

Choosing Direction

Formally adopted December 2013

Minor amendments June 2016, September 2016



Strategic thinking for 2013-2018

Version Control:

	September 2012	Trustee agreement to prepare new Strategy in association with expiry of Strategic Plan 2008-2013.
	19 February 2013	Strategy Workshop for staff and trustees, Barn, Henley-on-Thames
	17 April 2013	Core Strategy Group appraise report and identify key themes to progress
	28 May 2013	Draft Strategy <i>Choosing Direction</i> issued to trustees prior to meeting
	13 June 2013	Trustees assess broad outline and recommend changes within one week of meeting.
	July 2013	<i>Choosing Direction</i> revised and submitted to Core Strategy Group and staff for comment.
	16 July 2013	At AGM announcement that Strategy will appear on website for comment by members.
	August 2013	<i>Choosing Direction</i> consultation draft finalised and issued on website for comment
	December 2013	Trustees consider feedback and sign-off amended document.
	June 2016	Amendments to para 30a and 34.
	September 2016	Amendment to para 23

The Development of this Document

Choosing Direction has incorporated ideas from diverse sources through a series of iterations. From an initial, professionally-convened workshop, key work themes were identified by a core group, and incorporated into a draft approved by staff and trustees in June 2013. Following an announcement at the AGM, a revision was issued on the website and comments invited. Some 136 points were raised by members. These offered broad general support, alongside a more diverse, but frequently consensual view of work where work-effort should be focused (or avoided). Feedback was reviewed by both staff and trustees, and a summary of key points endorsed and published on the web. This feedback summary now forms a component of the range of documents accompanying the strategy, and will be used in business planning during the implementation phase.

Choosing Direction? The Purpose of this Document

1. The remarkable achievements of the Open Spaces Society derive from the strenuous efforts of a handful of skilled staff and volunteers, working to modest resources. While our scope for radical change may be limited, the evolving economic and political environment, coupled with emerging issues and opportunities, require a re-appraisal of our overall direction and emphasis. It is not the purpose of this document to reiterate the core tasks which form the backbone of the work of the OSS, nor to set fanciful aspirations, but instead to provide a fit-for-purpose, *nuanced shift of focus* covering the next five years, to help ensure that OSS remains securely at the forefront of the social movement protecting rights to paths and open space.

Introduction

2. The Open Spaces Society was founded in 1865. It has a remarkable legacy, being Britain's oldest national conservation body, the only national society which seeks to protect and preserve all kinds of public rights of way, commons, greens and open spaces for all kinds of users. Two of its founders went on to found the National Trust in 1895. The society has played a key role in protecting high profile sites like Hampstead Heath, Epping Forest, Wimbledon Common, Ashdown Forest and the Malvern Hills, fought for the re-instatement of common land which had been used for wartime defence and food production, was active in promoting the registration and protection of common land and common rights under the Commons Registration Act, pursued initiatives which led to the Countryside and Rights of Way Act 2000 (right to roam), and has always been at the forefront of campaigns to protect and promote greens, commons and rights of way.
3. The society inherits an outstanding reputation based on solid achievements. Today, its modest resources and expert staff and volunteers are severely stretched in meeting the demands generated by escalating pressures on open space and paths.

Underlying influences on the future of the OSS and its choice of direction

4. These include:
 - a) The poor national and European economic outlook, imposing severe constraints on personal budgets and local authority funding.
 - b) An increase in running costs for the society.

- c) A modest membership, with some decline especially from local authorities and parish councils.
 - d) A political framework more anti-pathetic to environmental protection, or to the generation of legal entitlements through use 'as-of-right', especially where these are perceived as inhibiting development and growth.
 - e) The presence of significant funding opportunities in certain quarters, including Heritage Lottery, Leader, sponsorship and grants.
 - f) Major pressure on the society's limited staff to answer the demands placed upon them.
 - g) A casework load which is externally generated, hence difficult to regulate or manage.
 - h) A modest profile for the society relative to its proud inheritance and modern achievements.
5. In the light of these, the plan must have organisational development and survival at its heart: survive, thrive, and achieve. The starting points for the plan are:
- a) The OSS will exist in five years' time.
 - b) It will be on a secure footing.
 - c) It will be effective in pursuing and achieving its objectives.

Core Principles

- 6. All work of the society will continue to derive from its mission, vision and strategic aims.
- 7. **The OSS's mission is to protect, increase, enhance and champion** the common land, village greens, other open spaces and public rights of way of England and Wales, and the public's right to enjoy them.
- 8. **The OSS's vision** is that:
 - a. everyone should be able to enjoy the benefits of commons, greens, other open spaces and public rights of way within easy reach of their homes, workplaces and leisure destinations;
 - b. existing commons, greens and other open spaces should be protected for their historical, social, environmental and ecological value;
 - c. new greens, open spaces and public rights of way should be created and afforded protection wherever they will benefit society;
 - d. the public should have rights of access, on commons, greens and other open spaces and along all public rights of way, for quiet enjoyment;
 - e. public bodies should be fully aware of their obligations and duties to enforce legislation, and should act willingly to enforce them; and
 - f. the public should be fully aware of their rights and able to pursue them.

9. The Strategic Aims are:

- a. to protect commons, greens and other open spaces;
- b. to protect and enhance public rights of way and public access;
- c. to secure new open spaces and public rights of way, and
- d. to protect the beauty¹ of the countryside.

10. The Open Spaces Society's niche²: The OSS is unique among charitable and public bodies as the only national institution, covering England and Wales, which seeks to protect and preserve all kinds of public rights of way, commons, greens and open spaces for all categories of lawful user. This unified approach to the protection and enhancement of *rights* in all cases remains central to our ethos, and enhances our reputation. The society's knowledge and experience of law and case-histories, and its inheritance of achievements in protecting rights, and influencing national thinking, are unrivalled.

11. Resources and Staffing. The intention of this document is to address the resources available for pursuing the society's mission and strategic aims in the longer term by:

- a. increasing income,
- b. stabilising or reducing workload,
- c. generating capacity, and
- d. managing and focusing effort onto those areas which are most productive.

12. Any new work may require a shift in emphasis, to provide the investment necessary for longer term gains. However, staff at OSS are already 100% or more committed. This strategy cannot place increasing burdens or expectations on existing staff. Hence any work arising through this strategy will require additional resourcing or an adjustment of current assignments.

Theme 1: Society Profile and Image

13. The OSS will raise its profile among the general public, media, politicians, influential bodies and policy formers.

14. An adequate profile is fundamental to all work undertaken by the society, generating membership and funding, gaining respect and credibility, and exerting influence. The Society needs to enhance and celebrate its modern reputation to complement the historical status it inherits.

¹ The concept of beauty includes wildlife and geological features. Such associations are also recognised in law, eg in section 114 'Interpretation' of the National Parks and Access to the Countryside Act 1949.

² In marketing terms this is its unique selling point or USP.

Action:

15. The OSS will **develop and implement a communications strategy**. This will identify:
 - a. Key audiences (eg members, potential members, professional practitioners, local campaigners, politicians, professional countryside people).
 - b. Key messages and subject areas to convey to each audience.
 - c. Key mechanisms for reaching different types of audience (web, media, press, social media, publications, mail-outs etc).
 - d. How people first come across and learn about the activities of the OSS.
 - e. Mechanisms through which members, supporters, volunteers, wider public and professional/policy formers can assist each other, or keep up to date and informed.

16. Central within the communications strategy will be **enhancing and developing the website**, and associated electronic/social media opportunities:
 - a. identifying how the website may be tagged to ensure that terms placed into search engines constantly bring the society to the fore;
 - b. providing monitoring facilities, identifying why people visit, and how long they stay
 - c. identifying how it may be targeted to existing and potential member demographics.
 - d. projecting an impressive, professional, lively, visual and competent image and serving as the principal public face of the society;
 - e. generating new members, supporters and income, including legacies; providing a source of technical advice and information tailored to government, local authorities, planners, developers, members and the public;
 - f. providing a vehicle for campaigns;
 - g. providing, or linking to, a forum for the exchange of ideas and best practice;
 - h. providing a mechanism to reduce enquiries which otherwise have to be answered in person.

17. The OSS will, through publicity and establishing a permanent written record, **celebrate the 150th anniversary of the OSS in 2015**.

18. The OSS will **develop its international reputation**. It will:
 - a. Establish links and assert its role as part of a global community of associated bodies,
 - b. Contribute on an occasional basis to international workshops, conferences or publications,
 - c. Gain international recognition for the work of OSS, and seek to learn from work in other countries.

Theme 2: Membership

19. The Open Spaces Society will pursue a highly targeted membership and participation drive, focused on the demographic characteristics of its current and potential membership base.

20. Membership must remain central to OSS's survival. Members provide a consistent (but not guaranteed) income, a mandate for action, a source of local participation, and 'eyes and ears' alert to emerging issues and concerns. Membership numbers have fallen slightly, while society costs rise. Income from membership is currently inadequate to ensure survival utilising this funding stream alone, while other sources of income may be substantial, but not dependable.

Action:

21. A demographic profile of existing members and volunteers will be established.

- a. The profile will identify those key demographic features that characterise members and those sympathetic to the Open Spaces Society's objectives.
- b. Research will identify why members join and stay, eg whether to support a cause, keep up to date, get advice, solve local issues, read magazines, participate, or for social reasons.
- c. OSS membership demographics will be compared with other access related bodies, eg Ramblers, walking groups, National Trust etc.
- d. An investigation will identify those values, causes, interests and incentives which are close to the heart of existing members.
- e. From the above the demographic profile and values of potential members will be identified for marketing purposes.

22. A membership drive will be initiated to establish a larger secure membership base.

- a. In association with the communications strategy, the mechanisms to reach the greatest number of potential new members will be established.
- b. In association with an understanding of the values and interests of the target demographic profile, suitable material will be prepared to appeal to reach and appeal to potential members.

23. Information on the values and interests of existing members will be used to initiate a drive to increase volunteering and participation, including the number and range of local correspondents, recognising that different members will be interested in doing different things including fund-raising.

24. In association with a revised business model, **a variety of membership categories will be considered** (eg standard, supporter, gold, patron etc), each with different services and benefits, especially concerning advice and casework.

25. **Target membership levels** to maintain financial security, and develop the business, will be identified.

Theme 3: Funding

26. **The society will be financed through management of a diverse range of income streams, distinguishing core and opportunistic funding.** While membership provides the most reliable funding stream for core work, other sources provide significant opportunity to supplement this, and to undertake additional major initiatives.

Action:

27. A funding strategy will be developed:

- a. The strategy will identify the range of sources available for contributing to the society's objectives, including *inter alia*, establishing categories of membership, supporter or friend; sponsorship; joint action; grants; donations; investments; tax inducements; funding related to the English or Welsh Rural Development Programme/Leader scheme; contracts; legacies; memorials; sales; member appeals; wider public funding.
- b. Key opportunities will be identified and the society's finances managed in accordance with an overall itemised plan.

28. The role, implications and scale of our reserves will be reviewed:

- a. The size of the reserve fund will be assessed relative to other charities.
- b. Implications for seeking wider funding while holding such reserves will be assessed.
- c. Our reserves may be adjusted to ensure an appropriate balance of security, obligations and opportunities.

Theme 4: Priority Work

29. The Society will seek to establish a more equitable balance between casework and pro-active initiatives, with campaigning and lobbying at its heart and ethos. Casework is an important part of our work³. It assists local people to secure survival and protection for open spaces in line with our objectives, it provides publicity, raises profile, informs decision-making, identifies emerging concerns, and is seen as a force for good.

However casework load is externally generated, and potentially overwhelming so that it places a major burden on staff, who struggle to take a strategic view of importance and are powerless to regulate it. It can subsume all other initiatives, hence preventing important work being undertaken as part of a planned programme.

Action:

30. The society will increase effort on pro-active initiatives, to approach parity with that on casework.

- a. In particular **the society will at any one time pursue at least one major, high-profile campaign or initiative each year⁴**, bold and visionary where possible (as befitting the OSS heritage), identified and agreed through management arrangements and, where departing from our normal work, trustee endorsement.
- b. Potential subjects for each year's campaign or initiative will be held as part of an updated list. Subjects for consideration may include, *inter alia*, campaigns for local greenspace standards, work associated with unrecorded rights of way (to be identified by 2026 in accordance with the Countryside & Rights of Way Act 2000, lost commons (in association with the Commons Act 2006), forthcoming legislation, work associated with the Welsh Environment Bill, local support networks, election manifestos, and OSS's 150th anniversary celebrations.

31. The society will manage workload by developing a casework strategy. This will be done without denigrating the value of casework, and while supporting staff who are subject to its pressures. In particular it will **explore** ways to:

- a. Reduce the number of individual contacts, through, for example, the provision of standard advice, frequently-asked-questions, use of interactive fora, self-help groups and exchanges on the website.

³ Also the distinction between casework and other initiatives is not hard and fast.

⁴ Some campaigns may run as the society's key, high-profile initiative for more than one year

- b. Limit the resources expended on casework, through, for example, limiting case-work to certain staff, criteria for involvement, triage and time management.
- c. Manage expectations of recipients, so that they are dissuaded from taking unreasonable liberties, or limiting individual help to certain categories of member.
- d. Generate funds, through, for example, offering a range of services rather than having a single help-everyone approach, limiting the scale of assistance to certain categories of member, ensuring that recipients of help are aware of staff legal qualifications and the likely cost of purchasing such expertise elsewhere, and inviting donations.

Theme 5: The Way we Work

32. The Society will review its efficiency, modernise to take advantage of technology, and clarify management procedures. The society works from modest premises, with a small staff, using limited office facilities, and in a poorly accessible location. Such issues need to be balanced alongside the society's relatively modest needs, its established skilled workforce and limited scope for change.

Action:

33. The society will review and update guidelines governing accountability and authority of staff, trustees, volunteers, and of work parties and their members.

34. Work will be delegated to the appropriate competent level.

35. Current filing procedures will be reviewed with a view to establishing, insofar as practical, a wholly or largely electronic system, while retaining (or depositing with an appropriate archive) documents of potential historic value.

36. Office technology and opportunities will be reviewed and updated where efficiency savings are justified.

37. The society will consider options in association with the expiry of the office lease in 2018.

38. The society will develop policies to ensure that governance procedures are open and transparent.

Timing, work planning and reviewing priorities.

39. This strategy will be reviewed and adjusted annually, and an annual programme of priorities and resourcing developed.