

Royal Society Former Staff Association

Supplementary Paper to the report of the 'Where Next? Review'

Section A – Background leading to the establishment of the Review

For some time, the Committee has been running with vacancies – the Hon. Secretary post had been unfilled since 2018 (with the Chairman and other members of the Committee fulfilling the Secretary's duties) and the Welfare Secretary position had not been filled since December 2022. It is important to stress that the situation is not unexpected or unusual – many volunteer-run bodies are experiencing the same shortage of people with time to offer. The pressures on everyone have increased – those in work are working in a much more pressurised environment, with less recognition of 'normal working hours'; those in retirement have additional roles as carers and grandparents, often required to look after their grandchildren or other family members. Meanwhile the financial pressures increase on us all, through the rising cost of living. The current situation is not anyone's 'fault', nor indeed is it new – the Association went through a similar period of concern in 2010/11 that led to 'The Way Forward review. That review brought about changes in the Association in name and constitution to accommodate and cater for the large number of former RS staff still in work (a consequence of changes in working patterns). Those changes resulted in a very successful recruitment drive and a 50% increase in membership numbers. More recently, however, the number of new members has diminished and the age profile of members has moved upward again.

It is also important to note what is not wrong with the Association. Overall, membership numbers remain good, and still well above the numbers at the time of The Way Forward review in 2012. Our finances are healthy, indeed there are concerns that our reserves are higher than the Charity Commission would recommend, were we a charity. Members remain very positive about the Association and enjoy being members, even if participation in visits and lunches has declined. These facts indicate that, at heart, the Association is a well-appreciated and wanted body. Arguably, its activities may not be in line with what members most want or are able to do, but the current problems lie with having an insufficient number of members able to give time to run the Association, not that they do not wish to be members or pay their subscriptions.

At the 2023 AGM, four Committee positions were due to be filled – the Hon. Secretary, Events Secretary, Welfare Secretary and *BTT* Editor. Not only were there no nominations forthcoming, but the Committee was aware that the Chairman and Treasurer were due to finish their allowable terms of service at the 2024, and the Association could be left with essentially no Officers or a working Committee. Accordingly, the Committee proposed to the 2023 AGM a review of the Association's future, consulting members on the aspects most valued and needed, looking at alternative models and structures, considering different modes of delivery, etc. If no sustainable model could be found that matched the resources (money, people and skills) available to deliver it, or if the membership did not agree to accept that model, then the only practicable option would be to close the Association. That decision must be made by the AGM in May 2024 when the Treasurer and Chairman reach the end of their final terms. Both options entail some complex matters (relating to governance, finances and banking) in their implementation, and thus the timescale for the review was short, to accommodate all those decisions and actions.

The 2023 AGM approved two proposals:

- (a) That the Committee institute a six-month review of the future of the Association (including consultation with members) to bring a viable model for the Association commensurate with its resources to a Special General Meeting to be held by the end of November 2023; the motion at the SGM to be either to adopt the model or to close the Association at the 2024 AGM.
- (b) That Rule 4 in respect of the composition, nomination and appointment of the Committee be set aside for one year and the Chairman authorised to make any appointments and co-options to the Committee needed for the running of the Association until the 2024 AGM. [This was to enable the Association to continue to operate in the absence of a full elected Committee.]

Section B – The Review Group

The Chairman sought volunteers to join the Review Group and was very pleased to have offers from six RSFSA members – David Boak, Scott Keir, Mary Manning, Chris Purdon, Imelda Topping and Eileen Wilson. These six joined the continuing members of the Committee (Mary Nixon, Nick von Behr, Len Mole and Peter Cooper) together with Jane Silverleaf and Peter Collins who had agreed to remain on the Committee, past their normal terms of service, to maintain the administration of the Association during 2023/24.

The Review Group worked by email and Zoom meetings. The latter were held regularly throughout the review. An area of the RSFSA website (<http://beyondtheterrace.org.uk/secdocs/wherenext.html>) was established where documentation and background information could be held for the Review Group and all RSFSA members to access. This included information on membership numbers and trends, financial information, the results of previous surveys by PAG, and background material and AGM discussion relating to the establishment of the Review.

Section C – Members’ Survey and analysis

The Review Group’s first task was to devise a survey to assess what aspects of the Association members most valued, what they wanted and obtained from being members, their responses to different types of technological options, and to what degree they could offer time to help run the Association. It was decided to run the survey online (using Google Forms) that could be put together and trialled easily and was directly accessible to most members as no Google account was required to complete the survey. A paper version was developed as a downloadable option and was sent by post to members not on email; those responses were input manually onto Google Forms so that all responses received were included in the analysis. Anonymous responses were permitted.

We were pleased to receive 53 responses (59% of the membership). Reminders and direct approaches were made to encourage responses, particularly the group of members without internet access who otherwise might have been omitted. A graphical analysis of the results is available on the RSFSA website, at <http://beyondtheterrace.org.uk/secdocs/wherenext/surveyanalysis.pdf>. Comparison with statistics of the whole membership shows generally that the members who responded mapped fairly well against the whole membership by most criteria, but there was an under-representation of under-60-year-olds.

Q1 (What aspects of the RSFSA do you value?) showed that the highest values were placed on *BTT* and activities related to exchanging news of members (notification of deaths, contacts list, members’ news, social links). WhatsApp, PAG and professional links ranked lower, but only a proportion of members engage in those, and those who do tend to be more from the under-represented under-60-year-olds.

There was an interesting level of support for welfare activities from the under-60s compared with higher age-groups – possibly a pleasing altruism that such work should be an important element whereas the reality may be that, once reaching the age needing that support, the scale and practicality of what the Association, especially financially, can offer is less critical – of greater benefit is its ability to keep more isolated members in contact.

Q2 was a more complex question – “Think of the things that you get out of participating in RSFSA activities – for instance, the aspects that give you enjoyment or how they enable you to do things you might not otherwise do. If the RSFSA stopped that activity/service, would you be able to find other ways to get that enjoyment and benefits, or would you lose out?” What members get out of being members of the Association is not necessarily tangible or easily described, and the question attempted to get behind the raw activities to ascertain how members valued the Association and what benefits it brought to them, especially ones that they could not obtain by other means. Overall, the responses reflected the member expectations of Q1, which may either show that what the Association offers is addressing members’ underlying needs, or that Q2 had failed to get across the nuances intended!

Q3 asked how members felt about different technologies, and understandably these reflected an age and computer-literacy bias, but the responses did at least helpfully indicate the likely uptake of different technological solutions. Comparing answers to Q3 with those to Q1 and the age of the respondents

suggests that the ability of the Association to offer a way of keeping in touch with friends without the need to use electronic methods is one reason why they highly value their membership.

Q4 asked whether members would feel able to offer help in running the Association. The responses showed some glimmer of hope, but more in terms of support for activities than for the underlying administration and financial management of the Association. But generally, and unsurprisingly given Section A above, members are less willing to offer their help even for the services they most value.

Overall, the survey showed no clear single essential benefit that members gained from their membership, but that members get some marginal benefits from membership in a range of ways, depending on their own wishes and circumstances. While the subscription remains low, members are happy to pay for these marginal, rather than essential, benefits.

This diverse range of benefits and reasons for enjoying and remaining members has also shaped the way that the Association has developed over its 37 years, expanding its range of aims and activities to meet the needs of an ever more diverse range of members. Other than having, at some stage, worked at the RS, there is no reason why there should be common needs or expectations across the membership – members have not all worked at the RS at the same time, they are geographically widely spread, and employment and employer-employee relationships are now very different, as also pensions and the nature of retirement, from those had operated in the last century.

While the survey showed little variation in the analysis of results by different sub-sets (age, geography, etc.), the under-60-year-olds shows far greater variation. This difference between the under-60-year-olds and older group of members is problematic: concentrating on meeting the needs and expectations of the majority (the older members) will disadvantage the under-60-year-olds, but the future of a sustainable RSFSA depends on attracting and engaging with the younger cohort. Conversely, concentrating on meeting the needs and preferred working methods of the under-60-year-olds will deter the older member from continuing their membership.

The responses to Q3 showed a significant drop in membership were we to move to online only, suggesting some form of printed output, posted to them, would be necessary, together with suitable administrative and funding mechanisms. Delivering any services to members without internet connectivity, or skills or confidence with IT, presents difficulties administratively and financially. While only a few members do not have email, there are others who scarcely use it or need others to help them with it, and another group who find it difficult to read substantial amounts of material (e.g. *BTT*) on a screen. The Review Group took the view that its role was to put forward proposals for the Association that continued to meet, as far as possible, the needs of all members – it was not its job to offer solutions that disenfranchised any group of members because of age, circumstances or skills.

Some respondents to the survey expressed the view that a 'new' association was required, starting afresh from a new assessment of the common needs of its members. The survey (and the Association's development) suggests there is no such common need because of the increasing diversity of its members. The Review Group also took the view that it was not its role to be trying to create a new association – it should concentrate on trying to find a way that the current one could be made to work to continue to deliver benefits to all members effectively and sustainably.

The survey results showed that members most highly value *BTT* and a membership list, and the benefits of maintaining contact with other members that come from those two. The former provides information on what others are doing, within an entertaining and diverse set of articles. The latter provides a means by which members can find the details of those they are not already in contact with, and can establish direct person to person links.

The survey responses to activities such as visits, the annual lunch and the Professional Activities Group, were mixed – such activities were (or had been) of interest to some members, but the survey did not suggest that they were key to members' reasons for staying members of the Association. They do, however, involve a significant amount of Committee members' time to set them up, to coordinate members'

participation and to deal with the finances. The Review Group concluded that it should looking at how these types of activity might be decided on and run in other ways.

Section D – Exploration of the proposed model and possible ways it would operate

Section D examines in more detail the thinking behind the Review Group's proposals and explores how each part might be delivered. Section D is not a blueprint for exactly what will happen if the SGM agrees to follow the model in paragraph 8 of the main report – that requires more exploration, testing and discussion. But Section D is intended as a 'proof of concept' – that the proposals could, in principle, be delivered and could operate in the way described in the main report to deliver the required objectives.

The Royal Society Former Staff Network

The Association currently operates a range of communications – official communications, *BTT*, occasional email updates, PAG communications, notifications of deaths of members, the annual membership list, etc. Each of these (except email updates and PAG communications) is then delivered to members by post and/or email. In addition, there are arms-length WhatsApp and LinkedIn Groups.

This range of items and delivery mechanisms is a major factor in the administrative load on Committee members. A more efficient and effective method would be to deliver as much as possible through a single networking system. The term 'networking' covers a large range of methods, from face-to face networking, through exchanges of news by email or letters between friends, to modern social and professional networks and shared workspaces (e.g. Facebook, Twitter, LinkedIn, Google Workspace) Younger age groups and those in work value these last forms of online networking and use it extensively but differently from older members who are generally happier with printed matter, email and the telephone.

The Review Group is proposing an RSFSA network that would provide central email-based forums by which members exchange news and thoughts, and through which groups of members can collaborate to set up events or smaller discussion groups. Although the members' survey showed that a website-based model to carry such an electronic network was marginally more acceptable than using a social networking platform, the task of building and maintaining a suitable website would be both person-intensive and expensive. Social and professional networking platforms provide these functions as their basis, so it would be easier to set up and cheaper to run, and the Review Group concluded that the benefits of a ready-built platform outweigh the disadvantages.

However, the chosen social networking platform must be appropriate to our membership and have the means to deliver other required functions – the compilation of material in the form of an electronic *BTT*, a repository for documents and images, a means of circulating and maintaining a membership list, a means of notifying members quickly about the death of a colleague and associated funeral arrangement. Such a platform would need some oversight and management, not least some level of moderation would be required, based on experience from the WhatsApp Group.

Other factors that the Review Group identified as important were:

- the ease with which members could use the network, including its complexity and whether members would need to log in every time to see or send messages over the network;
- what types of material the network could hold and distribute – whether attachments to email circulars were permitted, for instance;
- the security of the network in particular the holding of members' personal data;
- the ownership and copyright of materials held on the network;
- and not least, the platform must support the preparation of material in a form for sending to members who do not use any email/internet and a further group who are uncomfortable using such systems.

After looking at various options, the Review Group concluded that the network platform most suited to the Association's need was Group.io.

Members of the Review Group set up a trial on Groups.io and explored its suitability as the platform for the Association's network. Members would need to register their preferred email address on Groups.io, but then, without any further action they would be part of a private email distribution system, allowing them to receive emails distributed to the whole membership from their existing email accounts (in a similar way

that members get emails via Google Groups at present). Smaller email sub-groups (such as for professional or social based interests or regionality) can be set up, and members able to join them if they wish, to share emails with others in the sub-group.

By logging into the network on Groups.io, members who wish would enter a 'working space' that offers additional functionality and resources:

- the ability to browse the forums (the full sequence of all emails sent through the system);
- the ability to contribute to those email discussions, or start a new one;
- access to repositories for documents and images (past issues of *BTT*, for instance);
- a website area that could be structured to hold an online *BTT*, with new material added on an ongoing basis (members can be notified when new material is added);
- the option to set up a 'profile' with personal details and contacts, a photo and other information;

Maintaining groups.io would require two or three volunteers, whose roles include:

- managing members' registrations to the network;
- setting up and managing permissions for some members to maintain areas of the network (running the *BTT* area, for instance) or perform some administrative tasks;
- moderating the content on the forums.

Beyond The Terrace

The Review Group discussed the nature and practicality of how *BTT* could operate through an electronic network, while recognising that a printed version would need to be produced for members not able to access the online version. An electronic *BTT* need not necessarily follow the existing *BTT* model; holding material online would mean articles were less constrained in length and could have greater use of graphics etc. The change to a new medium offers opportunities as well and challenges.

The new model moves from what is essentially a paper product with an electronic sideline to an electronic product with a paper sideline. The latter format is essential for members who do not use electronic media, but the primary focus will be on the electronic product. As experience develops, we will recognise opportunities for innovations that were not feasible with a purely paper product. In this new model:

- Content will be hosted in a dedicated space of the RSFSA Groups.io network. That space could be subdivided into various standard headings (RSFSA business; members' news; RS news; articles; contact details; etc.). What counts as 'news' and whether it should have its own page or be housed within the *BTT* page will be for the editorial team to decide, and will develop over time.
- The current editorials (essentially introductions to completed editions of *BTT*) could at times be replaced by opinion pieces not focused on specific editions and written by anyone with interesting opinions.
- Contributions would be posted on the site as soon as received, edited and laid out. No length restrictions (other than to constrain verbosity!).
- RSFSA members would be notified through the network's email notification system when new material is published. Members will be able to opt in to receiving an automatic notification when new material is posted.

Initially there will be a need to commission material and to prompt members, especially towards the deadlines for the printed versions. But over time, the aim would be to encourage a self-sustaining level of activity on the forums and contributions to the *BTT* area.

The printed edition for members not able to access the network would be produced in one of two ways:

- simply by printing off the relevant pages of the website without any alteration, and then copying, stapling and posting them;
- or, with greater effort, relevant pages could be adjusted to fit into a coherent whole along the lines of the current printed *BTT*, and then reproduced and distributed as at present.

Either way, the paper version should be produced at regular intervals (e.g. every four months). Such deadlines are useful in generating new material.

To deliver this new approach, we will need the following editorial structure:

- An editorial team comprising the editor, one editorial assistant and the web editor. Editorial assistant to be appointed informally by the editor and serve a renewable two-year term.
- A Web editor should be included in the team to advise on technical issues associated with hosting the material.
- Editorial team members to be active in commissioning, writing and producing articles for *BTT*. Otherwise very little will happen.
- Editorial team members to source articles continuously.
- Editor to be responsible for producing and distributing the paper version in whatever form it eventually takes, with help from the editorial team as required.

The Review Group stresses that the model is unworkable without an appropriate set of members willing to support the above structure, but hopes that the new model of an editorial group with shared responsibility might attract a new editor and sufficient volunteers to form the group.

Membership List

The survey showed that members value a membership list in a readily usable form that they can use to contact other members. The Review Group's proposal is that a list would be held off-line (probably in Word format) by one member, updated annually and circulated to members by email as an attachment or printed and posted to those not on email.

At present, the Association holds a considerable amount of data on each member in its records – years of service, multiple telephone numbers and emails addresses, dates of birth, former names, etc. Not all of this data is contained in the circulated membership list. In the new proposals, such additional data need not be held (and probably, under GDPR, should not be held). The membership list, and any database from which it is formed, should contain no more than the basic information to allow the list to be used by members to contact each other – the member's name, and at least one of a postal address, telephone number or email address.

A further advantage in simplifying the data held is that the annual personal detail update forms would not need to be circulated and returned (saving on administrative time). The circulated membership list tells members exactly what is held on them, and they can immediately ask for it to be changed or deleted.

Updates to the membership list would come from two sources: the member holding the list would receive any updates from members during the year by email, post, phone or from postings on the email-based forums; and in addition, once a year the member holding the list may wish to ask members to let them know of changes.

A further role of the member responsible for the list would be to send up-to-date address details of members who receive *BTT* (or other material) by post to whoever is despatching that material.

The Review Group paid particular attention to security and data protection issues. Members need to be confident that their personal data (addresses, phone numbers, email addresses) are kept securely and arrangements comply with GDPR. Investigations of Groups.io lead the Group to believe that is a sufficiently secure platform for the distribution of personal data, but it may be prudent to review whether the final circulated membership list should be stored or archived on the working space.

The Review Group considered whether the membership list might draw on, or automatically synchronise with, information that members hold on Groups.io (their log ins or in their profiles). It decided against that for several reasons. First and foremost, there are members not using email and the internet, who will not have a presence on the network but must be included on the membership list. Second, members should have the choice to restrict or use different contact details for the membership list than they do on the network. Third, trying to coordinate data between the platform and the membership list makes matters far more complex, requiring liaison between the network administrators and the member responsible for the list, and tracking members as they update their email addresses, log-ins and platform profile.

Member-initiated activities

As described in Section C above, activities such as visits, the annual lunch and the Professional Activities Group had some support from members in the survey, but were not perceived as key benefits. The work in organising them, however, takes a lot of Committee members' time. The Review Group was not wanting to stop these activities but wished to find more effective ways of organising them. Given that support for these activities was not high across all members, it seemed appropriate, therefore, that, if a group of members wished to organise these activities, then there should be the means by which they could do so. Therefore, under the reduced and streamlined structure proposed, the Association would not continue to arrange activities centrally on behalf of members, such as social visits, the annual lunch, PAG seminars, etc. When members decide, through the email-based forums, that there was a wish for an event of this or some other nature, then such activities would be coordinated and arranged by the interested members themselves.

This model can, if members wish, be expanded to cover any form of member-initiated activity, grouping or event. One can imagine sub-groups of members with common interests working together, arranging a visit or seminar. Or members in a region of the UK deciding to meet up socially at a theatre or National Trust property. Members in work may wish to put together a workshop on a topic or start a mentoring scheme. The Association should be ready to assist by offering the communications networks and financial support (see Finance section below) to enable any member-initiated activity, but it is not set up to arrange those activities on behalf of members.

Governance

At present, the Association spends a lot of effort simply running itself, for instance holding an AGM, the election of designated Officers, evolving complex Rules and Regulations, managing the subscription system, etc. These tasks inherently require people and time to administer. Simplifying those aspects of the Association is easily said but is less easy in practice – if there is to be a body with an independent existence then there are inevitably structures and processes concerned with its governance and the way members can have a say in its management and activities.

Moreover, it is almost inevitable that such a body will need to spend money, if only on its own administration, leading to the complexities of a bank account, financial management and making payments to cover those costs. The financial aspects are covered in more detail in the next section.

The aim of the new arrangements is to run each part of the organisation through small teams of individuals who work semi-autonomously –the group running the electronic network, the *BTT* team, a membership person, a finance team, etc. There would be no Committee as now, leading and coordinating. Any team that had questions or concerns that it wished to consult the membership on can do so via the email-based forums (Groups.io even has a facility for a 'poll' to sound out members on issues). If there were a need for a 'General Meeting' of the Association, then Zoom is a perfectly acceptable way of holding it, provided that the views of those unable to take part are sought alongside it.

Turning these principles into a formal Constitution will need more work and consultation, but if the SGM agrees to the Review Group's model then that work will be done, and a new Constitution will be brought to the 2024 AGM.

Finances and financial management

Simplifying and streamlining presents particular challenges to managing the finances of the Association. Any handling of members' money must be done properly and accountably, while holding a business bank account brings banking regulations and checks that must be met.

The scale of the Association's finances is not large – an annual income level of £1600 involving some 120 transactions, predominantly relating to subscriptions. The Review Group made an early decision to look at dropping the annual subscription. Not only would this simplify the finances (and associated governance) but there was an additional benefit in attracting new members. We need to get new members involved in the Association as soon as possible after they leave the RS – tracking them down later, when their attachment to the RS and their connections with former colleagues have faded, is extremely difficult and

generally unsuccessful. By offering them free access as early as possible we can keep in touch with them, and can engage and integrate them more into the Association as time goes on.

The Association's accumulated funds would easily support the new structure for a period of three to five years; the circumstances and opportunities after that are unknown but can be reassessed beforehand. In the meantime, the constitution should allow voluntary contributions from members, should there be a need to keep things going.

The Review Group also considered the use of the Welfare Fund. While welfare must remain an important part of what the Association is about, its role in making grants has become increasingly less used. The Fund has been used to assist members to take part in Association activities – paying for taxis to attend the AGM or Annual Lunch, for instance – and there is no reason why it should not be used in a comparable way to ensure that members unable to use the electronic network are not disadvantaged, by paying the costs of. As regards the management of the finances, the Review Group felt that a lighter-touch system was both desirable and possible, based on the following:

- Three members to be appointed by the AGM in 2024 to form a finance team to manage the new Association's finances and to approve the use of the Association's funds for appropriate purposes in accordance with the Association's objectives. It would have delegated authority to authorise regular expenditure on enabling members' communications with the network and, if necessary, to solicit additional voluntary donations of funds. Decisions beyond these delegated decisions would require the finance team to consult the membership via the messaging network or Zoom.
- Both the General Funds and Welfare Funds would be managed by the finance team. Monies from the Welfare Fund would be used only to enable members disadvantaged by their not being on email/internet to participate in the network (e.g. by receiving printed copies of BTT).
- The Chair of the finance team is Treasurer of the Association and the official Lloyds account holder; if required by the bank, one other member may be designated Secretary (or such other title as is required).
- All three members of the finance team are bank signatories with on-line access.
- Normally, a decision is made by the Treasurer plus one other, but the finance team may wish to work by email or meet by Zoom to discuss special cases.
- Annually, the finance team will provide a statement of expenditure and balances to the membership, and respond to queries. It is not required to have the finances independently checked by a separate Accounts Examiner.
- If one member of the finance team departs (for any reason), then a replacement would be sought and confirmed through the messaging network. If Lloyds require a formal record of the appointment, then the finance team can convene a Zoom meeting, with all Association members eligible to participate, and prepare a formal record of the meeting.

The finance team would develop means by which the Association's bank account can support member-organised activities, such as an annual lunch, in an effective way that gets the right balance of roles and responsibilities between those organising the event and the finance team.

The regular work of making payments, recording them on a simple spreadsheet and checking the monthly bank statement could be shared among the three team members requiring at most a couple of hours a month each. Preparing and circulating the end of year report would take one member of the team perhaps a further couple of hours once a year. No accounting experience would be required, just being comfortable with numbers, dealing with money, working with a simple spreadsheet and with online banking.

A final note about the Association's bank account: we need the future RSFSA and its bank account to be an evolution from where we are, rather than a closure of the old RSFSA and the establishment of a new association. A closure of the existing RSFSA would have significant implications for how the money could be transferred to a new body and would require Lloyds to accept a new body in its place.

30 October 2023