



BMC ODG

Membership Engagement (Workstream 8) Report

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Contents

| | |
|--|----|
| 1. INTRODUCTION | 4 |
| 1.1 Background | 4 |
| 1.2 Document Purpose and Audience | 4 |
| 1.3 Document Overview | 4 |
| 1.4 Related Documents / BMC Initiatives / ODG Workstreams | 5 |
| 1.5 Status | 6 |
| 2. EXECUTIVE SUMMARY | 7 |
| 3. SOLUTIONS TIMELINE | 9 |
| 4. SOLUTIONS..... | 10 |
| 4.1 Recommendations for Local Area Meetings..... | 10 |
| 4.2 Area based & National events. | 13 |
| 4.3 Area Surveys and Votes. | 14 |
| 4.4 National Surveys and Votes. | 16 |
| 4.5 Use of Electronic Platforms for members submitting resolutions to General Meetings. | 18 |
| 4.6 Board and National Council to regularly review survey and vote results, ensure feedback to members | 20 |
| 4.7 Ability to personalise communications and BMC website to members..... | 21 |
| 4.8 Membership Engagement - Volunteers..... | 23 |
| 4.9 Membership Engagement - Clubs..... | 26 |
| 4.10 Hold and moderate discussions..... | 28 |
| 4.11 Single director accountable, increased head office support. | 29 |
| 5. SURVEYS & VOTES - PROCESS FLOW DIAGRAM..... | 31 |
| 6. SUMMARY OF COSTS | 32 |
| Appendix 1 - Current Members Database, proposed additions..... | 34 |
| Appendix 2 - Surveys & Votes – Current technology, recommended platforms..... | 36 |
| Appendix 3 - Surveys & Votes - Skills needed..... | 39 |
| Appendix 4 - Creation, Control and Use of Mailing Lists | 41 |

Version History

| Version | Date | Author(s) | Reason For Change | Sections Changed |
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| 0.1 | 03.10.2018 | Paul Evans | Initial version | N/A. |
| 0.2 | 10.10.2018 | Paul Evans | Extra detail inserted in Appendices. | Appendices 4-8 added. |
| 0.3 | 18.10.2018 | Paul Evans | Cross workstream dependencies fully articulated. Executive Summary created. Need new subsections in section 5 (now 4). Diagram and table changed to portrait format so they don't get cut off when translated to Google Docs. | Section 1.4 expanded. Section 2 expanded. Added sections 5.9 -5.12 (now 4.9-4.12) Sections 4 and 6 (now 3 and 5). |
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| 0.4 | 17.11.2018 | Paul Evans | Significant updates after a series of 11 meetings | Changes throughout all sections. |
| 0.5 | 21.11.2018 | Paul Evans | Final round of updates before issue of v0.5 for ORG review. | Minor changes throughout all sections. Delete prev section 3 (duplicates ToR), renumber subsequent sections. |
| 1.1 | 16.12.2018 | Paul Evans | ORG review comments | Significant changes throughout. |
| 1.2 | 19.02.2019 | Paul Evans | Comments from Lynda Buckley, Tony Ryan, Alex Messenger, Jon Chittenden | Change re membership retention, local and national events, area mailing lists. |
| 1.31 | 13.05.2019 | Paul Evans | Changes following presentation to and discussion at BMC Board in May 2019. | Clarify that recommendations address both area meeting attendees and wider membership. Remove section 3 plan. Clarify 4.4 re proxy voting. Review / update references to digital strategy. |
| 1.4 | 13.08.2019 | Paul Evans | Changes following presentation to and discussion at BMC National Council June 2019. | See review log for details of all comments made and changes in response. |
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Distribution

| Name |
|----------------------|
| BMC Board |
| BMC National Council |
| ODG Group members |

1. INTRODUCTION

1.1 Background

In 2018, the BMC Board and National Council set up the Organisational Development Group (ODG) to provide recommendations on implementing the outstanding items from the 2017 ORG report. The ODG has grouped these items into 8 workstreams, which together will provide recommendations to Board and National Council on all remaining outstanding items.

This is the report from workstream 8 - Membership Engagement.

Some key membership metrics as background -

- There are over 84,000 BMC members at the time of writing.
- Around 27,000 are club members, the remainder being individual, family, student and others.
- There are between 6300 and 6800 BMC volunteers (the majority are affiliated club volunteers); as clubs tend to be run by groups of volunteers, club members are particularly well represented in BMC volunteers.
- There are over 7,200 individual members who are not registered with any BMC Area.
- The majority of the BMCs members are “silent”. They do not belong to clubs, or volunteer. They do not attend area or national meetings, complete surveys, or submit proxy votes. We don’t know what they think about topics on which the BMC represents them, and we don’t know what they think about us as an organisation. In the absence of any better information, we assume that the minority who do comment, are typical of the majority who don’t.
- The BMC currently has an equity statement <https://www.thebmc.co.uk/bmc-equity-statement>, and this is an area which will be kept updated as part of future strategy work. Obviously all future work on membership engagement needs to be fully compliant with BMC equity policies.

1.2 Document Purpose and Audience

The audience for this document is the BMC Board, National Council, Local Area Chairs and Secretaries, BMC members and the ODG, including leads for, and members of, related ODG workstreams. Key proposals from the report will be summarised for presentation to members. The full report will be available to all BMC members, other than the removal of section 6 on costs.

This document contains recommendations both to improve engagement for members who are already engaged (area meeting attendees, volunteers) and also to improve engagement with the “silent majority” referenced in bullet 5 of section 1.1 above. Sections which specifically address this latter group are – 4.1 (items 3, 10, 13, 15, 16), 4.3, 4.4, 4.5, 4.6 and 4.7.

1.3 Document Overview

This document contains -

- A management summary (section 2)

- Implementation timelines (section 3) will be produced once the final version has been approved.
- Detailed descriptions of recommended solutions for each topic area (section 4).
- For clarity, a process overview “swim lane” diagram for votes and surveys is included (section 5).
- Indicative costs and resource levels are listed where possible (section 6).
- A number of detailed appendices containing further detail.

1.4 Related Documents / BMC Initiatives / ODG Workstreams

The following documents have provided input to this document -

- BMC Independent Organisational Review Group Report November 2017
- BMC Independent Organisational Review Group Amended Recommendations Report March 2018
- BMC Organisational Review Membership Survey - September 2017
- BMC IG Phase 2 recommendations document dated 24/7/2018
- BMC “ODG Recommendations Matrix” document dated 27/09/2018
- Workstream 8 Terms of Reference v1.0 dated 05/11/2018
- National Council paper “Update on Progress towards Developing a BMC Volunteering Strategy” submitted in Feb 2018

Coordination with existing BMC initiatives -

- **Coordination with BMC Marketing and Communications Group.** Several of the recommendations in this report rely on changes to the BMC IT systems and the Marketing and Communications processes which are the responsibility of this group. This group has a pivotal role in BMC communications with members. A number of the recommendations to address current issues are delivered by the BMCs Digital Strategy.
- **Coordination with existing volunteer activities and initiatives.** There are current recommendations to improve the BMCs management, recruitment and motivation of volunteers. Workstream 8 has met and coordinated with Lynn Robinson and Jane Thompson to understand what is already being proposed / actioned, as context for the additional recommendations from workstream 8 in the area of Volunteers.

The following ODG workstreams have provided input to this document, and this document has been discussed with and reviewed / approved by those workstreams -

- **ODG Workstream 1 - Strategy and Vision & ODG Workstream 6 - Policy** - members views and wishes will form a key input (amongst others) into Policy, and hence into Strategy and Vision. The Board and NC need to review and approve the facilities to seek members’ views, as fit for purpose.
- **ODG Workstream 2 - Operations and Finance** - firstly, because some of the proposals in this workstream will have costs and/or resource / skills impacts. Therefore BMC Board needs to review and approve the WS8 proposals. Secondly because workstream 2 owns Membership Packages, Digital Strategy, Communications, and Staff and Volunteer Resourcing, each of which will affect Membership Engagement. There is therefore significant overlap between the proposals in workstream 8, and those in workstream 2.
- **ODG Workstream 5 - Governance** - allowing Local Area chairs to take into account views of members who do not attend area meetings in person will require a change to the Articles of Association. Changes to the articles are also needed to allow electronic forms for submission of AGM resolutions.

- **ODG Workstream 7 - Partnerships** - “clubs” is a topic for both workstream 7 and workstream 8. The workstream leads agree that workstream 7 will approach the clubs topic from the viewpoint of the BMC engaging with clubs as organisations, whereas workstream 8 will approach the topic from the viewpoint of engaging with club members as individuals. The workstreams will coordinate to make sure that their proposals are mutually consistent and supportive.

1.5 Status

This version of the document (v1.4) has been reviewed by, discussed with, and incorporates suggested changes from –

- ODG.
- BMC HQ subject matter experts.
- The BMC Board.
- BMC National Council

It is for issue to, and comment by, BMC members.

2. EXECUTIVE SUMMARY

The following recommendations recognise current best practice in Membership Engagement within the BMC, and build on this base. Further detail on each recommendation is given in section 4. The BMC should -

- 2.1. Support the “best practice” recommendations for local area meetings listed at section 4.1; encourage area chairs and secretaries to use whichever recommendations they feel are most appropriate for their area.
- 2.2. Continue and expand the series of BMC local area & national events (e.g. Wilton Fest, Gower and Pembroke Festivals, Trem Fest). See section 4.2
- 2.3. Support the guidance to area chairs and secretaries on holding area surveys and votes given in section 4.3. Ensure that budget continues to be available for the existing staff (up to 1.5fte) and current IT tools required, and that the necessary skills in survey design and analysis are available (these budget and skills commitments are also required for 2.4 below).
- 2.4. Continue the use of online proxy voting for national AGMs, alongside voting by attendees and postal proxy voting. In advance of each AGM, carry out an annual national survey of member satisfaction levels and views, results to be presented at the AGM. Additional surveys may also be used to seek member views on topics and issues which will form strategy. More detail in 4.4, where live streaming of AGMs and live online voting is also discussed. The BMC should offer its survey and vote capability to its partners.
- 2.5. Review and endorse the proposals in section 4.5 for electronic submission by members of resolutions for the BMC AGM. Provide guidance on whether 0.5% resolutions can be “e-only”.
- 2.6. Ensure that a report on surveys & votes taken is a standing agenda item at Board Meetings and National Council meetings. This includes regular reports on the “micro surveys” taken at time of member interaction on the website (e.g. after insurance purchase). Also ensure that where a poll or survey has taken place, prompt feedback is provided to members, and disseminated to appropriate stakeholders, e.g. specialist committees. More detail in 4.6.
- 2.7. Review and endorse the proposals in section 4.7 on improving our ability to personalise communications and the BMC website to members. This will require delivery of a number of sections of the proposed BMC Digital Strategy. Costs of Digital Strategy are being assessed separately, and do not form part of the cost summary within this report.
- 2.8. Implement the recommendations in the Feb 2018 “Update on Progress towards Developing a BMC Volunteering Strategy” document. In addition -
 - Carry out a “knowledge audit” of BMC volunteers, providing a sound foundation for training, for induction, and for identifying high risk areas for priority knowledge and skills transfer.
 - Increase investment in appropriate training and paid courses for volunteers, using the BMCs network of partners where appropriate, and using a “social return on investment” model. See section 4.8 for further detail.
- 2.9. Clubs. As SE funding has now resumed, re-start the subsidised club workshop programme.
- 2.10. Hold and Moderate discussions. Do not establish a BMC online discussion platform at this time. Do continue to track and contribute to BMC related discussion on existing platforms. Revisit this decision once future improvements to the BMC website, and more targeted use of social media,

have been delivered. Obviously we cannot moderate discussions on platforms we do not own. We should however encourage discussions to be factual and courteous.

- 2.11. Management responsibility and accountability, resourcing. As will be seen from reviewing this report, delivering best practice in Membership Engagement for the BMC requires many areas of the organisation to change and evolve the way they currently operate. Improvement will require coordinated action by both paid staff and volunteers. It is recommended that a single Board Director is made accountable for the monitoring & measurement of, and delivery of improvements in, Membership Engagement. In addition, although most change will be delivered by volunteers, increased targeted head office support for these volunteers, particularly while change is taking place, is a prerequisite for successful implementation of these changes.

3. SOLUTIONS TIMELINE

A solutions timeline will be produced once the scope and solutions have been confirmed by BMC Board and National Council.

There will be significant dependencies between some recommendations and the BMCs Digital Strategy – in particular section 4.7 and Appendices 1 and 4 are dependent on Marketing and Communications planned developments.

4. SOLUTIONS

4.1 Recommendations for Local Area Meetings.

ORG recommendation 37 is “Local Area Committees should remain, however a number of operational changes should be made in order to make them more effective”.

Area meetings are not all run identically, nor should they be. It is not appropriate to make a “one size fits all” set of recommendations for all areas. The following is a list of “best practice” suggestions. Many areas will already do some of these things; not all suggestions will be appropriate for all areas. Area chairs and secretaries should consider the list, and implement whichever suggestions they feel would best suit their area. Consider including this list in the existing BMC “area meeting guidance” document.

1. Invite speakers - local activists with unusual / extensive experience, national figures from hillwalking or climbing, reps from groups who we need to work with for access (e.g. RSPB or NT). Also reach out to our partner organisations for speakers. Aim to get a mix of different “topic” speakers who will widen the existing demographic base (e.g. women and hillwalkers)
2. Advertising for the meeting should be widespread (clubs, climbing walls, outdoor shops for physical posters, electronic via social media, BMC and UKC / UKB / Hillwalking websites). If a talk is scheduled, give it prominence.
3. Produce and widely distribute (BMC Website, email to area members, Facebook) an area newsletter in advance of the meeting.
4. Venues should be accessible (i.e. good public transport and parking), big enough, and quiet. Good quality free chips and sarnies. Data projectors are increasingly used and useful. The BMC should help members to reduce their carbon footprint by using locations with good public transport. Holding meetings in places only accessible by car could disenfranchise younger members.
5. Advertise the meeting on Facebook and use the Facebook “who’s going” facility for area meets, it provides members attending with an opportunity for car shares, and gives the chair and secretary advance view of likely numbers.
6. Moving or rotating location can help if well advertised, and if to a location with large numbers of BMC members/ good public transport, but also risks “turning off” existing attendees. Change location with care, on a trial basis, and be prepared to switch back. In considering this, Area Chairs and Secretaries need a map of the area and its boundaries, and to be well aware of where the major population centres and public transport links are. A “heat map” of where area members live, by postal out code, is very useful.
7. Give good balance to all interest groups, including hillwalkers, and encourage women attendees. For areas which do not have a hillwalking rep, contact local hillwalking groups to try to get one - in fact, more than one helps to spread the load.
8. Give a friendly welcome to new faces. Actively encourage non BMC members to attend (as they often convert).
9. Strengthen links between local areas and clubs; identify all your local clubs, and ask local clubs to always send a rep. This should be part of the area clubs rep role. If your area contains club huts which would be convenient for, and are large enough for, a Local Area meet, consider asking clubs if they wish to host a Local Area meet - a summer barbecue meet, for example. Areas need to

consider how to engage with national clubs who have members in their region. Perhaps through National Clubs reps on Clubs committee?

10. Digital engagement with the wider (and especially younger) community is a key activity going forward. The BMC membership is biased towards older members. We need more young people to go to area meetings and engage in area activities. If Area reps do not understand and regularly use Facebook, Twitter, Instagram, Messenger etc. they need to get a volunteer who does, and who can help the area be more visible on these channels. Areas should consider having an area officer / official for this role, who might also be the area news contact (see point 17 below). As a minimum, have an area Facebook page.
11. University clubs and local walls are a good feeder. Reach out to local uni and further education hillwalking and climbing clubs. Help to facilitate transition from uni club to established club for students staying in the area after graduation. Or from uni club to individual membership.
12. Engage with key influencers in the area, as they can often help topics to “go viral”.
13. Area meetings are very important - but should be seen as one key route for engaging with wider area hillwalking, climbing and mountaineering community. Areas need to find the most appropriate ways to most effectively engage with all members in their area, not just meeting attendees. Especially we need to engage with the people who are active in areas, but who don't go to meetings. We need all area members to feel informed, valued and consulted.
14. Encourage meeting attendees to read the area newsletter, so individual sections of the meeting doesn't over-dominate.
15. Recent changes due to GDPR have meant that Area Chair and Secretaries can no longer hold lists of email contacts for their area. All communications from area reps to area members via email are currently routed through BMC head office (although one benefit of this change is that they now go to all area members). These changes have caused frustration at areas, and imposed extra workload at head office. Appendix 4 contains further detail on this issue and outlines how this area will be addressed during 2019. Head office should communicate this change to all area chairs and secretaries, setting out the use of the “engaged member” list.
16. Social media channels which do not require area staff to know individual contact details (local Facebook groups, Twitter etc.) can still be used by area staff.
17. BMC head office needs to ensure that news (whether centrally originated, or fed in from areas) is effectively fed to local area members; local area reps need to be on the alert for BMC news, monitor committees etc. and make sure relevant news is fed to the centre for onward transmission to members, and effectively communicated at area meetings. “Centrally originated” news needs to cover core BMC activities including specialist committees, and relevant work by partners. Areas should consider designating a “news contact” for their area (perhaps combined with social media officer from point 10 above).
18. Ensure that work done by volunteers in each area is mentioned in area meetings, with specific reports where appropriate.
19. Live streaming of area meetings has been mentioned, but at present we do not feel there is sufficient demand or interest to make this worthwhile for regular meetings. It may be worth considering for particular “hot topic” meetings, where there are more members interested than could fit in the usual venue. Live streaming of the “open forum” was used in the run up to the 2018 AGM, so BMC head office can provide advice if this is contemplated. Live streaming of national AGMs is discussed in section 4.4.

20. As well as communications within an area, chairs, secretaries and other officers should also consider “horizontal” communication between areas where there are topics of common interest, opportunities to share best practice, methodologies, resources, guest speaker recommendations etc. Area National Council reps are well placed to advise here, since reports from all areas are tabled at National Council meetings.
21. Note that currently the communities site is the only “official” way of storing area content - agendas, minutes of meetings, papers for meetings, events etc. but the site is unfriendly, little used and ineffective. This point is also referenced in section 4.7(final para). The communities (Local Areas) site needs to be redeveloped and should be accessed via the same sign-on as the main BMC site.

The following is a list of suggestions for BMC Head Office to improve support for Local Area volunteers –

1. Run a short, non prescriptive training course / training day for Area Chairs, Secretaries, NC reps and other key roles. More help is needed for newly elected officers. Areas need to recruit for officers well in advance, to do this they need full job descriptions. There is an opportunity to improve consistency of operations and spread best practice amongst areas. The introduction pack for local area NC Reps, Chairs and Secretaries needs improving.
2. Train the chair. Many chairs will have experience of chairing business meetings. Chairing a meeting of volunteers, local activists and a broad church of area members is not the same thing, and different skills are needed.
3. Social media/ IT training for area volunteers - “you cannot control social media, you can only join the conversation” Therefore we need area volunteers with a good understanding of social media, who have a clear and consistent view of what the BMC is about. Head office can help here -we need to implement a consistent policy & method for communication from areas to members.

4.2 Area based & National events.

Such events are a really good way of engaging not only existing members, but also climbers and hillwalkers who are not currently members, but whom the BMC does represent. Regular events such as Wiltonfest, Tremfest, and the Gower and Pembroke Festivals are all well established and popular. One off events such as the Great Ridge Walk have also been very well attended, and achieved significant media coverage. Hillwalking events continue to grow in popularity with the Peak area in particular arranging a number of walks, including at the 2019 AGM weekend.

One off or regular crag & hill cleanups are also popular, and a good opportunity for the BMC to engage with members and prospective members. The recent H2O initiative provides an opportunity to arrange hill cleanups.

It is important that we capture best practice after all events (and also lessons learned) so that head office can provide advice and support to organisers of existing and new events. There are challenges in doing this, since the current levels of BMC staffing do not even allow a member of staff to attend all events. This is a potential area for improvement, but would require additional resourcing.

Whether head office staff attend or not, we should consider a brief (less than 5 mins) "introduction to the BMC" at all BMC evening presentation type events, so that non members get a brief overview of the BMC, what we do, how to interact with us (including social media and website links), and a schedule of area meeting dates and locations. We should produce an "event support pack" for this purpose, with FAQ style answers to likely questions.

BMC involvement in events such as lecture tours by famous visiting climbers, KMF, Women's Trad Festival etc. are all opportunities to widen our profile and reach out to new prospective members.

Area meetings have in the past been combined with events such as launch of a new guide to a local area; this has worked well to increase attendance.

The BMC should consider combining the national AGM with a significant local event in the area in which the AGM is held.

There is a perception that head office support levels vary between events. More work is needed to quantify / confirm this. In particular we should aim to return a count of numbers (ideally including numbers of members and non-members) for all events. Also events typically start small, and take a number of years to grow to achieve their full potential; hence their support requirements will grow and evolve over this period.

4.3 Area Surveys and Votes.

ORG recommendation 37 is “Local Area Committees should remain, however a number of operational changes should be made in order to make them more effective”.

ORG recommendation 18 is “The BMC should implement a technology based national polling and discussion platform to gauge member views on national, international and local issues.”

This section makes recommendations for polling (either via a survey or via a vote) on local area issues. Surveys are advisory. Votes are binding.

Firstly, it is important to note that contentious issues at area meetings are (fortunately) rare.

Where area meeting topics are believed to be contentious or controversial, the area chair and secretary may contact BMC Head Office to request a survey to gather views of all area members in their area, before the issue is debated at area. The issues are not usually urgent, so the delay whilst a survey is taken should not be a problem. Any area members with suggestions for surveys must route them through the area chair and secretary.

Once the survey results are available, if the wider area membership and the majority of meeting attendees are in agreement, there is no issue. Surveys are cheaper than voting, so it makes sense to use a survey to assess the views of the wider area, before we consider going to the expense of an electronic vote.

Where the views of wider area membership conflict with the views of meeting attendees, such that the majority in the meeting would be outvoted by non-attending members, the will of the majority should be respected. Typically, issues are decided at area meetings by less than 0.5% of the members in an area. Where these issues are contentious, there is a risk of democratic deficit from the views of >99.5% of members not being sought. Equally, if people not at the meeting are asked for views, the question needs to be carefully framed and views for and against sent out with the survey or vote invite - see below.

Using a survey to gather wider opinions than those in an area meeting may help to resolve conflict. Using a vote may resolve conflict - or it may worsen it. Area chairs and Secretaries are best placed to make this judgement call.

Electronic voting at Area Meetings required amendment to the AoA (implemented at 2019 AGM - item 28.3.4). Area Chairs and Secretaries now have the power to request electronic votes from all area members, and to take into account such votes (at the chairs discretion) when counting votes at their area on the issue in question. A technical solution to allow this is not yet in place, but plans to provide it are ongoing.

See Appendix 2 for a detailed review of technical solutions for surveys and voting in the BMC. Note that surveys are currently only issued to members with a valid email address (this covers around 80% of BMC members). Voting via BMC website would only be open to members who have a website login.

Local Areas chairs and secretaries can also use surveys to get greater insight on what the area members think about area issues, including BMC issues specific to their local area, the conduct of their local area meetings, and the information members receive about their local area.

The decision as to whether to carry out area surveys, and the topics for such surveys, should be decided by each local area chair and secretary, and the results fed back to each local area. However, for reasons of data protection & GDPR, the selection of members to contact, and the issuing and analysis of surveys, will be carried out centrally.

Head office is able to support area surveys (see Appendix 2 for further detail) but there are capacity limits. In summary, for area surveys, if there was a standard format and the poll did not require extra

promotion beyond area newsletters, then two simple surveys per area per year could be feasible. Sending out more surveys than this is likely to “turn off” members in any event.

Local Area chairs and secretaries should receive results of all national surveys and votes, so that they can communicate them to the wider area membership, and gather any reaction from, or concerns raised by, area members.

Local Area chairs and secretaries must promptly and fully communicate results of all local surveys and votes to all area members (note - not just area meeting attendees). For this (and for other purposes) they will require head office staff to issue bulk emails to area members.

When area members are consulted on an issue, whether by survey or vote, if that issue is complex or contentious, brief clear papers for and against should be prepared and provided to members with the invitation to express their opinion (see Appendix 3 para 6). This should not only help to increase the numbers participating, but also ensure that members are better informed before deciding. It may be appropriate to distribute these papers in Summit (if timescales allow), via BMC website (national or local), and/or social media and email invitation.

In terms of timescales to carry out an in-house survey, if there is no queue, then perhaps 1-2 weeks to design the survey, identify members to be surveyed, and send out via email invites. Then however long we allow for responses. Then perhaps 2 weeks to collate responses and produce analysis.

4.4 National Surveys and Votes.

National **Surveys** are used -

1. For Annual Member Surveys (ORG recommendation 19 - “The BMC should implement a technology based Annual Member Survey”). Annual member surveys should aim for consistency year on year, so that levels of satisfaction can be tracked over time. We need demographic and interest data, to produce results for different segments of BMC membership. The Annual Member survey should happen before the AGM, timed such that the results can be reviewed and discussed at the AGM. As this would be categorised as a “complex survey”, (see Appendix 2 for survey categories) this might be outsourced. If it were outsourced then cost level would be similar to the 20:20 survey used for the ORG, i.e. around <removed> p.a. If carried out in house (if resource levels allow) it would obviously be cheaper.
2. For other ad-hoc purposes where the Board, NC or a BMC partner organisation wishes to seek the views of the membership. This might be to inform strategy work, consult before a contentious decision, or in a number of other scenarios.

There are two existing technical solutions for surveys, the use of an external agency (e.g. 20:20) or the use of an internal licensed solution (SurveyMonkey). A third solution using members sign on facilities will shortly be possible for simple questions. The pros and cons of the various options are discussed in Appendix 2.

The BMC needs to consider whether surveys of members for purposes of research should be “e-only” or whether paper surveys should also be sent where there is no email on record for a member; “e-only” may be seen as excluding members who do not use the internet / email.

Conversely, sending paper surveys and handling paper responses will drive costs up significantly. Decisions should be taken on a case by case basis. It would for example make no sense to use paper surveys to contact social media users. The likely response rate for paper will be a factor in the decision. Again, these issues are discussed in detail in Appendix 2.

The current use of micro-surveys for purchases made through the BMC website should continue. This is the only method currently available which has the potential to measure engagement of “members who do not engage” - refer to section 1.1 above. It is good practice for such surveys to be very simple, but at the same time they have the potential to reveal attitudes amongst members who we can’t reach any other way.

We should consider engaging with partner organisations to carry out joint surveys, which again have the potential to provide information from members who don’t tend to engage.

A key factor for ongoing review and monitoring will be the response levels achieved from a National Annual Survey of membership. The last such survey achieved 7.4% response rates. The ideal is obviously to drive up response rates significantly, particularly by engaging members who are currently “silent”, without significantly increasing costs.

National Votes.

ORG recommendation 38 “The BMC should implement an online voting platform in order to increase member engagement in its General Meetings”

Pre 2018 situation - for voting at national AGMs, the norm has been voting from the floor by those present in the meeting, and postal proxy voting for non-attending members.

For the first time, the 2018 AGM added the option of electronic proxy voting. This produced higher voting figures than had ever been seen before.

When a member sends in an electronic or postal proxy vote form prior to an AGM or EGM, their responses to each question are treated in one of two ways, depending on whether their vote on a given question is "directed" or "discretionary" -

- "directed proxy voting" (where the member selects "yes, no or abstain" on a topic where an opinion is required, or "person A / Person B / Abstain" where there is an election.) - that vote is counted as soon as the members submission is processed. The proxy to whom the vote is assigned has no influence over the option chosen.
- "discretionary proxy voting (where the member leaves the choice of how to vote to the discretion of their proxy) - that vote is counted when the person holding the proxy exercises that proxy vote, at the end of discussion on that agenda item, at the AGM or EGM.

Further changes may occur in the precise nature of proxy voting at future (2020 and beyond) BMC AGMs as a result of future recommendations from the governance working group set up following the 2019 AGM.

Electronic proxy voting for the 2018 & 2019 AGMs used the platforms & services of the ERS (Electoral Reform Services). Base cost around <removed>, though changes in the run-up to the vote increased this figure in 2018. We recommend that the BMC continue with this option in the short to medium term.

As with area surveys and votes (section 4.3) when members are consulted at a national level on an issue, whether by survey or vote, if that issue is complex or contentious, brief clear papers for and against should be prepared and provided to members with the invitation to express their opinion (see Appendix 3 para 6). This should not only help to increase the numbers participating, but also ensure that members are better informed before deciding. It may be appropriate to distribute these papers in Summit (if timescales allow), via BMC website, and/or social media and email invitation. There has been discussion of live streaming the national AGM and allowing electronic live voting. This is certainly technically possible. It would need a "high availability" video feed out, with every link in the chain configured with hot standbys. The BMC does not have this capability, and it would have to be outsourced at a likely cost of around <removed> per AGM.

In addition we would need a live voting solution. The cheapest option would be to build this onto the BMC website so we can ensure authentication of members voting. Likely cost <removed>. Assuming less than 1000 members likely to give up a Saturday to watch the entire AGM & vote "live", costs could easily hit <removed> per member voting.

We do not believe this can be cost-justified at present, and it is not currently recommended. However it is likely that costs will drop, and the cost benefit analysis will improve over time, so this should be reviewed regularly.

4.5 Use of Electronic Platforms for members submitting resolutions to General Meetings.

Changes to the articles were agreed at the 2019 AGM which raise the threshold for members submitting resolutions to AGMs to 0.5% of the membership, and allow "participation via electronic forms" (section 11.7.1). These AoA changes were prepared by ODG Workstream 5.

Any solution we adopt must be simple, and require minimal effort for head office staff to validate members supporting a resolution. 0.5% of membership is 420 members. We do not want head office staff to have to check details of 400+ members manually.

Technical options -

Option A - completely external system. Proposers can collect details of members who support their resolution using one of the many such platforms publically available (e.g. Change.org, 38 degrees, Represent.me). The choice of method to collect supporting members' details is left to the proposer. The BMC would need an agreed set of data per signatory (could be name, address, email, or (if platform allows) BMC membership number. The proposer would need to agree a file/dataset that allows validation whilst minimising data protection issues; which could be difficult if the proposer does not engage early in the process. This file would need to be validated electronically by comparison to the members database. Depending on detailed design decisions, it might be appropriate to send an acknowledgement email to all members who had supported the resolution.

Option B - completely in-house system. We would have to create custom fields per resolution (simple y/n choice) so that members can log in to the BMC database and register their support. Proposers would have to publicise their resolution and invite members to support them by logging in and ticking a box. No GDPR issues and use of website login means that authentication / verification is easy. This will have the largest development and support burden for Head Office.

Option C - hybrid. Some systems (e.g. represent.me) can be used in "hybrid" mode where a particular resolution can only be accessed via a website logon. So users would log on to the BMC website to authenticate themselves, and then select an option which takes them to the external system to register their support for the resolution. Since the resolution can only be accessed after logging on to BMC website, we can be sure that support is only coming from BMC members.

While these solutions will in all probability comply with GDPR and other legislation, this area will need detailed design work prior to an implementation decision.

In addition we will need to decide whether petitions under the 0.5% rule are "e-only" (cheaper, simpler, quicker) or whether we will accept paper signatures from members. Some points to consider are:

- Around 80% of BMC members have email addresses; as a general principle any member who has email / internet should use it when supporting a resolution, and it is a reasonable assumption most would.
- The new articles state that AGM papers are only guaranteed to be delivered on the website. We have already 'tacitly' decided that the internet is 'universal'.
- If we assume people don't have internet then we might also be required to send paper notifications of all potential resolutions to all members without email, which would be an added cost.

It is worth noting that submitting a resolution is not the same as a vote on the resolution at the AGM and the BMC are not legally bound to the same rules, e.g. the existing proxy voting system must allow postal voting. Is it necessary to also allow postal voting for submitting a resolution? If so this will increase costs to head office or make it more difficult for members to raise a resolution if they were required to manage paper.

Further detailed design work, and a decision as to whether paper signatures must be accepted for a 0.5% resolution, are required before a final option can be recommended, and build can commence.

4.6 Board and National Council to regularly review survey and vote results, ensure feedback to members

Board and National Council should regularly receive and consider reports on what surveys and votes have recently taken place, what the results were, any issues which have been uncovered, and the actions we are taking in response.

This should become a standing agenda item at Board and NC meetings.

Issues raised and actions taken under this agenda item should be minuted, so that the membership can see that the BMC is noting and taking action on their views.

We should feed back to all members who were asked for comment, whether they responded or not.

As well as feedback on individual issues, the BMC should produce stats annually about how many surveys we did, and how many members were consulted / responded.

We need to feed back a breakdown of the responses given. We also need to tell members “what will happen next”. Feedback on survey results should also be given to appropriate stakeholders, e.g. specialist committees.

Picking up the point from section 1 on “silent members”, a key metric of membership engagement are the numbers who comment on and are actively engaged with the BMC. We should aim to drive up the percentage of members who give us input and engage with us from the current “high water mark” of 7% or so. At the same time we need to benchmark ourselves against best in class membership organisations, to ensure that we do not set targets which are completely beyond anything achieved elsewhere.

At the 2018 AGM, significant concerns were raised about a perceived “transfer of power” from membership to the board.

Holding regular surveys to ask for members views, and acting on the results, will respond to these concerns by showing that the Board values members views, is asking for them, listening to them, and acting on the wishes of the membership.

The Board and National Council should also review, as a standing agenda item, numbers of members joining, renewing their membership and leaving the BMC. For members leaving, they are asked to complete a brief survey on why they are leaving, and an analysis of results is available and should also form part of the regular review. Whilst figures at a point in time are useful, trends should be the main focus.

4.7 Ability to personalise communications and BMC website to members.

This has not emerged as an ORG recommendation. However, when we look at how modern organisations increase member engagement, a consistent theme is to make the communications and the website experience more personalised and relevant to the individual.

As well as allowing us to better select members for surveys and polls, the changes to the BMC members database suggested in Appendix 1 will allow us to more accurately target and segment our mail, email, website content, and other communications to our membership.

This personalisation should take two forms -

1. Personalisation of channel. Modern communications allows a very wide variety of channels to be used when communicating with members (email, Facebook, Messenger, Instagram, Twitter etc. etc.). There is a marked difference in the channels preferred by older vs younger members. Using the wrong channel for the individual member means our message will never be read. Unless we adapt to this we will increasingly fail to reach our younger members.
2. Personalisation of content. Our members have widely varying interests. Once we know what their interests are, we can send them only that content which they are interested in. This makes our communications more relevant, and more likely to be read.

In terms of personalisation of content, it is a common complaint that there is some very interesting and relevant content on the BMC website, but that it can be very hard to find it

One priority for 2019, once extra information on members preferences starts being collected in the members database (see Appendix 1), should be the implementation of the planned “My BMC” menus on the BMC website. Here we can gather together in one place, all the content most likely to be of interest to each member, using our knowledge of their location, favourite areas of the country, and their mountaineering interests. Hence we can deliver to members all the existing content which they are likely to be interested in, but may not have seen. Obviously as new content is added, it will also be targeted to those members most likely to value it.

General communications.

When communications are issued, particularly via website updates, it is easy for them to be lost or overlooked.

This can lead to feelings of frustration amongst members, where they are partly pleased to find that the BMC has been doing something that they are interested in and supportive of, and partly frustrated when they realise it started some time ago, and they’ve only just found out about it!

Being able to target specific members using their specific interests will help with this.

The new “clubs/huts finder” website tool has been extended to walls & shops. It is filterable by region and has individual links to the map items. This should be publicised along with a direct link to the map.

Finally, the BMC Community (Local Areas) site badly needs an update. On this point, note that there are around 26k BMC members signed up to the local areas (community) sites. Some of this data looks genuine whilst other data is clearly false. A significant % of it will be out of date. We did consider whether these signups could be used to improve membership engagement. However current efforts are focused on de-duplication & cleansing of member details across all BMC sites (the SSO - Single Sign on changes). Not felt appropriate or best use of resources to use this data in isolation.

When specifying the SSO changes, use of social media signon was considered, but it was felt that SSO and data cleansing / deduplication were higher priorities.

“Lessons learned” from the current communities (local areas) site are that sites need regular content updates, “look and feel” updates, and technology refreshes. Visitor numbers need to be tracked and action needs to be taken if use is not what is expected / needed. Effort needs to be spent on making them relevant and driving traffic to them. All BMC sites need a single sign on.

Note that currently the communities site is the only “official” way of storing area content - agendas, minutes of meetings, papers for meetings, events etc. but the site is unfriendly, little used and ineffective. This point is also referenced in section 4.1 (point 21).

4.8 Membership Engagement - Volunteers

It is vital that members who are BMC Volunteers are engaged positively -

- Many (most?) of the services which the BMC provides are delivered by volunteers.
- Most of the engagement which the wider BMC membership receives is delivered by volunteers.

BMC Volunteer numbers

There are no accurate counts of BMC volunteers, especially for clubs. Some estimates -

1. Board / National council / Local Area Reps / Specialist Committees and working groups - around 200 - plus the subsidiaries and trusts - another 100. Total 300?
2. Volunteers working in access, conservation and comps (crag cleanups, festival support, comp judges) - between 1000-1500, some of whom (e.g. comp judges) may not be BMC members. This category would also include volunteers in BMC affiliated organisations and trusts, e.g. Mountain Training UK, Mountain Heritage Trust, Association of British Climbing Walls, Association of British Climbing Training Trust.
3. Clubs volunteers - there are over 300 clubs affiliated to the BMC with between 26-28k members - assume average of 8 committee members per club so 2400 committee members. Most affiliated clubs have many more volunteer roles - e.g. hut maintenance, meet organisers, novice support (and for some larger clubs, guidebook production). The total "affiliated clubs volunteer" figure could be 5000 or more. Whilst not as "directly relevant" to the BMC as the first two categories of volunteers, they are relevant as they provide a feeder from club volunteering to BMC volunteering and secondly because in volunteering for clubs they are often working in support of BMC aims and objectives.

So the total volunteers figure for the BMC, and its affiliated trusts and clubs, will be between 6300 and 6800, could even be higher. This is around 8% of total membership.

Although club members are around 30% of BMC members, most volunteers in category 1 above are club members. There is a natural progression from volunteering for your club, to volunteering for the BMC. A number of BMC volunteers hold more than one BMC volunteer role; for example area chairs and secretaries are often also area NC reps.

Current Support for Volunteers -

"Volunteer specific" communications & services from the BMC to volunteers are limited. See support for clubs volunteers in section 4.9

There is an introduction pack for local area NC reps, chairs and secretaries.

National Council Volunteering Strategy paper 2018.

National Council has received a paper "Update on Progress towards Developing a BMC Volunteering Strategy" at the Feb 2018 NC meeting. The objectives of this paper were to -

- Support the BMC's efforts to develop an active, supportive and welcoming community,
- Provide more support for events and initiatives at a local level,
- Enable the BMC to engage with the huge social potential of the outdoors,
- Develop new events and initiatives aimed at supporting longstanding, new and prospective members,

- Support members with their skills development, access and conservation work, and environmental contribution,
- Help the BMC to investigate and develop innovative ways of engaging its membership and audience in addition to the Area Meetings, clubs and committee structures,
- Respond to the BMC Independent Organisational Review Group Report (November 2017) and in particular recommendations 3, 49, 50 and 51,
- Help to steer the organisation when changes requiring consultation or which have the potential to generate controversy need to be made.

This paper provides much useful background, and contains proposals in a number of areas including -

- Volunteer award and recognition schemes
- SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the current state of BMC volunteering.
- Recommendations for short and longer term actions.

A volunteer survey was carried out in Dec 2017 to gather some key metrics from existing volunteers. Just under 200 people responded. Results are available separately.

We have numbers and names for a small % of volunteers, but for the majority (clubs volunteers) we do not know accurate numbers, their names, their skills, the amount of time spent, or the type of work done.

Many of the actions proposed in the Feb 2018 paper will improve engagement for volunteers, and are complementary to the proposals in the remainder of this section. The recommendations in the NC volunteering strategy paper should be implemented.

Other ODG workstream impacting on volunteers

Workstream 8 considers volunteers from the viewpoint of improving their engagement. Other ODG workstreams will also consider and impact volunteers from different perspectives -

- A volunteer who is a board member will be most impacted by workstreams 1-4.
- National Council members will be most impacted by workstream 5.
- Local area chairs and secretaries will be most impacted by workstreams 5 and 8.
- Partner and Clubs volunteers will be most impacted by workstream 7.

The impact on volunteers needs to be considered holistically across all ODG workstreams. This workstream makes 3 specific additional recommendations, which are complementary to those in the Feb 18 strategy paper.

Recommendation 1 - knowledge and skills transfer (dependency between ODG Workstreams 2 and 8).

More volunteer training material is needed. In particular the BMC does not have any record of the skills held by current volunteers, and a significant issue is that there is little or no succession planning. This is particularly a concern since many volunteers are older members, often retired people donating their free time for the benefit of the BMC.

Although the substantive work on this topic belongs (per the Implementation Group update Aug 2018) in workstream 2 - Operations and Finance (under item J (Resourcing) ii (Volunteers)), the membership engagement of volunteers will be considerably improved by carrying out a knowledge and skills audit amongst existing volunteers.

This should produce a “traffic light” style report, where skills and knowledge sets which are critical to the BMC, in short supply, and only possessed by one or two older members would be flagged as “red”.

Encouraging & facilitating older members to pass key knowledge and skills to the next generation will improve engagement for both existing and new volunteers.

Recommendation 2 - training - social return on investment.

BMC Volunteer Calum Muskett is currently doing a Masters Degree on the use of Wales' natural resources for the health and wellbeing of future generations i.e. participation in the outdoors. As part of this he has been evaluating the topic of Social Return on Investment (SROI). A brief intro to SROI can be found here- <http://www.socialvalueuk.org/resources/sroi-guide/>

We recommend that the BMC investigates the use of SROI in greater detail. There may be a business case for additional targeted training of volunteers, using BMC training partners where appropriate. Providing free or discounted training as recognition of time contributed, would act as a reward for significant contribution, and improve the engagement of volunteers. Improving both the skills and engagement of selected BMC volunteers may well provide a substantial “social return on investment” to the larger BMC membership, and the wider outdoor community whom we represent. If we demonstrate the “social value” of the BMC using a methodology developed with the UK Cabinet Office, this may well be useful to us in engaging with Sports England, Government, and other external bodies.

Recommendation 3 – additional volunteer benefits.

Volunteers don't work for the BMC for profit or handouts, and we don't want to engender that culture, but we could make them feel more valued by showing we recognise their efforts. Other options which might benefit volunteer engagement are -

- Better discounts from partners
- Free copies of BMC guide books
- Annual event(s) just for volunteers
- Maybe an annual Christmas meal they can attend and talk to other volunteers at (combining areas where they have common aims or crossover i.e. Peak, Yorkshire and NW).

4.9 Membership Engagement - Clubs.

Note that as described in section 1.4 above, workstream 7 (Partnerships) is responsible for recommending improvements in the BMCs relationship with clubs as organisations. This would include any recommendations involving clubs committee and huts committee. This section focuses on recommending improvements affecting the engagement of individual club members. Some of this will have already been covered under sections 4.1 (for club members attending local area meetings) and section 4.8 (for club members who are volunteers). Hence there are relatively few additional recommendations to make in this section.

As in 4.1, the BMC should encourage stronger links between Local Area meetings and clubs which operate in that area. Clubs should be encouraged to bring BMC related issues and concerns to their local areas where appropriate. Local areas should use clubs as a channel for engaging with the members in their area. Local areas should publicise the BMCs “club finder” map. <https://www.thebmc.co.uk/climbing-wall-finder#clubs>. The new clubs/huts tool will be extended to walls & shops. It is filterable by region and has individual links to the map items. <https://www.thebmc.co.uk/organisations/clubs>

Jane Thompson is working with the clubs committee to standardise the data that is to be displayed on both the map popup and the list.

Clubs / Huts / Walls & Shops will be able to update their own data and location (subject to moderation) <https://www.thebmc.co.uk/organisations/clubs>

Clubs may wish to form “communities of interest” - groups of clubs working together, either within an area or across areas, to address issues of shared concern or benefit.

Current state -

- BMC sends messages to clubs via email. Messages can be either to all club members, or to club contact, depending on relevance. These messages can originate from the clubs committee or from Marketing and Comms. Clubs committee emails targeted at all club members are always sent by Marketing and Comms.
- 1st week of each month there is a general email newsletter to all BMC members.
- All BMC clubs members are sent an additional newsletter as needed - may be around every 2 months - this email has details of upcoming courses.
- BMC now have a “main BMC communications contact” on file for each club.
- The clubs committee meets quarterly, the chair drafts a mail out to club members with news, the clubs committee members personalise this, and send the mailing to all clubs.
- There are currently 2 student club reps on the clubs committee. They have set up a FB page for student club officers, may expand into Twitter and Instagram.
- As part of the National Council reconstitution workstream, national clubs reps will be introduced on the National Council.

The BMC does provide the following for clubs volunteers -

- Training days for club committee members
- Liability Insurance for club committee members
- A national “clubs committee” to coordinate, discuss and progress issues for clubs
- A national “huts committee” to coordinate, discuss and progress issues for huts
- Novice training material for club volunteers working with novice club members

Issues

- While Sports England funding disappeared, club member support dropped off
- Contacting student clubs has traditionally been problematic (high turnover of members compared to other clubs), especially if the main contact is the student union.
- There have been frustrations around getting clubs content onto the BMC Facebook page - might set up a specific “BMC for Clubs” page.
- It is a common request from clubs that the BMC local areas need to do more to promote the local clubs.
- There is significant variation between clubs as to how much of the information sent to the club contact by BMC is then sent on to club members.

Recommendations

- We understand that the BMC is resuming direct club member support via the subsidised club workshop programme now that SE funding has resumed. This covers navigation, lead climbing, improvised rescue for climbers, first aid, scrambling, winter walking & climbing etc. Most of the courses will be based in club huts, so that clubs also benefit from the programme. Cost of this is expected to be around <removed>.
- Ease the transition when students leave uni clubs, making sure we inform them about clubs in their area that they could join.

4.10 Hold and moderate discussions.

ORG recommendation 18 “The BMC should implement a technology based national polling and discussion platform to gauge member views on national, international and local issues.”

The “polling” element of this recommendation is covered under recommendations 4.3 and 4.4, and Appendices 1, 2 and 3.

This section covers recommendations on the “implement discussion platform” element.

We suggest that this is something which is optional for the BMC, certainly in the first phase of developments, and could be left to a later phase, or accomplished using existing (non-BMC) platforms.

There are currently a number of online platforms where unstructured discussion about matters relevant to the BMC take place. Examples include UKC, UKH and UKB forums, various hillwalking forums, and various open and closed Facebook groups.

In addition, the larger clubs (e.g. the Alpine Club, Climbers Club) have their own online “members only” forums where discussions may also take place.

The public forums (especially UKC and UKH) get very large visitor numbers, so most topics are discussed, and a wide range of views expressed. On the other hand, discussions on UKC can be very robust and occasionally acrimonious, and display a distinct male bias. There is anecdotal evidence that some female members (and for that matter some male members) do not enjoy or value using UKC, so the views expressed may not be representative.

Obviously we cannot moderate discussions on platforms we do not own. We should however encourage discussions to be factual and courteous.

If the BMC were to launch its own forums, we would need to encourage members to use them, and we would need to moderate them. This takes us into the area of “codes of conduct”.

Also, we would still need to monitor the existing forums for matters which deserve our attention, and potentially require a response from staff or key volunteers.

As a minimum, we need to formalise the fact that we monitor, and respond where appropriate, to existing forums. This includes area reps (both specialist reps as appropriate, plus the “general” roles of Chair, Sec and NC reps) making sure they are aware of area issues, e.g access, conservation and participation issues, whether affecting individual or club members.

Setup of a BMC forum is not a current priority. Staff should focus on monitoring existing hillwalking, and climbing forums.

While the above is true at a “whole BMC” level, there are a number of specific areas where forums for particular constituencies might be useful. Examples include some of the “national constituencies” being considered as part of the ODG National Council reconstitution worksteam.

Equally if the BMC starts to make more extensive use of surveys and votes, and if the positions “for and against” on complex topics do end up generating extensive debate on non-BMC forums, it may be appropriate to consider bringing this in house, so that for example individuals participating are clearly identifiable rather than being able to operate anonymously behind a username.

We should review this when the “My BMC” changes are made following the MSO changes (MSO changes scheduled for mid Oct 2019). This will hopefully increase BMC site visits and satisfaction levels, at which time it will be appropriate to reconsider this topic.

4.11 Single director accountable, increased head office support.

Delivering best practice in Membership Engagement for the BMC requires many areas of the organisation to change and evolve the way they currently operate. Improvement will require coordinated action by both paid staff and volunteers.

It is recommended that a single Board Director is made accountable for the monitoring & measurement of, and delivery of improvements in, Membership Engagement.

Most of the changes recommended in this report would be delivered by volunteers, and therefore will be at zero cost to the BMC. However, additional cost is likely for a number of direct items (for example payments to external companies for complex annual surveys). Items such as continuation of AGM proxy voting are assumed to be included in existing budgets.

The number and complexity of the recommended changes is such that specific targeted head office volunteer support, over and above that which can be provided by existing staff, will be needed in a number of areas. Examples include -

1. Assisting area chairs and secretaries with publicising area events, and general communications to members and prospective members in area, through a wide range of social media, to allow targeting of younger age groups, who do not use email as a primary communications channel.
2. Assisting area chairs and secretaries with planning and running area events, and dealing with controversial area issues, including use of surveys and voting if appropriate.
3. Assisting other BMC volunteer groups as required to carry out a skills survey and arrange whatever additional training, coaching and development may be required.
4. Targetted Head Office support for National Surveys.

It is unlikely that a single person can be found with all the skills to discharge these tasks, and therefore it may be most appropriate to provide this support via two or more part time roles.

The incremental costs for items 1, 2 and 3 above are covered in the Summary of Costs below (section 6) under items 4.1, 4.2 and 4.8 respectively. Hence no additional costs for this section appear in the Summary of Costs table.

Peak demand for additional support will be while change is taking place; once improved member engagement has been delivered and become “business as usual”, we may be able to ramp this down.

Since head office are now responsible for all email traffic to members, the issue of emails being rejected to spam, or received but unopened, sits with them. Ongoing attention will be required to ensure that as much email as possible is whitelisted, that rejection levels are as low as possible, “open” levels as high as possible, and that members find BMC emails of value and interest. We suggest that reporting on this topic forms part of the regular reports on Membership Engagement which the Board and National Council need to receive.

Other factors to consider are membership retention – see final para of section 4.6. Also note the following factors influence membership retention –

1. Payment of individual subs by Direct Debit has a positive impact on retention
2. Subs increases have a negative impact.
3. Having more tailored membership packages and options, to make BMC membership more appropriate to the different membership groups in the BMC “broad church”, would positively impact retention

It is likely that additional staff support to improve membership engagement above and beyond what is discussed above will be required in the medium to long term. However it is only when a responsible director begins to monitor membership engagement in detail that we will identify the specific hot spots where additional support is needed. At the present time it is not possible to state where, and how much, additional support will be needed, only that it is likely to be required. It might affect web front end, back end systems, survey design, social media support, event support or a number of other different areas.

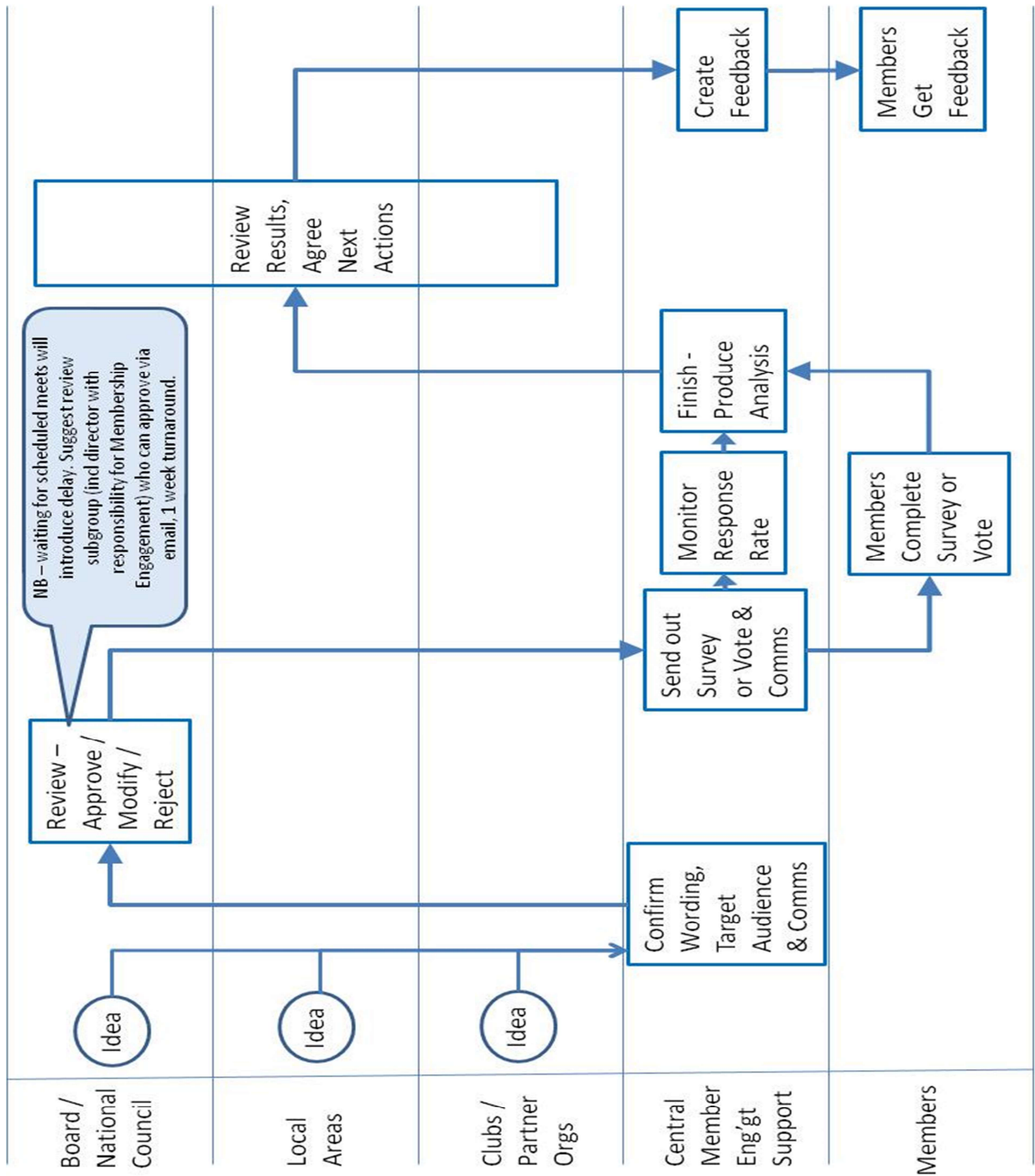
This report did not benchmark the BMCs levels of membership engagement against comparable organisations. However it is recommended that this benchmarking is done, on a continuing basis, as part of the implementation of these recommendations.

Transition to BAU (Business as Usual) and coordination with ongoing ODG workstreams.

With the publication of the final version of this report, and with ongoing work still progressing on other ODG workstreams, two questions need addressing -

1. The need for a handover from the report author to the director responsible for Membership Engagement, and the implementation of the various actions needed to make the recommendations “BAU”.
2. The need for ongoing coordination between Membership Engagement activities and the remaining ODG workstreams to ensure necessary coordination takes place, and that synergies are obtained and retained.

5. SURVEYS & VOTES - PROCESS FLOW DIAGRAM



6. SUMMARY OF COSTS

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Appendix 1 - Current Members Database, proposed additions

Best practice in digital engagement is for contact to the individual to be (where appropriate) targeted and personalised.

The BMC members database is called CIMM, and has been in existence for a number of years. We already hold significant data about each member, for example -

- Personal details (Name, Address, Phone, Email)
- BMC Membership number and type (individual, family, club, upgrade)
- Club membership(s) if any.
- BMC Shop Purchase history if any.
- Insurance purchase details if any.
- Committee memberships if any.

Work is currently taking place to expand the data which can be held for each member. This is associated with the MSO (Membership Services Online) changes to the website sign-on, but also involves storage of extra data per member on the backend servers. Currently MSO is only accessible to club officials to maintain details of club members. However changes are planned to allow individual members to access MSO, to change their own details.

MSO for individuals will go live in mid Oct 2019. It will have a phased release to groups of members rather than all members at once, this should lessen the impact on the Membership Team. The idea is to start with existing web users and assess the impact.

A further set of initiatives are then planned (e.g. inviting members to complete extra data when they take out insurance) to get members to add more data about themselves, including -

- what their interests are (indoor climbing, hillwalking, bouldering, sport, trad, mountaineering, skiing, etc. etc.).
- BMC “home” local area (or different if they’ve agreed to go somewhere else).
- Where they normally carry out their sport, e.g. lakes, wales, peak, SW, Scotland etc.
- Whether they are a volunteer, if so for what (access, crag cleanup, guidebooks, area rep etc).
- We should also consider capturing members who might be interested in volunteering, so that we can approach them either centrally or via their local area, depending on their interest and expertise.
- Preferred communications channel - post or electronic? If Electronic, Email, Messenger, Facebook, Instagram, other social media?

Keeping additional data about members, and using it to drive increasingly personalised contacts will require review from a GDPR / Data Protection viewpoint, to ensure that this is consistent with the BMCs Privacy Statement (which may need to be modified).

Extracting of lists of members for contact will need to take account of various “do not contact” scenarios - e.g. do not contact people who have not consented, do not contact minors, etc.

We already have metrics about which communications methods are preferred by different age bands, and can already see that whilst email is the most successful contact channel for the majority of members aged above 50, younger members are much more successfully contacted using methods such as Messenger and other social media channels (e.g. Facebook, Instagram).

We could currently (but do not) customise contact method by age band; we should do this in future, and our ability to personalise contact method will improve when members record their contact channel preference as part of their personal data on the BMC website.

The handling of contact lists will require care, since they represent a security risk. For this reason we recommend that they are kept under central control, with invites for polls, surveys etc being sent out centrally on behalf of areas.

For further detail, contact Marketing and Communications.

Appendix 2 - Surveys & Votes – Current technology, recommended platforms.

Definitions

A *poll* is process in which a group of people are either -

- Asked for their opinions (for example, to help form strategy) - defined below as a **survey** or -
- Asked to cast a vote, as part of an established democratic process, defined below as **voting** e.g. at an AGM or EGM.

A **survey** is a detailed study to gather data on attitudes, impressions, opinions, satisfaction level, etc., by polling all of or a section of the membership. The aim is to find out information about their opinions or behaviour, usually by asking them a series of questions.

A **vote** is the action or process of indicating choice, opinion, or will on a question, such as the choosing of a candidate, or whether to pass a resolution at an AGM or EGM.

Background. Polling for both surveys and votes is well established at the BMC. This appendix summarises the current situation and facilities used. It makes a number of recommendations for polling going forward.

Note that for all Survey and Voting solutions, to get a representative response rate, both areas and Head Office would need to commit to engaging with the target audience, via all available communications channels.

Response rates –

- At the 2017 ORG “whole membership” survey by 20:20, 5000 (7.4%) of 67,000+ members contacted responded.
- At the 2018 AGM around 7.8% of the membership voted, mostly by electronic proxy.

Both these figures are higher than we might typically obtain.

Current Solutions

1. Surveys via Mailchimp & SurveyMonkey

The BMC currently uses a Mailchimp & SurveyMonkey solution to carry out surveys of its membership

The benefits of the Mailchimp / SurveyMonkey solution are that it is in place, we already have staff who know how to use it, and it is cheap; we have an annual subscription based on the size of the mailing list (i.e. number of BMC members with emails). The Mailchimp element is also needed in any event for bulk mails to members. Therefore no extra IT costs for surveys.

Staff costs for surveys –

- Simplest survey (single issue) – 1 day to create, issue and analyse results.
- Average survey – 1 week to create, issue and analyse results
- Complex survey – may be 3 weeks or more. If resource allows then carry out in house. Otherwise, can be outsourced. For an example of outsource cost, the 20:20 survey for the ORG in 2017 was complex, e-only, and total cost was <removed>.

It has some disadvantages -

- There is nothing to prevent recipients forwarding the survey email, and hence a single invite being used to generate multiple responses. Although products such as <https://help.surveymonkey.com/help/duplicate-protection> may help.
- Where members share an email, only one invite will be received.
- Members who do not have an email address, or where the BMC has an out of date email address for them, will not be included; however, around 80% of the membership do have valid emails.

There are two options to avoid the “forwarding” issue –

- using a more expensive outsourced solution instead of SurveyMonkey
- we could potentially send SurveyMonkey invites via a custom change to the MSO solution (cost TBA), thus ensuring that only members logged in via the BMC website can complete surveys.

The current SurveyMonkey solution is only suitable for surveys, not voting.

We recommend we continue with the current solution for simple and average surveys - it is known, quick and cheap.

In terms of capacity (how many surveys per year can head office handle?) - with existing staff levels, we could provide up to 3 average national surveys per year. For area surveys, if there was a standard format and the poll did not require extra promotion beyond area newsletters, then two simple surveys per area per year could be feasible.

2. Postal Surveys

Sending postal surveys to members for whom we do not have a valid email address is unlikely to be cost justified by the low volume of responses - 16-17k members mailed, 7.4% response rate at best = best case perhaps 1200 extra responses. 10 years ago member surveys were entirely postal. Cost is high due to postage, and survey responses having to be manually coded up. This requires outsourcing to a specialist company. Approximate costs <removed> to mail 17k members and analyse results from 1200 responses.

3. Micro surveys

BMC members who buy insurance are currently asked their opinions at the end of the transaction via a “micro survey”. We add extra fields with “yes/no” sliders at on the appropriate member screens, record members responses, summarise the results for all members who completed during a period, and use the insights gained to improve our dealings with members.

This solution could be extended to gather opinions on simple issues, as an alternative to SurveyMonkey. It is more secure – only members logged and authenticated via the website can complete a survey response – but it is more expensive with a greater lead time.

In the longer term, the BMC should investigate integrating feedback from various sources of member opinion (for example surveys and forums). Products are beginning to emerge which can do this, based on single question microsurveys and natural language processing e.g. <https://www.wootric.com/>

4. Electronic & Postal Voting – National AGMs & EGMs

Although there are cheaper electronic voting solutions available, we recommend that the BMC continue with ERS (Electoral Reform Services) for electronic and postal proxy voting at National AGMs. There are three reasons for this -

1. The ERS has a “gold standard” reputation for impartiality and even handedness, and this is helpful in making the results of any vote beyond question. Questions are checked, response rates monitored, and results analysed by a neutral third party.
2. Electronic voting emails are prone to be treated as spam by certain email filtering programmes; thus they never reach their intended destination, resulting in a lower turnout. The ERS is known and “whitelisted” by a number of spam filters, more so than their competitors, hence our email invitations to vote are more likely to reach members, and voting figures will be correspondingly higher.
3. Their service allows us to send both electronic and postal proxy voting forms to the entire electorate.

Due to the significance of the topic, effective planning, governance and lead in time is vital.

5. Electronic Voting – Area issues.

Area Chair and Secretaries might decide that a binding vote may have to be taken when even after surveying (the cheaper option) the area membership, and establishing the views of the majority who responded on some contentious issue, they are still unable to resolve conflict amongst area members.

At the time of writing a technical solution for area voting is not live, though there is a proposal for how it could be developed.

We could conduct a vote as a simple A or B question via the members login (MSO) screens, once individual member use of MSO goes live (mid-Oct 2019). Cost per question around <removed>.

As only 80% of members have emails, and at best 7% of those contacted respond, in an area with 10k members, we might expect 560 responses, or <removed> per vote received.

A decision made by 7% of area members is considerably more valid than one made by 20 members out of 10,000 (or 0.2%). Especially since 80% of members would have been asked for their opinion.

The 2019 Articles of Association have been changed to allow area electronic voting (para 28.3.4).

Appendix 3 - Surveys & Votes - Skills needed

Ensure that both the questions asked, and the conclusions drawn from responses, can be defended as neutral and unbiased. Avoid errors such as -

1. Sample (members included) not representative / biased
2. Sufficient background not provided for informed response
3. Leading questions
4. Options not presented
5. Conclusions not justified by the responses

For proxy voting via the ERS, they advise on ballot design as part of their service; however, internal review and good governance is still vital.

For surveys using SurveyMonkey or custom questions asked via MSO, we will need to retain and further develop the appropriate skills internally to ensure questions asked and conclusions drawn from responses are unbiased and objective.

The level of skills needed depend on the complexity of the questions asked.

Designing and interpreting a neutral, non-leading poll, vote or survey with multiple (particularly nested) questions is not a simple matter. There are a number of potential sources of bias which must be recognised and avoided. Without the right skills and training it is easy to accidentally skew the results, or reach misleading conclusions. Staff skills are key.

We must consider also whether the average member will have the detailed background knowledge on an issue to make an appropriately informed choice. If there is any doubt about this, and the issue is contentious, it may be appropriate to send out brief documents from the “opposing camps” with a survey or vote, and invite members to read the statements from each side before making their decision.

Survey and Vote design should be a central service provided to areas by head office.

A further consideration is to strike the correct balance between binary or multiple choice questions, which constrain members freedom of expression, and may result in the loss of nuance, against “text boxes” where the member can insert any text they wish. Obviously the former are quicker to analyse, and easier to interpret. The latter give more freedom of expression to each member, but it can be hard to draw meaningful conclusions about the views of a majority.

In a “text box” survey, if the members do not answer the question asked when completing text boxes (which has happened in the past to a significant extent), drawing any valid conclusions can be very challenging.

Having designed the survey, we then issue it to members inviting them to complete the survey during a specified period.

Whilst the survey is open, we need to track response levels (at overall NOT individual level), and issue reminders if needed. Reminders should be sent to all members who were surveyed; it would be both difficult and inappropriate to target only those who have not yet responded.

We should liaise with clubs both locally and nationally as appropriate, to ask them to encourage their members to complete surveys.

We should consider use of common survey templates across areas, stable over time, to allow comparison of results within an area over time, and between areas.

Note that when asking questions about products or purchases, we will tend to get responses that members will want it cheaper, faster or better (i.e. time / quality / cost). We should be careful how we ask questions about purchases as we may just get these responses. Even then it will be useful to know where the majority feels we should be striking a balance. However additional questions and/or careful structuring of questions may be needed to get responses beyond these basic factors.

Appendix 4 - Creation, Control and Use of Mailing Lists

From a systems design viewpoint, it is not good practice to have multiple copies of members data. There should be one master copy (the BMCs members database) and all communications to members should use contact details from this list.

When area secretaries and others used to keep their own copies of mailing lists, problems arose over time because either –

- Members tell the area of a change of email but do not notify BMC head office or
- Members tell the BMC head office of a change of email but the area is not aware.

Also the more copies of data exist on more different machines, the greater is what is known in information security as the “attack surface”. In other words, the higher the chance that a computer with a copy of members data is hacked and members details become available to those who have no right to them. Such an incident would be a data breach, and likely notifiable under GDPR to the Information Commissioner.

When GDPR was introduced, area secretaries and others were asked to destroy any area mailing lists which they held, and to send out via Head Office any communications needing to be issued via email to area members.

This has led to a degree of frustration.

A number of developments are planned to address these concerns during 2019, as part of the BMCs Digital Strategy. Key points are described below -

Area emails

A lot of work is going on at BMC HQ to monitor, and increase the open rate and engagement of email to members. A key part of this is ensuring that we have a consistent style, tone and language in our communications to members. We can show that when we do this, email open rates increase and unsubscribe rates drop; this must ultimately benefit member retention.

The basic concept for “email to area members” going forward is that there are two email lists of area members for each area. A list of all area members, and an “engaged” list of active local area members. Members get onto the engaged list by completing this form - <http://bit.ly/bmc-areas>.

Note that when area secretaries did used to hold separate email lists, it would only be a list of active local area members –probably the “less than 1%” who had ever attended an area meeting .

For the “all area members” list, the approach is that Head Office send them a single email per quarter, the content of which MUST be agreed between Head Office and the area chair, secretary and reps. The basic objective of this email is to inform all area members of important AREA news and issues, and to encourage some of them to engage more with the BMC, and hopefully transfer to the engaged list. The area reps control WHAT is in the email. Head Office staff control HOW it is sent. Area chair, secretary and volunteers need a schedule for when these emails are to be sent, and a deadline by which content is needed. This needs to include area meeting dates, key events, contact info for key BMC contacts etc.

For the “engaged” list, 3 areas have been trialling the following approach; it is now recommended that the remaining areas adopt it -

1. Local areas can email the “engaged” list pretty much at will, by submitting email content to Head Office. For this to be worthwhile, we need to build up lists of engaged members for the other areas, using the form above.
2. The advantage of areas doing this via head office is that areas benefit from a high level of email knowledge to optimise open rates, so areas may prefer to continue on this route. Head office can cope with up to one email per quarter for all areas using the current “manual” approach.
3. We should review demand from areas as this facility becomes more widely used. If demand rises beyond this point (likely in the medium term) we should build a facility that allows local chair and secretaries to enter text of emails to be sent to “engaged” members, and send the email directly without the involvement of head office. Guidance should be provided to chairs and secretaries as to how to maximise open rates and engagement of emails sent via this method.

Other (non email) channels for area comms to members

The use of email is skewed towards an older male demographic, so areas should also use targeted communications across the range of social media platforms in order to reach a more diverse audience. For example by using their local area page on Facebook, and by use of Twitter, Instagram and so forth.