



RAMBLERS RISK MANAGEMENT

Summary of Research: May 2022 to March 2023

Abstract

A summary of the research conducted to: inform the task & finish group in Autumn 2022; in order to provide recommendations to the board of The Ramblers' Association early in 2023



Contents

.....	0
Context.....	2
Aims	2
What we did.....	3
Executive Summary.....	4
What we found	6
The Ramblers has certain obligations.....	7
Proportionate: the benefits outweigh the risks.....	7
So how do The Ramblers measure up?	8
Good practice and the role of the organisation	9
Understanding a "systems approach" to risk management	10
Understanding different types of Risk Assessment	10
Policies and procedures documents	11
Putting it all together	12
Implementing change	13
Appendix - Five key options	14
About the Author	15

Context

The Ramblers local network consists of over 480 local groups and 59 areas across England, Wales and Scotland. These groups lead over 40,000 group walks per annum, helping over 100,000 people to go walking. In addition, The Ramblers work with over 160 partners to deliver a further 30,000 Wellbeing Walks across England.

The goal is to enable more people to access the outdoors and experience the joys of walking. Facilitating a great walking experience is essential - all group walks should be enjoyable, welcoming, inclusive and safe.

Some 23,000 volunteer walk leaders are the difference between a good and great walk. Managing risk on and before a walk is part of the Walk Leader's role and The Ramblers has a duty to ensure appropriate steps are in place to support both walker and volunteer safety, as well as comply with their insurance policy.

During the COVID-19 pandemic, additional steps to manage risk were introduced, including a requirement for a written risk assessment, for each walk, to be completed and recorded. There was some resistance to this at the time and, as trusting and supporting their leaders is fundamental, the focus on the process and paperwork was undermining this goal.

The Ramblers is not alone in seeking to identify a more dynamic and 'proportionate approach to risk management for volunteer-led walks.' In addition, the worldwide approach to risk management itself is in a state of flux with new ideas emerging across the adventure activity sector. In response to feedback from members; and having recognised an opportunity for positive change, The Ramblers commissioned this research to explore and inform their options for the next steps.

Aims

- Clarifying the role and importance of risk management on Ramblers group walks – now and future direction
- Reviewing our current risk assessment processes and support for walk leaders to plan and manage risk on group walks – to deliver a great walking experience.
- Benchmarking against other approaches across the outdoor sector – identifying opportunities to learn from and share best practice
- Working with key staff to produce a range of options and recommendations for future improvement across the organisation.
- To inform, support and enable the Task & Finish Group to evaluate future options and develop proposals for the board.

To explore the different risk management options available, that continue to satisfy insurance requirements, legal requirements and the risk appetite of trustees.

What we did

Any review of, and subsequent changes to, the risk management process will have implications for all stakeholders involved in the delivery of Ramblers and Ramblers Wellbeing Walks. It also carries reputational risks in terms of the outcomes and how they are communicated. Hence we started with an exercise to map and measure the potential levels of impact; and prioritise the importance of this study, for all stakeholders. This included: internal stakeholders (from the trustees to the walk leaders themselves); as well as external stakeholders (from insurance companies to partner organisations) engaging with The Ramblers.

In pursuit of a “Proportionate” response to risk it seemed important to first establish the risk profile of “walking for leisure”. This enabled us to make meaningful comparisons with risk management procedures elsewhere, in other countries, activities and organisations. This required a combination of desk based research into available sources of data for injuries, accidents and incidents for walking (and comparable activities); combined with consultation with key “Subject Matter Experts” (SMEs) on risk, and policy makers for national guidelines on risk management.

We then set out to critically review the current procedures, to see the situation through the lens of all those stakeholders, organisations and participants, in order to establish the requirements and obligations of: legal, governance, insurers, partners, areas & groups, walk leaders and walkers alike. This took a funnel approach: starting with the wider international comparisons; through national guidelines and organisations; down to sector specific comparisons for volunteer led walks.

Externally, we were able to compare and contrast both Risk Management systems; and specific Risk Assessment models; with other countries, activities & organisations dealing with similar issues and comparable levels of risk. Consultation with numerous sector SMEs providing opinion, case studies and opportunities for development, revealed several common approaches across the sector.

Internally, it was important to fully understand the issues, and hear from people delivering across a wide range of Ramblers regions, products, groups and types of walk. Further desk based research & consultation with key people across the organisation revealed that many groups are producing their own guidance documents, and that pockets of excellent practice already exist. This feedback informed both the content and evaluation of the final proposals.

By taking the best elements of external and internal practice, five key options (see appendix) were developed with the Task & Finish Group. Further research then focussed on selecting best-fit guidance, case-studies, and providing detailed examples – to support the group.

Executive Summary

Headline findings from the first phase of the research – as presented to the Task & Finish group.

Context – view of risk:

1. Ramblers is absolutely not alone in seeking to identify what is a proportionate approach to Risk Management.
2. This has been an ongoing issue in the UK for at least two decades and is exemplified by the Government inquiry into proportionate risk management led by Lord Young and then Prof Löfstedt and later the DWP.
3. These government reviews recognise the need to separate leisure from workplace guidance and legislation.
4. There is no prescribed way of doing risk assessment and, for example, ISO 31010 describes 31 approaches. Duty holders are free to choose.
5. Duty holders have not received much guidance on the interpretation of 'proportionate' and struggle to find an optimal path – often pressured to act disproportionately as a result.

Changing approach:

6. The sector approach to risk management is not rigidly defined and is in a state of flux with new ideas emerging.
7. Consequently, duty holders should accept and even embrace that they might need to refine their protocols in time.
8. Conventional risk assessments (e.g. HSE "Five steps" model) do not incorporate the fact that sport and leisure activities are conducted for their benefits, including health. There is a growing interest, nationally and internationally, in benefit-risk assessment (B-RA) for such activities.
9. Key message – hypothetical assumptions about what is meant by "Risk Assessment", or evaluations based on previous experience of workplace risk assessment procedures, are not helpful. The outdoors is different - and that is (or needs to be) recognised by everyone!

Non-negotiable obligations:

10. Everyone has a duty of care to protect their neighbour: you must take reasonable care to avoid acts or omissions which you can reasonably foresee would be likely to injure your neighbour. (This transcends any legislation or regulation of adventure activity and is a fundamental requirement of society. This one is non-negotiable: leader or peer; volunteer or professional!)
11. You have an elevated duty of care as a leader both contractually and by accepting responsibility (whether professional or voluntary).
12. As Ramblers walks are open to the public, there can inevitably be an elevated or enhanced Duty of Care on behalf of the leader – whether voluntary or paid.
13. As an employer (with more than five employees) we have a legal (Health & Safety Executive) obligation to conduct risk assessments and record significant findings (for 12 months).
14. We must ensure we have a risk management system in place which is proportionate and ensures the risks to walkers are "As Low As Reasonably Practicable"
15. As a charity, we have a safeguarding duty to "take reasonable steps to protect from harm people who come into contact with your charity."
16. Society expects a higher standard of care in organised outdoor activities than in personal recreation.

Walking is relatively low risk

17. Walking is the nation's favourite past time – and increasingly popular.
18. Worldwide, *definitive* risks have proved almost impossible to ascertain. This is largely due to inaccurate data from a lack of consistent reporting.

19. But *relative* measures show walking to be incredibly low risk as an activity.
20. The Ramblers have an excellent (high) level of reporting, but a relatively low level of incidents and an excellent claims history.

The benefits outweigh the risks

21. Walking carries an inevitable degree of risk – we need to be comfortable with (and skilled at articulating) that fact.
22. Especially when, compared to other activities, that level of risk is incredibly low. For example, driving to the start may be higher risk than the walk itself.
23. Risk & adventure, in leisure activities, can frequently have a more positive than negative impact on health and wellbeing.
24. The benefits of walking, for both physical and mental health and wellbeing, are well evidenced.
25. There is a universal consensus (& published joint statement) to promote the fact that the benefits of activity outweigh the risks. Even for those with long term conditions.
26. Especially when there is a suitably experienced leader to reduce the risks (& increase the benefits) even further.

Risk management - An evolving landscape:

27. In most organisations, Risk Assessment is just one aspect of Risk Management which, in turn, is regarded as a sub-set of a broader Quality Assurance strategy or policy.
28. There are already many pockets of excellence across The Ramblers, which could inform a consistent best practice process to follow.
29. Commercial guidance and regulation does not apply, but may offer examples of best practice for key elements of risk management.
30. Likewise, some voluntary sector models *only* apply if walkers are genuine peers. This is rarely the case for The Ramblers.
31. The only way to reduce the Risk Assessment burden on the leader - is to increase the Risk Management and Quality Assurance burden on the organisation, elsewhere in the process.
32. The competence of staff is the biggest single factor affecting the safety of adventure activities. Hence, the competence of walk leaders (voluntary or otherwise) is the biggest single factor affecting safety on group walks.
33. In order to give leaders more autonomy, you must have a system to evidence that they have the competence (skills, knowledge, attributes etc.) to justify it.

Initial conclusions

34. A Risk Assessment of each route may be important, but not necessarily every time, by every leader.
35. It is far better to focus on risk management and quality of leadership, within an organisational strategy for excellent walk leadership.
36. There is an opportunity to further explore the use of Generic > Specific > Dynamic risk assessments, within organisational guidelines, procedures and education.
37. Generally, a terrain focused “hazard identification” (HSE five steps) model is no longer widely regarded as the best solution for outdoor activities.
38. Hence, it is far better to focus on a benefit-risk assessment (B-RA) model.
39. Especially if that leads to the dynamic review of the impact of terrain, weather and the group (people) on the day.
40. A checklist for this is considered to be a valuable method of Risk Assessment within ISO 31010
41. The amount of detail should likely depend on the grade of walk to be undertaken.

This research then informed the Task & Finish group, enabling them to develop and evaluate proposals to the board of The Ramblers.

What we found

The worldwide view of risk management is in a state of flux. The UK, along with Australia, New Zealand, Singapore and Canada have all reviewed their approaches to risk management & regulation in adventure activities in recent years. There has been a worldwide trend away from regulation (now seen as disproportionate) towards good practice guidelines and national codes of conduct. Lord Young's 2010 reviewⁱ, urged the UK to: free businesses from unnecessary bureaucratic burdens; separate out play and leisure from workplace contexts; and replace Adventure Activities Licensing Regulations with a code of practice.

Duty holders have not received much guidance on the interpretation of 'proportionate' and mixed messages from both the regulator and the Courts have not helped either:

One could reasonably question how duty holders can be expected to comply with legislation, the meaning of which is still being debated within the legal system itself.

Laurence Ball King

Risk Management is therefore poorly defined in the sector, which has struggled to find an optimal path for proportionate risk management. Especially for volunteers.

For many good reasons, The Ramblers chose to *tighten* their demands on leaders – at a time when the global appetite was to *loosen* and review best practice. Understandably, this met with resistance from some members. But neither The Ramblers, nor their insurance company, nor the walk leaders (and even walkers) should fall into the trap of making assumptions about what is meant by "Risk Assessments" based on any previous workplace experiences and procedures.

There is growing international acknowledgement that these workplace "risk-avoidance" models do not serve the adventure activity sector well, for good reason:

1. **Risks are often actively embraced**, and deliberately sought out, rather than simply avoided - as they can have a positive (life affirming) benefit as well as a negative risk of harm.
2. **More dynamic**: conditions beyond the control of the duty holder (weather, tides, etc.) can change quickly. Operators and frontline staff must be suitably skilled to assess, respond and adapt appropriately, and at speed.
3. **Greater variability**: unlike a fixed place of work, the variable factors in outdoor activities multiply the range of risks, due to: the types of route/terrain x the conditions x the different leaders x the different participants. All these, in combination, have an impact on the changing levels of risk for each walk.
4. **Participants are usually customers, rather than workers**. This means they have less opportunity to learn about and evaluate the risks they face; and less long term engagement in their management.
5. **Rigid or pre-determined approaches can stifle essential adaptation** and "risk-matrices" are increasingly criticised, in favour of more dynamic benefit-risk assessment models based on narrative.

The outdoors is different - everyday risks in adventure activities are different from many traditional work activities and that is (or needs to be) recognised by everyone!

The Ramblers has certain obligations

Some aspects of risk management are non-negotiable. Organisations with more than five employees, have a legal (Health & Safety Executive) obligation for risk assessments to be conducted; the “significant findings” recorded; and kept for 12 months, but the law expects the duty holder to choose what form that takes and *how* to manage that process.

As a Charityⁱⁱ there is a duty to “take reasonable steps to protect from harm people who come into contact with your charity” safeguarding volunteers, staff members, participants and donors.

Everyone has a duty of careⁱⁱⁱ to protect their neighbour^{iv}. This transcends any legislation or regulation of adventure activity and is a fundamental requirement of society. This one is non-negotiable: leader or peer; volunteer or professional. Everyone taking part in volunteer-led walks deserves to know their safety is being managed well.

Adventure activity specific legislation and regulation^v are normally reserved for the commercial provision of activities. Volunteers, clubs and peer-to-peer adventures (often known as the common adventurer model) are usually excluded. However, it is core to the charitable aims, that all Ramblers group walks are accessible to the public. Hence, with new walkers regularly joining these walks (c.91% of the time) the walk leader may always have an enhanced duty of care. The Ramblers need to be cautious about any ambiguity regarding the supervision of minors, vulnerable people, or novices – especially in the context of wellbeing walks.

Worldwide, one important consideration is consistently upheld:

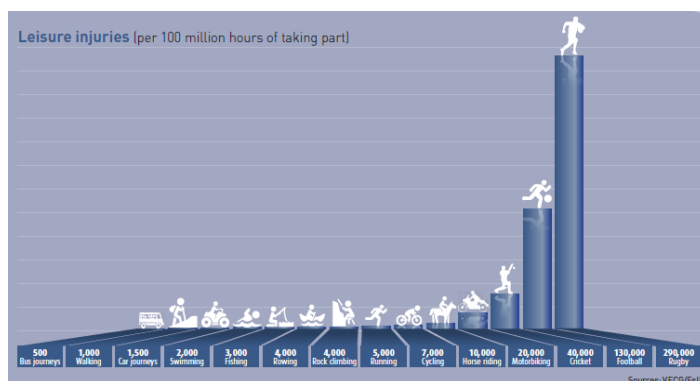
Society expects a higher standard of care in organised adventure activities than in personal recreation.

Proportionate: the benefits outweigh the risks

The Ramblers are not alone in seeking a proportionate approach to risk management. Without clear guidance or accurate data on the levels of risk, many duty holders have struggled to find an optimal path, and are often pressured to act disproportionately.

Here in the UK, walking is the nation’s favourite pastime, demonstrating consistent growth in participation year on year. Walking carries an inevitable degree of risk – we need to be comfortable with (and skilled at articulating) that fact. But the benefits are extensive and well evidenced.

Worldwide, attempts to *definitively* measure risk profile and rates of incident have been largely inconclusive. Accurate data is hard to come by (usually due to poor, or inconsistent reporting) and



even recent studies rely on outdated data sets. Figures are often skewed, whereby walk leaders are obliged to report *all* incidents, however minor; yet recreational walkers report very few, if any.

Encouragingly, *relative* measures demonstrate that walking for leisure is *relatively* low risk, when compared to near neighbour sports and everyday

activities. For example, walking appears to be: 3 times less risky than fishing; 7 times less risky than cycling; 40 times less risky than cricket; and safer than driving to the start of the walk! As a consequence, it was possible to benchmark the corresponding approaches to risk management.

Most importantly, a consensus from both the activity and health sectors agree that the benefits far outweigh the risks, even for those with long term conditions^{vi}.

So how do The Ramblers measure up?

Walking is low risk. Especially when there is a suitably experienced leader to reduce the risks (& increase the benefits) even further. Engaging the leaders in this process and educating them as to the benefits is key.

In the year 2020-21 Ramblers walk leaders alone, led 21,867 walks, equating to well over 1.1 million hours of activity. If we apply a consistent formula to compare these figures, walk leaders reported:

- 108 incidents ~9.5 per 100k hrs
- 86 injuries in total ~7.6 per 100k hrs
- 59 Minor injuries ~5.2 per 100k hrs
- 46 Insurer notifications ~4.0 per 100k hrs. This could be the closest direct comparison with studies using A&E attendance
- 2 fatalities (both of which were pre-existing heart conditions) ~ 0.18 per 100k hrs



Despite encouragingly high rates of reporting, this still puts Ramblers walks in the centre of the expected range for walking. Furthermore, with no successful insurance claims in this period, Ramblers walks are relatively low risk to insure.

Despite this excellent record, The Ramblers operate the tightest demands we have seen in the study for conducting a risk assessment. No other organisation was found to require a walk leader to complete a written risk assessment for every route, every time, and record it themselves for three years. The *current format* of risk assessment is as close to a simple checklist as one can get, but with the potential to quickly and easily complete, whilst on a recce, the specific details relevant to each route. Research found polarised internal criticism: some suggesting this goes too far; others not far enough.

It is especially interesting that “one size fits all” for such a wide variety of walks and leaders. Walks invariably vary by route and terrain, but also by the skills required of the leader, and by the duty of care to participants. A single approach is bound to be excessive for some, and potentially inadequate for others, potentially reducing all to the lowest common denominator. The issue is not so much *what* leaders are being asked to do but *how* it is explained and justified.

The Ramblers are one of the loosest organisations in the research, for checks and monitoring. Risk assessments are requested, but not submitted, nor checked, and it is entirely possible for this guidance to be ignored. There are no mandatory requirements for first aid; nor taking a register of participants (and their emergency contact details). The online training and resources are excellent, but accessed by choice, and passed by completion rather than demonstrating any particular level of skill, competence or quality as a leader.

The competence of staff is the biggest single factor affecting the safety of adventure activities^{vii}

Hence, greater consideration could be given as to whether the current recruitment, selection, training and support given to walk leaders demonstrates that leaders are competent, and that basic good practice is being followed (as well as satisfying the trustee appetite for risk).

Good practice and the role of the organisation

External research into best practice from around the world, revealed a range of approaches. None are a perfect fit but each has merit:

Activity specific guidelines from near-neighbour models, like the Eagle Ski Club^{viii} and Mountaineering Scotland^{ix} focus on guidance for peer led, or member-to-member club meets. This “common adventurer model” sees the leader *only* as event organiser. It is based on the premise that all walkers are equal; and risk management is a shared responsibility. This is rarely the case for Ramblers group walks.

Models of good practice from the Outdoor Education sector, like the Outdoor Education Advisers’ Panel (OEAP) National Guidelines^x, could be easily adapted and applied. Whilst they are not a direct match, they focus on non-regulated (non-commercial) best practice; and provide clarity over the role of all staff in managing risks on activities.

National Guidelines from the National Governing Bodies of Sport (e.g. British Cycling^{xi}, Canoeing^{xii} and Athletics^{xiii}) provide insightful benchmarks – and how the process may change for more experienced or more highly qualified leaders, who can be given more individual responsibility but less administrative demands. These focus on demonstrating competency of the leader, usually by accreditation or qualification.

In the UK, the Adventure Activity Licensing Regulations lead to a relatively “standard” model for commercial providers. This focuses on the chain of responsibility across the whole organisation; and a technical expert to employ, train, accredit and deploy competent staff – to operate within clear guidelines and standard operating procedures. In a similar way . . .

International guidelines like the Australian Adventure Activity Standards and Good Practice Guides (GPGs). The AAAS and GPGs take a ‘systems approach’ to risk and safety. This means looking at all the factors that contribute to risk, instead of focusing only on what occurs during the activity itself. The guides provide examples of how they work, how to write them, and some links for supporting information.

Effective risk management in outdoors and adventure settings is highly context-specific, it cannot be a ‘tick the box’ exercise, nor can it take a ‘one size fits all’ approach

The Ramblers therefore need to choose a blended approach which is proportionate to the level of risk and fit for their purpose – across their range of walks, groups and activities. A summary of this research was presented to the Task & Finish group. From this point, the aims of further research were to inform discussions and enable evaluation of the options. From this, a range of options was developed with the Task & Finish Group for consideration (see Appendix).

It was possible to evaluate each of these options against The Ramblers obligations (legal, charitable & insurance); risk appetite of the trustees; and scrutiny against recent “worst case scenarios” (court & legal proceedings) for other organisations. We decided that further evidence would be useful, to explore the current status quo. A walk leader survey was designed, interviews with, and feedback from key individuals considered, and further desk-based research into the implementation of Risk Management guidance, policies and procedures undertaken.

Whatever system is adopted; The Ramblers should view risk assessment as an element of a larger risk management system. This, in turn is just one element of supporting leaders to deliver excellent walks.

Understanding a "systems approach" to risk management

Everyone in The Ramblers has a role to play in the delivery of Ramblers Walks: from setting strategic aims and ethos; through engagement and training of volunteers; down to the individual leaders and walkers. Everybody has expectations which deserve to be met. Everyone can play a role in increasing quality and enjoyment, whilst reducing risk.

The aim of risk management is not to remove risk completely, but focus on the part everyone in the system plays, to recognise and manage these risks appropriately.

As safe as necessary, not as safe as possible - RoSPA

A key concept: The only way to reduce the Risk Assessment burden on the leader - is to increase the Risk Management burden on the organisation, elsewhere in the process. You can only give leaders more autonomy, if you have a system to evidence that they have the competence (the skills, knowledge, attributes, training & experience) to warrant it.

The walk leader is not just the walk organiser: they are responsible for creating a positive and supportive environment. They need to have the skills and confidence to adapt on the day and manage any incidents or emergencies.

Participants also need to understand what is expected of them when joining a walk, and everyone has a role to play in ensuring the group's safety.

Research revealed numerous examples of excellent guidance on risk management systems from around the world. Recognise that legislation, regulations and commercial models need not apply, but can provide valuable examples of best practice to follow. In the UK, the Mountain Training National Guidelines^{xiv} succinctly explain what should be in an organisation's safety management system. The Australian Adventure Activity Standards^{xv} outline how to design such a system (and what it should contain).

There is an opportunity to cherry pick the best elements of all these examples. The trustees of The Ramblers should consider which elements satisfy their appetite for risk; and how they could be implemented, within a devolved organisation.

The current reliance on a hazard identification approach: a recce and risk assessment completed and recorded in advance, is at risk of detracting from the more important dynamic risk adaptations (to the specific group; and the changing conditions) on the day.

By implementing a risk management system, education and guidance could be given, to enable different types of risk assessments to be utilised at the appropriate stages of a risk management process:

Understanding different types of Risk Assessment

The international standard for risk management (ISO 31010) outlines some 31 different models for risk assessment, from complex industrial processes, to simple checklists. The Ramblers are free to choose a proportionate approach, and should recognise that semantics are important: risk-assessment is frequently an unhelpful term, with a wide range of assumptions and inconsistent definitions. In fact, some of the most useful activity guidelines refuse to use the term, favouring guidance on "recording the planning process" and focusing, more positively, on managing quality

and safety. For the sake of simplicity, the consensus in the outdoor activity sector is to acknowledge and work with three main types of risk assessments:

1. **Generic** risk assessments are evolving tools that educate walk leaders as to the likely issues they will need to anticipate and strategies for mitigating typical risks, on different types and levels of group walks. They are typically held in the central office, within standard operating procedures (SOPs), guidance notes and training. Covering common hazards for a task or activity, they frequently form the basis for a risk assessment template, as a starting point for . . .
2. **Specific** Risk Assessments focus on the particular issues and risks of certain types of group walks. Held within different regions or groups, this is where local knowledge or group-specific experience of walks can be shared, recorded, and knowledge built over time. They should take account of the location, terrain, environment, and people doing the walk. *“An important consideration is that the action – the control measure – is usually dependent on the person not the hazard.”* These are subsequently reviewed, and not necessarily refreshed, at the start of each walk, enabling leaders to derive checklists that identify the likely priorities of:
3. **Dynamic** risk assessments enable leaders to recognise key decision making triggers and events, whilst a walk is underway (e.g., changing weather, fitness of ramblers etc.) in order to anticipate how to react and adapt. This type of risk assessment is often used to cope with uncertainty or unexpected change. As a consequence, these usually rely on the skills and experience of the leader, and cannot be written down in advance.

The challenge is in deciding, in a variable activity such as walking, what degree of variation warrants a new risk assessment.

These should all be underpinned by an emphasis on the importance of dynamic benefit:risk assessment and enable adaptation to purpose at each stage. For more information read "Nothing Ventured: balancing risks and benefits in the outdoors"^{xvii} by Tim Gill, with a really good *References and further info* section on the penultimate page.

The Snow and Avalanche Institute for Scotland have developed an educational model^{xvii} for a robust 3 x 3 checklist, encouraging leaders to consider their familiarity with the: terrain, conditions and people - and their implications on safety – before, during and after every walk.

Likewise, the AdventureSmart^{xviii} “three questions” (gear, weather, knowledge & skills) checklist is being used by many Ramblers leaders. Both these models are increasingly being applied, by many organisations, across all outdoor activities in the UK.

Policies and procedures documents

The industry norm for most organisations is to generate and publish a set of standard operating procedures (SOPs) and guidance documents. These usually take the form of an organisation wide handbook, which outlines how everyone contributes to the delivery of excellent walks (and managing safety as a component of that). A handbook would spell out what the organisation expects from the leader; but also what the leader can expect in terms of support, training, consistency and monitoring from the organisation.

In this context, SOPs for The Ramblers would contain details of:

- Procedures e.g. the steps on the walk leader journey from volunteering, through training, to leading.
- Process e.g. the steps that a walk leader would be expected to take, in order to plan and deliver an excellent walk.

- Policies e.g. the details and terms of insurance cover, provided to walk leader.

There are numerous direct comparisons with guidance for volunteer led walks, from all manner of outdoor organisations, clubs and groups. For example, the Living streets walk leader manual GET YOUR COMMUNITY WALKING^{xix} provides everything you need to know in a vibrant and positive guidance document.

For guidance on how to write organisational policies and SOPs the Sport & Recreation Alliance^{xx} can be an excellent resource of case studies. Sport England, through their Club Matters^{xxi} scheme, provides similar resources and guidance for clubs.

Semantics are important in these documents, to provide clarity over the level of requirement. Appropriate use of words like *could*, *should* and *must* will help differentiate between mandatory requirements and simple guidance or advice.

Whatever system is adopted, and whatever terms are chosen, any changes should be communicated, supported, monitored (upheld) and reviewed, with clarity over the reciprocal roles and responsibilities of the organisation and leaders alike.

National Centres guidance notes give examples of best practice in the "commercial model". They are not, therefore, a literal example to copy. However, they demonstrate how an organisation can hold core principles and generic risk assessments tight, enabling individual staff more autonomy for delivery. In particular, pay attention to the degree of guidance; explanation of safety as a partnership for all; clarity on roles & responsibilities across the organisation; and how the process can be distilled down into a separate (simple) guidance document for leaders.

In essence, the more that can be done in a generic way, at an organisational level (to ensure the right people are in place, with the right skills, to make the right decisions on the day) the less the burden on the volunteer leader, later on in the process. But this only works if their efforts are reciprocated: and the organisation ensures procedures are followed, with adequate clarity and training up front; and appropriate monitoring and review of quality.

Putting it all together

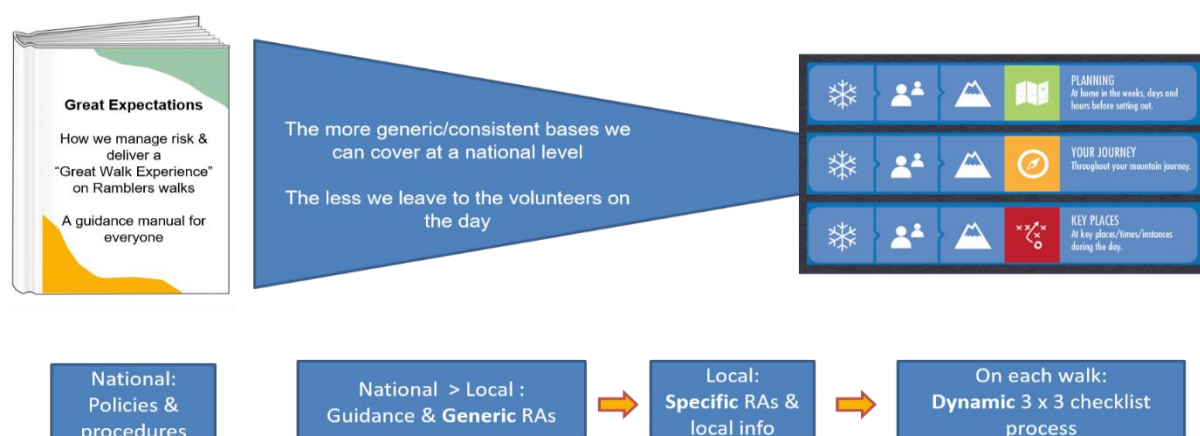
Further research into current practice across The Ramblers revealed many existing pockets of good practice; and the majority of leaders conforming to norms and wanting to do the right thing. One project leader summed it up perfectly: *"In the absence of any guidance from above, we have developed our own policies and procedures. But rather than bottom up - leaders protecting themselves from the lack of clarity; it should surely be top down - The Ramblers protecting their leaders . . ."*

It became apparent that a "common core" approach (of everyone trying to do the right thing) would never be as contentious as further discussion about risk assessment documents. Furthermore, many groups have written their own guidance, follow established principles and use the best models.

When all the best elements from the research are combined, it leads to an organisation wide model for the management of risk:

"This 'core consistent approach' outlines the steps we would expect each walk leader to follow. This framework is about investing in walk leader skills and training, empowering volunteers to lead within their own capabilities and trusting them to make a judgement about the level of risk – depending on the activity, the people taking part and the conditions. This is about standards not standardisation

and trusting our leaders, rather than sitting on their shoulders". This was presented to the Task & Finish group and, in turn, to the board of The Ramblers as an infographic.



Implementing change

Throughout this project, we have been mindful of the need to “Take the leaders on the journey”. Implementing change is not easy, but any new system should be proposed to the members and stakeholders for consultation before it is finalised. Using the “planning permission” analogy: you would not invite the masses to the architect’s office, but you would share the initial plans as soon as they are fit for consultation and review. This is bound to increase organisational buy-in; and any unintended consequences or issues can be addressed before any changes are finalised.

When listening to feedback from current walk leaders, it is important to consider the needs of “future leaders” not just the past. It is often “the squeakiest wheel which gets the most oil” so be robust in ascertaining data and scale of issues – not just responding to the loudest voice. There is a lot of good practice, and good content, across the organisation already. Proactively weave more of this into the training, education and expectation earlier in the process.

Whatever The Ramblers do must be proportionate, balanced and reciprocal. That is, if it is important, the organisation must take it seriously *and* ensure it is clearly and consistently upheld. This probably results in a greater burden for the central monitoring of standards, procedures and quality assurance.

The semantics of online learning and leader training must be confident, positive and educational. Share the reasons why we do what we do. Focus on positive process and learning – not on negative bureaucracy. By all means explain how quick and easy it is to complete the daily process; but be careful not to trivialise the importance of it.

Focus on the process (to support leaders in the delivery of excellent high quality walks) first; and consider how the organisation gathers sufficient evidence to fulfil obligations second. Development of online tools for planning, may make it really easy to gather, monitor and centrally store evidence of best practice, in due course. Remember – the organisation has the ultimate burden of responsibility to provide evidence – so make it as easy as possible for the volunteers to comply, and then get on with their valuable role.

Finally, in this rapidly evolving climate, the approach to risk management has been, and continues to be, in a state of flux. Consequently, The Ramblers (and members) should accept and embrace the need to continuously review and refine risk management protocols over time.

Appendix - Five key options

From the benchmarking of different approaches in different countries, sports and activities, five key options (& their potential merits & impact) were explored in more detail:

Options	What (& considerations)
A. No change	Maintain current process – hazard based risk assessment for each walk.
B. Return to pre-pandemic process	Remove need for written risk assessment (<i>would potentially leave leaders <u>and</u> the organisation exposed to all risks</i>)
C. Full commercial model (industry norms, compliant with licensing regulations, as deployed by professional organisations)	Appointment of a qualified "competent person" to train and assess leaders & take overall responsibility for risk management. Generic risk assessments and SOPs in-house. Only 'qualified/accredited' leaders can lead walks. Once approved, leaders are deemed suitably competent and skilled to dynamically manage risk on the day, then monitored. (<i>Would require an incredibly high level of time, resource and expense</i>)
D. Consistent core approach (Recording <i>what we actually do</i> to manage risk in an explicit & consistent way, compliant with sector guidance/best-practice, and to educate future leaders)	Focus on a quality risk management (RM) process rather than the risk assessment (RA) document. Clear and consistent RM expectations & roles agreed across the whole organisation. A handbook or manual forms the basis of consistent Guidelines & a Walk Leader Agreement. Generic RAs & route info held locally, enabling leaders to focus on (& share) the dynamic Risk:Benefit checklist & judgement on the day. (<i>The optimal solution, to bottle best practice from within the organisation – with greater clarity for all</i>)
E. Common Adventure Model	Leader as event organiser. Based on the premise that all walkers are equals. Walker agreement understood – shared approach to risk. (<i>Could only apply if walkers are truly equals – rarely the case with regular new walkers attending, or on many types of walks</i>)

About the Author

Martin Chester has over three decades of experience of outdoor activity provision, from instructional to strategic levels for key national organisations across the outdoor sector. Previously the Director of Training at Plas y Brenin (Sport England's National Outdoor Centre) and the CEO of NICAS, Martin brings understands the importance of strategic aims and compliance in this kind of review.

Having managed the instructional team at Plas y Brenin, Martin appreciates the real-world issues of delivering change across a wide-ranging team; and organisational policy at the coal-face. He sits on the independent safety committee for Glenmore Lodge. He brings extensive experience of the design and review of numerous outdoor interventions for the likes of Sport England, Forestry England, National Trust, and a host of National Governing Bodies.

Martin was co-author of the influential "Getting Active Outdoors" report in 2015; Strategic lead for the "GetOutside - Activity in a time of COVID-19" project; author of the "Great Outdoors Opportunities" paper as the OIA's response to Sport England's new 'Uniting The Movement' Strategy; and is a freelance consultant and mountain guide. As such, he brings an extraordinary network of contacts, from across the sector, to this project.

References & useful links

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