensure our expenditure and reporting thereof is in line with good accounting practice.

All IT costs including those for Assemble and the Insight Hub are reviewed regularly by the finance director and also the finance and risk committee on behalf of the board of trustees. I remain confident that should any issues arise, the correct action will be taken.

3. As with the costs for IT, discussed in the previous question, the £1.2m for finance, administration and human resources, does include the staff costs associated with our day to day running costs relating to overheads. These include the staff in finance, facilities, HR, data protection and admin support. The non-staff costs include rent, rates, insurances, telephones and all other relevant expenditure that both provide the infrastructure to support the charity to meet its charitable aims, also ensures that we comply with our legal, regulatory and fiduciary responsibilities of running a national charity. For clarity, the 'finance' element is the finance department not financing costs, such as leases and loans.

(6) Digital transformation programme

The three year Digital Transformation Programme has now expired, but did not report any progress after Quarter 1 2020, and information about it on the website is no longer available. What is the current status of this IT development programme? In particular:

- *Of its original targets, how many were met on time, how many were late in being completed and how many are still outstanding?*
- *Which director is now responsible for overseeing developments, and what is the Job Description for this post?*
- *Do you think that the methods and frequency of reporting to the membership about the progress of this initiative accord with the Code of Conduct, which says "communications of decisions should be clear and effective"?*
- *What targets now exist, and how will planned achievements be measured and publicised?*

Response

Salesforce implementation and the delivery of the website (planned for autumn this year) are still outstanding but are in progress.

We have had an interim Finance Director since November who is in post until the end of July. We are currently recruiting a permanent Director of Finance, Performance and Impact who will take over from our interim and will be managing the finance, performance and DDT functions.

Our programmes of work covering all areas of the organisation are in our operational business plan, where all staff teams have clear plans and targets that are monitored by the CEO and board of trustees.

Our activities and progress are reported in the annual report and through our membership and volunteer communications, which we hope are clear and effective.

(7) Campaigning for rights to walk

The coincidental arrival of the Don't Lose Your Way campaign and 'lockdown' have presented us with a real challenge. So many more people have been out walking in the past year or so that the demand for a decent network of paths has grown ever stronger.

The publicity about lost paths has worked so well that local communities with a poor or non-existent paths network have evidently been looking at the maps of our 'discoveries' and are encouraged to think that help is on its way. To a degree we may have shot ourselves in the foot, because, for all except a tiny proportion of this multitude of lost ways, the evidence to rescue them simply does not exist and many folk are going to be deeply disappointed as a result.

How, otherwise, is this need to be met? In Scotland, the past year has seen a remarkable increase in the number of paths, which have come into existence as people have simply walked where they are entitled to do – mostly along the margins of cultivated fields or in woodland.

The political reality is that the Scottish access system is not likely to find its way south of the Border, but is there not a case for campaigning in England and Wales for the right to walk in such locations as on arable field edges and in woodland?

As the question states, the pandemic has increased use and appreciation of many local paths and green spaces, and people intend to walk more in the longer term. We continue to make this case to government – and agree that it strengthens the argument for greater investment in improving the path and access network. This is a message we are pushing through [our manifesto for local government](#) – this was produced in the run up to the England's council elections in May, but we will continue to press for this as councillors take up their roles. We are pushing national government in England to fund improvements to paths and access through the new agricultural payments regime (introduced through the Agriculture Act), and to give this greater priority across government by introducing new targets for access to green space under the Environment Bill currently in parliament – more on that work is available [here](#). We updated [our position on freedom to roam](#) and are focusing on pragmatic changes to improve existing open access – including new opportunities for access. There is no 'quick fix', but we are developing a long-term plan for improvements to open access.