

Membership Handbook

September 2025

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ROYAL BRITISH LEGION

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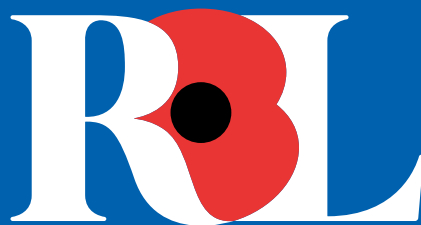
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Opening & General



ROYAL BRITISH LEGION

About the Membership Handbook

Welcome to the Membership Handbook

The Membership Handbook is a vital resource for all members of the Royal British Legion mandated by the Royal Charter, it provides essential guidance to ensure that our work is carried out in alignment with the principles and legal obligations enshrined in this cornerstone document. The handbook is designed to help members navigate their roles effectively, offering both policy guidance for day-to-day activities and detailed information about the structure and operation of our membership organisation. By following the guidance and instructions contained within, you will not only ensure compliance with UK charity law and the Royal British Legion's policies but also contribute to the smooth and successful running of your branch, county, district or section. This handbook is an indispensable tool to help us work together to achieve our shared vision and mission, and it complements the Royal Charter by providing practical advice and clarity for all aspects of membership activities.

It has two purposes:

- To ensure that you comply with UK charity law and with the Royal British Legion's policies when going about your RBL activities. Where you see the words 'must' and 'must not', or 'do' and 'do not', these instructions are a requirement of law or of RBL policy.
- To help you to run a happy and successful branch, county, district or section. It is good practice to follow the instructions in the handbook as many have legal or policy requirements that will help with compliance of the Royal Charter and RBL policies.

This book is detailed but not completely comprehensive, so if you have any questions that aren't addressed here, ask your MEO (Membership Engagement Officer) for help.

A formation is branch, county, district or section. Where you see the word 'county' or 'counties', these terms cover all counties, districts and sections.

The Royal Charter

The Royal Charter directs all of the Royal British Legion's work. It is a governance document that is recognised by the Government and the Charity Commission. It is enforceable in law. You can read the Royal Charter through the RBL's [website](#).

This handbook sits alongside the Royal Charter. It was created to help RBL officers; committee members and RBL members make sure they're acting within the rules of the Royal Charter.

Our Strategy 2025-2035

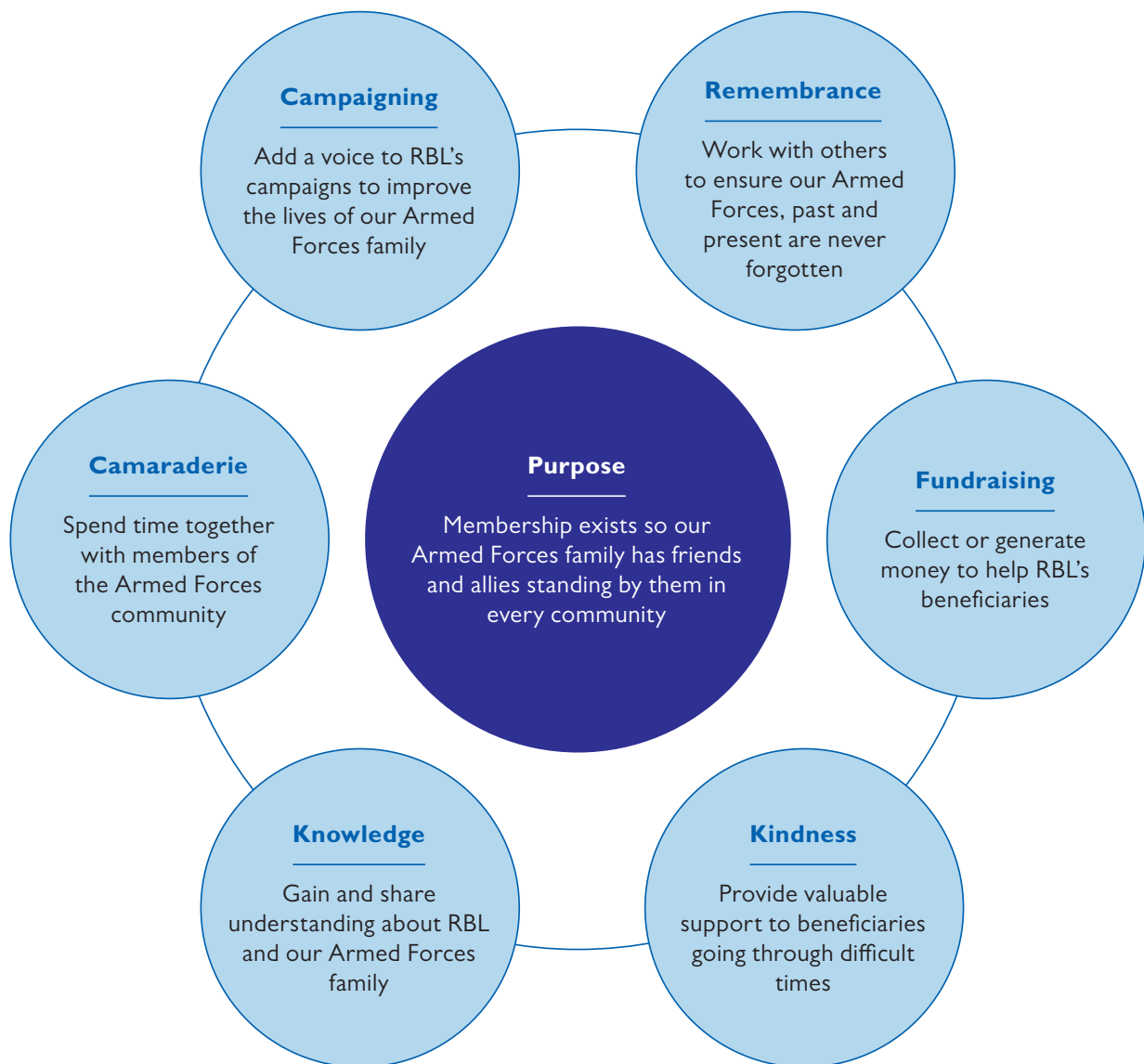
We want to be part of a society which values its Armed Forces, and we want RBL to be ready for the future, the best it can be for the people we serve and for our members, volunteers, and colleagues. We are responding to the changing world and the Armed Forces community's evolving needs.

Much of our work already revolves around the connections made across our communities and wider society. Through our new strategy, we will better harness the power of those connections to bring people together to support our communities in the most effective way possible and promote the important role of Remembrance.

Purpose and Value of Membership

Membership exists so our Armed Forces family has friends and allies standing by them in every community.

Our members bring value to the RBL through six core functions as shown below:



What it means to be a RBL member

Values and conduct

As local representatives of the Royal British Legion, members are expected to behave with integrity, to work together and to trust each other. Our values apply as much when dealing with people face to face as when communicating online, whether through official RBL channels, social media or personal emails.

We have ten guiding principles:

1. Respect and maintain the confidentiality of RBL information (unless you need to disclose something to prevent harm to yourself or to others, or to prevent financial or reputational risk).
2. Follow the organisation's policies and procedures.
3. Remain neutral and unbiased in all RBL activities.
4. Promote equality and diversity without being discriminatory.
5. Be dedicated to the responsibilities you have agreed to.
6. Be respectful and considerate towards others.
7. Guard the reputation of the RBL and build positive relationships internally and externally.
8. Ensure that no personal benefit or conflict of interest arises from your actions.
9. Be responsive and proactive in dealing with others.
10. Put comradeship at the heart of what you do.

We have four values that we maintain:

Stand together – We stand with an ever-evolving Armed Forces community, sharing a life-long commitment to support and comradeship. We share knowledge and build connections. Together with a national network of charities and partners, we ensure life during and after service is filled with purpose and community.

Be respectful – We stand with the Armed Forces community, valuing and respecting all experiences with empathy. We put people first, treating everyone with fairness and kindness, acting with integrity.

Take pride – We exist to make a positive difference to the Armed Forces community. Remembering and honouring service and offering support. We are thoughtful and focus our passion in the right way, taking ownership to ensure every action counts.

Embrace change – We look ahead to better understand the needs of those we serve, leading with confidence, expertise, and relevance. Guided by evidence and committed to learning, we are responsive and adaptable, empowered to ensure what we do is meaningful and impactful.

About the RBL

Overview

The Royal British Legion (RBL) stands at the heart of a national network dedicated to supporting our Armed Forces community. Since our founding in 1921, we have been unwavering in our mission to ensure the unique contribution of serving personnel, veterans, and their families is never forgotten. From those who have served just one day to those whose service is far behind them, we are here to provide assistance whenever it is needed, every day of the week. As the UK's largest Armed Forces charity, we cannot do this alone, the RBL's strength is its 180,000 members, over 50,000 volunteers, and a wide network of partners. We work tirelessly to deliver practical, emotional, and financial support to the Armed Forces community. Our roots lie in the aftermath of the First World War, when the British Legion was formed by uniting four ex-service organisations. This commitment to care and remembrance began with initiatives like the Poppy Appeal, launched in 1921 to support WWI veterans, and continues today with a modern, professional organisation driven by our shared values of:

- Stand together
- Be respectful
- Take pride
- Embrace change

The Royal Charter, which governs all we do, ensures we uphold our responsibilities with integrity and accountability. Whether through direct support, remembrance, or advocacy, the Royal British Legion remains a steadfast presence for all who have served and those who continue to serve.

How the RBL is financed

All funds held by the RBL (by branches, counties and centrally) are charitable funds and are the responsibility of the Board of Trustees. The funds must be used only according to instructions and policies from the [Board of Trustees](#). These instructions and policies are always in accordance with the Royal Charter, charity law, financial laws and other regulations concerning use of charitable funds, as well as codes of practice, rules of good practice and other professional compliance advice the RBL receives. The use of charitable funds for purposes other than those laid down by the Board of Trustees is strictly forbidden and may be illegal. The Board of Trustees is responsible for two funds defined in the [Royal Charter](#).

The Benevolent Fund

This contains gifts of money or property from public or private subscription or other sources, and is the charity's main source of income. The Poppy Appeal provides a large part of this income. The Royal Charter requires formations to give active support to the organisation of the Poppy Appeal, which is a year-round activity, and not just confined to Remembrancetide.

The General Fund

This funds the membership organisation. It draws its income mainly from the annual membership fees paid by members and from Gift Aid on those fees. It covers:

- Membership administration, governance, grants, training grants and events grants (the application process for which can be found [here](#)) for counties.
- Producing RBL magazine
- Membership Support
- Membership Training
- Membership staff costs

Both funds will be examined annually by an independent examiner or a qualified auditor.

The RBL's governance

The Board of Trustees is the RBL's governing body. It instructs and advises the Membership Council, counties and branches. Find out more about how the Board of Trustees works on our website [here](#).

The Membership Council represents the members of the Royal British Legion. Find out more through your local branch. RBL staff implement the policies and procedures agreed by the Board of Trustees and the Membership Council.

Annual Conference

Annual Conference is the key RBL event of the year, acting as the AGM for the organisation. It is an important meeting supporting the governance of the charity where the annual accounts report, Director General's address and voting on motions take place. Alongside the business of conference, which is set out in the Standing Orders for Conference, the event also provides the opportunity for engagement and discussion between membership, staff and invited guests.

The Annual Conference is a great opportunity to catch up on Royal British Legion news, meet fellow members from across the UK and abroad as well as RBL teams. The RBL website has a dedicated [page to Annual Conference](#). As well as Annual Conference being a social engagement event, there are specific requirements set out in the Royal Charter for the business of Conference, which include:

- a. presentation of reports and accounts for the past year;
- b. the Director General's address to Annual Conference;
- c. consideration of Motions proposing amendments to the Charter;
- d. consideration of issues of general policy raised by way of Motion by the Board of Trustees or county/district conferences or overseas or non-territorial branches; and
- e. nominations for membership of the Conference Committee.

All decisions at Annual Conference are taken in the form of voting by branch delegates. Any branch member may attend as a visitor to Annual Conference; all branches may send a branch delegate and can vote on or submit motions. Branches are still required to nominate their delegate to represent their formation at conference. There is support available for delegates to have a proportion of their expenses met.

The Conference Committee

The Board of Trustees has delegated authority to the National Conference Committee to oversee that the business of conference is planned and carried out in order with the Royal Charter and Standing Orders for Conference. This committee consists of:

- One member of the Board of Trustees nominated by the National Chair.
- Two members of the Membership Council nominated by the Membership Council Chair.
- Three members or life members elected by Annual Conference.

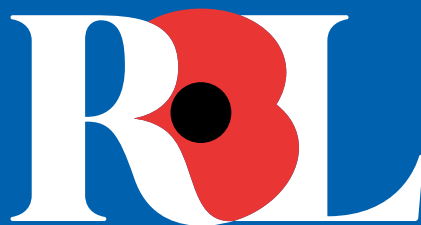
Members of the Board of Trustees, Membership Council and staff members may attend and can speak at Annual Conference. However, they may not vote or attend as the delegate of any branch or county committee.

Each county committee is entitled to send one delegate to Annual Conference who can speak but not vote on any motions

The National President presides at the opening of Annual Conference. The conference is chaired by the RBL National Chair (or in the Chair's absence by the RBL National Vice Chair).

Annual Conference information is available on the main RBL website, with information pertaining to previous years available on MAP at this link.

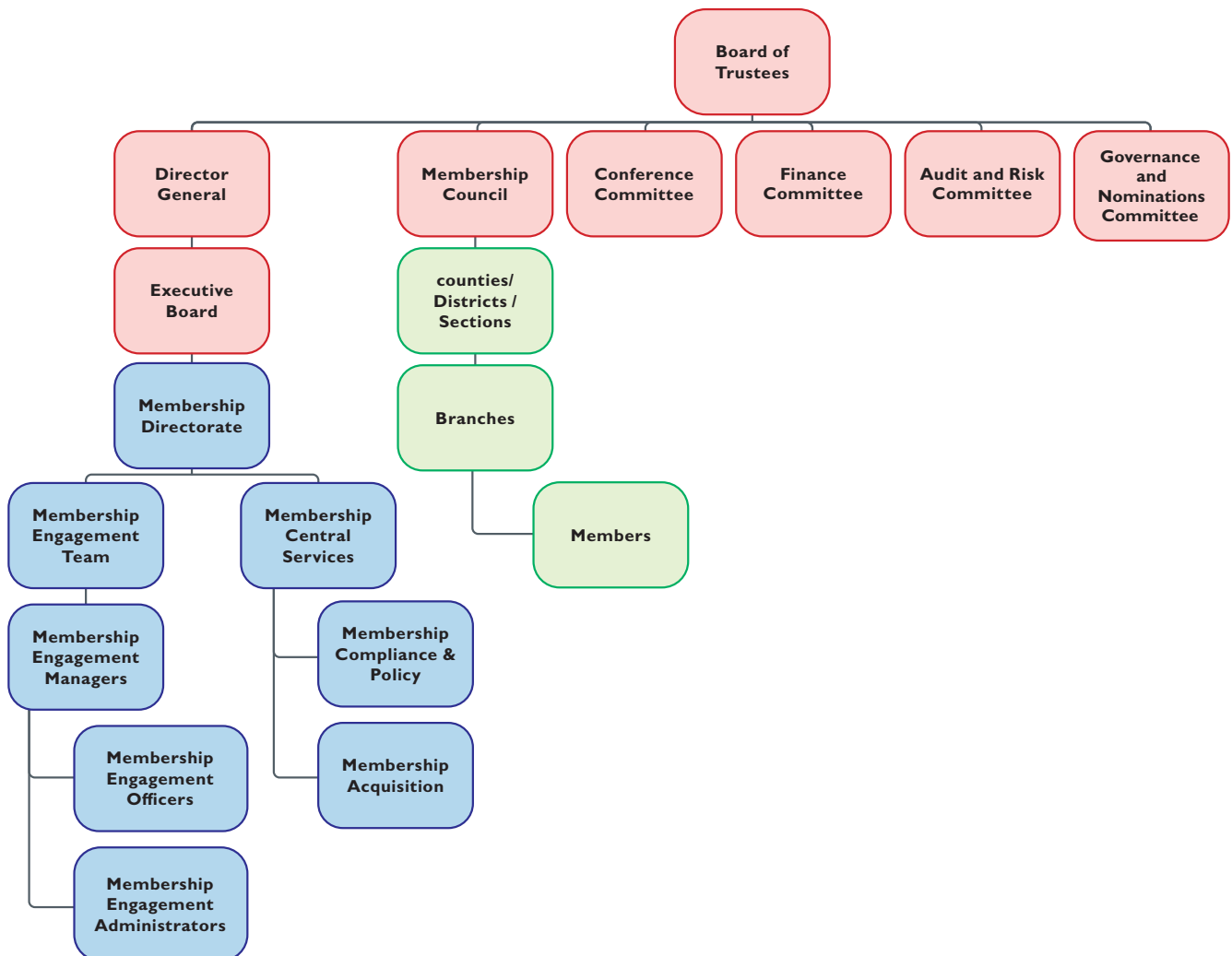
Structure & Organisation



ROYAL BRITISH LEGION

Membership Council

Where the Membership Council sits within RBL



About the Membership Council

Aims and how it works

The Membership Council is a sub-committee of the Board of Trustees. It represents the needs of RBL membership. It usually meets six times a year, right after the meetings of the Board of Trustees. The Membership Council Chair can also call a special meeting of the council if needed.

The Membership Council exists to:

- Help with membership policy matters at the request of the Board of Trustees or RBL directors.
- Manage and administer counties.
- Manage and administer branches that do not belong to a county.
- Approve the formation, amalgamation and closure of counties, branches.
- Approve county model byelaws, county byelaws and branch model byelaws.
- Approve, amend and withdraw RBL club licences.
- Monitor the General Fund Budget and make recommendations on income and expenditure.
- Make recommendations for the improvement of membership administration and systems to make sure that members' needs are being met.

It helps to develop the RBL's strategic membership plan and oversees:

- The Membership complaints procedure.
- Membership Training
- The Ceremonial Handbook.
- The RBL's Youth policy.
- The RBL's Bands policy.
- The RBL's Cups and Shields Guidelines.

Details of these can be found on Microsoft Office 365 (O365) or through your MEO.

The Membership Council is made up of the following:

- Two members of the Board of Trustees appointed by the RBL's National Chair.
- These two members are the Chair and Vice Chair of the Membership Council.
- 19 members, including one from each electoral region and one from Overseas, the Women's Section and National Branches.

Geographical Electoral Regions:

- Cornwall/Devon
- Somerset/Wiltshire
- Dorset/Hampshire/Isle of Wight
- London (Greater London)
- South-East (Kent, Surrey and Sussex)
- East Anglia/Essex (Cambridgeshire, Essex, Norfolk, Suffolk)
- South-East Midlands (Bedfordshire, Berkshire, Buckinghamshire, Hertfordshire, Northamptonshire, Oxfordshire)
- South-West Midlands (Gloucestershire, Herefordshire, Worcestershire)
- West Midlands (Shropshire, Staffordshire, Warwickshire and Birmingham)
- East Midlands (Derbyshire, Leicestershire, Lincolnshire, Nottinghamshire)
- Wales (Gwent, North Wales, South-East Wales, South West Wales)
- Yorkshire (North and East Yorkshire, South and West Yorkshire)
- Merseyside/Cheshire (Cheshire, West Lancashire)
- Manchester/Lancashire (Greater Manchester, Lancashire)
- Northern (Cumbria, Isle of Man, Northumbria)
- Ireland (Northern Ireland, Republic of Ireland)
- Overseas (Germany, Spain South, Spain North)

Membership Council Meetings

At meetings, there needs to be at least one trustee member and seven elected members present for the meeting to be quorate. In addition, the RBL's Executive Director of Membership should be present and heads of department and managers from the RBL's membership division if they are needed. Other members of RBL staff may be invited to help with specific agenda items. The RBL's Executive Director of Services may have a standing agenda item so that they can brief the Membership Council and feedback on matters relating to the RBL's service delivery.

The Chair of the Membership Council chairs the meetings. Therefore, they need the skill and experience to guide the council, including good knowledge of the RBL's activities. Anything they say in this role should reflect RBL views and policy. In the absence of the Chair, meetings are Chaired by the Vice Chair of the Membership Council.

The meeting participants work through the agenda. Reports that have been produced for the Membership Council to consider (including sub-committee work) are circulated at 14 days ahead of the meeting to Membership Council members by email.

The Membership Council provides the Board of Trustees with minutes of meetings and detailed reports on specific proposals where needed. Members of the Membership Council can see meeting agendas, briefing papers and decision minutes on the RBL intranet. Confidential items are published in the secure area.

The Membership Council can also advise the Conference Committee on motions for Annual Conference.

Members of the Membership Council represent the views of themselves and their regions. However, once a majority decision is taken by the Membership Council, it must be honoured by all members. The Chair can ask a Membership Council member to relinquish their position if there is a conflict with the RBL's values and aims, they do not accept a majority decision or if they have been absent for three consecutive meetings in a year.

What Membership Council members do

Membership Council members always act in the best interests of the Royal British Legion. They must not gain financial or other benefit from membership of the Council. Council members take decisions together and are collectively responsible for their implementation. They delegate responsibility for the day-to-day running of the membership to the Membership Department.

They ensure that the Membership Organisation acts within the terms of the Royal Charter. They are also responsible for organising briefings in their electoral regions.

Membership Council members undergo training when they take up their role. They are paid reasonable expenses. They should attend Annual Conference and can attend county committee meetings in their electoral region without invitation. They should attend the annual general meetings of counties in their electoral region.

Membership Council Working Groups

Ceremonial Working Group

This group maintains the Ceremonial Handbook, which can be found on Microsoft Office 365 (O365) or through your MEO, and considers all matters to do with ceremony. It meets at least three times a year and the agenda is circulated at least one week before each meeting. The Chair of this group presents the minutes to the Membership Council.

Terms of Reference

Chair: Membership Council (MC) Rep

The members are:

- 3 Membership Council Reps (not including the Chair)
- National Parade Marshal (NPM RBL) – *voting*
- Deputy National Parade Marshal (DNPM RBL) – *non-voting*
- Women's Section National Parade Marshal (WSNPM RBL) – *voting*
- Deputy Women's Section National Parade Marshal (DWSNPM RBL) – *non-voting*.

The Membership Governance Coordinator coordinates the meetings of the Ceremonial Working Group. Three members of this group must be at a meeting for it to be quorate. Votes are taken by a show of hands.

1. Purpose

The Ceremonial Working Group has been set up to enable Membership Council to provide assurance to Board of Trustees that the ceremonial events which involve members are being carried out in accordance with RBL policies; that the responsibilities and reputation of RBL is upheld and that the required presence provided, where ceremonial events are required; that the Ceremonial Handbook is accurate and up-to-date; that due diligence is checked when approving the National Standard to be present at an event.

2. Membership

The Ceremonial Working Group shall be comprised of up to four MC reps (with one of the MC reps appointed Chair) and the four parade marshals as detailed above.

Administrative support can be provided by the Membership Directorate.

The Chair is responsible for writing reports for Membership Council.

3. Secretary

The Membership Directorate can provide administrative support with setting up the meetings and taking notes.

4. Quorum

The quorum necessary for the transaction of business shall be the Chair, and two other members.

5. Frequency of meetings

The Ceremonial Working Group shall meet four times a year, and as and when required.

6. Notice of meetings

Meetings shall be called by the secretary at the request of the Chair, or directly by the Chair if secretary support is not required.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

Meetings can be in person or virtually as appropriate.

7. Duties

Delegated Authority

The Membership Council delegates responsibility to the Ceremonial Working Group, in the context of its purpose (point 1).

8. Review of Terms of Reference

The Terms of Reference and the effectiveness of the Ceremonial Working Group shall be reviewed annually and led by the Chair, with support from the Governance team.

Membership Awards Committee

This group decides on the application criteria and the Annual Membership Awards. It meets twice a year and the agenda is circulated at least one week before each meeting. The Chair of this group presents the minutes to the Membership Council.

Terms of Reference

Chair: Membership Council (MC) Rep

The members are:

- 4 Membership Council Reps (in addition to the Chair)

Members serve for three years and can serve multiple terms. Three members of this group must be at a meeting for it to be quorate. Votes are taken by a show of hands.

1. Purpose

The Annual Membership Awards Committee has been established to enable Membership Council to provide assurance to the Board of Trustees the Annual Membership Awards are effectively promoted, and that the judging process is fair and appropriate, taking into account RBL values.

2. Membership

The Annual Membership Awards Committee shall be comprised of up to five MC reps, with one of the MC reps appointed Chair. Administrative support will be provided by the Membership Directorate.

The Chair is responsible for writing reports for Membership Council.

3. Secretary

The Membership Directorate provides administrative support with:

- Setting up the meetings and taking notes
- Promoting the awards
- Administering the awards entry process
- Organising the awards event

4. Quorum

The quorum necessary for the transaction of business shall be the Chair, and two other members.

5. Frequency of meetings

The Annual Membership Awards Committee shall meet four times a year, and as and when

required. The meetings will take place to align with the deadlines for the launch, promotion and judging of the awards.

6. Notice of meetings

Meetings shall be called by the secretary at the request of the Chair.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

Meetings can be in person or virtually as appropriate.

7. Duties

Delegated Authority

The Membership Council delegates responsibility to the Annual Membership Awards Committee, in the context of its purpose (point 1).

8. Review of Terms of Reference

The Terms of Reference and the effectiveness of the Annual Membership Awards Committee shall be reviewed annually and led by the Chair, with support from the Governance team.

Legion Complaints Committee (LCC)

This group deals with membership complaints and reports to the Membership Council. The LCC is briefed on all formal complaints and discusses them at meetings, where it decides whether to conduct a formal review. The Chair of the group can consult members of Royal British Legion staff if they need to.

Terms of Reference

Chair: MC Rep

The members are:

- Up to 6 MC Reps

1. Purpose

The Legion Complaints Committee has been established to:

- Enable Membership Council to provide assurance to the Board of Trustees that complaints about members are reviewed appropriately and according to the Membership Complaints Procedure.
- Action appropriate sanctions against members, as a result of LCC reviews as well as external investigations.
- Ensure that procedures are followed, reporting is accurate and timely, and other Directorates are involved and/or updated when necessary.

2. Membership

The Committee shall be comprised of up to six MC reps of relevant experience and training, with one of the MC reps appointed Chair of the Committee. The LCC Chair maintains the right to co-opt other suitably qualified members to the LCC from the wider Legion membership. Members serve for three years and can serve multiple terms. Administrative support will be provided by the Membership Directorate.

The Chair together with the Membership Liaison team is responsible for writing reports for Membership Council.

3. Secretary

The Membership Liaison team will ensure that the Committee receives information in a timely manner to enable full and proper consideration to be given to issues; will minute the proceedings and decisions of the meetings, including recording the names of those present and in attendance.

4. Quorum

The quorum necessary for the transaction of business shall be the Chair, and two other members.

5. Frequency of meetings

The Committee shall meet four times a year and otherwise as required.

6. Notice of meetings

Meetings of the Committee shall be called by the secretary at the request of the Chair.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

The Committee is authorised to meet in person or virtually as appropriate.

7. Duties

Delegated Authority

The Membership Council is solely responsible for the duties and actions of the Legion Complaints Committee.

8. Review of Terms of Reference

The Terms of Reference and the effectiveness of the Committee shall be reviewed annually and led by the Chair, with support from the Governance team.

Community Connections Working Group

Terms of Reference

Co-Chairs: Membership Council (MC) Rep; Head of Membership Services & Development

The members are:

Representatives from:

- Membership Development, Membership Engagement, Learning & Development
- Welfare
- IT
- Safeguarding
- County chairs

1. Purpose

- To enable the Membership Council to provide assurance to Board of Trustees that counties and districts, branches and members are fully trained and delivering community initiatives including BCS, whilst adhering to RBL policies, safeguarding and compliance requirements.
- Contribute to shaping how branches and counties foster community connections, aligned with the Royal British Legion's membership values: Kindness, Camaraderie, Knowledge, Fundraising, Remembrance, and Campaigning.
- Provide input into the development of the Membership, offering advice on procedures, priorities, and the delivery of community-based initiatives, roles, and services—including Branch Community Support (BCS) — and support reporting on their outcomes.
- Encourage and support branches in actively engaging with these community initiatives.

2. Membership

The Working Group is co-chaired by an MC Rep and the Membership Development Manager.

- A staff member co-chair is responsible for writing reports for the Membership Council, in collaboration with the MC Rep co-chair – providing data, informed advice and guidance on development, training, platforms, policies and delivery activities to support the MC with its responsibilities pertaining to branch and county community initiatives.
- Other members include staff and volunteers who offer expertise and experience in safeguarding, welfare and membership.

3. Secretary

A note-taker will ensure that the Working Group receives information and papers in a timely manner and will minute and distribute the action points.

4. Quorum

The quorum necessary for the transaction of business shall be one of the Chairs and at least four other members.

5. Frequency of meetings

The Working Group shall meet 12 times per year and otherwise as required. The meetings will take place to align with deadlines for reports into the Membership Council.

6. Notice of meetings

Meetings of the Working Group shall be called by the secretary at the request of the Co-Chairs. Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

- The Working Group is authorised to meet in person or virtually as appropriate.

7. Duties

Delegated Authority

Branch and County community initiatives require joint delivery from both the Membership Council and staff. The Membership Council has delegated responsibility to this Working Group.

8. Review of Terms of Reference

The Working Group's Terms of Reference and the effectiveness of the Working Group shall be undertaken annually and led by the Co-Chairs.

Overseas Membership Working Group

Terms of Reference

Co-Chairs: MC Rep and Head of Membership Policy and Compliance

The members are:

- Membership Engagement Manager – Overseas
- Head of Membership Engagement

Representation from the following teams

- Finance
- Poppy Appeal
- Training
- Overseas Casework team

Purpose

The Overseas Working Group has been established to enable Membership Council to provide assurance to Board of Trustees that RBL Overseas branches and district compliance is being monitored, and that branch related activities are being undertaken in accordance with relevant laws, policies and legal guidance as relevant to RBL and the foreign territories.

9. Membership

The Working Group will be Co-Chaired by the Membership Council Representative for Overseas branches and districts and the Head of Membership Compliance and Policy with the members of the group comprised of the subject matter expert teams (listed above)

There will be occasions within which additional expertise will need to be brought into particular tasks on an advisory basis as required.

10. Secretary

A secretary will ensure that the Working Group receives information and papers in a timely manner to enable full and proper consideration to be given to issues. The secretary will produce a record of decisions of all meetings, including recording the names of those present and in attendance.

11. Quorum

The quorum necessary for the transaction of business shall be one of the Chairs, and four other members.

12. Frequency of meetings

The Working Group shall meet as required. The meetings will take place to align with deadlines for reports into Membership Council.

13. Notice of meetings

Meetings of the Working Group shall be called by the secretary at the request of the Co-Chairs.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

The Working Group is authorised to meet in person or virtually as appropriate.

14. Duties

Delegated Authority

The Membership Council has delegated to the Overseas Working Group the duties to carry out the purpose as defined in point 1 above.

15. Reporting

The Working Group shall submit reports to the Membership Council as necessary. To achieve this, the Working Group will request information from relevant teams to form the report, as well as share information through the Executive Board to the Board of Trustees (where required) to support the wider strategic aims concerning overseas work.

16. Review of Terms of Reference

The Working Group's Terms of Reference and the effectiveness of the Working Group shall be reviewed annually, led by the Co-Chairs.

Youth Membership Working Group

Terms of Reference

Co-Chairs: Membership Council (MC) Rep; Membership Experience Manager

The members are:

- 1 X MC rep in addition to the Co-Chair
- 2 X county youth officers (one North, one South)
- 1 X county chair; Membership Engagement Manager
- Membership Development Manager

1. Purpose

The Youth Membership Working Group has been established to enable Membership Council to provide assurance to the Board of Trustees that:

- activities are in place to develop the youth membership offer, with the aim to grow youth membership
- activities involving youth members are carried out in accordance with the youth membership policy and Legion youth strategy.

2. Membership

The Working Group shall be co-chaired by an MC rep and member of staff.

The staff member co-chair is responsible for writing reports for Membership Council, in collaboration with the MC rep co-chair - providing data, informed advice and guidance.

3. Secretary

A note-taker will ensure that the Working Group receives information and papers in a timely manner and will minute the action points.

4. Quorum

The quorum necessary for the transaction of business shall be the Co-Chairs, and three other members.

5. Frequency of meetings

The Working Group shall meet four times a year and otherwise as required. The meetings will take place to align with deadlines for reports into Membership Council.

6. Notice of meetings

Meetings of the Working Group shall be called by the secretary at the request of the co-Chairs.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

The Working Group is authorised to meet in person or virtually as appropriate.

7. Duties

Delegated Authority

The Membership Council has delegated responsibility for developing youth membership to this Working Group.

8. Review of Terms of Reference

The Terms of Reference and the effectiveness of the Working Group shall be reviewed annually and led by the co-Chairs.

Membership Finance & Compliance Working Group

Terms of Reference

Co-Chairs: Membership Council (MC) Rep; Head of Membership Policy & Compliance

The members are:

- Director: Financial Accounting and Business Processes;
- Head of Legacy Management
- Head of Risk Management and Insurance
- Branch and Restricted Funds Manager
- Audit Compliance and Investigations Manager
- Membership Compliance Manager

1. Purpose

To enable Membership Council to provide assurance to Board of Trustees that:

- A strategy and contingencies are in place to assist branches and counties/districts in achieving compliance and good financial management.
- The Membership Handbook is up-to-date, user-friendly and accessible.

2. Membership

The Working Group is co-chaired by an MC rep and the Head of Membership Policy & Compliance.

The Chairs are responsible for writing reports for Membership Council - providing data, informed advice and guidance on branch and county/district finances and compliance.

3. Secretary

A secretary will ensure that the Working Group receives information and papers in a timely manner to enable full and proper consideration to be given to issues. The secretary shall minute the proceedings and decisions of all Committee meetings, including recording the names of those present and in attendance.

4. Quorum

The quorum necessary for the transaction of business shall be one of the Chairs, and four other members.

5. Frequency of meetings

The Working Group shall meet six times a year and otherwise as required. The meetings will take place to align with deadlines for reports into Membership Council.

6. Notice of meetings

Meetings of the Working Group shall be called by the secretary at the request of the co-Chairs.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

The Working Group is authorised to meet in person or virtually as appropriate.

7. Review of Terms of Reference

The Working Group's Terms of Reference and the effectiveness of the Working Group shall be undertaken annually and led by the co-Chairs.

Clubs & Bands Working Group

Terms of Reference

Co-Chairs: Membership Council (MC) Rep; Head of Membership Acquisition (Staff)

The members are:

- 3 x MC Reps (in addition to Chair), Head of Estates, Head of Membership Policy & Compliance
- Head of Membership Services & Development
- Head of Membership Engagement
- Club Relationship Managers

MC Reps to be appointed by The Chair of The MC.

1. Purpose

The Clubs Working Group has been established to enable Membership Council to provide assurance to the Board of Trustees that:

- RBL club compliance is being monitored, and that club license renewals are being processed;
- By feeding into the clubs strategy, plans are in place to encourage clubs to offer their spaces up to their local community for services and activities.
- Provide development and strategic support for RBL Clubs across The Uk.

2. Membership

The Working Group shall be chaired by an MC rep and Co-Chaired by the Head of Membership Acquisition and Development

The Co-Chairs are responsible for writing reports for Membership Council - providing data, informed advice on withdrawing licences to clubs, and granting licences to open new clubs for The MC to approve. Input into the reports will come from the Estates team and the Clubs Compliance Co-ordinator.

Other members of the Working Group include 3 other MC reps, staff representatives from policy and compliance, club relationship Managers, estates, membership engagement, membership services and development.

3. Secretary

A note-taker will ensure that the Working Group receives information and papers in a timely manner and will minute the action points.

4. Quorum

The quorum necessary for the transaction of business shall be the Chair, and three other members.

5. Frequency of meetings

The Working Group shall meet four times a year and otherwise as required, as directed by The Co-Chairs of The Working Group. The meetings will take place to align with deadlines for reports into Membership Council.

6. Notice of meetings

Meetings of the Working Group shall be called by the secretary at the request of the Co-Chairs.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

7. Duties

Delegated Authority

The Membership Council has delegated responsibility for clubs, with regards to the purpose detailed in point 1, to this Working Group.

8. Review of Terms of Reference

The Terms of Reference and the effectiveness of the Working Group shall be reviewed annually and led by the Chair

Training Working Group

Terms of Reference

Chairs: Membership Council (MC) Rep

The members are:

- MC rep (in addition to Chair)
- Director of Learning & Organisational Development
- 2 x county training officer
- 1 x county chair
- Head of Membership Policy & Compliance

1. Purpose

The Training Working Group has been established to enable Membership Council to provide assurance to the Board of Trustees that:

- counties and districts, branches and members are undertaking training – to achieve and maintain compliance status, meet legislative requirements and ensure best practice.
- Feeding into the training strategy and policy, content is shaped, activities are prioritised and membership feedback is applied.

2. Membership

The Working Group shall be chaired by an MC rep.

The Chair is responsible for writing reports for Membership Council – providing data, informed advice and guidance – with support from the L&OD team.

3. Secretary

A secretary will ensure that the Working Group receives information and papers in a timely manner to enable full and proper consideration to be given to issues. The secretary shall minute the proceedings and decisions of all meetings, including recording the names of those present and in attendance.

4. Quorum

The quorum necessary for the transaction of business shall be the Chair, and four other members.

5. Frequency of meetings

The Working Group shall meet six times a year and otherwise as required. The meetings will take place to align with deadlines for reports into Membership Council.

6. Notice of meetings

Meetings of the Working Group shall be called by the secretary at the request of the Chair.

Unless otherwise agreed, notice of each meeting confirming the venue, time and date, together with an agenda of items to be discussed, shall be distributed no later than five working days before the date of the meeting.

The Working Group is authorised to meet in person or virtually as appropriate.

7. Duties

Delegated Authority

The Membership Council has delegated responsibility for membership training to this Working Group.

8. Review of Terms of Reference

The Terms of Reference and the effectiveness of the Working Group shall be reviewed annually and led by the Chair

Membership Council Administration of a county

1. Counties entering Membership Council Administration

- 1.1. The decision to take a county into MC Administration is a serious matter and is for the judgement of the Membership Council (MC). MC Administration is a temporary measure where the county is supported by the MC instead of a county committee and all county affairs, including bank account, are under the control of MC until the county can return to normal.
- 1.2. Every effort should be made to prevent the need for MC Administration. Issues within counties should be identified as early as possible in order to resolve them. The MC should monitor the counties through the county Development Registers and associated Action Plan in order to achieve this. Where issues are identified the MC Rep should work alongside the county chair and committee, Audit and Compliance team, MEO and the MEM to support the county to resolve the issues within a given timeframe.
- 1.3. A county may be taken into MC Administration where:
 - The county committee is not effective due to the committee structure. This may be due to:
 - A county is unable to form a committee or a committee stands down.
 - The county chair stands down, is removed from post, or the role is otherwise vacant and either there is not a county vice chair or vice chair is unwilling to act as interim Chair (see note below 1.4).
 - A county committee is temporarily unable to function effectively, for example, where there are insufficient committee members or the county officer roles cannot be filled.
 - There is no likelihood of potential committee members coming forward.
 - The county committee is not functioning effectively in its role. This may be because:
 - The county committee is unable or unwilling to fully comply with the Legion compliance requirements (governance and financial).
 - The county committee has demonstrated a lack of effective management of the county's branches leading to multiple issues.
 - A county committee is not demonstrating the Legion's values and behaviours, have not followed the rules as laid down in the Royal Charter and the Membership Handbook or have not followed relevant RBL instruction, policy and procedures.
- 1.4. Where this situation occurs, the MC should consider whether the remainder of the county committee is functioning and effective and whether standing the committee down for MC Administration would therefore be detrimental to the county. If this is the case then the MC may choose to put in place a temporary county chair, selected by the MC Rep from the existing committee, and agreed by MC, who will remain in place until elections are conducted.
- 1.5. The decision to take a county into MC Administration should be agreed by the MC and noted in the MC meeting minutes. In exceptional cases there may be a requirement to take a decision on a county's status outside of the routine MC meeting schedule. In such a case, the decision is to be taken by email vote and discussion and the decision is to be ratified and recorded at the next MC meeting.

2. MC administration process

- 2.1. Once the decision has been taken to take a county into administration, the MC should appoint two MC Reps as Points of Contact who are responsible for implementing and managing the MC Administration for the county.
- 2.2. There are two approaches (described in more detail below) to managing the administration period depending on the situation within the county:
 - **Approach 1:** this intervention is undertaken when the branches within the county are in a positive state and the primary issues lay within the county committee itself. The aim of MC administration in this case is to maintain business as usual and provide oversight of the county until an election can be held to establish a new committee.
 - **Approach 2:** this is a more intensive intervention where the issues within the county extend to the branches and there are multiple and complex matters which require resolution. This may include where the MC Administration process is expected to be in place for a prolonged period ie: beyond one election cycle. The aim of MC Administration in this case is to resolve the issues within the county while maintaining business as usual and oversight of the county. This ensures that, once established, the new county committee is able to function and manage the county effectively.
- 2.3. To take a county into administration the following process should be followed:
 - A letter should be sent to any existing county committee members informing them that the county is being taken into administration and that they no longer hold committee roles.
 - County officers should be informed that all required documentation should be handed to the MC Points of Contact, giving a date by which this must occur.
 - County officers are to be informed that all county resources are to be handed over to the MC points of Contact including any laptops or event resources such as gazebos (or the contact and keys for the location in which these items are stored). All such items should be listed on a county asset register.
 - Outgoing officers are requested to amend the bank mandate by a given date so that the signatories are the supporting county chair and supporting treasurer
 - All branches of the county should be informed that the county has been taken into administration.
 - The county president and county chaplain, unless also being removed from role, should be informed of the Administration process and should support the process where appropriate.
 - The fundraising PAM should be informed of the Administration process.

3. MC Administration Approaches:

- 3.1. **Approach 1.** A working group should be formed to manage the administration process which includes:
 - MC points of contact (one of which is to chair the meetings)
 - A supporting county chair

- A supporting county treasurer
- Membership Engagement Officer (MEO)
- Membership Engagement Administrator (MEA)
- Audit and Compliance staff member
- Membership Learning & Organisational Development (L&OD) member of staff
- A member of the finance team.

3.2. The role of the county chair and the treasurer are not intended as interim county chair and treasurer but are to support the MC Points of Contact in the administration process, including managing county funds and acting as mentors to the new county chair and treasurer once a new committee is in place.

3.3. Approach 2. For this more intensive intervention two groups are established:

3.3.1. Oversight Group: The aim of this group is to resolve the key issues within the branches and at county level, which prevent the county from functioning effectively and in a compliant manner. The group will produce a clear action plan for the branch and county level matters and deliver resolution of these issues prior to a new county committee being established. The Chair of the Interim Committee (details below) is to feed into, and report back from, this group.

- MC points of contact (one of which is to chair the meetings)
- A supporting county chair
- Membership Engagement Manager (MEM)
- Membership Engagement Administrator (MEA)
- Audit and Compliance staff member
- Membership Learning & Organisational Development (L&OD) member of staff
- A member of the finance team.
- A member of the legal team (as required)
- A member of the property trusts team (as required)
- The Regional Property Manager(as required)
- The Regional Clubs Relationship Manager (as required)

3.3.2. Interim Committee: The aim of this committee is to ensure that the county continues with business as usual, that branches receive appropriate BAU communication and support and that the county has representatives at key activities such as county chairs' seminar.

- MC Rep
- A supporting county chair (chair of the committee)
- A supporting county treasurer
- Membership Engagement Manager (MEM)
- County Parade Marshal
- An interim committee including CTO and branch or group representatives.

4. Administration of the county

- 4.1. Throughout the MC Administration period, all county branches are to be kept informed of progress and are to be informed of the contact details for the MC Points of Contact.
- 4.2. There is no restriction placed on branches within counties that are in MC Administration; branches should continue to carry out their usual role and branches are still eligible to vote. County Officers who are stood down as part of MC Administration may continue to sit on the branch committee.
- 4.3. The MC should consider whether the ceremonial roles of Standard Bearer and county Parade Marshal have contributed to the reasons that the county has been taken into administration. If this is not the case they may both remain in post while a county is in MC Administration and the county standard bearer will retain the standard throughout. Authorisation to parade the standard during this time should be sought from either the MC Point of contact (Approach 1) or the interim county chair (Approach 2). During the period of administration the standard bearer competition should take place as usual.
- 4.4. County conferences should take place as usual during the period a county is in MC Administration and are to be organised and organised by the MC Point of Contact (Approach 1) or the interim county committee (Approach 2) with support from the staff team.
- 4.5. Following each county chairs' seminar a face to face back-brief session should be conducted for all branches within a month.
- 4.6. Where the county has a group structure, the group committees are unaffected by the MC Administration. Unless they have been specifically stood down as a result of the MC Administration process, those elected by the group committees to be group reps on the county committee will continue to hold that appointment throughout the process and will move onto the new committee once formed. Group reps should continue to provide support to branches, support the MC Administration process and brief the MC Points of Contact and interim county chair as required.
- 4.7. Branches in county administration and those which are CSBs at the time that the MC Administration begins will be administered by the supporting county chair and county treasurer.
- 4.8. The L&OD team should continue to deliver any branch training that has been scheduled or is required by the branches. The MEO should liaise with neighbouring counties and inform the branches of any training taking place in neighbouring counties that it would be appropriate for the branches to attend.
- 4.9. Any commitments that the county had made, such as events, should be honoured.
- 4.10. The appointment of county poppy appeal co-ordinator is unaffected by the Administration process and should continue to carry out their role. Updates are to be provided to the relevant contact.
- 4.11. Processes relating to effective county management of branches should continue during the period of MC Administration. These include branch closures or a branch moving to CSB.

5. County Finances

- 5.1. Any funds within their county continue to be held as a restricted fund for the county – these funds are available to the MC Points of Contact for such expenditure as is required to manage the county and re-establish a county committee. The funds should be monitored and managed by the supporting county treasurer.
- 5.2. The county will not be classed as compliant for the duration it is in MC administration.

6. Resolution of issues

- 6.1. The Points of Contact should establish a clear plan of action to resolve any issues or matters outstanding that were factors in the county moving into administration or would be a barrier to a new committee effectively managing the county. The Branch Risk Register and an Action plan should be maintained throughout the MC Administration period.
- 6.2. The MC Points of Contact will also be responsible for ensuring any Compliance and Audit recommendations have been properly actioned and such activity is properly recorded to support the county coming out of administration.
- 6.3. The Points of Contact should report to the MC at every meeting on the progress of the county administration process.

7. Forming a new committee

- 7.1. In some instances, the working group may deem it necessary to inform one or all of the previous committee members or officers that they are not permitted to stand for election and these members must receive written permission from the Membership Council Representative to stand for any future officer appointment or to become a committee member. Any previous committee members who are still subject to an LCC Investigation during the formation of the new committee will not be considered for a role on the new committee until the conclusion of the investigation.
- 7.2. In order to form a new committee and elections process should take place. This may take place outside of the usual elections period, if deemed appropriate by MC:
 - Meeting time and date are decided.
 - 12 weeks prior all branches are notified of time, date and location and nominations are requested.
 - 8 weeks prior – nominations for the following are received:
 - County chair
 - County vice chair
 - Treasurer
 - County committee members
 - 4 weeks prior to the meeting the branches are provided information on the respective nominees for each role. If only one nomination is received for an officer role, then that individual is appointed without the need for a vote.
 - At the meeting a ballot will take place. The vote will take place using ballot papers. Where no ballot is required as there is only one nominee for the role, then that role will be announced at the meeting provided the nominee meets the role profile.

- Should a situation arise whereby no county chair and vice chair are nominated, the county will remain in MC Administration while the process of election for chair and vice chair elections is run for a second time. The nominated committee members will become the county committee in abeyance. If no nominations for chair and vice chair are received at the second election MC is to consider the future of the county.
- 7.3. Within a month of the meeting the new committee is to hold a committee meeting during which it will:
- Appoint the county officer roles: CYO, CTO, CRO, county secretary, CCSC and county parade marshal.
 - Co-opt members onto the committee to fill any vacancies.
 - Sign the MS1
- 7.4. The MC Points of Contact are to liaise with the Membership L&D team to arrange the appropriate training to be delivered to all committee members and officers within 6 months of the formation of the new county committee.
- 7.5. Once a new committee is in place, the supporting Chair and Treasurer should remain as a point of contact and mentor for the new committee until it is properly established.
- 7.6. Whilst the new committee remains under MC Administration the new County Chair and/or committee must defer to the Interim Committee Chair and/or Interim Committee who remain as the delegated authority from the MC. It is expected all parties will work collaboratively together towards leaving MC administration.

8. Counties leaving Membership Council Administration

- 8.1. The process for taking a county out of MC administration should be a phased one and should not automatically occur when a new county committee is formed. The working group and in particular, the MC Reps who are the county Points of Contact, should remain in place to support, guide and mentor the new committee.
- 8.2. Once the MC Points of Contact are satisfied that the criteria below have been met, they should submit a final report to that effect to MC recommending that the county be taken out of administration. The MC decision should be noted and minuted.
- 8.3. The following should be used as a guide to indicate a county which is stable and effective enough to be taken out of administration:
- The county has formed a full committee with all elected and appointed officers in place.
 - The county chair and vice chair have completed county management training, the treasurer has completed the required treasurer training and the majority of officers have undertaken the appropriate training, or they are scheduled to do so.
 - The county has demonstrated effective monitoring and management of the county and their branches' compliance and an increase in compliance has been recorded.
 - The county committee has adopted an effective approach to the management of the branches, activities and funds branch, with county committee members each responsible for acting as the link for a number of branches.
 - The issues highlighted in the action plan and factors which led to the county being taken into administration have been fully resolved or moved to a position which is manageable through the county committee.

Elections

For information on how the Royal British Legion is organised, see sections 'About the Royal British Legion' and 'About Formations' later in this handbook. Many roles within the RBL are elected by members.

Rules

- No canvassing is allowed. Canvassing refers to the practice of actively soliciting votes to influence an election in an individual's favour. This includes visiting voters to encourage support..
- Nomination forms must be signed by the candidate to show they have accepted it.
- All forms relating to elections should be completed in block capital letters.
- Spoilt ballot papers will not be included in any count.
- Negative voting, including the 'for or against' type, is not allowed and will render a ballot paper invalid. If there is more than one candidate, every branch in the electoral region will have the opportunity to vote.
- Ballot papers that are incorrectly filled in or that have arrived after the deadline are declared void.
- Ballot papers and candidates' CVs must be presented at a branch meeting (not a Branch Committee meeting).
- The candidate who gets the most votes is the winner.
- In the event of a tie, the result is decided by drawing lots.

Members and Life Members are entitled to vote, hold office and be members of any council or committee. However, members are not allowed to hold office or be elected if:

- They possess any previous convictions or circumstances which may mean that they are not suitable for the role.
- They have been removed from trusteeship of a charity by a court of law or by the Charity Commission.
- **They are deemed unsuitable by the LCC.**

Board of Trustees, National Chair & National Vice Chair

General notes:

- Only Current, Adult, or Life Members may be nominated.
- There can be only one nominee per branch for each position.
- If branch members nominate more than one member for National elections, a vote is held via ballot paper at a full branch meeting. The nominee who gets the most votes is the winner. If there is a tie, the final nomination is determined by lot between the tied candidates.
- National officer and Board of Trustee candidates will be subject to a screening process.

Standing for election

Candidates are not allowed to canvas. But they can:

- Create a CV no longer than one page of A4.
 - Consider what will help the decision of voters: for example, RBL-specific experience, relevant professional experience and a personal statement.

They should bear in mind that CVs may be edited before being distributed to voters. Candidates may be asked to make alterations (which they can accept or decline). Where CVs are not in accordance with the laid out guidance, CVs will not be distributed but the candidate will remain on the ballot.

Nominations	Refer to Royal Charter and the Election Pack issued annually to all branches in November.
Actions prior to election	
Voting	
Term	
Vacancy occurring mid-term	

National Conference Committee

General notes:

- Only Current, Adult, or Life Members may be nominated.
- There can be only one nominee per branch for each position.
- If branch members nominate more than one member for National elections, a vote is held via ballot paper at a full branch meeting. The nominee who gets the most votes is the winner. If there is a tie, the final nomination is determined by lot between the tied candidates.
- If only one nomination is received, the candidate is deemed elected.

Standing for election

Candidates are not allowed to canvas. But they can:

- Create a CV no longer than one page of A4.
 - Consider what will help the decision of voters: for example, RBL-specific experience, relevant professional experience and a personal statement.

They should bear in mind that CVs may be edited before being distributed to voters. Candidates may be asked to make alterations (which they can accept or decline). Where CVs are not in accordance with the laid out guidance, CVs will not be distributed but the candidate will remain on the ballot.

Nominations	Refer to Annual Conference Special Circular issued annually to all branches in October.
Actions prior to election	
Voting	
Term	
Vacancy occurring mid-term	

Membership Council

General notes:

- Only Current, Adult, or Life Members may be nominated.
- There can be only one nominee per branch for each position.
- If branch members nominate more than one member for National elections, a vote is held via ballot paper at a full branch meeting. The nominee who gets the most votes is the winner. If there is a tie, the final nomination is determined by lot between the tied candidates.
- Membership Council candidates will be subject to a screening process.
- Candidates for the National Branches District must live in the UK.

Standing for election

Candidates are not allowed to canvas. But they can:

- Create a CV no longer than one page of A4.
 - Consider what will help the decision of voters: for example, RBL-specific experience, relevant professional experience and a personal statement.

They should bear in mind that CVs may be edited before being distributed to voters. Candidates may be asked to make alterations (which they can accept or decline). Where CVs are not in accordance with the laid out guidance, CVs will not be distributed but the candidate will remain on the ballot.

Nominations	• The Governance team will issue nomination papers to each branch by 1st October • The nominee must be a branch member of that Electoral Area and live either in the Area or adjacent to it. • Candidates for the National Branches region must live in the United Kingdom. • Candidates for Overseas must reside in the European Economic Area. • The nomination must be proposed, seconded and voted on at a branch General Meeting. • The Branch Secretary must send to the RBL Governance team the branch's nomination form with a copy of the candidate's CV. The nomination form must be signed as accepted by the candidate. • Membership Council members must not be Chair or Vice Chair of Counties or branches or voting members of County or Branch Committees. They can only take the role of a President. • Any conflict of interest must be declared
Actions prior to election	• The RBL Governance team will check if the nomination is valid and inform the candidate and the branch that it has been received. If there is more than one nomination, the RBL Governance team must forward all nominations to an external company such as Electoral Reform Services, who will conduct the election. • Candidates' CVs and ballot papers, accompanied by a pre-paid envelope, will be sent to branches in the electoral region.
Voting	• Branch members must decide on their preferred candidate at a branch General Meeting and mark their choice on the ballot paper. • The Branch Secretary must ensure the ballot paper is signed by two Branch Officers, is clearly annotated with the county/district name and states that it contains ballot papers and send it to the external company. • The external company receives and retains all returned envelopes in a secure place and notes any envelope that has been opened or not sealed correctly and immediately reports it to the RBL Governance team. • The external company opens and counts the votes for each candidate. • Any branch ballot paper that has been completed incorrectly or arrives late will be declared void and the envelope and the papers forwarded to the Director General, who will inform the branch concerned. • The elected candidate is the one who gets the most votes. • The external company will inform the RBL Governance team of the result of the ballot. The RBL Governance team will then inform the candidates and RBL formations. • In the event of a tie, the National Chair, witnessed by the Director General, will draw lots.

Term	• Three years.
Vacancy occurring mid-term	• A member from the electoral region which has a vacancy will be co-opted in line with a co-option process to be agreed between the Executive Director of Membership & the Membership Council Chair. If more than 15 months of tenure is left, new elections will be arranged.
Co-option	• In the event that a Membership Council Area is not filled following an election, the area will be open for a co-option process. • An invitation will be put out to all members inviting them to apply for co-option. Application packs will be issued to those who respond which will need to be completed by a specified deadline. Candidates will be expected to submit documents for a DBS check. Following this, candidates who meet the threshold for co-option will be invited to interview with the Chair of the Membership Council and the Executive Director of Membership. • On the occasion that the co-option process may result in a significant proportion of the MC areas being subject to elections in the following year, the MC Chair may decide to extend a co-opted MC Rep for one further year to ensure the effectiveness of the MC is maintained.

County Chair & County Vice Chair

General notes:

- Only Current, Adult, or Life Members may be nominated.
- There can be only one nominee per branch for each position.
- If branch members nominate more than one member for county elections, a vote is held via ballot paper at a full branch meeting. The nominee who gets the most votes is the winner. If there is a tie, the final nomination is determined by lot between the tied candidates.
- If only one nomination is received, the candidate is deemed elected.

Standing for election

Candidates are not allowed to canvas. But they can:

- Create a CV no longer than one page of A4.
 - Consider what will help the decision of voters: for example, RBL-specific experience, relevant professional experience and a personal statement.

They should bear in mind that CVs may be edited before being distributed to voters. Candidates may be asked to make alterations (which they can accept or decline). Where CVs are not in accordance with the laid out guidance, CVs will not be distributed but the candidate will remain on the ballot.

Nominations	• The MEO must request nominations from branches by 1st July and circulate the nomination sheet. • Branches may only nominate one current member per branch for each post at a branch General Meeting. • The nominee does not need to be a member of the nominating branch but must belong to the branch in the county/district where elections take place. • Once elected, they cannot remain a voting member of any Branch Committee. • Upon election to the role of County Chair or County Vice Chair, a member must relinquish any branch chair role held. Where a CC or CVC is branch chair and a replacement cannot be found, threatening the existence of the branch, the candidate can stay in both roles for up to three months until a new branch chair is in place. • Any conflicts of interest arising during this period must be declared. • Candidates for the National Branches District must live in the United Kingdom. • Candidates for any Overseas District must live in the European Economic Area. • Candidates cannot be nominated for both positions of Chair and Vice Chair in the same election year. • The MEO must receive the branch nomination, accompanied by the candidate's CV, no later than 5pm on the second Monday in September.
Actions prior to election	• The MEO must check if the candidate is a current member of a branch in the county and inform the candidate and the branch that the nomination has been received. • They must also inform the branch and the candidate if the nomination is rejected. • If there is more than one nomination, the MEO must send ballot papers to branches by 1st October with a return pre-paid envelope addressed to Head Office.
Voting	• Branches to hold a General Meeting to decide upon their vote. • Branches to complete ballot paper and return in the envelope provided by the second Monday in December. • Spoilt ballot papers will not be included in the count. • MEM and MC Representative to appoint scrutineers to count ballot papers. • Candidates will be informed of count at least 7 days before and can be present as observers. • Candidate with the highest number of votes is elected. • In the event of a tie, Chief Scrutineer draws lots to decide. • MEO notifies results of ballot to each Candidate. • Results to be announced at County Conference.

Term	• Three years. • No person may serve more than three terms as a Chair or Vice Chair. However, this does not exclude one person from being elected for three terms as a Chair and three terms as Vice Chair.
Vacancy occurring mid-term	• The next highest-placed candidate in the latest election must fill the vacancy until the end of the term. If there is no such candidate: • If there are less than 15 months until the end of the term, the Committee must co-opt a temporary replacement. • If there are more than 15 months until the end of the term, a new election must be started within one month and completed within four months.

County committee (at least seven but no more than 15 members) AND County Conference Committee (three members out of six)

General notes:

- Only Current, Adult, or Life Members may be nominated.
- There can be only one nominee per branch for each position.
- If branch members nominate more than one member for county elections, a vote is held via ballot paper at a full branch meeting. The nominee who gets the most votes is the winner. If there is a tie, the final nomination is determined by lot between the tied candidates.
- If only one nomination is received, the candidate is deemed elected.

Standing for election

Candidates are not allowed to canvas. But they can:

- Create a CV no longer than one page of A4.
 - Consider what will help the decision of voters: for example, RBL-specific experience, relevant professional experience and a personal statement.

They should bear in mind that CVs may be edited before being distributed to voters. Candidates may be asked to make alterations (which they can accept or decline). Where CVs are not in accordance with the laid out guidance, CVs will not be distributed but the candidate will remain on the ballot.

Nominations	• The MEO must request nominations from branches by 1st July and circulate the nomination sheet. Branches must nominate no more than one current member per branch for each post at their branch general meeting.
Actions prior to election	• The MEO must check if the candidate is a current member of a branch in the county and inform the candidate and the branch that the nomination has been received. They must also inform the branch and the candidate if the nomination is rejected.
Voting	• By ballot at the annual meeting of county conference.
Term	• One, two or three years as decided by the county committee.
Vacancy occurring mid-term	• The committee must co-opt a temporary replacement until the next annual meeting of county conference when a new election must be held.

Branch Officers (Chair, Vice Chair), Secretary, Treasurer (appointed, not elected)

General notes:

- Only Current, Adult, or Life Members may be nominated.
- There can be only one nominee per branch for each position.
- If branch members nominate more than one member for county or National elections, a vote is held. The nominee who gets the most votes is the winner. If there is a tie, the final nomination is determined by lot between the tied candidates.
- If only one nomination is received, the candidate is deemed elected.

Standing for election

Candidates are not allowed to canvas. But they can:

- Create a CV no longer than one page of A4
 - Consider what will help the decision of voters: for example, RBL-specific experience, relevant professional experience and a personal statement.

Where CVs are not in accordance with the laid out guidance, CVs will not be distributed but the candidate will remain on the ballot.

Nominations	• The nomination sheet listing branch office and tenure must be made available to members 21 days before the branch Annual General Meeting. Completed nomination sheets – including the name of the nominee, membership number and name of the proposer and seconder – must be sent to the Branch Secretary at least seven days before the branch Annual General Meeting.
Actions prior to election	• The Branch Secretary must check if candidates are current members and if they consent to stand for position. The master nomination must be created and circulated to members.
Voting	• By ballot by eligible members present, unless the position is unopposed, in which case the person is elected automatically. Election of Branch Officers takes place before the election of Committee members.
Term	• One, two or three years as decided by the Branch Committee
Vacancy occurring mid-term	• The next highest-placed candidate in the latest election must fill the vacancy until the end of the term. If there is no such candidate: • If there are less than 15 months until the end of the term, the Committee must co-opt a temporary replacement. • If there are more than 15 months until the end of the term, a new election must be started within one month and completed within four months.

Branch Committee members

General notes:

- Only Current, Adult, or Life Members may be nominated.
- There can be only one nominee per branch for each position.
- If branch members nominate more than one member for county elections, a vote is held via ballot paper at a full branch meeting. The nominee who gets the most votes is the winner. If there is a tie, the final nomination is determined by lot between the tied candidates.
- If only one nomination is received, the candidate is deemed elected

Standing for election

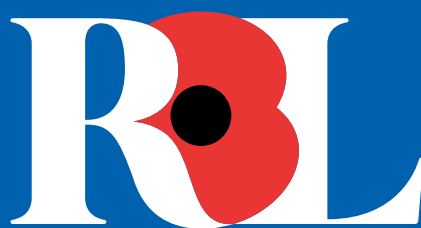
Candidates are not allowed to canvas. But they can:

- Create a CV no longer than one page of A4.
 - Consider what will help the decision of voters: for example, RBL-specific experience, relevant professional experience and a personal statement.

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Policy Guidance



ROYAL BRITISH LEGION

Law and Governance

This section of the handbook will guide you in day-to-day Royal British Legion matters. If you follow the guidance in the following pages, you will be acting within the law and in accordance with the Royal Charter and RBL policy.

Everyone is welcome to become a RBL member. You can join via www.britishlegion.org.uk, by phone or by calling our free helpline, or by completing a membership application form available from branches. Every member has to join a branch and pay an annual fee. Membership will be renewed annually, and unpaid membership will be cancelled. If you decide not to be a member for any reason, your membership can be easily cancelled at any time.

Data Protection

Members' details are held in the central database managed by Royal British Legion staff. Branches and members should report any changes, such as changes of address, by emailing membershipservices@britishlegion.org.uk or via the Membership Self-Service Portal Log In (britishlegion.org.uk)

It is the responsibility of every member who processes personal data as part of their role to comply with RBL's Data Protection Policy, which can be found [here](#).

RBL will process your personal data for a number of purposes. You can read the RBL's privacy policy and promise [here](#).

Protecting People's Data

The Royal British Legion is committed to ensuring good practice in the handling of personal data in order to comply with the requirements of the General Data Protection Regulation (GDPR).

RBL must only process data in a fair and lawful way, and only for permitted purposes where it has identified a lawful basis to do so.

Lawful data processing is everyone's responsibility. If you process an individual's personal data when performing your duties, please familiarise yourself with RBL's [Data Protection Policy](#).

All RBL policies and procedures relating to data protection can be obtained from the MEO.

It is very important that members notify RBL's Data Protection Officer (DPO) of any data breaches or suspected data breaches AS SOON as they become aware of them. Please send an email to the Data Protection Officer using the email address dataprotection@britishlegion.org.uk.

Accessing Your Personal Data

Under data protection law, you have the right to request access to the personal data that the Royal British Legion holds about you. This is known as a Subject Access Request (also known as a SAR).

It's important to understand that a SAR gives you access to your personal data only. It does not entitle you to receive full copies of documents, emails, or other records in which your personal data may appear. Where personal data is disclosed, we may apply exemptions and restrictions in line with data protection legislation. This means that certain parts of any document or email we disclose to you may be redacted (i.e. blanked out), for instance, to comply with legal obligations or protect the rights and freedoms of others.

Notwithstanding the foregoing, we will always aim to provide sufficient context to help you understand the personal data we disclose.

If you would like to make a Subject Access Request, or have any questions about your data subject rights, please contact our Data Protection Officer at: dataprotection@britishlegion.org.uk

You can read more about your data subject rights in the RBL Privacy Notice.

General Data Protection Regulation (GDPR)

Processing personal data includes the collection and storage of personal data, accessing and using personal data, and transferring or sharing personal data. All members who process personal data, including the Membership Council, county and branch officials, must adhere to the following principles:

Obtaining data	• Personal data obtained on the membership application form should be sent to the relevant office as soon as possible, preferably by recorded delivery Any copies kept locally must be kept securely and destroyed as soon as the new joiner's membership is confirmed. • Members who collect personal data from others must always clearly explain the purpose for which the information is being collected and how it will be used. They should also explain who to contact if the individual wishes to amend their personal data or exercise any of their 'subject rights' under GDPR. Please refer to RBL's Data Protection Policy for further information.
Accessing data	• Membership listings can be accessed online via Microsoft Office 365 (O365) system Users must not share their login details with others. Only authorised branch officers who signed the MS1 can have access to membership listings. • Membership data can also be obtained from the MEO or the Membership Department staff. Only branch/county officers who signed the MS1(A) form and Membership Council members can obtain membership data, and only for a specific purpose for which they have responsibility.

Storing data	• Personal data must be stored securely. • Hard copies must be kept in a safe place e.g. locked room, drawer, cupboard, or box • Electronic copies must be kept on a device which is password protected (e.g. laptop, encrypted memory stick); ideally the folder/file should also be password protected. Members must take care to avoid having the devices lost or stolen. • Where a device, or paper record containing personal data is lost, you must report this as a data security breach to the Data Protection Officer as soon as possible using the email address dataprotection@britishlegion.org.uk • Data should not be kept any longer than it is needed, and no longer than the periods set out in the Retention Schedule, after which the data and should be securely disposed of or deleted.
Processing data	• Members' data must not be used for any other purpose than performing Membership Council or Working Group responsibilities, administering the duties of the County and Branches, and communicating information relating to RBL. • Mailings or information unrelated to RBL activities, in particular third party marketing materials, must not be sent or emailed to members • Membership listings or any other materials based on these listings (e.g. address labels) should be used within one week of receipt and then securely destroyed, (because they quickly become out of date). The central database is modified on a daily basis to reflect address changes, membership lapses, deaths, resignations, changes of membership type and new members. • When emailing more than one person, members' email addresses should not be typed into the 'To' or 'CC' fields, but placed in the BCC (Blind Carbon Copy) field. This prevents you inadvertently sharing members' email addresses with other individuals without a lawful basis to do so. Such unlawful data sharing would be a breach of RBL's data security requirements and a data breach reportable to the Data Protection Officer.
Retaining data	• Data must not be retained for longer than is necessary to complete the purpose for which the data was collected. Permitted retention periods can be found in the Members Retention Schedule. If you cease to be an RBL member you must hand over to your Branch or Head Office any paper or electronic materials containing any personal data such as lists or labels. You must delete any electronic formats of membership data you hold.
Sharing data	• Members have not given consent for their personal data to be made available to anyone except authorised RBL staff and Branch Officers. Consequently, a member's personal data (including addresses, telephone numbers and email addresses) must never be shared with the public, other organisations, other members, unauthorised staff or other volunteers. • If you wish to share or receive a member's personal data, please contact the MEO in the first instance to make sure you have a lawful basis to process the requested data for the intended purpose. The MEO may reach out to the Data Protection Officer for guidance before responding to you. Following this process will enable the MEO to ensure a consistent approach is maintained. • All communications relating to RBL business must be sent from an rbl.community email address by membership formations. • Use of personal email to discuss or transfer RBL data is a breach of RBL's Acceptable Use Policy (find here) unless an exception has been granted.

Members' retention schedule

Description of document	Format	Trigger (time when the retention period specified in the next column starts)	Disposal Action and Retention Period ('delete for paper' means placing in a shredder or a secure disposal bin)
• Communications received and sent by post or email that contain personal data	Paper (P)/ Electronic (E)	• Date received/sent	• Delete after 12 months
• Copies of county or Annual Conference delegate applications	Paper (P)/ Electronic (E)	• Conclusion of Conference	• Delete after three months
• Copies of Youth Affiliation applications	Paper (P)/ Electronic (E)	• Affiliation cancelled/ ended/branch closed/ youth organisation closed	• Delete immediately
• Copies of: - Accounts forms - Bank statements - Authority to disclose information forms	Paper (P)/ Electronic (E)	• Document completion date	• Preferably make an electronic copy (to be deleted after seven years) and destroy paper copy immediately. If not possible keep in a safe place and destroy after seven years
• Copies of expense claim forms/ receipt vouchers/payment vouchers/other financial documents e.g. invoices	Paper (P)/ Electronic (E)	• Payment received by the claimant	• (P) make an electronic copy and destroy paper copy immediately. If not possible keep in a safe place and destroy after seven years • (E) delete after seven years
• Membership complaints	Paper (P)/ Electronic (E)	• Issue resolved (e.g. completion of mediation meeting, Investigation Panel or appeal)	• Delete after three years
• Membership reports and listings with members' details	Paper (P)/ Electronic (E)	• New report/listing obtained	• Delete immediately • (Microsoft Office 365 (O365): we will auto-delete all the reports that are older than 12 months)
• MS1/MS1A		• Completion date	• Delete after five years
• Election documents: candidate CVs, ballot papers	Paper (P)/ Electronic (E)	• Election results obtained	• Delete after 30 days
• County/branch meeting minutes	Paper (P)/ Electronic (E)	• Publication date	• Delete after five years
• Copies of membership application forms	• P/E (scanned)	• P/E: membership confirmed date	• Delete immediately
• Cheques	• Paper	• P: receipt date	• Cheques must be banked weekly. Returned cheques to be destroyed immediately
• Any documents with personal data of cancelled/deceased members	• P/E (scanned)	• Death/cancellation notification	• Remove personal data (email, telephone number, DOB and address) from all documents immediately

Public Relations (PR)

All local PR work is coordinated by Regional PR Officers. Any members who are contacted by the media for comment or interview should direct the journalist to the RBL Regional Press Officer for the area, the contact numbers for which can be found on the website at www.britishlegion.org.uk/quick-links/press-office-contacts.

The Press Officers will ensure that an appropriate response is provided or will be able to give you a brief and advice on how to respond. The press team will also help if a crisis occurs or if you are simply unsure of how to handle an issue.

Compliance

Branch and county compliance is monitored by the Membership Compliance & Policy team, with guidance from the Membership Finance & Compliance Working Group.

The Membership Finance & Compliance Working Group is chaired by a representative of the Membership Council and co-chaired by the Head of Membership Compliance & Policy. Staff members from Finance, Membership Compliance & Policy, Risk Management and Insurance, and Internal Audit sit on the group. The group exists to provide assurance to the Board of Trustees that the Membership Handbook is accurate and accessible to members, as well as manage and progress streams of work that help branches and counties achieve operational compliance and good financial management.

What Compliance means

To be compliant, branches and counties must fulfil their financial and administrative obligations by submitting their annual accounts and membership forms within the specified deadlines set by the Royal British Legion.

Branches and Counties cannot be considered compliant if they are in administration, as this status indicates they are not fully operational or meeting the required organisational standards.

Compliance for Branches

A compliant branch is one that fulfils its financial and administrative responsibilities in accordance with the Royal British Legion's policies. This includes:

- Submitting its annual accounts by 30th September for the field financial year ending on 30th June of that year.
- The branch must submit its MSI form, which details its committee membership, by 31st December of the same year.
- For county supported branches, compliance is solely determined by the timely submission of the MSI form by 31st December.

Compliance for Counties

A compliant county meets its obligations by adhering to both financial and administrative deadlines set out by the Royal British Legion.

- This requires the submission of annual accounts by 30th September for the field financial year ending on 30th June of that year.
- Additionally, counties must submit their MSIA form, detailing county-level committee membership, by 28th February of the following year.

Benefits of Being a Compliant Branch

- Maintain full operational status, avoiding the limitations placed on branches under administration
- Remain eligible for branch-level activities, events, and funding opportunities as guided by RBL policy
- Help protect the reputation of the RBL and ensure continued public trust, by demonstrating sound financial and administrative management
- Reduce the likelihood of being selected for a compliance review or audit by maintaining accurate records and meeting reporting deadlines
- Strengthen the branch's role in supporting the wider Armed Forces community, by remaining an active, credible part of the Legion's network
- Benefit from enhanced transparency, security, and efficiency by adopting good practices such as:
 - Maintaining at least three authorised signatories on bank mandates, with all payments requiring two unrelated signatories
 - Keeping less than £5,000 in local branch accounts, transferring surplus to the Branch Fund Initiative (BFI)
 - Using an official RBL.Community email address for professional, secure communication

Summary of General Compliance Requirements

While not part of the Royal Charter compliance criteria, adopting certain good practices can significantly enhance the effective running of a branch.

- It is required to have three or more signatures on bank mandates, ensuring that every cheque/bank transfer is signed by at least two signatories who are not related to each other.
- Branches should hold less than £5,000 in bank accounts and counties less than £15,000, transferring surplus balances into BFI accounts maintaining practical financial management.
- Additionally, registering for and using an RBL.Community email address ensures secure and professional communication, aligning with the standards expected across the Royal British Legion.

These practices support transparency, accountability, and operational efficiency.

Audit and Investigation Criteria

The Audit Compliance & Investigations Team is part of the Internal Audit Department and work on behalf of the Audit & Risk Committee and the Membership Council, providing them with information and assurance to help support them to fulfil their responsibilities.

Each year a number of RBL branches and counties are selected to have a compliance review. The prompt for a review can be from various sources and the reasons are varied, including routine reviews of branches or counties that have not been audited in the past. However, the majority of reviews are due to failure by a branch or county to comply with the policies and procedures set out in the Royal Charter and Membership Handbook.

The purpose of a compliance review is to identify what, if anything, is not as expected/required and the underlying reasons why. The overarching reasons are to protect charitable funds and ensure the RBL complies with Charity Commission requirements.

If a branch or county is selected for a review, officers will generally be asked to provide:

- The branch or county ledger / cashbook / spreadsheets showing income and expenditure
- Cheque books, paying-in books, bank statements, and BFI statements
- Payment & Receipt vouchers; together with supporting invoices, receipts, and expense forms
- Branch or county meeting minutes showing the authorisation of expenditure
- Other appropriate documents, such as asset registers and Independent Examiner (IE) reports (if applicable).

This will normally cover a three-year period, and branches and counties are required to supply all documentation requested and answer any queries raised by the team. Where issues are identified, remedial actions will be identified and explained/communicated to the appropriate individuals.

Factors that the Audit & Investigation team consider when assessing operational compliance include:

- County/Branch Committees – is there a full committee
- Levels of expenditure – Are costs appropriate and proportionate to the activities of the county/branch
- Is expenditure permissible – in line with Royal Charter & MH, are receipts present & legitimate
- Income – Have they recorded income on SOP131 when required
- Expense claims – Have they used SOP42 forms and have they been authorised
- BCS Expenditure – does BCS expenditure adhere to guidelines

- Petty cash – is it below £50 and are there receipts
- Online banking – is dual authorisation enabled
- Branch Minutes – minimum number of meetings held and decisions minuted e.g., authorisation of expenditure

Finances

RBL funds – general notes

All money held by branches, counties and districts are charitable funds and belong to the RBL. The Board of Trustees is responsible for the management and administration of this money.

The RBL's corporate financial year runs from 1st October to 30th September. The financial year for branches, counties and districts runs from 1st July to 30th June. The RBL's accounts are audited annually.

To find more information about funds held by the RBL, please consult the [Royal Charter](#).

The General Fund

Membership fees go into the General Fund, an unrestricted fund. General Fund and Gift Aid claimed on those fees and donations also go here. It pays for:

- Membership governance and administration, including Annual Conference.
- Grants to Counties and Districts for administration, training and events.
- Producing RBL magazine.
- Membership support, development and training.
- The costs of staff involved in activities that support the membership.

About formation finances

Branch and County funds

They are unrestricted funds, the day-to-day administration of which has been delegated to branch and county committees. These funds must be used to further the Royal British Legion's charitable aims through activities, almonisation of welfare grants or through donations to the Poppy Appeal or other RBL services and activities.

Some branches and counties also have their own restricted funds. These funds may contain money from Branch Property Trusts, legacies and other donations and can only be spent in accordance with the relevant terms or wishes of the donor.

Carers Expenses Policy

We recognise that some members may require a carer to be able to participate in RBL activities and the RBL is committed to making all of our activities inclusive. Where a member

requires the support of a carer, the following principles apply:

Necessity of the carer: The carer is required because of the member's illness, frailty, disability or diagnosed health condition and the member is unable to undertake those activities without the support of a carer for the duration of the activity.

Official Activities: The member is undertaking official, necessary activities on behalf of the branch or county and any expenses are incurred as a result of that activity.

Member's Role Remains Primary: The member is always the primary participant in the activity, supported by their carer. Specifically, if a member holds an officer role, they must fully carry out the responsibilities of that role. Carers should not participate in RBL business, such as committee meetings, or take on any official duties.

Making Reasonable Adjustments: Consideration should be given to alternative ways in which the member can be involved which do not involve the requirement for a carer e.g.: delivering or attending training online.

Definition of a carer: The carer is an individual who is recognised as the member's carer. They may be an unpaid carer or a professional employed to provide care. The RBL will not cover the costs of a professional carer except for mileage and expenses incurred in line with the principles above and RBL's expenses policy.

Where the above principles are met, the branch or county can cover the carer's expenses. Any expenses must be in line with the RBL expenses policy.

Branch Crisis Grants

Branches can issue a Branch Crisis Grant up to £200 where an immediate response is required out of office hours. This enables branches to respond quickly where support is needed by our beneficiaries who are facing a crisis need for the basics of life, food, shelter etc. The Branch Crisis Process, available on MAP, must be adhered to when issuing a grant.

The Branch Funds Initiative (BFI)

BFI is a savings scheme administered by Head Office. Funds are pooled and invested on long-term deposits with banks approved by the Finance Committee. This helps branches and counties to benefit from a higher rate of interest than they would normally achieve independently and keeps their funds secure. See 'BFI transfers and statements' further down in this section to find information relating to depositing and withdrawing funds from BFIs. All funds exceeding £5,000 (or a lower figure if you are a smaller branch not requiring as much operating cash) must be placed in the BFI.

RBL Online Membership Accounting System

LOMAS is an electronic accounting system for branches, counties and districts maintained by the Finance Department. Its purpose is to provide branches and counties with a secure online platform for maintaining their accounts and to automate the production of the annual branch return. LOMAS is not an online banking platform.

If your branch is interested in using LOMAS, contact your MEO.

If you need help with LOMAS, email lomashelpdesk@britishlegion.org.uk.

Branch Property Trusts

Some branches are connected to properties that are held on trust.

Please refer to the BPT General Guidance document for information. All direct enquiries can be made at BPT@britishlegion.org.uk or via your MEO.

Financial Management

Branch and County banking

UK branches must have only one bank account. This must be a current account held preferably with Lloyds Bank or Barclays. It must be held in the name of 'The Royal British Legion – [branch name]'. Personal accounts or accounts in the name of Committee members must not be used for branch transactions, even as a temporary measure.

If a UK branch has more than one account, it must close the additional account(s) and transfer any balance within it to its main current account or to the Branch Funds Initiative (BFI). If you're not sure what to do with a bank account, contact your MEO for help.

Branches should only keep enough money in their current account to meet their day-to-day requirements. For most branches, this will be £1,000 or less. The maximum amount of funds that branches are permitted to hold in their current account is £5,000. The maximum amount of funds that counties are permitted to hold is £15,000. All funds that are surplus to day to-day requirements/exceeding limits must be placed in the Branch Funds Initiative (BFI) account that is administered at RBL's Head Office. Women's Section are required to send surplus funds to the WS Benevolent Fund.

Overseas branches are not required to deposit surplus funds into the BFI due to the risk of unfavourable exchange rate variances and foreign transaction fees when sending money in and out of UK bank accounts. Instead, overseas branches are permitted to have one additional bank account besides their current account, to keep surplus funds in. This must be a bank savings account, with a reputable, registered financial banking institution; we would recommend using the same bank that holds your current account where possible. The savings account should generate a (higher) rate of interest on the funds it holds. For clarity, only overseas branches are permitted to have a second bank account, being this savings account.

No branch, being overseas or UK, should hold investments of any kind (besides CCLA investments in the UK) without prior written approval from RBL's Chief Financial Officer.

Having run an internet banking pilot with Lloyds in the first half of 2024, RBL is encouraging all counties and branches to switch to internet banking with Lloyds. Contact your MEO for details about how to do this.. Branches banking with other banks are not currently permitted to set up internet banking without the express permission of the Finance Department. This is to ensure that appropriate financial controls are in place over all branch transactions. In particular, dual payment authorisation must be set up as part of the initial registration for internet banking and instructions for how to do this will be sent to you when you are invited

to register for the Lloyds internet banking programme.

Branches are not currently permitted to operate a Contactless Terminal, QR code or any similar arrangement for income. Work is ongoing to find a viable solution to address the increasing cashless society. When available, confirmation about what contactless payment methods can be used will be shared via Central News.

Branches are not currently permitted to operate a Contactless Terminal, QR code or any similar arrangement for income.

How to manage branch funds

The Branch Committee, under the leadership of the Branch Chair, is responsible for the branch funds. It must make sure:

- That there are adequate controls and accounting records.
- That branch expenditure complies with the policies and procedures of the RBL and with charity law.

Branches should create a simple budget for the year, setting out the income they expect to generate and what they expect to spend.

Day to day, the Branch Treasurer maintains the branch accounts. The Branch Committee should approve the Branch Treasurer's delegated authority limit, generally between £250 and £500, depending on the size of the branch.

Branches should record their income and expenditure in separate funds (Benevolent Fund or General Fund). A fund is simply a way of recording income, expenditure and cash separately in the branch accounts. This does not mean that each fund requires a separate bank account. A branch can have more than one fund in its current account and Branch Funds Initiative. At the end of the financial year, the sum total of all funds held by the branch should equal the total amount of cash held in the current account and BFI.

If branches have funds that are surplus to requirements, they should consider making a donation to the [Poppy Appeal](#), making a transfer to the county welfare fund or donating to a Royal British Legion care home. This will ensure that the funds are used to support the RBL's beneficiaries. You can ask your local Community Fundraising team or check the Fundraising Handbook about other projects and ideas.

BFI transfers and statements

To withdraw funds from the BFI, you can apply by emailing a completed BFI Withdrawal Form to branchaccounts@britishlegion.org.uk or via your Royal British Legion Online Membership Accounting System (LOMAS) account if you are a LOMAS user.

To deposit funds in the Branch Funds Initiative, complete the BFI deposit form and email this to branchaccounts@britishlegion.org.uk. To pay by cheque, post your cheque addressed to the Branch Accounts team at Head Office For branches registered for internet banking, to pay by direct bank transfer we will provide you bank details once we have received your completed form; ensure you put your Branch Number and the text "BFI Deposit" in the reference field on the bank transfer.

The interest rate paid to BFI accounts is determined by the RBL's Finance Committee and reviewed regularly. The current rate of interest can be found on your latest BFI statement. Interest is credited and statements are generated as at each calendar quarter end. Statements are available to download on LOMAS for LOMAS users, or emailed to non-LOMAS users, within a maximum of four weeks of the calendar quarter end. If a branch has not received a statement this can be requested from their MEO or branchaccounts@britishlegion.org.uk.

Dos and donts for spending branch and county funds

Do:	Don't:
• Use funds to further the charitable aims of the RBL. • Spend funds on events (for example, to recruit new members, for Remembrance events or to raise funds for the RBL). • Keep invoices or receipts for everything you buy with RBL money. By law, all invoices, receipts and vouchers must be securely retained for seven years. If you don't have an invoice or receipt, the person who has spent the money must create and sign a voucher, detailing what the money was spent on and how much. The voucher must be countersigned by a Branch Officer who had nothing to do with the purchase. Please refer to the 'Spend Guide — Local Commemorative Events' located on MAP for further guidance. • Keep the branch cheque book and paying-in book in a locked safe or drawer.	• Use funds for the purchase, construction, repair or maintenance of memorials unless the memorial is owned by the branch and responsibility hasn't been passed on to another party. Memorials are usually the responsibility of the local authority. • Use funds to accumulate more money. • Sign blank or partially completed cheques. • Sell goods. The Royal British Legion as a charity cannot trade; that is why goods can only be sold through a separate trading company (Poppy Shop). Branches and counties are part of the charity and therefore must not trade under charity law. However, they can offer low-value items sourced from the RBL (such as pins, pens and wristbands) for a suggested donation (not a minimum donation) to raise funds. Please note that any income from items produced by the Poppy Appeal must be sent to Poppy Appeal. • Use funds to subsidise another branch, a RBL club or any other third party. That includes loans or making reductions or deferments of charges due to the branch. If this happens, the Branch Committee members responsible may be found personally liable to reimburse the charity. • Give grants or make donations to other charities. The only exceptions are a donation to a local ex-Service charity with the approval of the Operations Directorate through the local MEO, or a donation to the Central Benevolent Fund to be allocated to a grant that the Board of Trustees has already agreed. • Use funds for paid employment. • Procure your own resources – branded products are available via your MEO all year round and from the Poppy Appeal ordering portal during Poppy Appeal. • Enter into any financial credit or lease agreement (including the rental of property or equipment).

Rules on cheque and cash handling

You can read the full policy (SOP131) if you request it from your MEO, but below are some day-to-day rules to help you keep your transactions in order – and to help protect the Royal British Legion from fraud.

- A branch's bank account must have up to four mandated signatories, all of whom must be Branch Committee members. At least two signatories who are not related to each other must sign every cheque and authorise every online payment. It is the Branch Committee's responsibility to make sure the list of mandated signatories is up to date when members leave or join the Committee.
- Check bank statements as soon as you receive them. Investigate any unexplained entries immediately. If you suspect fraud, tell your MEO.
- Reimburse petty cash only when you see a receipt and only directly to the claimant.
- Keep the branch petty-cash float as low as possible and reconcile it monthly. Any expenditure above £50 should be reimbursed by cheque. However, if the RBL's Finance Department has approved electronic banking by Lloyds bank appropriate procedures are to be observed. You can find the petty cash policy (SOP3) on Microsoft Office 365 (O365) or request it from your MEO.
- All expense claims should comply with the RBL's expenses policy (SOP42), which is available on Microsoft Office 365 (O365) or from your MEO. All claims must be submitted on the correct form, signed by the claimant and with receipts attached. All expense payments must be approved by the Branch Committee (at least their Treasurer and Chair) before payment.
- Issue a receipt for any cash or cheques given to the branch, unless the donation is part of a cash collection. Any cash received should be counted as soon as practically possible in the presence of two people. Use the SOP131 form, available on Microsoft Office 365 (O365) or from your MEO, to record the amount counted.
- If cash or cheques cannot be banked immediately, they should be placed in a sealed envelope, petty-cash tin or collection box and locked in a safe or a drawer.
- Cash and cheques must be banked within three days of receipt. Any cash receipts in excess of £1,000 must be banked within 24 hours. The longest you can leave it to bank cash and cheques is one week after receipt.
- No signatory is to sign a blank cheque. Authorised signatories should not be family members or cohabitants.

How to submit your annual return

Please refer to the Guide to Completing the Year-End Branch Return, which is updated annually and sent to Treasurers with the Branch Return Forms. You can also get a copy of this guide electronically from your MEO, or on the Membership Administration Portal (MAP).

New branches are not required to submit a branch return in their first financial year until they have been operating for six months.

Each year, a number of branches are selected for audit by the Royal British Legion's statutory auditor or the internal audit and compliance team. Branches are more likely to be selected for audit if they are holding substantial RBL funds, have failed to submit their return on time or have failed to respond to queries on their return from the MEO, or the Finance Department.

Funding and insuring branch events

Branches must attempt to secure services for their events at little or no cost where possible.

Any expenditure associated with the event must be reasonable and proportionate. All branch events should be discussed and approved at a minuted Branch Committee meeting in advance of the event.

The Royal British Legion holds public liability insurance in the event that it is held legally liable for injury to a third party or for damage to third-party property.

Branch events are covered by the RBL's insurance policy. This includes branch Standards paraded at such events, whether within the UK or overseas.

As far as Remembrance events are concerned, responsibility for organising Remembrance Parades should be passed to the local authority.

Parade safety for Remembrance events is the responsibility of a Civic Authority. Temporary Traffic Management Operations (TTMOs) may only be organised and deployed by the Civic Authority and on no account should RBL staff or volunteers be deployed to manage. Where RBL has to be the event organiser (because the Civic Authorities refuse) RBL may take this role but there can be no street Parade, no road closure and, therefore, no need for a TTMO unless this aspect of the event is owned by a Civic Authority. Whilst the branch can be involved in determining a Parade route, it should not itself contract with a third party and may not take responsibility for the design, and deployment of a TTMO.

RBL does not own or insure TTMOs. That is because the law relating to the safe deployment and removal of a TTMO is complex and should be left to local authorities or the police, who are the experts. These are formal arrangements and branches should not seek to make local arrangements with their local police or any other organisation or individuals as these would also not be covered. The requirements of the various Health & Safety regulations and Road Traffic Acts are complex, leaving the branch and RBL vulnerable to the human cost of dealing with serious road accidents and liability issues. As a result, our insurers will not provide cover. This policy does not only apply to Remembrance events, but any branch event where a road closure is being considered.

Therefore, any branch owned and organised event, including Remembrance events, must be:

- i. Static i.e.: no Parade on the public highway or movement of participants and crowd from one location to another along or near roads.
- ii. Completely off-road for both participants and other observers, including ensuring

that any attending members of the public would not be on or near to a road in such a way that management of traffic would be required to ensure safety.

- iii. Organised by and agreed by the branch and recorded as such in branch minutes. Individual members may be the lead for a branch event but should not organise events, including Remembrance events, acting as an individual.

Any events organised by members that are of a social nature, such as Christmas meals, or travel, such as trips to the National Memorial Arboretum, visits to Regimental Museums or trips overseas, are not RBL events and therefore are not covered by the RBL's insurance policy. Any income and costs related to these events are not charitable income and expenditure and should not pass through the branch accounts. They must be held and accounted for separately. Under no circumstances may RBL funds be used to subsidise social events for members.

If you're planning a large fundraising event (with expenditure of more than £1,000), please check with your Community Fundraiser that it doesn't clash with any other large event.

Please note that RBL equipment should not be loaned to or used by other organisations due to complications around liability in the event of improper use, and the potential for reputational damage.

Value Added Tax (VAT)

Branches and counties sit outside of the Royal British Legion's VAT arrangements. This means that branches and counties are unable to register for VAT. Branches must not charge VAT on any invoices they raise and are unable to reclaim any VAT they are charged by suppliers and other third parties. Branches cannot sell merchandise and cannot give away merchandise for a suggested donation of more than £1, e.g., jewellery, bags, clothing, etc. Doing so would constitute a vat-able supply. It is permissible to give away small items in exchange for a suggested donation, provided the value of the item is £1 or less, e.g., a pen.

Gift Aid

Members are encouraged to Gift Aid their membership fee when they join. Gift Aid Members can add or remove a Gift Aid declaration at any time by contacting the Membership Services team via email to membershipservices@britishlegion.org.uk or by logging into the Membership Self-Service Portal.

Note: any Gift Aid donations cannot be paid into branch funds as branches cannot claim Gift Aid directly. The RBL will claim Gift Aid centrally and only on donations and gifts received directly to its accounts.

Independent Examiner (IE)

The role of the Independent Examiner is to independently examine the branch's books, records, and annual accounts maintained by the branch or county/district officers and express an opinion on them annually. The Independent Examiner is more commonly referred to as an IE.

The branch or county is to approve the appointment of an IE annually. Branch members should not be acting as an IE for a branch of which they are a member. Furthermore, MEOs/ MEMs should not be appointed to undertake IE activities on accounts produced within the County they support in the usual course of their duties.

An IE, who is not a qualified accountant, must attend RBL training and successfully pass the examination. Only then will the IE be declared qualified by the RBL. The qualification will be valid for a period of two years, after which requalification training must be attended, and examination passed.

Where the IE is not a CCAB qualified accountant, they are limited to examining branches with gross income of up to £30,000 only.

Terms of Reference

1. A related party cannot be appointed as an IE. The definition of a related party is:
 - a. A major donor to, or beneficiary of the branch or county/district; or
 - b. The child, parent, grandchild, grandparent, sibling, spouse, civil partner, business partner or employee or a Branch Officer or Committee member or of someone who is a major donor to or beneficiary of the branch.
2. The IE should obtain an understanding of the RBL's constitution, branch organisation, branch accounting systems, the size and complexity of the branch and the nature of its income, expenditure, assets and liabilities. The IE should review the accounting records and be satisfied that they are adequate for the size and complexity of the branch. Detailed checks should then be conducted. Upon completion of the examination, the IE will sign their report and note any matters to be brought to the attention of the Board of Trustees.
3. The IE must keep a record of the work undertaken with schedules of any relevant information extracted and explanations obtained from the Branch Officers which have been used to support the IE's opinion of the accounts. The IE should retain one copy of the final accounts after signature.
4. IE must refer to the 'Guide for Auditors and Independent Examiners' issued annually by the Finance Department before completing their examination.

Legacies

How to deal with legacies

In all instances where a branch is notified of a legacy (a gift in a Will), the branch must contact the Legacy Management Team at the earliest opportunity at legacies@britishlegion.org.uk or call 020 3207 2100 and ask for the Legacies Management Team.

The Legacy Management Team manages, receipts, and allocates all legacy income to ensure that the correct amount is received and that funds are used in the manner specified in our Royal Charter, and the Will. They are the only team with delegated authority from our Trustees to act in the administration of legacies, and are able to provide a formal receipt and discharge to the Executors. Therefore, all correspondence relating to legacies must be sent to the Legacy Management Team as soon as possible.

Where a legacy is specifically gifted to the branch, the legacy shall be paid to the branch if under £5,000; legacies over £5,000 will be placed into a Branch Trust, held for the benefit of the branch. The Royal Charter sets out that legacies should only be used for furthering the RBL's objectives which means use is restricted to welfare and Remembrance activities, so it is not possible to place the legacy income into the branches BFI account, or simply to generate interest. .

To make a withdrawal from a Legacy Trust the branch should complete form SOP163 Appendix A and submit this to the Membership Compliance & Policy team for approval (membershipcandp@britishlegion.org.uk). The team will check the planned expenditure is permitted under the Legion's general spending guidelines, and confirm with the Legacy Management Team it is also permitted under the restrictions of the legacy, before requesting payment to the branch by the Branch Accounts Team. In accordance with Charity Commission requirements to prevent funds being held in trusts indefinitely, please do endeavour to spend the funds within a reasonable time frame (3-5 years).

To prevent double accounting, legacies held in Legacy Trusts at Head Office should not be listed in branch accounts as this would mean they are accounted for twice.

Fundraising

Counties and branches have a key role in fundraising and should play their part in the Poppy Appeal. There will be committees looking after county funds and branches will look after branch funds.

In addition, counties and branches may raise funds for their General Funds but must keep this activity separate from the Poppy Appeal and not use Poppy Appeal branding for this purpose. This is because Poppy Appeal branding may suggest fundraising for the Poppy Appeal and create confusion over how the funds will be spent. Also fundraising for the General Fund must not take place during Remembrancetide.

Counties/districts and branches are not permitted to produce their own branded merchandise.

It is good practice for counties to form a county fundraising committee. This may comprise people who are not Royal British Legion members but have been chosen because of their local standing and influence or their experience in fundraising.

Bear in mind that fundraising is a regulated activity with its own [national code of practice](#). This code applies to volunteers as much as to paid fundraisers, so if you're doing any fundraising at all, you should be aware of it. If you have any questions, contact your Poppy Appeal Manager (PAM) or Supporter Care at membershipservices@britishlegion.org.uk.

Fundraising in Northern Ireland

Important Note: Any physical events during Poppy Appeal, charity events, and mass events where stalls are present, the 'EU Representative Notice' (available on MAP) must be physically printed and positioned on/near the stall/event.

The Poppy Appeal

A Shared Purpose

Each year, the Poppy Appeal brings people together across the country to honour the service and sacrifice of the Armed Forces community, and to raise vital funds that support the Royal British Legion's work today.

The Appeal is one of the UK's most recognised fundraising campaigns and remains central to how the RBL funds the delivery of care, advice, and practical support to serving personnel, veterans, and their families.

Although the Poppy Appeal is now coordinated by the RBL's Poppy Appeal Team, its success and delivery continue to rely on the dedication of thousands of volunteers, many of whom are RBL members. While branches no longer lead the Appeal directly, the role of membership in supporting and promoting it remains essential.

We're encouraging all members to get involved: to volunteer, assist their local volunteer Poppy Appeal Organiser, (who may themselves also be a member) and help ensure the Poppy Appeal continues to thrive in every community.

Why Your Support Matters

Our members have always been at the heart of the Legion's impact in the community, and we're inviting you to continue that tradition by supporting the Poppy Appeal in new ways:

- Support local volunteers and Poppy Appeal Organisers (PAOs) or even become a PAO if there is one needed
- Help identify collection sites or venues in your community
- Offer your time as a volunteer, even just a few hours can make a huge difference
- Champion the Poppy Appeal in your branch, club or community
- Support the recruitment of volunteers in your community

How the Poppy Appeal Works

Key Timings

- The Poppy Appeal runs from late October to Remembrance Sunday each year
- Dates of the Poppy Appeal are communicated via the Poppy Appeal Team and RBL communication channels
- Local street collections, house to house collections, supermarket and other private locations host collectors. Tins and boxes are placed, and collections are also held at sporting and major events, including by military collectors on London Poppy Day
- Donations are accepted via cash, contactless terminals, and other cashless payment technologies

Roles and Responsibilities

- The Appeal is delivered by the Poppy Appeal Team, with the support of nearly 4,000 trained volunteer Poppy Appeal Organisers (PAOs).
- PAOs are responsible for managing volunteers, collection sites, ordering stock, and counting and banking donations within their Districts.
- While PAOs are appointed by the Poppy Appeal Team and do not need to be RBL members, support from local Branches is crucial to their success.

Volunteer Appointments

- Only the Poppy Appeal Team can appoint new PAOs.
- The Poppy Appeal Team also manages PAO resignations, auditing of Districts, and, if necessary, removals- approved by the Head of the Poppy Appeal Team.

Poppy Appeal, Fundraising and Compliance

Donation and Trading Activity

- All products used during the Poppy Appeal, whether sold or given for donations, must comply with safety legislation.
- All items must be sourced through approved RBL processes; branches cannot procure products independently.
- The use of the RBL Seal (which includes a royal crest) for fundraising purposes is restricted and requires approval from the Lord Chamberlain. See below for further information.

If you're unsure whether an activity is charitable or trading, contact your Membership Engagement Officer (MEO).

Use of the Royal Crest

The Royal British Legion (RBL) Membership Badge (also known as the RBL “crest”, “seal” or “lion”) contains a royal crest. This document has been developed to provide County and Branch Officers with clear guidance on the correct use of the badge to ensure consistency and adherence to RBL brand guidelines across branches and counties. This guidance also helps maintain the integrity and prestige of the RBL Membership Badge while ensuring it is used appropriately in alignment with the charity’s values and brand identity.

RBL has been granted consent to use the King’s Crown as part of our Membership Crest under an agreement between RBL and the Lord Chamberlain’s Office. This Guidance helps to ensure the Membership Crest is used appropriately in accordance with that consent.

General Principles

1. Official Use Only

- The Membership Badge is a formal emblem of the RBL and may only be used by officially recognised RBL branches, counties, and membership groups.
- It must not be altered, redrawn, or used in a way that could misrepresent the organisation.

2. Design Integrity

- The Badge must always be reproduced in its official form, maintaining proportions, colours, and details as specified in RBL's Members Brand Guidance.
- Additional elements such as text, images, or decorative effects, must not be added to the Badge.
- The Badge must not be distorted, stretched, or compressed.

3. Permitted Usage

The Membership Badge may be used for:

- Official RBL branch and county stationery (letterheads, meeting agendas, reports).
- Membership certificates or awards issued by branches or counties.
- Approved digital and print materials that promote RBL membership activities.
- Branch and county social media pages and websites, provided it is used in accordance with RBL's social media policy
- Ceremonial items which are part of a pre-approved list of items managed by the RBL Product and Trading team.

4. Restricted Usage

- The Badge must not be used for commercial purposes, including merchandise and clothing, fundraising materials, or promotional items, without prior approval from RBL.
- It must not be used in political campaigns, lobbying activities, or in association with any organisation that does not align with RBL's values.
- Individuals, including branch or county members, must not use the Badge for personal purposes (e.g., on personal websites, business cards, or non-RBL-related communications).

5. Digital and Print Guidelines

- Always use high-resolution files provided by RBL.
- The Badge should be placed prominently but not overpower other elements of a document or design.
- It should be used on a neutral or appropriate background to maintain visibility and respectability.

6. Enforcement and Reporting Misuse

- Branches and counties are responsible for ensuring proper use of the Badge within their areas.

- Any suspected misuse should be reported to membershipservices@britishlegion.org.uk for review.

Requesting Approval or Guidance

The Poppy Shop features a range of products with the Membership Badge, and on MAP there is a range of collateral and templates featuring the Badge.

If a branch or county is unsure whether a proposed use of the Membership Badge complies with these guidelines, they should seek clarification by emailing membershipservices@britishlegion.org.uk

How to Get Involved or Find Help

- Want to volunteer or support your local Poppy Appeal?

Contact your Poppy Appeal Manager (PAM), if you are unsure who your local PAM is, your MEO can guide you

- Have questions or concerns?

Your MEO is your first point of contact and can help escalate issues where needed.

- Already a PAO and a member?

The PAO Handbook is your key resource, reviewed annually and supplemented by regular updates and seminars delivered by the Poppy Appeal Team.

Branches and Counties Supporting the Poppy Appeal

- We encourage all Branches to work closely with their local Poppy Appeal Manager to support the delivery of the Appeal
- Branches and Counties can provide strong support to the Poppy Appeal Team and PAOs, assisting with the distribution of merchandise and collection materials, as well as the secure banking of donations
- Merchandise and donations collected during the Poppy Appeal must be used solely for RBL charitable purposes, not branch operational costs.
- Outside of the Poppy Appeal, Branches must clearly state if funds raised are for branch activities and not the Poppy Appeal.
- PAOs can be RBL members, but they don't have to be. They come from all walks of life: from students and retirees to working professionals, military families, community leaders, and first-time volunteers. What unites them is a shared commitment to supporting the Poppy Appeal, raising funds, and helping the Royal British Legion continue its vital work. Each is supported in their role by the Poppy Appeal Team.

Non-red Poppy Wreaths

The Royal British Legion has no objection to wreaths other than red poppy wreaths being laid at war memorials or in Remembrance services. The RBL respects the rights and freedoms of groups and individuals to make their own decisions about how to observe Remembrance.

The RBL defends the right of others to wear poppies and lay wreaths consisting of other colours and flowers. However, the RBL's red poppy is a universal symbol of Remembrance and peace which is inclusive of all regardless of race, belief, origin, sexual orientation or gender identity.

Importantly, the red poppy raises funds to support our Armed Forces, veterans and their families in their time of need.

We see no contradiction in wearing other emblems alongside the red poppy, or laying other wreaths alongside the red poppy wreath. We recognise the right of any group or individual to express themselves within the law.

Raising money for other causes

Branches may sometimes join with other charities but it must be made clear to donors who they are giving their money to. When Royal British Legion merchandise is being used, the funds raised are always for the RBL charity.

If branches want to raise money jointly with other charities, this is not permitted during the Poppy Appeal period and the RBL logo and merchandise must not be used for it.

With any questions, contact your local Community Fundraiser or MEO.

Grants

Branches may apply for funding from statutory funding bodies, trusts, and foundations or from Local Government organisations. Bids for grant funding must:

- Be agreed by the Branch Committee at a committee meeting and the decision minuted.
- Be for projects or activities which are within a branch's remit.
- Reflect the purpose and functions of Membership.
- Be ringfenced within the accounts, and the associated expenditure must be accounted for as restricted.
- Only be made where there are insufficient funds within the branch funds, BPT or BFI, the use of such funds would leave the branch with insufficient funds for their normal operation or where branch funds are not permitted to be used for the required purpose.
- Branches must inform their MEO, county chair, and the Donor Relationship team at

Head Office at membershipservices@britishlegion.org.uk of their proposed bid.

A member of the Donor Relationship team will confirm whether the Royal British Legion already has a relationship with any potential funders and so whether the proposed application can go ahead. This is to protect significant relationships with trusts, where the relationship can be managed without breaking prior agreements (e.g. limited number of applications permitted per year) which the branches may not be privy to.

In addition, where the bid is for a specific purpose, such as being property related, the relevant staff from that department must also be informed.

Branches must not submit any grant applications without prior agreement from the above staff. Doing so could harm the RBL's reputation, interfere with the national fundraising efforts, or even break legal requirements. Fundraising regulations may force a return of grant obtained without prior agreement.

If a bid is successful, the branch should inform the MEO, county chair, Donor Relationship team and any other departmental staff who were required to approve the bid submission. Depending on the period of the funding, the branch will be required to report to the above staff as the project progresses and must inform them of any issues or concerns with either the use of funds against the project or any failure to achieve the outcomes set by the funder.

Any funds from a successful bid must be placed into the branch bank account and must be kept ringfenced for the specific project for which it was granted.

Complaints

The Royal British Legion takes seriously all complaints about the services it delivers to its members and stakeholders; about the integrity and propriety of all its employees, members and volunteers; and about its policies and procedures

The RBL is committed to making its complaint-management process accessible, fair and transparent. All complaints made will be appropriately reviewed as quickly as possible and, where appropriate, the complainant informed of outcomes and any action taken in line with the current complaints and grievance procedures.

Procedures for different kinds of complaints

Membership Complaints: Legion Complaints Committee (LCC)

The LCC manages complaints in accordance with the membership complaints procedure. For a copy of this procedure please contact legioncomplaints@britishlegion.org.uk.

Any complaints about Legion members should first be raised with their Branch Chair who should attempt to resolve the matter through informal discussion in line with the principles outlined in the membership complaints procedure.

Similarly, where a complaint concerns the actions of a Branch Committee or any Branch Officer or committee member, the complaint should first be raised with the County/District Committee who should attempt to resolve the matter informally at a local level.

Informal resolution guidance can be found within the membership complaints procedure.

For complaints that concern the actions of a County/District Committee, any County/District Officer or committee member, or involve safeguarding or matters of financial probity, local resolution should NOT be attempted, and the issue should be immediately referred to the LCC.

If you have received a complaint about a member or you want to make a complaint about a member, you can contact the Legion Complaints Committee (LCC) for guidance via email at legioncomplaints@britishlegion.org.uk

Membership Services

If you are unhappy with how your membership queries have been handled, please contact membershipservices@britishlegion.org.uk

Fundraising

For complaints about fundraising activities, refer to the Poppy Appeal Organiser Handbook, available through Microsoft Office 365 (O365) or your Poppy Appeal Organiser/Manager.

Branch Community Support (BCS)

Where you receive a complaint about a BCS Supporter, or a BCS Supporter makes a complaint, this should be referred to and dealt with by the Head of Membership Engagement (direct to BCS@britishlegion.org.uk) and handled in accordance with the Operational Complaints Procedure.

Following the investigation, the branch will be informed of the outcome. It should be noted that if a complaint about a BCS Supporter is upheld then action may be taken to remove that person from the BCS role. The branch must uphold any decision made. If you are making or have received a complaint that relates to club membership, the club committee should be approached first

Board of Trustees & Membership Council

If there is a complaint against a member of the Board of Trustees or a member of the Membership Council, the Complaints Committee Chair will refer that case to the RBL's Governance Committee.

Photography and Social Media

RBL uses social media to drive year-round awareness of our services and support, demonstrate our impact through positive storytelling content, and engage with our community.

Whether you run a social media account on behalf of your branch or county, or use social media in a personal capacity, this code of conduct exists to help you use social media effectively and responsibly, in a way that supports RBL and protects its reputation.

This code of conduct must be followed when using social media on behalf of your branch and in a personal capacity, including commenting on a post, sharing content (posts, updates, photos, videos or links), using it as a messaging tool, or simply maintaining a profile on any social media site. Even content shared in private messages or closed groups can become public so please think before you post. The caveat 'all views my own' is not sufficient. Please refer to the ten guiding principles (page 5) and RBL's values (page 6) when conducting yourself online.

Code of conduct

To avoid bringing your branch or RBL into disrepute, you must not share content or comments on social media that may cause offence to another member, employee, volunteer, partner organisation, MP or member of the public.

RBL is committed to creating a diverse and inclusive organisation, and we often share content on our national social media channels that reflects the diversity of the Armed Forces community and of wider society. You must not share personal opinions or public posts, private messages or post comments that are offensive or degrading (including sexist, racist or homophobic language).

You must not share content that implies you are a spokesperson for RBL or associated charities or partner organisations.

If you have a complaint about your branch, another member, or RBL, you must raise this directly with your Branch Official or RBL MEO (see page 34 for more information). Do not air this on social media as this will simply draw unwanted attention to the issue rather than help resolve it.

Unless you're running an account for your branch or county, you must not use the Royal British Legion, RBL or any derivative as part of your username for any social media channel. You must not use the RBL logo or Membership emblem, or any modification of these logos, as your profile picture.

You must not share information deemed confidential or meant for RBL members only. In accordance with GDPR you must not share personal information about another individual, including photographs, videos or audio recordings of another person (because these are regarded as personal data under GDPR).

Using social media to intimidate, bully or harass another individual through public or privately shared posts or comments will not be tolerated.

You must not speculate or comment on political affairs; as RBL must always remain politically neutral.

Dealing with issues

Things can escalate quickly on social media. If you spot a potential issue or anything that could pose a reputational risk (e.g. other staff, volunteers, individual members or supporters publicly discussing matters such as other members, volunteers, RBL services or events, or using discriminatory or offensive language) please flag this immediately to your MEO.

Inappropriate behaviour

Inappropriate behaviour involving social media sites or digital communications platforms, inside or outside the workplace, will normally be dealt with under our internal performance procedures and serious cases could be viewed as gross misconduct. We may also ask people to remove internet postings that are considered a breach of this Social Media Framework. If you're ever in doubt about what's considered acceptable, please contact a Branch Official, MEO or RBL's social media team before publishing. Unacceptable behaviour on social media could result in a complaint being made to the LCC.

Photography

To ensure that RBL has a lawful basis for collecting personal data under data protection laws you should always obtain written consent from individuals you plan to photograph or record. If you organise an event of activity where you are taking photographs or making audio or audio recordings of one or more individuals, you should make it a priority to obtain appropriate written consent before going ahead. If the person is under the age of 18 sufficient consent must be obtained from their legal guardian. In events or activities where consents are not normally sought, you should let attendees know that photographs will be taken and the event may be recorded. If any attendees do not want to be photographed or recorded, they should be invited to make themselves known to the organiser or photographer. For more information or guidance, please contact membershipservices@britishlegion.org.uk.

VIP, Royal Household Invites and Politics

Contact with key influencers

Often our counties and branches will hold events and feel that they would like to have media coverage or guests there who will help to:

- Raise the profile of the RBL
- Raise the profile of the branch or county
- Promote the event, including with the intention to increase attendance

Many branches and counties have strong relationships with the civic dignitaries including the Lord Lieutenant or Mayor and we would encourage branches and counties to foster these positive connections, but sometimes we know that you want to have an even greater impact and may wish to invite media outlets or individuals with a more significant influence, reach or profile, including celebrities, MPs or members of the Royal Household. All of these are possible, but counties and branches should not approach these individuals directly but must follow the appropriate guidelines below. This is to ensure that:

- We go through the appropriate member of staff, where a connection may already be in place – this increases our chance of them accepting any invite.
- To ensure the correct channels are used – often invites will only be accepted if they go through a specific office or individual.
- We avoid duplication, where one individual receives multiple contacts, which can impact our positive relationship with them.
- We ensure that we manage our engagement with high status supporters where the most impact will be made from their involvement.
- That we avoid breaching our political neutrality (applies to MPs)
- Our press coverage is at an appropriate level with the right messages being conveyed.
- Any message that we promote around an individual's involvement with us is appropriate.
- And finally, that we avoid the Legion approaching people we should not, for a variety of reasons.

If you wish to invite regional or national press, celebrities, MPs or members of the Royal

Family to an event, you are required to contact your MEO who will ensure that your request is passed to the member of staff in the appropriate department. Please also contact your MEO prior to agreeing any involvement should any celebrity, MP or member of the Royal Household contact you directly to be involved in an event or activity.

- Royal Household requests – the Governance Office.
- MP requests – the Compliance, Policy and Research (CPR) Team
- Celebrity Requests – the Celebrities Relationship officer within the Fundraising events team
- Press – the local PR officer.

We would encourage you to connect with your local press and local councillors and want to support you better to ensure that we have a consistent message about the RBL's work. Your MEO can put you in touch with the local CPR team member or Press Officer who can provide advice and support.

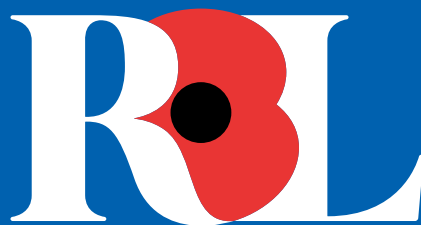
Political campaigning and RBL affiliation

If you are an active party-political campaigner or elected representative e.g. a councillor, or you will be standing for election as a councillor, please make sure you separate your party-political activities from your RBL membership. In practical terms, this means considering:

- Conducting your party-political activities on a different social media platform to those you use for your RBL activities (e.g. using Facebook for personal political content and using LinkedIn for your RBL activities).
- Providing a generic biography which doesn't mention the RBL on any autobiographical information on election materials or websites.
- Never including your council title in your RBL.Community email signature, and never using this address for party-political or council business.
- Never using the poppy or RBL logo on any party-political material.

Generally, please consider whether any activities you take part in or content that you produce would either deliberately or inadvertently suggest RBL's support or endorsement for one political party or candidate over another.

National



ROYAL BRITISH LEGION

Activities for members

Members who take part in activities with their local branch or county will often find that they get more out of their membership and feel more connected to the Royal British Legion's work. During the course of the year, branches should carry out their fundraising and community support responsibilities, but they should also spend time on other activities.

Events of a social nature (funded by members and not by branch funds) might include trips to the National Memorial Arboretum, Christmas meals, visits to Regimental Museums or travelling to places of interest. Members can also participate in sports competitions with other branches at county and regional level. There are currently competitions for bowls, snooker and darts in some areas.

Members driving on behalf of the RBL in a volunteer role must be legally entitled to drive and have a full driving licence. Once a person reaches the age of 70, they have to renew their driving licence every three years. When a volunteer is using their own vehicle in their voluntary activities, they should tell their insurers but make it clear that they will only receive out-of-pocket expenses and that this is not commercial use of the vehicle. Association of British Insurers insurance companies do not charge an extra premium for volunteer drivers. Branches often help with local Remembrance events and funerals. Guidance for ceremonial activities for branches can be found [here](#).

Recruiting and retaining members

Branch members, county recruiting officers and branch recruiting advisers are responsible for recruiting activities, but it's up to every member to bring new people into the Royal British Legion. Find out everything you need in the Recruitment Handbook, available through Microsoft Office 365 (O365) or from your MEO.

Training

Training is provided by the Learning & Development team in Head Office or by the county training officers. Any queries about membership training should be sent to the Learning & Development team via email on membershipservices@britishlegion.org.uk. More information about training can be found in the Membership Training Policy, available in the MAP.

Sending delegates to Annual Conference

Every branch and county can send a delegate to Annual Conference. Branch and county delegates can speak, but only branch delegates can vote. Branches with more than 300 members may send a second delegate. Branches with more than 1,000 members may send one further additional delegate for every 500 members over 1,000.

Members of Royal British Legion staff should not attend Annual Conference as voting delegates. Branches and counties may put forward motions for Annual Conference, as long as they have been approved at the relevant annual county conference. Two delegates of the same branch may not propose and second the same motion. Branch presidents are entitled to attend as a delegate, but this must be done as a member, not in their capacity as branch president.

How things work at conferences

Read the Standing Orders, available through Microsoft Office 365 (O365) or by request to membershipservices@britishlegion.org.uk for conference protocol and process.

Delegates' expenses

Delegates are able to claim their travel expenses, part of which will be paid by Head Office and the remainder by the branch or county.

Awards

The Royal British Legion recognises outstanding contributions or achievements that go well beyond what might normally be expected of a RBL officer or member.

National Awards

To be considered for a national award, a person must have already been awarded a county or branch Certificate of Appreciation. National awards are decided by the National Chair.

- The National Certificate of Appreciation is the highest honour. It may be awarded to a member who has made a conspicuous contribution to the RBL for at least 12 years. Certificates are presented at Annual Conference and are accompanied by a lapel badge inscribed 'For Merit'.
- Life Membership is awarded to a member who has given at least 10 years' meritorious and conspicuous service to the objectives of the RBL as defined by the Royal Charter. This member usually holds the RBL Gold Badge. The recipient remains a member without having to pay a membership fee for the rest of their life. When Life Membership is approved, a certificate is sent to the member, together with a Life Membership card and badge.
- The Gold Badge may be awarded to a member who has given at least eight years' meritorious and conspicuous service to the objectives of the RBL as defined by the Royal Charter. Following the National Chair's approval, the branch or county proposing the award must meet the cost of the badge. When the recipient passes away, the badge becomes the property of the next of kin, who may retain it or return it to the branch.
- Application forms for national awards can be obtained from the MEOs or from Microsoft Office 365 (O365). Applications must:
 - Demonstrate the individual's service to the RBL.
 - Be signed by the Chair of the nominee's branch, group or county. If the Chair is the nominee, the application must be signed by the President. Where two or more offices are combined, it may be necessary to involve the Treasurer.
 - Be recommended by the county committee.

It is advisable not to tell the nominee about recommendations to avoid disappointment if the application isn't successful.

Every member, excluding Youth Members, Life Members and members awarded a National Certificate of Appreciation, must pay an annual membership fee to the RBL.

County award

A county Certificate of Appreciation may be awarded to a member who has made a conspicuous contribution to the county.

Branch Award

A Branch Certificate of Appreciation may be awarded to a member who has made a conspicuous contribution to the branch or RBL in general.

King's Birthday and New Year Honours

RBL members may be recommended for inclusion in the King's Birthday and New Year Honours List. Recommendations are normally for the Order of the British Empire – Officer of the Order (OBE), Member of the Order (MBE) or British Empire Medal (BEM). The RBL has its own Honours Group who oversee the nominations process; the Honours Group is chaired by the National President.

The member being nominated should have given exceptional and outstanding service to the RBL. Citations must be submitted on the dedicated Cabinet Office Citation form which contains a record of offices/roles held and dates, and demonstrates the distinctive nature of the nominee's work. References should be made to service in HM Forces and any voluntary work with other organisations and in the local community.

The RBL has guidance on the Honour process, which along with the form can be requested via your MEO or the Director General's Office. Please note only the Cabinet Office citation form will be considered, no additional information such as supporting letters will be reviewed as part of the citation. All citations should have the 'nominated by' completed in case any queries arise.

The timetable for nominations is set by the Cabinet Office and therefore subject to change.

The Director General's office will email county chairs and MEOs with the timetable with an expected return date of end of January for New Year Honours and end of August for the King's Birthday Honours. Please send these to:

Executive Assistant to the Director General, The Royal British Legion, 199 Borough High Street, London SE1 1AA or email your county chair or MEO for forwarding to the Director General's office.

Due to the complicated process around Honours, it is better to avoid telling the nominee that they have been nominated to avoid disappointment if the recommendation is not successful.

Annual Membership Awards

These awards are all presented at Annual Conference:

Award	Criteria	Nominator
Haig Cup	Awarded to a branch (with more than 50 members) that can demonstrate compliancy and which, during the past year, has not only supported its membership and beneficiaries, but also positively promoted RBL within its community, county/district or the wider country. Winners receive a scroll of award and a star to add to their branch Standard.	County Committees nominate branches.
Lister Cup	Awarded to a branch (with up to and including 50 members) that can demonstrate compliancy and which, during the past year, has not only supported its membership and beneficiaries, but also positively promoted the RBL within its county/district or the wider community. Winners receive a star for their branch Standard.	County Committees nominate branches.
Maurice Challenge Cup	Awarded to the county/district/section that can demonstrate compliancy and which, during the past year, has not only supported its membership and beneficiaries, but also positively promoted the RBL within its community. Winners receive a scroll of award.	MC Reps nominate counties.
Jellicoe Cup	Awarded to a branch in recognition of its sterling efforts, enthusiasm and determination to further the aims of the RBL by increasing the visibility of the services and actively supporting our beneficiaries under the Branch Community Support scheme. All nominated branches must be at least three years old. Winners receive a scroll of award.	Branches are nominated by county/district/section.
Churchill Shield	Awarded to a national branch that can demonstrate compliancy and which, during the past year, has not only supported its membership and beneficiaries, but also positively promoted the RBL within its district or the wider community. All nominated branches must be at least three years old.	Branches are nominated by the National Branches district.
Downing Shield	Awarded to an individual member who is recognised to have played an important part in the delivery of BCS with a view to greatly improving RBL's support to beneficiaries.	Nominations should be sent from branch or county/district.
Lewis Shield	Awarded to an RBL member with a disability who has provided substantial inspiration for other RBL members.	Individuals are nominated by their branch, with the county/district/section also providing a citation in support of the application.
Knox Shield	The Knox Shield is awarded to an organisation or group for their commitment and willingness to work collaboratively with our local membership, be that the county committee or CCSC or branch committee to increase awareness in RBL services provided under BCS.	Nominations should be sent from branch or county/district/section.
McCrae Shield	The McCrae Shield is awarded to an overseas branch that can demonstrate compliancy and which, during the past year, has not only supported its membership and beneficiaries, but also positively promoted RBL within its district or wider community. All nominated branches must be at least three years old.	Nominations are made by the relevant district, MC Rep for Overseas or MEO.

Award	Criteria	Nominator
Ian Hamilton Cup	Awarded to a club for making significant efforts in furthering the charitable objectives of RBL, showing good and effective general management and/or significantly developing the club. Please note, only clubs that have a full licence can be nominated.	Clubs are to be put forward by their county/district. More than one club per county may be nominated.
Sir Clive Johnstone Award	Awarded to an individual, group or team that has demonstrated the ability to create, repair or improve unity.	Nomination by members, volunteers or members of staff.
Membership Training Award	Awarded to an individual who has shown excellence in their capacity to deliver learning that makes a real difference to members.	Individuals are nominated by county/district chairs.

How to apply: Nominations for the above awards should be submitted by the listed nominator for each award in the table provided. Details of how to formally submit a nomination to the Annual Membership Awards Working Group for consideration are shared alongside the deadline(s) each year as part of the Annual Conference October Special Circular, available on MAP.

Annual Membership Awards – Poppy Appeal

The following awards are awarded based on the previous year's Poppy Appeal fundraising. The awards are presented to winners at Annual Conference.

Award	Criteria	Nominator
Noel Rogers Trophy	Awarded to the officially recognised RBL overseas branch/club which donated the greatest sum to the Poppy Appeal.	No application required.
Bucher Trophy for Clubs	Awarded to a club, licensed by RBL, for raising annually the largest donation amount per club member for the most recent Poppy Appeal, to include funds raised from 1st February to 31st January.	No application required.
Poppy Appeal Trophy	Awarded to the county that has raised the highest Poppy Appeal donation result per capita, based on population.	No application required.
Hughes Trophy	Awarded to a county for the highest percentage increase in donations for the Poppy Appeal per capita, based on population.	No application required.

How to apply: No applications are required. Winners are calculated by RBL's central office based on the available data from the previous year's Poppy Appeal.

Youth Members

The Royal British Legion is committed to helping young people understand the issues of Remembrance, conflict and the importance of peace.

County youth officers are appointed to develop relationships with young people, schools and cadets in the county.

Branches may affiliate with any local youth organisation, such as St John Ambulance, The Scout Association, Girlguiding, The Boys' Brigade or youth clubs. The purpose is to promote mutual support and encouragement to each other's aims and objectives in the local community.

In addition, the RBL welcomes members from the age of 12 up to the age of 18. Young people can join as [Youth Members](#) free of charge. All they have to do is fill out an application form.

You can read our Safeguarding Policy on Microsoft Office 365 (O365) or request it from your MEO.

Ceremonial Protocol

For information on ceremonial protocol including flying flags and wearing of medals, please refer to the Ceremonial Handbook.

RBL-licensed Bands

The Royal British Legion has licenced bands across the country. From male-voice choirs, to marching bands, to youth bands, our RBL Bands play a key part in connecting the RBL with local communities. For musicians our bands provide an opportunity to develop their skills while being part of a bigger purpose; helping the RBL to be visible, raise funds and recognise the Armed Forces Community.

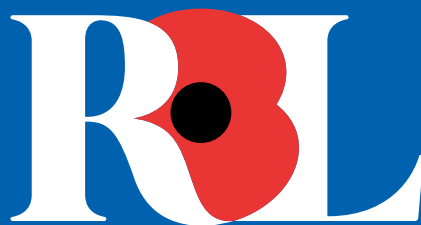
If branches are holding events or have fundraising activities at which they plan to have music, they should consider using an RBL band in the first instance. The contact details for the Bands can be found on the website. Branches can also support their local Band by promoting the opportunities for members who are musicians to join the RBL Band.

RBL-licensed bands are allowed to use the RBL's name and logo, but are separate legal entities and therefore, except for during Remembrancetide, they will need to charge for attendance at an event, even where it is RBL organised. Branches cannot provide funding to bands from branch funds. Where the branch and band are fundraising together at an event, it must be clear which organisation the donor's money is for; separate, clearly-marked fundraising tins must be used and band funds must not pass through branch accounts. The Bands Policy can be found on MAP.

Flying Flags

For information on ceremonial protocol including flying flags, please refer to the Ceremonial Handbook.

Counties



ROYAL BRITISH LEGION

About counties

What counties are and how they are structured

- Counties, districts and sections are administrative regions of the Royal British Legion. They have different names but the same functions.
- A branch is a group of RBL members, which may be formed based on locality or shared interest. Counties are made up of several branches.
- No more than two branch representatives, elected or co-opted, will hold positions on group, district and county committees unless approval to waive this is granted by the Membership Council Representative for the area concerned.

Committees and the roles people can hold

	County/District
Committee roles	Chair, Vice-Chair, Secretary, Treasurer (appointed, non-voting), Community Support Coordinator/committee, County Recruiting Officer, County Training Officer
Committee-appointed roles (but not committee members)	President; Chaplain (optional)
Number of additional committee members allowed	Seven to 15
Quorum	Half the members entitled to attend and vote

While optional roles are not required, the responsibilities need to be assumed by another committee member in the event the post is vacant.

County Chaplain

County chaplains can be invited and appointed to the role given they are approved by the county committee and the decision is reflected in the minutes. Chaplains can be of any recognised faith, so long as they are suitably qualified according to a religion's endorsing authority.

MS1 Self Declaration

Prior to assuming officer/committee roles, the member must be able to comply with the below Self-Declaration Document:

SELF DISCLOSURE

Part 1

REPUTATIONAL or FINANCIAL ROLES

The Legion's principal concern is the safety of its members, beneficiaries, staff and volunteers. We have no appetite for recruiting unsuitable people into roles where they may carry out activity that is harmful to our people or the people we support.

We will use the information on this form to assess any risks associated with you taking up or continuing in this role. We assess each declaration on its merits. We ask for your complete honesty when completing this declaration.

If you fail to disclose an offence and we are later informed of it, you may be subject to sanction, up to and including expulsion from Legion membership. You may also be removed from any additional Volunteer/Membership Roles you may hold.

By signing the declaration you understand that it is necessary for you to declare the information requested below and that your role may involve access to Children, Young People and/or Adults at Risk or may involve access to Legion funds. When you sign the declaration it is to the effect that you confirm the statements below to be true and that you will inform RBL of any changes in the circumstances which would affect the veracity of your declaration.

If you feel that any of the statements below are not true, you should raise this with your MEO for discussion with the Safeguarding Team. It is recommended that you do this prior to formally standing for the role in order that your suitability for the role can be confirmed prior to you being appointed. If you are unable to positively confirm any of the statements in this declaration this does not automatically mean you will be found unsuitable for the role.

1. I have never received a conviction or conditional caution for any criminal offence (spent convictions are not required to be declared).
2. I am not a person known to any Social Services department/statutory agency as being an actual or potential risk to Children or Adults at risk.
3. I have never been the subject of any sanctions or reprimand from the RBL or any other charity or organisation's governing body in relation to children, adults at risk, financial impropriety or reputational risk.
4. I am not, nor have I ever been, on the sex offender's register.
5. I have never been disqualified as a director of a limited company and I have never been subject to a bankruptcy order (declaration required for all roles), an Individual Voluntary Arrangement or a debt relief order (IVA and DRO declaration only required for Treasurer roles).
6. I do not have any personal loans/debts that are currently unlawfully in arrears (a debt where an individual has breached the terms).
7. I do not have any outstanding CCJs against myself or know of any outstanding CCJs against my address.

8. I confirm I will comply with the Legion's Safeguarding Policy and Safeguarding Code of Conduct.
9. I confirm I will comply with the Legion's Health & Safety Policy.
10. I confirm I will comply with the Legion's Data Protection Policy.

Part 2

Consent for us to conduct a DBS check

All volunteers and members must give consent to TRBL to conduct a Criminal Record check if so required – this includes - DBS/ ACCESS NI/ Disclosure Scotland.

Part 3

How we will use your personal data:

The information you have provided on this form will be used by The Royal British Legion Group to assess your suitability for the role that you have applied for or are undertaking.

We process the information on this form with your consent. You can withdraw your consent for us to use this information at any time but doing so may affect your ability to take up or continue in the role.

Your information is treated in confidence and is handled with discretion. It is stored securely, whether in paper or electronic form, and is not shared outside of our organisation unless we are legally obliged to do so.

Visit www.britishlegion.org.uk/privacy to find out more about how we use personal data, or contact our data protection officer by emailing: dataprotection@britishlegion.org.uk

By completing the declaration on the MS1 or MS1a you give your consent to the Royal British Legion to use the information on this form in the ways set out above.

Rules for all Royal British Legion Officers

They must:

- Follow the duties and responsibilities outlined by the Board of Trustees and the Membership Council.
- Adhere to all RBL policies and procedures.
- Ensure the formation complies with charity law.
- Serve the interests of the RBL at all times.
- Undergo appropriate training for their role.
- (For Branch Officers) not serve as officers of an associated club committee.
- (For Branch Officers) not be a tenant or representative of a tenant of properties held in trust by the branch.

- Any Membership Officer (branch chair, county chair, Membership Council representative, Board of Trustees member) cannot hold a position of National Parade Marshal, Deputy or Assistant National Parade Marshal whilst in membership office.

What happens if a role suddenly becomes vacant?

If this happens to the role of Chair or Vice Chair, the next highest placed candidate in the latest election fills the vacancy. If there is no such person, the committee should co-opt a temporary replacement for the remainder of the term unless there are more than 15 months until the next election. In this case the committee must initiate an election within one month and complete it within four months to fill the vacancy.

If a vacancy occurs for any other position, the committee should co-opt a suitable member of a branch within the county as a temporary replacement until the next annual meeting or special meeting, when a fresh election must be held for the rest of its term. A member elected or appointed in this way may be elected for up to three further terms in the office concerned.

What county committees do:

- Oversee the activities of the branches in their counties and establish groups.
- Recommend to the Membership Council the closures, openings and status changes of branches.
- Prepare county plans.
- Authorise any person, whether or not a member of the RBL, to visit any meeting of any branch or Branch committee in its county at any time on its behalf and to have access to all deeds, documents, books and accounts of this branch.
- Take a branch into administration where necessary, keeping the Membership Council informed at all stages. A branch unable to form a committee or in other ways unable to temporarily function, is supported by the county committee instead of branch committee where all branch affairs including its bank account, are under the control of county until the branch can return to normal.
- In case of a local resolution which identified a need for a member to be suspended or excluded, the county committee refers this back to the LCC for action.
- Make sure every branch submits copies of its annual branch accounts to Head Office.
- Hold an annual meeting, which may put motions forward to the RBL's Annual conference.
- Help the [Board of Trustees](#) and the Membership Council to carry out the work of the RBL.
- Help to organise the Poppy Appeal and any other fundraising activities in their counties.
- Establish sub-committees.

- Act on resolutions passed at the annual meeting of county conference (or at a special meeting of the county conference), as long as they do not conflict with the Royal Charter or with the Board of Trustees' instructions.
- Encourage payment of membership fees by Direct Debit and encourage members to Gift Aid their subscription where appropriate.

For more about their responsibilities, see the [Royal Charter](#).

The county committee, in discussion with the Membership Council Representative, should elect to remove a Branch Officer or committee member from their position, or prevent them from taking a position on a committee, where they have not demonstrated the RBL's values and behaviours, have not followed the rules as laid down in the Royal Charter and the Membership Handbook or have not followed relevant RBL instruction, policy and procedures.

RBL Name Badges for County Officers

To maintain a consistent and professional public presence, the main public-facing county officers of the Royal British Legion (RBL) will be issued with a branded name badge. This badge serves to identify the individual as an authorised representative of their county during official engagements, events, and interactions with members of the public or partner organisations.

Eligibility and Issuance

We will provide branded name badges to county Officers whose roles include regular engagement with the public or external stakeholders. These may include, but are not limited to:

- County Chairs and Vice-Chairs
- County Presidents
- County Community Support Coordinators
- County Recruitment Officers
- County training Officers
- County Youth Officers

The badge will display the RBL logo, the individual's name, and their official title. Upon appointment, the officer's details will be submitted by the relevant county secretary to the Membership Administration team, who will arrange production and delivery.

Use of Badge

The badge is provided to be worn at all official RBL events and when representing the RBL in a public or partnership capacity. It should be clearly visible and worn in a manner consistent with the dignity and professionalism of the organisation. The badge remains the property of the Royal British Legion and is to be used strictly for official purposes only.

Return of Badge

If a county Officer leaves their role—whether through resignation, completion of term, or removal—they are required to return the name badge within 14 days of their departure. The county Secretary will be responsible for requesting its return and ensuring it is either returned to the county Office or sent directly to the Membership Directorate at Haig House.

Failure to return the badge within the specified timeframe may result in follow-up action to recover the item, as it remains RBL organisational property.

Byelaws

Byelaws lay down how a formation is organised and structured and how it works. They also contain all the terms of reference of county sub-committees. They are based on the model byelaws. For counties, any amendments or additions must be approved at a meeting of county conference by a two-thirds majority and then approved by the Membership Council.

County Plan

Counties must have a three-year plan based on Royal British Legion aims and policies and the county objectives. county plans are live agenda items which the county committee reviews at each committee meeting and should also be reviewed annually by the county committee at their annual meeting.

County plans should not include business as usual (BAU) activities e.g., maintaining contact with branches, assisting branches with compliance, encouraging Remembrance activities. The plan should provide specific actions which will support improvement in each area and align to the RBLs strategic objectives.

Strong county plans include activities that increase the visibility and reach of the RBL in communities e.g., re-establishing closed branches, encouraging younger members to take on committee roles thereby promoting the organisation to younger generations.

Strong county plans significantly improve the chances of a successful grant being awarded during the annual County/District Grants Award process.

County Meetings

County Committee Meeting

COUNTIES	Committee Meeting				
Frequency	At least four times a year	Dates	To be set at its first meeting after the annual meeting of county conference	Quorate requirements	At least half the members entitled to attend and to vote must be there to make the meeting quorate
Notifications	NA				
Chair	County chair or vice chair in their absence				
Attendees	Required: county officers and committee members Optional: Membership Council representative		Typical Agenda Suggestions		
Other	Minutes to be distributed to the Membership Council representative and the Membership Engagement Manager. If a committee member is absent for three meetings in a row in a 12- month period, they are deemed to have vacated the seat unless a valid reason has been provided and accepted by the rest of the committee.				
For details of how national meetings are held, please refer to the Royal Charter; and to the Standing Orders, available through Microsoft Office 365 (O365) or your MEO, for the Conduct of Annual conference.					

Annual General Meeting (AGM)

COUNTIES	Annual General Meeting (AGM)				
Frequency	Once a year	Dates	To be decided by the county committee and county conference committee	Quorate requirements	The quorate is 4 branches or 10% of the branches in the county, whichever is largest. For Women's Section and National Branches the quorate is 4.
Notifications	At least: • 12 weeks before: Branches notified about date/time/venue • Six weeks before: Branches receive provisional agenda. • Four weeks before: Branches submit nominations for county committee, county conference committee and National Conference Committee and motions and charter motions for Annual Conference and/or county conference. • Two weeks before: Branches submit amendments to motions. • Two weeks before: final agenda sent to all Branches				
Chair	County chair or vice chair in their absence				
Attendees	• Visitors (members, guests) • Delegates: branches and county supported branches can appoint: • One delegate if a Branch has 300 members or fewer • Two delegates if a Branch has more than 300 but fewer than 1,000 • Three delegates if a Branch has more than 1,000 but fewer than 1,500 members • Additional delegates for every 500 members over 1,000	Typical Agenda Suggestions	Suggested: • Declare results of the county elections • Approve amendments or additions to the county byelaws (requires a two-thirds majority vote) • Pass resolutions requiring specific actions from the county committee • Vote on submitted motions that have been approved by the conference committee • Elect committee members • Elect county conference committee members • Review the accounts for the past year • Review the county plan covering the next three years • Review reports and the progress made with the county plan over the past year • Consider any discussion papers on relevant topics approved by the county committee on which the views of the membership should be sought		
Other	Delegates are permitted to speak and vote, provided they are current RBL members. However, they must not be RBL employees, county officers, or members of the county committee. Additionally, motions cannot be proposed and seconded by delegates from the same Branch. Following each meeting, the minutes must be uploaded to MAP, and submitted to the MEO and the Membership Council Representative within three months.				
For details of how national meetings are held, please refer to the Royal Charter ; and to the Standing Orders, available through Microsoft Office 365 (O365) or your MEO, for the Conduct of Annual conference.					

County Special General Meeting

COUNTIES	Special General Meeting (SGM)				
Frequency	As required	Dates	Within 21 days of a valid request	Quorate requirements	NA
Notifications	At least seven days before to all branches				
Chair	County chair or vice chair in their absence				
Attendees		Typical Agenda Suggestions	• Discuss a single matter of extreme urgency or importance • Remove from office an officer of the county committee or member of the county committee • Consider a vote of no confidence tabled by at least 1 / 4 of the branches within the County.		
Other	Meeting must be called at the direction of the Board of Trustees, the county committee or of at least one quarter of the branches in the county. In the event of a vote of no confidence being raised, ¼ of branches within the county will hold a branch meeting and specifically record in their branch minutes the majority vote stating they have no confidence in the county committee/specific county officer. In the event of specific county officers being subject to a vote of no confidence, branches will report to the county chair and request the SGM. In the event of a vote of no confidence in the county chair or whole county committee, the SGM will be arranged via the MC Rep/MEO and chaired by the MC Rep. If the vote is successful, this must be recorded in the minutes, and the county officer/county committee will be stood down.				
For details of how national meetings are held, please refer to the Royal Charter; and to the Standing Orders, available through Microsoft Office 365 (O365) or your MEO, for the Conduct of Annual conference.					

County Special Committee Meeting

COUNTIES	Special Committee Meeting				
Frequency	As required	Dates	Within 14 days of the request being received	Quorate requirements	At least half the members entitled to attend and to vote must be there to make the meeting quorate
Notifications	At least seven days before to all committee members				
Chair	County chair or vice chair in their absence				
Attendees	Required: county officers and committee members Optional: Membership Council representative		Typical Agenda Suggestions		
Other	Meeting must be called at the request of any eight members of that committee				
For details of how national meetings are held, please refer to the Royal Charter; and to the Standing Orders, available through Microsoft Office 365 (O365) or your MEO, for the Conduct of Annual conference.					

County conference

Every conference agenda should include, as a minimum:

- Reports (including the chair's report and welfare report).
- Accounts for the past year.
- The corporate address (to be given by the allocated speaker). The corporate speaker should be allocated minimum 20 minutes for the corporate update and any Q&A.
- Motions, including the proposal of amendments to the Royal Charter and the membership rules.
- Review of the county plan.
- Nominations for membership of the conference committee.

Counties and districts may choose to also have a guest speaker who presents to the conference on an item of interest, for example, a local charity or a beneficiary. The guest speaker is separate from the corporate speaker and should not be a trustee.

County Conference Structure and Agenda Guide

For county chairs hosting a county conference, this section provides a recommended structure and agenda format for hosting a county conference. It is intended to ensure ceremonial consistency, procedural clarity, and adherence to Royal British Legion standards.

Annual County Conference – Sample Agenda

Delegates are asked to be seated by 10:15 am.

The Parade and Inspection of County and Branch Standards will take place at 10:00 am.

Provisional Agenda

1. Entry of Standards
2. Opening Ceremony
 - Exhortation – County President
 - Last Post – Bugler
 - Reveille – Bugler
 - Kohima Prayer – County President

3. Prayers and Silent Tribute
4. Civic Welcome
5. Reply and Address by the County President
6. Apologies for Absence
7. Appointment of Scrutineers and Adoption of Standing Orders (as outlined in the County Handbook)
8. Minutes of the [Insert Year] Annual conference
9. Matters Arising from the Minutes
10. Annual Report of the County Chairman
11. Annual Report of the Honorary Treasurer and Adoption of Accounts
12. RBL Corporate Guest Speaker
 - (Insert name and title)
13. Annual Report of the Membership Council Representative (If attending)
14. Adoption of County Plan
15. Election of County committee Members
16. Nominations of Three Members from Branches to the County conference committee [Insert Year]
17. Guest Speaker
 - (Insert name and title)
18. Debate Motions and Motions of Urgency
 - Note: Any Motion of Urgency must be presented to the County conference Chairman by 09:45 hrs.
19. Seek Permission to Destroy Ballot Papers (If required)
20. Vote of Thanks by the County Vice Chair (CVC)
21. Ceremonial Handing Over of the County Standard
22. Charging of Members, Elected and Appointed Officers to Pledge Acknowledgement of Responsibility
23. National Anthem
24. March Out Standards
25. Closure of conference

This structure can be adapted slightly based on local needs or venue constraints but should maintain ceremonial and procedural elements for consistency across the organisation. County chairs are encouraged to liaise with their MEO and county committee to finalise arrangements well in advance of the event.

The county/district conference committee are responsible for the planning and delivery of the conference and should use the 'Standing Orders for Annual conference and TOR for the conference committee', making adjustments where appropriate to allow for where the county conference differs from the Annual conference. This Standing Order is available on the Membership Administration Portal (MAP).

County conference organisation

The county/district conference committee are responsible for the planning and delivery of the conference and should use the 'Standing Orders for Annual conference and TOR for the conference committee', making adjustments where appropriate to allow for where the county conference differs from the Annual conference. This Standing Order is available on the Membership Administration Portal (MAP).

County Role Descriptions

County President

The county president is appointed by the county committee and serves in three-year terms for an unlimited amount of time as decided by the committee. The county president although an officer, is not a member of the county committee.

The county president has both a representational and advisory function. The president should have the ability to open doors, establish useful contacts and bring influence to bear in the local community. They should always promote the Royal British Legion's charitable aims, vision and values. Therefore, they should be a distinguished person in public life, the local community, or the RBL and be able to counsel the chair and officers as necessary in the execution of their duties.

The president has a non-executive role, without a vote, as they are not a member of the county committee, but they should attend and speak at meetings of the county conference and committee. While an individual who is approached to act as county president is not required to be a member of the RBL, they should become a member on appointment.

Terms of Reference

1. The President must give clear, constructive and comprehensive advice/guidance to the county committee when required.
2. Chair the meetings of the county conference during the election of Officers and give an address at meetings of the county conference.
3. Be responsible for ensuring that any action taken against the county chair is in accordance with the RBL Complaints Procedures, where appropriate.
4. Take part in consultations on all recommendations to the National President for National Honours.
5. Assist the county committee with hosting county dignitaries at county events
6. Act as county representative, if required to present county and or branch awards.

County Chair

The strategic direction is set by the Board of Trustees (BoT) with Membership Council supporting its implementation to the wider membership through the county chairs and county formation. County chairs provide advice, recommendations and insight to branches to enable them to implement the operational activities to support the RBL's strategy and to deliver the purpose of membership and the values that membership brings to the RBL.

County chairs provide leadership and guidance to their counties/districts across the UK and overseas. Adherence to RBL policies and compliance requirements is expected across the membership network and a key role of county chairs is ensuring that both the county itself and the branches are compliant and adhering to policy and procedure. County chairs and their committee members work closely with branch chairs to proactively manage risk register and issues at county/district, branches and clubs.

The county chair is responsible for the management of the county and for developing a county committee through which they discharge their responsibilities by ensuring that the committee members are appropriately trained and experienced and are following correct policy and procedure.

County chairs are expected to uphold the RBL code of conduct and demonstrate the highest standards of values and behaviours.

The county chair is elected by ballot to chair the county committee for a tenure of three years.

Key Responsibilities

General

1. To build and maintain a strong relationship with the Membership Directorate, particularly the local staff, and wider RBL teams, working together to support and develop the membership to enable effective delivery of the purpose of membership.
2. To be fully conversant with the Royal Charter, the Membership Handbook and all other relevant policies and procedures. To educate and work with the branch chairs so they fulfil their responsibilities in accordance with those documents.
3. To provide feedback and insight to MC Reps to ensure that the members voice is represented in discussions at Membership Council.
4. Uphold the RBL vision, values and code of conduct.
5. To actively participate the county chairs induction programme including a full handover from the previous incumbent, and attend the relevant county management training.
6. To play a key role in the public relations of the RBL and represent the Legion and membership at relevant local events.
7. To participate in relevant membership events and meetings and to work collaboratively with the relevant peers/staff to support the future development of membership and improvement of current practices.

8. Willingness to attend county chair seminars (March and September events) and Annual conference (in person or virtually)
9. Be prepared to undertake the mentoring of newer county chairs
10. To undertake any mandatory training including Data Protection and Cyber Security.

Management of the County

11. To approve branch byelaws and manage the formation, amalgamation and closure of branches.
12. County chairs should have oversight of the clubs in their county/ district, including knowledge of the clubs' licence status, and are responsible for signing off club licence forms and ensuring that an effective branch exists to support club affiliations.
13. Maintain appropriate county byelaws.
14. Proactively support and manage branches and clubs within the county with a focus on achieving the purpose of membership and the activities which bring value to the RBL and being compliant with RBL policies and procedures. To foster strong links between the county committee and the branch committees and engage with branches and members across the county.
15. Develop and manage county three-year plans and oversee and work with the MEO to maintain the branch risk registers. To develop a county action plan relating to the risk register and any branch and county audit recommendations and deliver on any actions.
16. Resolve issues between members and within branches, encouraging local resolution first before escalation up through to LCC, while ensuring the serious issues or those relating to safeguarding are escalated at the earliest opportunity.
17. Successfully deliver, through the county conference committee, the annual general meetings (county conferences) in accordance with the Membership Handbook (MH), Royal Charter and county bye-laws, whilst taking into account the views of the delegates.
18. To ensure effective communication with branch committees and ensure that relevant information is cascaded out. To hold a briefing for branch officers following each county chair's seminar to pass on key messages and updates
19. To encourage branch and county officers to attend relevant training.

Management of the County committee

20. Provide effective oversight of the county budget through the county treasurer.
21. To establish an effective county/district committee with officer roles filled and duties carried out effectively and to ensure succession planning and mentoring for all key roles.
22. To brief county committee members on updates and ongoing matters at national level
23. To recognise real and perceived conflicts of interest and to declare any such potential conflicts when they arise.

Person Specification

- Must be able to demonstrate a good understanding of the role of a county chair and their responsibilities to the county/district and branch network.
- To recognise the time commitment involved to carry out county chairs responsibilities, including visiting the branch network, preparing for meetings and chairing the county committee meetings.
- To liaise with external agencies including military, Lord Lieutenant's and High Sheriff offices and local government agencies within the county.
- Able to manage county committee meetings, ensure that county matters are effectively addressed and take a balanced and objective view, as well as constructively manage and contribute to discussions.
- The ability to build effective and positive working relationships with others, built on trust and respect, across staff and members alike.
- To recognise the importance of personal development and committed to continuous learning.
- Should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and county use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
- Must be able to respect confidentiality.
- To have a positive commitment to the Equality, Diversity and Inclusivity agenda and able to challenge staff and members alike who don't align with RBL ED&I values.

County Vice Chair

The county vice chair is elected by ballot for a tenure of three years. The role of a county vice chair is to aid the county chair in managing the county.

The county vice chair is expected to show strong leadership, management and diplomatic skills especially when deputising for the county chair. The county vice chair must be prepared to advise the county committee, accordingly, as directed by the county chair.

Terms of Reference

The county vice chair is to deputise for the county chair in their absence at all county meetings.

1. The county vice chair should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and County use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
2. The county vice chair must be conversant and compliant with the current Royal Charter, the Membership Handbook and policies and procedures, which are all located in the MAP on Microsoft Office 365 (O365).
3. Attend all county meetings so that they can be conversant with on-going issues and changes taking place within the RBL, in particular at county level.
4. The county vice chair must assist the county chair with ensuring that all county committee members and branches are aware of and adhere to the RBL vision, values and code of behaviour for working together.
5. Fully support the work of the MEO and the Membership Council representative.
6. Participate in discussions with the county chair on important issues, give their opinion honestly, but having given it, defer to the chair's judgement. Abide by the chair's decisions.
7. Expect to be given specific tasks by the chair, such as the organisation of a county event or chairing of a sub-committee.
8. Any training requirement is to be discussed with the county chair and arranged through the county training officer and/or the MEO.
9. The county vice chair must possess good basic I.T. skills and be able to access the MAP in Microsoft Office 365 (O365), use email and be familiar with social media platforms that the RBL, county and branches use.

County Secretary

County/district committees must appoint a secretary at the first committee meeting following the annual general meeting (county/district conference) for a tenure of one to three years.

The secretary acts as a focal point for county/district administration, including organising meetings and the distribution of correspondence (ideally electronically), agendas and meeting minutes. They also retain and safeguard vital county/district documents using the MAP and assist the county/district chair and the MEO in ensuring the effective administration of their area.

Terms of Reference

The county secretary is responsible to the county/district chair and committee for the efficient management of administration.

1. The county secretary should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and county use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
2. Must be conversant with the current Royal Charter, the Membership Handbook and policies and procedures. The county/district secretary must demonstrate the RBL vision, values and code of behaviour.
3. Must ensure that all documentation is kept safely and securely on RBL platforms and in the rbl.community email account.
4. Should discuss and arrange any training requirement through the county/district training officer and/or the MEO. The secretary is expected to undertake any mandatory training including Data Protection and Cyber Security.
5. Is responsible, in discussion with the county/district chair, for arranging committee meetings, compiling and distributing all necessary paperwork, including agendas and reports, and for producing and sending out the minutes of the meetings within a reasonable timescale.
6. Distribute any correspondence from the county/district committee to branches.
7. When complaints require local resolution, the Secretary is requested to attend the meeting and act as a notetaker. Caveat: if there is any conflict of interest caused by the Secretary being present at the resolution meeting the MEO should be contacted for advice.
8. Supports the MEO in the election process for county/district chair and vice chair.
9. Support the MEO in the collation of key documents from branches such as MS1s.
10. Support the county/district committee where increased administrative support is required, including during an area wide audit.

11. Inform the National President via the Governance Support Officer of new county president appointments.

County Committee Member

To be elected to the county committee, those members standing for election must be aged 18 or over. They must be able to confirm that all of the statements in the safeguarding self-declaration are true and declare if any statement is not true.

Each county committee member occupies a key place in the management of the county, this is in addition to any specialist role they may hold. In conjunction with all other Members of the committee, they have a collective responsibility to the RBL for the smooth running of the county.

A committee Member should assist in the supervision of the branches within the county which are responsible for giving active support to the organisation, the Poppy Appeal and Community Support.

Terms of Reference

1. The county committee member should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and county use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
2. Must be conversant and compliant with the current Royal Charter, the Membership Handbook and policies and procedures, which are all located in the MAP on Microsoft Office 365 (O365).
3. Aid the county committee, Membership Council and Board of Trustees to carry out the work of the RBL and actively promote the aims and objects at local level.
4. Must adhere to and actively promote the RBL vision, values, and code of behaviour for working together.
5. Attend all county committee meetings and the annual meeting of county conference.
6. Attend any training required as directed by the county chair or identified through organisational need in accordance with RBL policy.
7. Assist with the Poppy Appeal and other legitimate fundraising activities within the county.
8. Assist the county chair with defining and allocating the geographical area for which each of its branches is responsible and ensuring that the whole area of the county is covered.
9. Assist the MEO in all aspects of their work.
10. Assist with the formation, submission and implementation of the three-year county plan and associated fiscal arrangements.
11. Provide the Membership Council and Board of Trustees with any information they may require in the interests of the RBL.

12. Provide input and support to the county chair concerning specialist appointments and the appointment of sub-committees where appropriate.

County Recruiting Officer (Optional)

The county recruiting officer is the main point of contact for advice on and the delivery of Recruitment and Retention campaigns at the county level, ideally suited to someone with a background in recruitment, sales and/or marketing.

The county recruiting officer is to advise the county committee on the recruiting structure in the county, planned recruiting activities and the results of such activities. Where there is more than one county recruiting office in the county, the most experienced becomes the principal county recruiting officer, this role can be rotated amongst the recruiting officers.

Terms of Reference

1. The county recruiting officer should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and county use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business..
2. The county recruiting officer must be conversant and compliant with the current Royal Charter, the Membership Handbook and policies and procedures, which are all located in the MAP (Resource Area), on Microsoft Office 365 (O365).
3. The county recruiting officer must be aware of and actively promote the RBL vision, values and code of behaviour for working together.
4. Successfully complete the county recruiting officer course and any other training and development required to meet organisational needs.
5. Provide input to the county plan regarding membership recruitment and retention targets in line with county objectives.
6. Prepare an annual recruiting and events budget for approval by the county committee.
7. Identify best practice used by branches within the county and submit recommendations to the Membership Development Team.
8. Identify individuals from branches within the county who have the potential to become recruiting Advisors.
9. Organise and deliver recruiting Advisor training within the county with supporting training resources from the Membership training Team and county training officer.
10. Ensure that appropriately trained recruiting Advisors are available to assist at county and local recruiting events.
11. Identify branches at risk of closure due to low membership and make recommendations for the continuation of the branch.
12. Monitor trends in county recruitment and retention in collaboration with the MEO and make recommendations to rectify negative trends.
13. Provide recommendations to branches on methods to improve their retention and

induction practices.

14. Advise branches on what publicity material is available and how it may be obtained.
15. The County Recruitment Officer is expected to undertake any mandatory training including Data Protection and Cyber Security.

County Treasurer

The county committee must appoint a county treasurer. The appointment takes place at the first committee meeting following the annual meeting of county conference with a tenure of one year.

County treasurers must be financially aware and have attended a branch treasurer's course or received similar formal financial training within the timescale set by the RBL. They are non-elected members and have no vote on the county committee.

The role of a county treasurer is to administer the financial management of the county and any agreed county Supported branches.

Terms of Reference

1. The county treasurer should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and County use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
2. The treasurer must and without delay receive and bank all monies received on behalf of the county committee or conference.
3. The county treasurer is to attend all county meetings to report on the activities and status of the county accounts including any county Supported branches. They are to prepare and present a written financial report and be available to answer questions.
4. The county treasurer must be aware and support the RBL vision, values, and code of behaviour for working together.
5. Prepare the accounts of the county and any county Supported branches for audit or independent examination, ensuring that a copy is forwarded to Head Office within three months of the close of the Field Financial Year.
6. Present the accounts to the annual meeting of the county conference.
7. With the assistance of the county Chair, and budget holders, prepare the county budget. In doing so the treasurer must ensure that they anticipate all expenditure needs in a realistic manner. The treasurer must be aware of all planned activities and their financial implications.
8. The county treasurer shall prepare all cheques drawn on the county accounts. All cheques must bear the required number of signatures as authorised by the county committee. The treasurer must be one of the signatories to the bank account. No signatory is to sign a blank cheque.
9. The county treasurer must attend training courses, as required, to ensure that any training/development needs or organisational requirements are met to ensure they remain aware of changes being made to RBL policy and procedures.
10. Act as an advisor to all branch treasurers and check branch accounts in conjunction with the MEO.

County Parade Marshal (Optional)

The county parade marshal/ceremonial officer is appointed by the county chair and committee to be actively involved in the planning and organisation of all county events which include a ceremonial element.

They are to be fully conversant with the RBL's Ceremonial Handbook, bearing in mind that when appearing before the public the prestige of the RBL is in their keeping. Those involved in all ceremonial procedures must always strive to ensure continuity and uniformity in that their dress, turnout and bearing are of the highest order.

The role of county parade marshal is subject to an enhanced DBS check and the RBL's screening programme detailed within the RBL's Safeguarding Policy. All screenings and mandatory online training must be completed prior to commencing duties. The county parade marshal is an appointment that is reviewed annually.

Terms of Reference

1. The county parade marshal/ceremonial officer must be aware of and actively promote the RBL vision, values and code of behaviour for working together.
2. The county parade marshal must attend and pass a parade marshal course.
3. To be fully acquainted with the Ceremonial Handbook, and to give appropriate guidance on ceremonial matters where necessary to branches.
4. To be actively involved in the planning, organising and attending all county events which include ceremonial duties.
5. To encourage within the county, interest in learning, practicing and upgrading Standard Bearing Drills and Ceremonial Procedures.
6. To organise training courses for novices and experienced Standard Bearers/Marshals.
7. To prepare and submit a ceremonial budget which includes costs for training to the county committee for approval and to monitor the budget throughout the year.
8. To organise specialist training courses for Judges in Standard Bearers' Competitions.
9. To contribute to the planning and organisation of the county standard bearers' competition.
10. To encourage all branches and their county to follow the procedures outlined in the Ceremonial Handbook for the induction of newly-elected officers.
11. To prepare periodic progress reports as necessary for the county committee.
12. To assist the National parade marshal, as requested, in all matters affecting Ceremonial, parades, services and competitions.
13. To liaise with the county ceremonial and parade marshals in neighbouring counties and to share best practice.

14. The Parade Marshal must undertake mandatory safeguarding training, sign the safeguarding self-declaration and complete DBS check prior to undertaking any activities in the role.

County Training Officer (Optional)

The county training officer is usually appointed from within the elected members of the county committee. However, where there is no suitable candidate, the county committee can appoint a county training officer from within the membership.

The role tends to fall to someone who has experience in training delivery or has a genuine interest in learning and development and is prepared to deliver a local training schedule and collate registration for nationally-led training courses.

Terms of Reference

1. The county training officer should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and County use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business..
2. Deliver local virtual and classroom-based training to branches within the county.
3. The county training officer must be conversant and compliant with the current Royal Charter, the Membership Handbook and policies and procedures, which are all located in the MAP (Resource Area), on Microsoft Office 365 (O365).
4. The county training officer must be aware and actively support the RBL vision, values, and code of behaviour for working together.
5. Attend training courses, as required, to ensure that any training/development needs, or organisational requirements are met.
6. Identify the training needs of members and evaluate the level of training required, escalating to the National Membership training team where appropriate and to liaise with the MEO to identify, from the MS1, new committee members who will require training for their role.
7. To recruit and supervise a team of assistant county trainers involved in the delivery of short courses and workshops across the county.
8. To prepare and monitor an annual training budget for approval by the county chair and committee, liaising with the county treasurer to ensure it is incorporated into the annual county budget.
9. To prepare a county training and development plan for approval to the county chair and committee.
10. To maintain accurate records of county course attendance and report course titles and attendance figures to Membership training.
11. To maintain the county training resources.
12. To collate requests for training and submit formal training bids to Membership training where appropriate.

13. To collaborate with specialist post holders concerning any training assistance required.
14. Identify and maintain a register of suitable training venues within the county.
15. The county training officer is expected to undertake any mandatory training including Data Protection and Cyber Security.

County Youth Officer (Optional)

The county youth officer is appointed from within the members of the county committee.

Where there is no suitable candidate, the county committee can appoint a county youth officer from within the Membership. The role suits someone who has experience of working with young people.

The role is subject to the RBL's screening programme detailed within the RBL's Safeguarding Policy. All screening, including an enhanced DBS check and mandatory online training, must be completed prior to commencing duties.

Terms of Reference

1. The county youth officer should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and County use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
2. They must be familiar with the current Royal Charter, the Membership Handbook and policies and procedures concerning youth and Safeguarding. These documents are all located in the MAP (Resource Area) on Microsoft Office 365 (O365).
3. They must be aware and actively support the RBL vision, values and principles for working together.
4. They will be responsible for development of a county youth Plan which, with approval, will become part of the county plan. County youth officer must provide a written report for county committee meetings on the progress of the plan and related youth engagement activities.
5. The county youth officer is expected to undertake any mandatory training including Data Protection and Cyber Security.
6. The county youth officer must undertake mandatory safeguarding training, sign the safeguarding self-declaration and complete DBS check prior to undertaking any activities in the role.
7. Other duties of the CYO:
 - Create/maintain a communications plan for internal and external stakeholders including direct and indirect affiliations within the county, working in conjunction with the Membership Governance Co-ordinator to ensure good news stories can be escalated and effectively distributed.
 - Create/maintain a register of all affiliated schools, youth organisations and band formations within the county.
 - Encourage branches to affiliate with youth groups and schools within the county and to assist in planning activities for a meaningful affiliation. Those activities may include fundraising or awareness events, joint Remembrance and the promotion of Standard Bearing skills.

- Support and advise branches that have affiliated youth groups and assist with planned branch events/activities with them.
- Provide quarterly updates concerning the county youth affiliation register and youth Group engagement to the Membership Governance Coordinator.

- Where there is a youth band in the county, the county youth officer should maintain regular contact with the band master, offering support/assistance as required.
- Provide support to the MEO in solving queries concerning individual youth Membership and the difference between that membership and the Affiliation Scheme.
- Assist the county committee with the organisation of a youth standard bearer competition.
- Contact and network with youth organisations where appropriate (including Local Authority youth Services) to encourage affiliations with local branches or direct affiliation to the county.
- Invite (with agreement from the county committee) youth leaders to committee meetings, especially when discussing holding joint activities or to maintain good working relationships.

County Poppy Appeal Co-ordinator (Optional)

The county poppy appeal co-ordinator is usually appointed from the elected members of the county committee. Where there is no suitable candidate, the appointment can be filled by a member from one of the county's branches.

Terms of Reference

1. The poppy appeal co-ordinator must be aware of and actively promote the RBL vision, values and code of behaviour for working together.
2. Under the guidance of the Community Fundraiser, assist with the training of Poppy Appeal Organisers within the county as required.
3. Assist the Poppy Appeal Organisers within the county to ensure the annual Poppy Appeal achieves the maximum income possible.
4. In liaison with the Community Fundraiser, the county chair and committee, encourage and assist in promoting and implementing all year round fundraising opportunities for the Poppy Appeal.
5. The treasurer is to report the details of all proposed expenditure to the branch committee at their regular meetings for their approval. All such reports are to be shown in the minutes of the meeting.

County Standard Bearer (Optional)

The county standard bearer is normally the winner of the county standard bearer competition and is appointed to the position for the year.

Whilst undertaking standard bearer duties and taking part in competitions, the Royal British Legion makes every effort to ensure participants' safety. As with any physical activity, all standard bearers are required to acknowledge that there may be a risk to one's health and that a minimum level of fitness is required.

Should there be any changes to their physical health which would impact their ability to carry out their role safely, the standard bearer should make this known to the county parade marshal as soon as possible.

The county standard bearer must be fully conversant with the RBL's Ceremonial Handbook, bearing in mind that when appearing before the public that the prestige of the RBL is in their keeping. Those involved in all ceremonial procedures must always strive to ensure continuity and uniformity in that their dress, turnout, and bearing are of the highest order.

Terms of Reference

1. The county standard bearer must be aware of and actively promote the RBL vision, values and code of behaviour for working together.
2. Must complete MS1B.
3. Should be given authority by the county committee to parade the county Standard. This authority must be recorded in the county committee meeting minutes and a county officer must be present when the county/district standard is paraded. In cases of emergency or at short notice, the county Chair alone may grant permission, but that delegated authority must be reflected in the minutes at the next committee Meeting.
4. Must always liaise with the county parade marshal concerning ceremonial duties and obligations.
5. Provide assistance to the county parade marshal as required.
6. The county standard bearer is expected to undertake any mandatory training including Data Protection and Cyber Security.

County Community Support Coordinator/Committee (CCSC)

Each county should have in place a county community support coordinator.

The purpose of the coordinator is to support the county committee and branches to promote branch community activities including BCS, encourage participation, and support the sharing of knowledge around RBL's services.

They will serve as the link between the county and the Membership Development Team, collaborating to promote best practices and support branches.

Role

The role of the CCSC is to:

- a. Champion Camaraderie, Kindness and Knowledge within the county, supporting community activities, including BCS.
- b. Share knowledge of RBL's services within the community, encouraging the channeling of beneficiaries through RBL's Contact Centre.
- c. Promote branch community activities throughout the county, identifying where BCS recruitment opportunities arise.
- d. Organise branch community presentations as required for county committee members and branch committees.
- e. Encourage the attendance of BCS Supporters at relevant BCS Training.
- f. Support and collaborate with the CYO (county youth officer) and CRO (county recruitment officer)
- g. Provide a point of contact to branches for advice and guidance.
- h. The CCSC is expected to undertake any mandatory training including Data Protection and Cyber Security.

Reporting

- Using the Branch Community Dashboard, report branch community activities, including BCS activities within the county and present at county committee meetings.
- Identify and share good news stories with the Membership Development Team bcsc@britishlegion.org.uk

Support

Support and guidance will be provided by the Membership Development team and your local Membership Engagement Officer.

Should a safeguarding alert be brought to the attention of a CCSC, it is their duty to report

this issue to their Membership Engagement Officer.

N.B. all CCSCs are required to be members of The Royal British Legion

Group Rep

The Group Rep plays a key role, acting as the vital link between branches in the group and the County, ensuring effective communication and engagement. The group also represents the interests of branches within the group at county committee meetings.

This role is ideally suited to members who are organised, reliable, and confident in communicating through digital channels. The Group helps maintain an active presence for the County within the community and ensures that members remain informed and connected.

Terms of Reference

1. The group rep must be aware of and actively promote the RBL's vision, values and code of behaviour for working together.
2. Must be available to attend County Committee meetings as required, raising branch issues and concerns where necessary.
3. Must have and regularly monitor their assigned RBL.Community email account in order to communicate effectively with the County team and Membership Engagement Officer (MEO).
4. Act as a point of contact for all correspondence issued by the County Committee, MEO, Membership Council and Board of Trustees, ensuring it is shared promptly with branches within the group.
5. Responsible for arranging the Group Annual General Meeting (AGM), along with other Group Officers.
6. Encourage and support branches in organising or taking part in activities that promote the Royal British Legion within the local community.
7. Must be conversant and compliant with the current Royal Charter, the Membership Handbook, and any relevant RBL policies and procedures (available via the MAP on Microsoft Office 365 or from the MEO).

Groups

Counties can use a group system if they wish. All counties need an efficient method of two-way communication with their branches. The group system, used correctly, can be a valuable, vital, administrative and management tool for any county committee. Group meetings, held at regular intervals, provide a local point of contact and advice, mutual support and assistance. County officers can make good use of group meetings to discuss policy matters and plan forthcoming events where group/branch support would be advantageous.

Optimum group Size

Counties wishing to adopt, and use, the group system should look carefully at the size and shape of the county area when it is deciding the group areas and in which group to place a branch. Equally, it is important to determine the optimum group size to provide an efficient and effective structure. Too large a group can be cumbersome to organise, too small a group can have little effect to which there is no advantage. The ideal size is therefore thought to be between seven and ten branches for a large, widely dispersed county, and between five and seven for a smaller county.

Group Naming

Groups are to be named to identify them. It can be by known and accepted regional terms, by town name, by district name or by reference to the area through points of the compass.

Model Group Rules

The Membership Handbook provides guidance for the management, responsibilities and work of the group. The county committee is charged with defining their responsibilities. Counties should provide a set of model rules for groups which are to be endorsed by the county committee. Where the model rules are to be modified for local use, again, they are to be endorsed by the county committee before they are taken into use.

Group Members on the county committee

The workload of county committee members can be demanding. These members must be individuals who are able and willing to give their time freely throughout the year. A heavy and demanding workload can lead to a paucity of committee members, which may require some committees to co-opt individuals to vacancies. Having to co-opt individuals can have an adverse effect on the committee, reducing the number of elected committee members and therefore can affect the numbers required for a quorum. This in turn can restrict the committee from carrying out its business on behalf of the county membership.

County committees should consider using one or two members from each group to

populate their county committee. This spreads the county committee members across the entire county area giving representation to all branches and ensures that the county remains quorate.

Communication between county, group and branches.

Communication is the key to county, group and branch harmony. The county, its groups and branches must embrace technology and remain current.

Counties, groups and branches should use a calendar for planning events/activities. This requires effective and consistent co-ordination with the full co-operation of all concerned. This will reduce conflicts with shared dates for some smaller events and may ensure that larger county events can be supported by the groups and branches.

Compliance

Group officers will be elected by the branches they represent at the group Annual General Meeting. See county Model Rules for group officers.

Group Finances and Accounts

There is no requirement for a group to hold a BFI Account and this fund, if held, should be closed immediately and the income disposed of within the current rules.

If a group needs to hold a group bank account a justification case should be put forward to the county committee and the group must comply with the guidance given. The group bank account must not exceed £250, unless authorisation is given by the county committee, and the group must submit its account for audit annually within the given timeframes. A failure to comply may result in the county withdrawing its permission for the group to hold an account and the account will be closed.

The principal expenditure will be on travel expenses of committee members (those named on the group MS1) and on administrative expenses incurred by the group Secretary. It may also be necessary to provide for the hire of a hall for meetings (if branches within the group are unable to provide premises). On this basis there is no need to build up a reserve for financial contingencies.

A group committee does not qualify for financial support from membership fees and there can be no official RBL source of funding for groups. All group funding must be raised from within the group. Groups may raise subscriptions from their branches and hold group fundraising activities to provide funds to finance their activities. branch subscriptions to the group should be at a fixed rate per branch to be decided at the group AGM and made annually. The money obtained constitutes charitable funds and must be treated as such.

Formation of Groups

Each county committee may divide its area into geographical divisions to be known as groups (a number of branches that the committee thinks appropriate for administrative purposes). As communication is the main priority, the group structure should be based on the geographical proximity of branches. Groups are to conduct their business using the same policies and procedures as those for branches contained within the Membership Handbook, with the following exceptions:

Groups can operate in one of two ways:

1. A group of branches operating with group officers. They hold meetings with branch Representatives at regular intervals. A group Representative is appointed to represent the group and its branches at county committee meetings where they are appointed to the county committee.
2. A group of branches operating without group officers. They do not hold meetings. Each branch is contacted as required by a county committee member who is nominated by the county committee to look after each group of branches.

If a county operates either group system, every branch within the county must be allocated to a group, without exception, the group name should easily identify the group and its area.

Groups operating with group officers are to submit a MS1 containing the contact details of the chair, secretary and if applicable the group treasurer, standard bearer and group representative.

Each branch within the group may send a representative to group Meetings to discuss and vote on issues and whilst any branch member can attend group Meetings only one representative from each branch can vote.

Forming, amalgamating and closing counties

Amalgamating counties

These are the steps that must be taken:

1. The chair and committees of the counties agree to the restructuring, and to write to the chair of the Membership Council for approval, copying in the relevant Membership Council representative.
2. Once the Membership Council has agreed, the counties (branches) must call a joint Special General Meeting of their county conferences at which branch delegates must vote by simple majority whether to approve the formation of the new county. The relevant Membership Council representative should be at this meeting.
3. If approved, branch delegates must elect the new county committee, chair and Vice chair to serve until the next annual meeting of county conference. Following the election of the new county committee, chair, and Vice chair, the previous county committee, chair and Vice chair retire immediately. Branch delegates must also elect three non-county committee Members as members of a new county conference committee.
4. County Treasurers must close their accounts on the date of the Special General Meeting at which the amalgamation was approved, prepare them for independent examination or audit and for adoption of the annual accounts at the next annual meeting of county conference.
5. All of the funds of the constituent counties must be passed to the new county Treasurer to form the new county funds.
6. The old county standard should be laid up, with a new one obtained and dedicated.
7. Alternatively, the panel of one of the previous county standards may be altered.
8. Remembrancetide must continue to be conducted on the basis of the constituent counties until the new county is formed at the first annual meeting of county conference. After that, the new county assumes responsibility for the co-ordination of events during Remembrancetide.
9. As soon as possible after their election, the new county committee must set the date of the annual meeting of county conference and draft new county byelaws for approval by the annual meeting of county conference. The committee should appoint:
 - A county treasurer
 - A county secretary
 - A county training officer
 - A county recruiting officer

- A county youth officer
 - A county parade marshal
 - A county standard bearer (until the next competition)
10. For the remainder of the first RBL financial year, the new county budget is to comprise the sum of the budgets of its component counties. The balance of the county budgets for the financial year is to be channelled through the new county instead of the former counties. The county must propose its own budget bid for the following year.
 11. At the next annual meeting of county conference, delegates must approve the accounts of the constituent counties closed at the date of formation of the new county. At the conference, the results of the ballot for county chair and Vice chair should be announced. The chair should be elected for three years and the Vice chair two years, to allow for continuity. After that, the vice chair's term should be three years. The full county committee should also be elected following normal election rules. Retiring committee members may stand for re-election. The county treasurer should be appointed and the county byelaws adopted.
 12. This process is followed for amalgamation of branches.

Forming a County

These are the steps that must be taken:

1. The chair and committees of the branches wishing to form a new county agree to the restructuring and to write to the chair of the Membership Council for approval, copying in the relevant Membership Council representative.
2. After the Membership Council has approved the new county, the branches that will form the new county must organise branch meetings to put forward nominations for the county Founding committee. Head Office staff will distribute nomination forms for committee officers and members, guidelines and a timetable to all branches concerned.
3. The nomination forms are to be returned to Head Office and the subsequent election will be coordinated by Head Office.
4. The founding county committee consists of seven elected members, a county chair and county Vice chair. All are elected for three years. The seven candidates with the most votes will be the members of the county Founding committee.
5. Less than four weeks after their election, the county Founding committee must appoint a county Treasurer and county Secretary. Each must be appointed until the first annual meeting of county conference.
6. The county founding committee should set the date of the annual meeting of county conference and start the process of drafting new county byelaws for approval by the branch delegates at the annual meeting. The county Founding committee will act as the county conference committee for the first annual meeting. Minutes of the first meeting of the county Founding committee must be sent to Head Office.
7. At the first annual meeting of county conference after the Special General Meeting, up to a further eight committee members may be elected by branch delegates. county committee members will serve for one, two or three years (initially decided by county conference to avoid all the committee changing at once).

8. The branch delegates must elect a new county conference committee.
9. As soon as possible after their election, the new county committee should appoint a county training officer, a county recruiting officer and a county youth officer. The county treasurer and county secretary appointed at the first county founding committee remain in post until the annual meeting of county conference the following year
10. The county committee can appoint a county president.
11. A new county standard is to be obtained and dedicated in accordance with Royal British Legion practice. The county committee shall also arrange the appointment of a county standard Bearer.
12. The county committee must appoint a county parade marshal.
13. Remembrancetide must continue to be conducted on the basis of the constituent counties until the new county is formed at the first annual meeting of county conference. After that, the new county assumes responsibility for the co-ordination of events during Remembrancetide.
15. Once a bank account has been opened, all branches in the new county will make a donation to the new county committee in order to meet initial administration costs. The county Founding committee will make a recommendation to branches on the amount to be paid into the county account.
16. The county must propose its own budget bid for the following year.

County administration of a Branch

The decision to take a branch into county administration is a serious matter and is for the judgement of the county committee. County administration is a temporary measure where the branch is supported by the county committee instead of a branch committee and all branch affairs including bank account, are under the control of county until the branch can return to normal. To take a branch into administration the county committee should appoint two county committee members as Points of Contact for the branch.

A branch may be taken into county administration where:

- A branch is unable to form a committee or a committee stands down.
- A branch is temporarily unable to function.
- A branch is not demonstrating the Royal British Legion's values and behaviours, has not followed the rules as laid down in the Royal Charter and the Membership Handbook or has not followed relevant RBL instruction, policy and procedures. In this circumstance, prior to taking a branch into administration, the county chair should appoint a member of the committee to work alongside the MEO to support the branch to resolve the issues within a given timeframe.

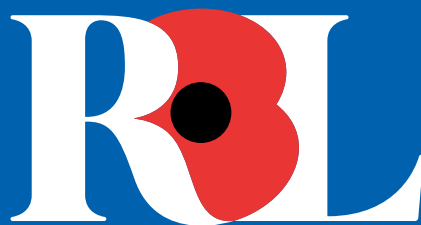
The county committee should advise the Membership Council Representative why it is felt necessary to take the branch into county Administration. The Membership Council must then be kept informed at all stages. To take a branch into administration the county committee should appoint two committee members as Points of Contact for the branch.

A letter should be sent to any existing branch committee informing them that the branch is being taken into administration, that they no longer hold committee roles and that all required documentation should be handed to the county point of contact.

All members of the branch should then be informed that the branch has been taken into administration. The Points of Contact should then work with the MEO to resolve any existing issues within the branch before aiming to re-establish a Branch committee via a Special General Meeting (SGM). Once a new committee is in place, a member of the county committee should remain as a Point of Contact and mentor for the new committee until it is properly established.

In many instances it may be necessary to inform one or all of previous committee members that they are not permitted to stand for election at the SGM and these members must receive written permission from Membership Council Representative to stand for any future officer appointment or to become a committee.

Branches



ROYAL BRITISH LEGION

About Branches

What branches are and how they are structured

- A branch is a group of RBL members, which may be formed based on locality or shared interest.
- To become a member of the RBL, a person has to join a branch. Every RBL member is therefore a branch member.
- A member can join up to four branches, so can belong to a maximum of four branches at one time and pays only one membership fee. They will have to pay admin fees for each branch they joined.
- A member who sits on more than one Branch committee, must be a member of that branch and this does not exceed four branches at any given time.
- An individual, who is a member of multiple branches, is not allowed to be nominated as a Conference delegate by more than one branch.
- No more than two branch representatives, elected or co-opted, will hold positions on group, district, and county committees unless approval to waiver this is granted by the Membership Council Representative for the area concerned.
- Where it may cause confusion, branches which share a geographic name with branches in other areas in the UK or Overseas can request permission to include the county or district in their branch name. The MS5D form should be used for this purpose.

Four kinds of branches:

- Branches that cover a defined geographical area. These are the most common kind and each one comes under the responsibility of a county.
- Overseas branches. Read more about these [here](#).
- National branches. These are non-geographical and are often created by special interest groups. National branches are overseen by the National Branches district.
- Branches of the Women's Section.

A branch must have a committee of at least five members, elected and appointed. If a branch isn't able to form a committee, it can apply to its county for CSB status.

A CSB has no committee, just two Points of Contact, and no bank account. The county manages its funds.

All branches are part of a county (with some exceptions Overseas and National) and are guided by their counties. A branch not happy with any decision of its county committee, may within 28 days raise a complaint to the Membership Council. A copy of the complaint must be sent to the county committee at the same time.

Branches can form groups, particularly in large counties. Groups can help branches to support each other, act as a forum and provide a link between branch and county.

Counties and branches each have their own committee. Counties also have their own conference.

Committees and the roles people can hold

	Branch
Committee roles	Chair, Vice-Chair (optional), Treasurer (appointed, voting), Secretary, Branch Community Coordinator (optional), Branch Recruiting Advisor (optional)
Committee-appointed roles (but not committee members)	President (optional); Chaplain (optional)
Number of committee members allowed	Five, with a recommendation of no more than 11 and an absolute maximum of 15
Quorum	Four

While optional roles are not required, the responsibilities need to be assumed by another committee member in the event the post is vacant.

Branch Chaplain

Branch chaplains can be invited and appointed to the role given they are approved by the branch committee and the decision is reflected in the minutes. Chaplains can be of any recognised faith, so long as they are suitably qualified according to a religion’s endorsing authority.

MS1 Self Declaration

Prior to assuming officer/committee roles, the member must be able to comply with the below Self-Declaration Document:

SELF DISCLOSURE

Part 1

REPUTATIONAL or FINANCIAL ROLES

The Legion’s principal concern is the safety of its members, beneficiaries, staff and volunteers. We have no appetite for recruiting unsuitable people into roles where they may carry out activity that is harmful to our people or the people we support.

We will use the information on this form to assess any risks associated with you taking up or

continuing in this role. We assess each declaration on its merits. We ask for your complete honesty when completing this declaration.

If you fail to disclose an offence and we are later informed of it, you may be subject to sanction, up to and including expulsion from Legion membership. You may also be removed from any additional Volunteer/Membership Roles you may hold.

By signing the declaration you understand that it is necessary for you to declare the information requested below and that your role may involve access to Children, Young People and/or Adults at Risk or may involve access to Legion funds. When you sign the declaration it is to the effect that you confirm the statements below to be true and that you will inform RBL of any changes in the circumstances which would affect the veracity of your declaration.

If you feel that any of the statements below are not true, you should raise this with your MEO for discussion with the Safeguarding Team. It is recommended that you do this prior to formally standing for the role in order that your suitability for the role can be confirmed prior to you being appointed. If you are unable to positively confirm any of the statements in this declaration this does not automatically mean you will be found unsuitable for the role.

1. I have never received a conviction or conditional caution for any criminal offence (spent convictions are not required to be declared).
2. I am not a person known to any Social Services department/statutory agency as being an actual or potential risk to Children or Adults at risk.
3. I have never been the subject of any sanctions or reprimand from the RBL or any other charity or organisation's governing body in relation to children, adults at risk, financial impropriety or reputational risk.
4. I am not, nor have I ever been, on the sex offender's register.
5. I have never been disqualified as a director of a limited company and I have never been subject to a bankruptcy order (declaration required for all roles), an Individual Voluntary Arrangement or a debt relief order (IVA and DRO declaration only required for Treasurer roles).
6. I do not have any personal loans/debts that are currently unlawfully in arrears (a debt where an individual has breached the terms).
7. I do not have any outstanding CCJs against myself or know of any outstanding CCJs against my address.
8. I confirm I will comply with the Legion's Safeguarding Policy and Safeguarding Code of Conduct.
9. I confirm I will comply with the Legion's Health & Safety Policy.
10. I confirm I will comply with the Legion's Data Protection Policy.

Part 2

Consent for us to conduct a DBS check

All volunteers and members must give consent to TRBL to conduct a Criminal Record check if so required – this includes - DBS/ ACCESS NI/ Disclosure Scotland.

Part 3

How we will use your personal data:

The information you have provided on this form will be used by The Royal British Legion Group to assess your suitability for the role that you have applied for or are undertaking.

We process the information on this form with your consent. You can withdraw your consent for us to use this information at any time but doing so may affect your ability to take up or continue in the role.

Your information is treated in confidence and is handled with discretion. It is stored securely, whether in paper or electronic form, and is not shared outside of our organisation unless we are legally obliged to do so.

Visit www.britishlegion.org.uk/privacy to find out more about how we use personal data, or contact our data protection officer by emailing: dataprotection@britishlegion.org.uk

By completing the declaration on the MS1 or MS1a you give your consent to the Royal British Legion to use the information on this form in the ways set out above.

Rules for all Royal British Legion Officers

They must:

- Follow the duties and responsibilities outlined by the Board of Trustees and the Membership Council.
- Adhere to all RBL policies and procedures.
- Ensure the formation complies with charity law.
- Serve the interests of the RBL at all times.
- Undergo appropriate training for their role.
- (For Branch Officers) not serve as officers of an associated club committee.
- (For Branch Officers) not be a tenant or representative of a tenant of properties held in trust by the branch.
- Any Membership Officer (Branch Chair, county Chair, Membership Council Representative, Board of Trustees member) cannot hold a position of National Parade Marshal, Deputy or Assistant National Parade Marshal whilst in membership office.

What happens if a role suddenly becomes vacant?

If this happens to the role of Chair or Vice Chair, the next highest placed candidate in the

latest election fills the vacancy. If there is no such person, the committee should co-opt a temporary replacement for the remainder of the term unless there are more than 15 months until the next election. In this case the committee must initiate an election within one month and complete it within four months to fill the vacancy.

If a vacancy occurs for any other position, the committee should co-opt a suitable member of a branch within the county as a temporary replacement until the next annual meeting or special meeting, when a fresh election must be held for the rest of its term. A member elected or appointed in this way may be elected for up to three further terms in the office concerned.

Administering Branch Fees

Branch membership lists are kept online on the Microsoft Office 365 (O365) portal. For access and information, speak to your Membership Engagement Officer (MEO). Branches should decide to set a joining fee and/or an annual subscription fee, both of which must be decided by the members at branch Annual General Meetings. Each of these fees must not be less than £1. Membership fees are not payable by youth members as stated in The Royal Charter.

A member that is unable to pay their membership and branch subscription fees may be permitted to remain a member, despite non-payment, at the discretion of the Branch committee. This is further subject to the requirements and restrictions laid out in the Royal Charter.

Branch committees must tell Head Office what their membership, joining and subscription fees are using the branch rates letter each year. Should a branch wish to maintain its current branch fee structure into the next financial year, no action is required. If Membership Services does not hear from a branch before the deadline, the existing rates will be maintained. Branches should actively help members to renew their membership. Their MEO can help with any queries. Please forward any cheques or applications within 30 days of receipt to avoid delays processing them.

Members should transfer their membership to another branch. If they have paid their membership fee and any subscriptions due to their current branch, they will not need to make any additional payment in their current membership year.

Branches must not refuse membership unless they have valid reasons. Any objections to an application must be made to the county committee via the MEO. The Membership Council will make the final decision on whether the application should be accepted in consultation with the county committee.

Branch Meetings

General Branch Meeting

BRANCHES	General Branch Meeting				
Frequency	Quarterly (minimum)	Dates	committee to decide	Quorate requirements	Four committee members
Notifications	committee to decide				
Chair	Branch Chair or Vice Chair in their absence				
Attendees	Members	Typical Agenda Suggestions	Suggested: • Provide updates on the local and wider work of the RBL • Provide updates on branch past and future activities • Make decisions • Nominate candidates for elections at county and national levels • Vote on candidates for elections at county and national levels		
Other					
Any reports presented at the meeting and minutes of previous meeting must be circulated to the attendees at least seven days before the meeting. If community support cases are discussed during the meeting, the personal details of beneficiary/beneficiaries must not be disclosed.					

Annual General Meeting (AGM)

BRANCHES	Annual General Meeting (AGM)				
Frequency	Once a year	Dates	Between 1st October and 30th November	Quorate requirements	Four committee members
Notifications	At least 21 days before to all members				
Chair	Branch Chair or Vice Chair in their absence				
Attendees	Members	Typical Agenda Suggestions	Suggested: • Review previous year's activities • Agree next year's activities • Elect officers and committee members • Nominate candidates for elections for Membership Council • Vote on candidates for county appointments • Debate and agree motions for Annual Conference to be taken to county conference for approval • Agree accounts		
Other	Members can add items to the agenda if they submit them before the deadline specified by the committee				
Any reports presented at the meeting and minutes of previous meeting must be circulated to the attendees at least three days before the meeting. If community support cases are discussed during the meeting, the personal details of beneficiary/beneficiaries must not be disclosed.					

Special General Meeting

BRANCHES	Special General Meeting (SGM)				
Frequency	As required	Dates	As required	Quorate requirements	NA
Notifications	At least seven days before to all members				
Chair	Branch Chair or Vice Chair in their absence				
Attendees	Members	Typical Agenda Suggestions	Suggested: - Remove from office or position a branch committee member - Elect another member to replace the removed member or fill in a vacant post - Discuss any other urgent matter of importance and make appropriate decisions - Table a vote of no confidence in county officers/county committees.		
Other	Meeting can go ahead only if the committee decides it is needed or it has been requested by a minimum of two thirds of members. In the event of a vote of no confidence being raised, ¼ of branches within the county will need to hold a branch meeting and specifically record in their branch minutes the majority vote stating they have no confidence in the county committee/specific county officer. In the event of specific county officers being subject to a vote of no confidence, branches should report to the county chair and request the SGM. In the event of a vote of no confidence in the county chair or whole county committee, the SGM should be arranged via the MC Rep/MEO and chaired by the MC Rep. If the vote is successful, this must be recorded in the minutes, and the county officer/county committee will be stood down.				
Any reports presented at the meeting and minutes of previous meeting must be circulated to the attendees at least three days before the meeting. If community support cases are discussed during the meeting, the personal details of beneficiary/beneficiaries must not be disclosed.					

Committee Meeting

BRANCHES	Committee Meeting				
Frequency	As required	Dates	Committee to decide	Quorate requirements	Four committee members form a quorum
Notifications	Committee to decide				
Chair	Branch Chair or Vice Chair in their absence				
Attendees	Committee	Typical Agenda Suggestions	Suggested: - Remove from office or position a branch committee member - Elect another member to replace the removed member or fill in a vacant post - Discuss any other urgent matter of importance and make appropriate decisions		
Other	If a committee member is absent for three meetings in a row in a 12- month period, they are deemed to have vacated the seat unless a valid reason has been provided and accepted by the rest of the committee				
Any reports presented at the meeting and minutes of previous meeting must be circulated to the attendees at least three days before the meeting. If community support cases are discussed during the meeting, the personal details of beneficiary/beneficiaries must not be disclosed.					

Premises occupied by branches

Branches that occupy or control properties must make sure that the building is safe. The Branch Chair is responsible for this, although he or she can delegate day-to-day management to another Royal British Legion member.

Everything you need to know on building safety legislation is in the Branch Occupied Premises Statutory Compliance Policy available through the Commercial Team at the Head Office.

Branch Role Descriptions

Branch President

The Branch President is an optional non-elected role, usually occupied by someone of important standing in the community.

The President is appointed by the Branch Committee for a tenure of up to three years, which can be repeated. They may advise the Committee but do not have a vote. Their role is only representative and advisory. While an individual who is approached to act as branch president is not required to be a member of the RBL, they should become a member on appointment.

Terms of Reference

The President may attend and speak at the meetings of the Branch committee but must not propose, second or vote.

1. Has both a representational and encouraging role and be able to counsel the Chair and Officers as and when necessary, in the execution of their duties.
2. When offering advice/feedback to the Branch committee, the President should be clear, constructive, and encouraging.
3. Attend meetings and assist the Branch committee at branch events as required.
4. Represent the RBL in the local community and as such must be conversant with the services the organisation offers.
5. Preside at the opening of the branch AGM and give the presidential address.
6. Present branch awards.
7. Develop a good working relationship with the county president.
8. The President cannot attend county conference as a delegate.
9. If required by the branch committee, discuss suitable successors for the role of Branch President with them and having arrived at a consensus, negotiate discreetly and confidentially with the chosen person, to establish a willingness to serve and accept the role and the duties it involves.

Branch Chair

To be eligible for the role of Branch Chair an individual must be aged 18 or above, be a member or Life Member of the branch. They must be able to confirm that all of the statements in the safeguarding self-declaration are true and declare if any statement is not true.

The Branch Chair is the most senior elected officer on the branch committee. They are expected to show strong leadership, management, and diplomacy skills to ensure that a close bond and good relationship is maintained between the branch committee, the branch members, and the county.

Terms of References

1. The Branch Chair is accountable for all branch activities and must delegate activities in a manner that will ensure duties are performed effectively and in accordance with RBL policies and procedures.
2. As the senior Branch Officer, the Chair should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and county use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
3. Chair and manage meetings effectively ensuring that they are planned accordingly with an agenda and run to time, avoiding the imposition of personal ideas on the meeting but encouraging participation from members.
4. The Chair should be an effective leader, able to drive and implement decisions taken by the committee, assist in the resolution of issues between members and direct activities to support the aims of the RBL.
5. The Chair is usually elected for a three-year term and their tenure can be repeated. Should the Chair step down for any reason and there is no Vice Chair, a suitable candidate from the branch can be co-opted to become the Chair until the next Annual General Meeting, when a fresh election for the role is held.
6. The Chair is accountable to the Membership Council and ultimately the Board of Trustees, through the county committee for the smooth daily running of the branch. However, they must be prepared to represent the views and concerns of the branch through the county chair and committee. To this end, chair must have extensive knowledge of all issues affecting the branch.
7. The Chair must be conversant and compliant with the current Royal Charter, the Membership Handbook, policies, and procedures, which are all located in the resource area on Microsoft Office 365 (O365) and must be prepared to advise the Branch committee accordingly.
8. The Chair must ensure that proper handovers take place between newly elected Branch Officers, elected committee Members, and their predecessors. This includes access to Microsoft Office 365 (O365) (through the MEO) and that all minute books, correspondence, RBL publications, branch papers and keys are handed over.

9. The Chair must ensure the Treasurer has a correct audit/examination undertaken, that it is agreed by both the outgoing and incoming Officers and that both are satisfied with the security of cash and cheque books. In addition, and along with the Treasurer, the Chair must reconcile the branch accounts with the branch bank statement at least quarterly. This action must be noted in the minutes at the earliest opportunity.
10. The Chair must set an example as an active member of the RBL and be available for advising both the committee and branch members when necessary.
11. The Chair is expected to undertake any mandatory training including Data Protection and Cyber Security. .
12. The Chair must ensure that sub-committees, individual Officers, and members for specialist functions are appointed where necessary. Those individuals concerned must be made aware of the policies and procedure linked to the role such as data protection and safeguarding adults and children.
13. The Chair must ensure that all Branch committee members and branch members are aware of and adhere to the RBL vision, values, and code of behaviour for working together.
14. The Chair has a responsibility to ensure that any training/development need or organisational training requirement is discussed with the county training officer and that individuals are able to access the required training. In the absence of a county training officer, the MEO is to be consulted.
15. The Chair is responsible for ensuring that all new branch members are welcomed and receive an induction to the RBL and maintain regular communications with their branch membership.
16. The Chair has a responsibility to maintain a good working relationship with the MEO and should always seek their advice when necessary.
17. During ceremonial events, it is the responsibility of the branch chair to ensure that standard bearers are equipped and dressed correctly as per the guidance laid out in the Ceremonial Handbook.

Branch Vice-Chair (optional)

To be eligible for the role of Branch Vice-Chair an individual must be aged 18 or above and be a member or Life Member of the branch. They must be able to confirm that all of the statements in the safeguarding self-declaration are true and declare if any statement is not true.

Although an optional role, the Branch Vice-Chair can be key in supporting the Branch Committee. They work closely with the Branch Chair to help manage branch affairs and provide leadership where required. The Vice-Chair should be prepared to deputise for the Chair in their absence and take on specific duties as delegated by the Chair. This role requires strong organisational, diplomatic, and leadership skills, along with a good understanding of branch operations and RBL procedures.

Terms of Reference

1. The Branch Vice-Chair must support the Branch Chair in the effective management and leadership of the branch, stepping in to lead when the Chair is unavailable.
2. Must possess good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use their assigned RBL.Community email address, and be familiar with social media platforms used by the branch and County.
3. Should be familiar with the responsibilities of the Chair and be ready to assume the Chair's duties temporarily in their absence, including chairing branch meetings and representing the branch as necessary.
4. Must undertake specific tasks as delegated by the Branch Chair, such as leading on the organisation of branch events, chairing sub-Committees, or supporting community outreach initiatives.
5. Must be conversant and compliant with the current Royal Charter, the Membership Handbook, and all relevant policies and procedures located in the resource area on Microsoft Office 365 (O365).
6. Should work with the Branch Chair to ensure that branch activities are aligned with RBL objectives, values, and code of behaviour for working together.
7. Must help promote cohesion and teamwork within the Branch Committee and encourage active participation by members in branch activities.
8. The Vice-Chair is expected to support the Chair in ensuring proper handovers between outgoing and incoming Committee members, including access to relevant systems and documentation.
9. Should liaise with the MEO where appropriate and support the Branch Chair in maintaining an effective relationship with the County Committee and RBL staff.
10. Should be prepared to support the induction of new branch members and help maintain clear and regular communication with the wider branch membership.

11. During ceremonial events, the Vice-Chair should be prepared to assist in ensuring that standard bearers are equipped and presented in accordance with guidance set out in the Ceremonial Handbook, particularly in the Chair's absence.

Branch Committee Member

To be elected to the Branch committee, those members standing for election must be aged 18 or above. They must be able to confirm that all of the statements in the safeguarding self-declaration are true and declare if any statement is not true.

A Branch committee Member occupies a key place in the management of the branch. They must follow in every respect the duties and responsibilities as required by the Board of Trustees and Charity Law.

As an elected Member of the Branch committee, they must be ever vigilant that they serve the interests of the Charity at all times.

Terms of Reference

1. The branch committee member should have good basic I.T. skills and be able to access the MAP on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the branch and county use. To comply with GDPR the role holder must be comfortable with using the rbl.community email address allocated to them. Use of the rbl.community account is compulsory for RBL business.
2. Must be conversant and compliant with the current Royal Charter, the Membership Handbook and policies and procedures, which are all located in the MAP on Microsoft Office 365 (O365).
3. Aid the branch committee, county committee, Membership Council and Board of Trustees to carry out the work of the RBL and in particular actively promote the aims and objects at local level.
4. Must adhere to and actively promote the RBL vision, values, and code of behaviour for working together.
5. Attend branch committee meetings, general meetings and the branch AGM.
6. Attend any training required as directed by the branch chair or identified through organisational need in accordance with RBL policy.
7. Assist with the Poppy Appeal and other benevolent fundraising activities within the branch.
8. Provide the county committee, the Membership Council or the Board of Trustees with any information they may require in the interests of the RBL.
9. Assist the branch chair in appointing any necessary sub-committees.
10. Assist with the formation, and implementation of the three-year branch plan and associated fiscal arrangements.

Branch Membership Secretary

The Branch Membership Secretary is a post held by an appointed member of the Branch committee. The Branch Membership Secretary is accountable to the Branch Chair and committee for the daily administration of the branch membership.

This role may be combined as a complementary role with for example, Branch Secretary or Branch Treasurer.

Terms of Reference

Encourage all potential new members to join electronically or by telephone. However, as a last resort, paper application forms can be completed. Once checked, the completed form is to be kept securely under cover, so it cannot be seen by others, all monies are to be passed to the Branch Treasurer and the form and branch cheque are to be posted, by recorded delivery, to the RBL Membership Payments and Application Team in Northampton.

1. Where an annual branch subscription fee is agreed ensure that the Branch Rates Letter is completed and returned in accordance with RBL procedures.
2. Ensure that when handling, processing, or storing personal information GDPR requirements are strictly adhered to. This is achieved by following the RBL's Data Protection policy and procedures as laid down in Membership Handbook, para 7b. This information must be given to those branch members involved in recruiting.
3. Attend training as directed by the Branch Chair and/or stated in RBL policies and procedures.
4. Should possess good basic I.T. skills and be able to access the MAP and Microsoft 365 and use email.
5. The Membership Secretary is expected to undertake any mandatory training including Data Protection and Cyber Security.

Branch Secretary

The Branch Secretary, assisted by access to Microsoft Office 365 (O365) and the MAP, acts as a focal point for branch administration, including the distribution of correspondence (ideally electronically), agendas and meeting minutes. They also safeguard vital branch documents such as legal deeds.

In the absence of a Branch Membership Secretary, The Branch Secretary should additionally carry out the duties pertaining to this role as outlined in the relevant Terms of Reference. If the Branch Secretary is carrying out both roles, their responsibility also includes being the first point of contact for any data protection queries before escalation to the MEO.

Terms of References

1. The branch Secretary is responsible to the branch chair and committee for the efficient management of the branch administration.
2. Organise and set up branch General and committee meetings to take place on a regular basis.
3. Regularly liaise with the county committee to provide updates on information such as replacement officers.
4. Act as point of contact for receipt of correspondence issued by the county committee, staff, the Membership Council and Board of Trustees, and to ensure all correspondence received is communicated to the branch committee for appropriate action without delay.
5. Handle all vital documents pertaining to the branch and, in the absence of a Membership Secretary, control all aspects of Membership.
6. Liaise with the branch chair in the preparation of the agendas for all branch meetings, ensuring that all the branch committee members are provided with the relevant details within a reasonable timescale in advance of these meetings.
7. Attend and record minutes of all General and committee Meetings and safeguard all papers and documents under lock and key.
8. Use Microsoft Office 365 (O365) to access all published handbooks, publications and guides for reference.
9. Ensure all returns are fully completed, signed, dated and submitted within the determined timescale.
10. Attend training as directed by the branch chair and/or RBL policies and Procedures.
11. The Secretary is expected to undertake any mandatory training including Data Protection and Cyber Security.

Branch Recruiting Advisor

The Branch Recruiting Advisor plays a key role in both branch and county recruitment. At branch level, they actively seek opportunities to promote the Royal British Legion and recruit new members. At county level, they provide support to the county recruiting officer at county events and work with other branches that may be experiencing difficulty with recruitment and could be under a threat of closure. This role is ideally suited to branch members with a background in sales, marketing and/or recruitment who enjoy meeting new people.

Terms of Reference

1. Branch Recruiting Advisors must be aware of and actively promote the RBL's vision, values and code of behaviour for working together.
2. Must attend a Recruiting Advisor course to provide them with the skills and knowledge for their role.
3. Must possess good basic I.T. skills and be able to assist potential members to join the RBL online.
4. Must be conversant and compliant with the current Royal Charter, the Membership Handbook and policies and procedures which are all located in the MAP on Microsoft Office 365 (O365). If these systems cannot be accessed, electronic copies of the relevant documents can be obtained from the Branch Secretary or MEO.
5. The Recruiting Advisor is expected to undertake any mandatory training including Data Protection and Cyber Security. .

Branch Treasurer

The role of a Branch Treasurer is to administer the financial management of the branch, ensuring that the Chair and committee are always aware of the financial state of the branch.

The Branch Treasurer is a post held by an appointed member of the Branch committee. They are responsible for running income and expenditure accounts. At branch level, the use of the RBL On-line Membership Accounting System (LOMAS) or other approved Excel accounting template is optional but recommended. There is also LOMAS training available for Branch Treasurers.

Branch Treasurers look after all financial matters and must submit audited annual accounts by 30th September following the end of the field financial year on 30th June.

Terms of Reference

The Branch Treasurer must be conversant with the relevant provisions pertaining to all financial matters as prescribed in the Royal Charter, the Membership Handbook and other relevant policies and procedures, and must be prepared to advise the Branch committee, accordingly, seeking advice from the county treasurer, as required.

1. The Branch Treasurer must always bring to the attention of the Chair and committee the financial implications of any decision they are considering.
2. The Branch Treasurer must report the branch income, expenditure, and cash balances to the Branch committee at least quarterly. The report must be accompanied by a quarterly bank reconciliation, which reconciles the cash book balance with the amount on the bank statement. They should present the accounts in a clear and intelligible way at meetings including at the AGM, bearing in mind that many members may not be familiar with accounting procedures and should answer any questions in an open manner and in a way that will be understood by a lay person.
3. Undertake or attend the RBL Branch Treasurers' training and/or LOMAS training within timescales stated in the training guidance, and any refresher training in accordance with RBL policy.
4. Be responsible to the Branch Chair and committee for all the financial affairs of the branch, including the annual accounts and the branch bank account.
5. Control all monetary transactions, ensuring that they meet with guidelines contained within the 'Use of Funds Policy' and record these in the branch receipt and payment ledger. All receipts and supporting documents are to be held by the Treasurer on behalf of the Branch committee. See below for further advice on storing information.
6. The Branch Treasurer is also responsible for maintaining records of branch transactions, either electronically (in Excel or LOMAS) or hard copy (in a ledger book or similar). These transactions should be summarised by income and expenditure type in order to produce a quarterly report for the Branch committee. The report should explain any large or unusual transactions or instances where income or expenditure differ significantly from what was planned. The report must be accompanied by a quarterly bank reconciliation, which reconciles the cash book balance with the amount on the bank statement.

7. When keeping records electronically, Branch Treasurers are advised to keep regular backups, using the Microsoft Office 365 (O365) auto-save function, to ensure that records are not lost. In addition, the Branch Treasurer is responsible for safeguarding the branch cheque book, paying-in book and bank statements, as per the Membership Handbook.
8. The Treasurer is to ensure that the branch accounts are examined/audited within the required time scale and are required to submit the branch account return with supporting documentation to the MEO. Branch reasurers should always refer to the 'Guide to Completing the Year End Branch Return' issued annually by the Finance Department before completing their return. They should contact their MEO if they have any queries.
9. The Treasurer is to ensure that all cheques for payment are made out correctly and clearly show the registered Charity number and branch title. All cheques must be signed by at least two of the authorised signatories, one of whom is to be the Treasurer, that they are clearly endorsed 'A/C Payee only'. No signatory is to sign a blank cheque. Authorised signatories should not be family members or cohabitantes.
10. The Treasurer can request the Branch committee to authorise the limit the Treasurer may expend on a single item without prior reference to the committee. This authority should be reviewed annually. The request and action taken must appear in the minutes of the meeting at each review.
11. The Treasurer is to ensure that all expenditure, other than petty cash, is by cheque. However, if the RBL's Finance Department has approved electronic banking by Lloyds bank appropriate procedures are to be observed.
12. The Treasurer is to report the details of all proposed expenditure to the Branch committee at their regular meetings for their approval. All such reports are to be shown in the minutes of the meeting.
13. The use of petty cash must be Authorised by the Branch committee and operated as an impress system. The petty cash book is to be checked monthly by the Treasurer and at least one other Branch Officer and must be countersigned by these individuals as being correct. The petty cash limit should be no more than £50.
14. Should include knowledge of the MAP and Microsoft 365 for storing financial documentation including accounts and sending emails.
15. The Branch Treasurer should be conversant with the MAP and Microsoft 365 (including membership listings)

Branch Parade Marshal

A qualified Branch Parade Marshal should be actively involved in the planning and organisation of all branch ceremonial events.

They are to be fully conversant with the RBL's Ceremonial Handbook, bearing in mind that when appearing before the public that the prestige of the RBL is in their keeping.

Those involved in all ceremonial procedures must always strive to ensure continuity and uniformity in that their dress, turnout and bearing are of the highest order.

A qualified Branch Parade Marshal is subject to the RBL's screening programme detailed within the RBL's Safeguarding Policy. All screening and mandatory online training must be completed prior to commencing duties.

Terms of Reference

1. A Branch Parade Marshal must be aware of and actively promote the RBL vision, values and code of behaviour for working together.
2. Must have attended and passed the Parade Marshal course and where appropriate subsequent requalification courses every three years.
3. To be fully acquainted with the Ceremonial Handbook, and to give appropriate guidance on ceremonial matters to the Branch committee.
4. To assist the county parade marshal at ceremonial events or training when requested.
5. To assist the National Parade Marshal when requested.
6. To liaise with the county ceremonial and parade marshals in neighbouring counties in neighbouring counties and to share best practice.
7. The Parade Marshal is expected to undertake any mandatory training including Data Protection and Cyber Security.
8. The Parade Marshal must undertake mandatory safeguarding training, sign the safeguarding self-declaration and complete DBS check prior to undertaking any activities in the role.

Branch Standard Bearer

The Branch Standard Bearer is specially appointed by the Branch committee.

Whilst undertaking Standard Bearer duties and taking part in competitions, the RBL makes every effort to ensure participants' safety. As with any physical activity, all Standard Bearers are required to acknowledge that there may be a risk to one's health and that a minimum level of fitness is required. Should there be any changes to their physical health which would impact their ability to carry out their role safely, the Standard Bearer should make this known to their Branch Officers and the county Parade Marshal as soon as possible.

The Branch Standard Bearer must be fully conversant with the RBL's Ceremonial Handbook, bearing in mind that when appearing before the public that the prestige of the RBL is in their keeping. Those involved in all ceremonial procedures must always strive to ensure continuity and uniformity in that their dress, turnout, and bearing are of the highest order.

Terms of Reference

1. The Branch Standard Bearer must be aware of and actively promote the RBL vision, values and code of behaviour for working together.
2. Must complete MS1B.
3. Must be given authority by the Branch committee to parade the branch Standard. This authority must be recorded in the Branch committee meeting minutes. In cases of emergency or at short notice, the Branch Chair alone may grant permission, but that delegated authority must be reflected in the minutes at the next Branch committee/ General Meeting.
4. Must liaise with the county parade marshal concerning ceremonial duties and obligations.
5. Provide assistance to the county parade marshal as required.
6. The Standard Bearer is expected to undertake any mandatory training including Data Protection and Cyber Security.

Branch Community Coordinator

Please note that the items below are examples of what a BCC could undertake. BCCS don't need to fulfil all role descriptors. A BCC's role within a branch will depend on the branch's individual initiatives.

Terms of Reference

1. Share resources around Branch Community Activities and BCS, including presentations and talks.
2. Feedback activity from BCS and Community Activities to counties using the reporting dash.
3. Encourage and support new BCS Supporters to sign up for BCS (Home/Hospital visit and Telephone Buddying)
4. Ensure BCS referrals are channelled through the Contact Centre.
5. Keep in touch with BCS Supporters within branches by offering support if needed.
6. Assess eligibility for Crisis Grants when appropriate.
7. Promote the activity of the branch within local press and social media sites, in line with RBL's Social Media Policy.
8. Improve armed forces community liaison and connect veterans with what neighbouring branches and clubs can offer.
9. Offer support and advice around Standard Bearing, including connecting county parade marshals with standard bearers for training.
10. Organise and facilitate community activities in line with RBL's Branch and county Event Guide, including but not limited to coffee mornings, veterans' breakfasts, events, awareness events.
11. Ensure local veterans are aware of branch activities, which may be of benefit to them.
12. Engage with youth organisations.
13. Support Network Engagement Team initiatives.
14. The Community Coordinator is expected to undertake any mandatory training including Data Protection and Cyber Security.

Point of Contact

The Point of Contact (PoC) plays a key role in the successful operation of a County Supported Branch (CSB), which is a simplified model of branch governance designed to support branches that are unable to meet the full compliance requirements of a standard RBL branch. Each CSB selects two PoCs who act as the vital link between the Branch, the County team, and RBL Head Office, ensuring effective communication, legal compliance, and community engagement.

This role is ideally suited to members who are organised, reliable, and confident in communicating through digital channels. The PoC helps maintain an active presence for the branch within the community and ensures that members remain informed and connected.

Terms of Reference

1. PoCs must be aware of and actively promote the RBL's vision, values and code of behaviour for working together.
2. Must have and regularly monitor their assigned RBL.Community email account in order to communicate effectively with the County team and Membership Engagement Officer (MEO).
3. Act as the main point of contact for all correspondence issued by the County Committee, MEO, Membership Council and Board of Trustees, ensuring it is shared promptly with the Branch.
4. Must act in a timely and appropriate manner in response to requests and information received from County and National levels.
5. Responsible for arranging the Branch Annual General Meeting (AGM) and one additional branch meeting each year, as required for CSB compliance.
6. Liaise with local authorities and organisations regarding local Remembrance events and represent the Branch in local commemorative activities.
7. Encourage and support Branch members in organising or taking part in activities that promote the Royal British Legion within the local community.
8. Ensure that all Branch activities comply with charity law and the requirements of the Charity Commission.
9. Must be conversant and compliant with the current Royal Charter, the Membership Handbook, and any relevant RBL policies and procedures (available via the MAP on Microsoft Office 365 or from the MEO).
10. Receive and communicate regular financial updates from the County Treasurer to Branch members, and co-sign Branch Fund Initiative (BFI) withdrawal forms alongside the County Treasurer.

Declarations of interest

Declarations of interest at local level should be recorded at a local level and notified to your MEO who can notify the Membership Compliance and Policy team. You should be reminded that in each transaction in which you have an interest you should declare your interest as soon as possible and follow the organisations' rules for managing this.

Forming, amalgamating and closing branches

Amalgamating branches

Speak to your MEO to receive information relating to the amalgamation of branches

Forming a branch

A new branch needs at least 15 members or potential members aged 18 or over to have a meeting about it. It must pass the following resolution:

“That this meeting hereby accepts the Objects of the Royal Charter, the Schedule of Rules and the Membership Handbook and formally establishes a branch.”

A county representative must attend the meeting where the proposal to form a branch is being discussed to offer guidance and support. If the meeting agrees to form a new branch, then form MS9, available from your MEO, must be completed. The MEO must send the completed MS9 to the relevant Membership Council rep and to Head Office for approval by the Membership Council. A county committee may stop the formation of new branches where there is already a branch in existence.

Closing a branch

1. If a branch cannot be revived and it is impractical to amalgamate it with a neighbouring branch or form a county supported branch (CSB, branch members or the county committee can decide to close the branch. Such closure must be approved by the Membership Council.
2. The branch subject to closure holds a Special/Extraordinary General Meeting where the following are discussed, decided on and minuted accordingly:
 - a) to close the branch.
 - b) where the branch members wish branch funds (including any branch legacies or any BFI funds that are not connected to a Branch Property Trust (BPT)), to be allocated. Accounting documents such as cheques or BFI transfer forms to be completed and signed at this meeting. If there is a BPT, and timing cannot wait, then all branch monies must be transferred to the branch general BFI account pending the BPT (Property) BFI being set up with the branch members indicating their preference for how remaining balances not connected to a branch property or legacy trust should be allocated.
 - c) if a branch has a BPT and funds within the General Account are derived from the BPT (rental income) then this money must be transferred into a BPT (Property) BFI account held at Head Office.

- d) what to do with the branch Standard. Is it going to be laid up or passed to the county/district for either safekeeping or training purposes?
3. MEO contacts Finance to see if there is a BFI, BPT or legacy trust.
 4. MEO also contacts Audit Team to see if there is an open audit or any other concerns.
 5. MEO offers opportunity for members to transfer to another suitable branch.
 6. At this stage it should be clearly identified what type of BFI Account(s) the branch holds, what, if any is BPT or legacy trust money and what is unrestricted branch funds for disposal with the bank balance as per the branch's wishes.
 7. The MEO completes the MS5A and submits it, along with all other supporting paperwork to the Membership Council Representative and county chair for examination before the application is presented to county/district committee for approval.
 8. County/district committee consider and agree to closure application being put forward to the Membership Council once branch has arranged for bank account(s) to be closed, submitted a final set of accounts and cheque(s) for the branch's final balance(s) made payable to wherever specifically within the Royal British Legion, the branch wishes their funds to go to.
 9. Membership Services team sets the branch status as pending closure on CARE, until able to update status on CARE as closed.
 10. Closure forms sent to Membership Governance Co-ordinator (MGC) who checks all necessary parties have signed and then forwards all paperwork to the Branch Finance Compliance group where Membership Council Representative(s) will request that the Membership Council approve the branch closure to complete the audit trail in the Membership Council meeting minutes.
 11. Once confirmation of closure of bank account(s), including BFIs has been received along with a zero-balance statement(s) uploaded to branch accounts database on SharePoint by the MEO the branch's status can be set as closed on all systems.
 12. The following are worth noting:
 - a) Branch cannot become a (CSB) unless it has fully completed the process of closing its bank account(s), including BFI, and transferring all funds to the county/district.
 - b) The same criteria should apply when a branch is closing.
 - c) Obtaining cheque(s) for the branch's final balance(s) should be an absolute requirement as this ensures the funds are allocated and accountable. In the past branches have claimed they have sent closing balance cheques to various parts of the Royal British Legion, for example the Poppy Appeal, but there has been no record of these cheques having been received or paid in.
 - d) BFI accounts are essentially another bank account and therefore it is important branch members are aware of their existence and given the opportunity to identify where, in the case of BFIs not associated with a property, they wish these funds to go.
 - e) Under this approach we should be in control of knowing where the branch funds have gone thereby preventing future phantom branches.

Becoming a County Supported Branch (CSB)

A county supported branch (CSB) is a method of operating for branches that are struggling under the traditional compliance requirements. It enables a branch to retain membership, to stay active within community and to retain the standard.

Instead of a traditional committee, the branch will only need to elect two people to act as a Point of Contact (PoC). The PoCs must have and frequently use email addresses as they will act as the link between the branch and the county/ RBL HQ. CSBs will not have their own bank account. The branch membership will retain the right to decide how their funds are used (within RBL rules). The branch will retain its standard and continue to organise and partake in activities in their local community. The branch is obliged to hold a minimum of two meetings a year, one of which will be the branch AGM.

Whether or not a branch can become a CSB is a decision that rests entirely with the county/ district committee. The decision needs to be noted in minutes or communicated in writing to the MEO.

The branch must be continuously meeting at least one of the following:

1. The branch is actively trying to recruit new members
2. The branch is providing comradeship
3. The branch is parading its standard and is visible in the community
4. The branch is committed to delivering the Branch Community Support activities
5. The branch is delivering on wider charitable objectives as specified in the Royal Charter

When a branch becomes a CSB and closes its bank current account, funds should be sent to its BFI, which is retained like any other branch BFI.

Head Office records will be updated for the BFI statements to ensure they are now sent to the county instead on a quarterly basis, so the county knows the balances available for each CSB.

Under usual finance rules, counties spend where appropriate at the request of CSBs on CSB matters - using the county's own cash float upfront and then submitting monthly/quarterly BFI drawdowns to reimburse themselves as needed.

With the CSB BFI the CSB's ringfenced balance total will be known with only the last month/ quarter of spend ever outstanding.

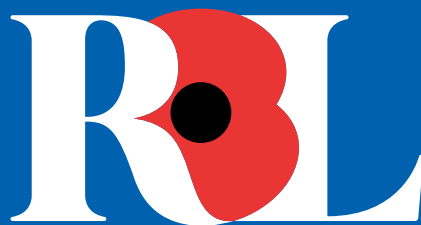
Arrangements will be made where not already in place to re-instate CSB branch BFIs to enable counties to transfer monies into these accounts. You may have seen the communication in May 2025's Central News asking branches (£5k max) and counties (15k max) to deposit excess funds into their BFI accounts prior to 30 June 2025 in time for year-end accounting.

CSBs are only required to submit their MS1s by the 31st of December to be considered compliant.

Returning to full branch status from CSB

CSBs should apply to return to full branch status with their county approval when the branch is able to form a full committee and regain control over their funds. MEO and county committee will be able to guide a branch through this process which will involve elections of the new committee.

Overseas



ROYAL BRITISH LEGION

Overseas Districts and branches

The information contained in the Membership Handbook applies to all branches, however due to the local regulation and legislation differing from the UK in other countries, overseas branches may need to operate in a different way in some circumstances. This section of the Handbook outlines some areas of operation which are specific to overseas branches. For all other MH sections, interpretation of the Membership Handbook may be sought from the Overseas MEO.

Overseas district and branches should not undertake any activity that conflicts with local law, whether or not that activity is mentioned by the Royal Charter or this Handbook or any other policy document relevant to them. If there is a conflict, then the law of the country where the district/branch is located must prevail.

Overseas Branch Types

District

These are overseas branches which operate within a district in the same way as UK branches. Where an Overseas district exists, branches are administered through the district. Overseas districts must ensure that neither the district nor any of the constituent branches undertakes any activity that is in conflict with local law, whether or not that activity is mentioned by the Royal Charter or this Handbook or any other policy document relevant to them.

Standalone

Stand-alone Branches are administered by their branch committee and fall under the direct responsibility of the Membership Council and therefore Membership Council rep for Overseas. The MC Rep for Overseas will act in lieu of a district chair for all relevant responsibilities, for example, on meritorious awards where they act as a signatory.

Registration as a separate legal entity

Some countries require an 'association' such as an RBL district or branch to be registered with the local, regional or national authorities. Each branch/district must register as a society or charity as required by the country in which they are formed. Districts are to ensure that both the district itself and branches within the district are compliant.

Statutes for branches within a district may not be registered without prior agreement from district, or by the MC for a district statute and standalone branches, and Head Office. The advice of Legal Counsel at Head Office must be sought. New branches may be opened following the usual new branch opening process.

Property

Special considerations may apply to the ownership of property in non-UK countries. Standalone branch chairs and district committees are responsible for ensuring that their branches are aware of the regulations that apply and that they comply with them.

Branch Boundaries and Poppy Appeal Income

The activity most likely to be impacted by local law is fundraising, for which each country has its own regulations. Overseas districts and branches must ensure when raising money for the Poppy Appeal that all fundraising activities are compliant with its country's laws.

A Standalone branch or a district should establish with the local authorities what is and what is not permitted and must ensure that this information is passed to branches before any fundraising is undertaken. Advice can also be sought from the Fundraising Team.

The completed original Poppy Appeal Statement of Account must be sent to Poppy Appeal in Aylesford after the annual Poppy Appeal with a copy to the district PAO if relevant.

Welfare

All overseas beneficiaries are managed, and their support coordinated by, the Overseas Casework Services Team. In order to support beneficiaries in countries where an overseas branch exists, the RBL Overseas Casework Services Team train and support Overseas caseworkers. A process map for the referrals and case management is attached. Districts should have a district welfare coordinator (DWC) who works with the Overseas Casework Services Team to co-ordinate the delivery of welfare within the district. Where branches have more than one volunteer caseworker, branches may also appoint a Branch Welfare Co-ordinator.

Overseas branch members must not provide support to beneficiaries unless they:

- Are a trained caseworker and
- Have registered the beneficiary with the Overseas Casework Services Team (district branches should do this through the district welfare coordinator) or
- Have received the beneficiary as a referral from the Overseas Casework Services Team.

Referrals

Overseas Casework Services receive referrals through several routes:

1. Beneficiary contacts local district/branch directly and a volunteer caseworker has notified the Overseas Casework Services Team (district branches should do this via the DWC). They have completed or are arranging to complete the Form A and full needs assessment which is then sent to the Overseas inbox via Overseascasework@britishlegion.org.uk
2. Beneficiary calls or emails RBL contact centre, and their details are recorded and assigned to the Overseas Casework Services Team. If appropriate and volunteer caseworker available; a Form A and FNA is requested via a volunteer caseworker. If not, then case is assigned to Case Officer who contacts beneficiary directly.
3. A third party (relative, friends, organisation) contacts RBL on a beneficiary's behalf. Consent and if required Power of Attorney is confirmed and point of contact agreed if not the beneficiary directly.

4. Direct referrals to the RBL contact centre out of hours are picked up by the Urgent Support Team (UST) - ust@britishlegion.org.uk (UK time out of hours service operates from 5pm-8pm Monday-Friday and 8am-8pm during the weekend for Overseas beneficiaries).
5. Referrals are also received directly from the Foreign Commonwealth Development Office (FCDO) worldwide.

Casework

Form A and a full needs assessment must only be completed by trained volunteer caseworkers. If a volunteer caseworker is not available, the case can be assigned to a Case Officer from the Overseas Casework Services Team who can complete the assessment with the beneficiary directly.

Funds may only be used for a beneficiary where:

- the beneficiary is recorded with the Overseas Casework Services Team and
- the spend has been approved by the Overseas Casework Services Team and a letter of authority has been provided.

The DWC should carry out regular checks on assigned cases to volunteer caseworkers to ensure timely progression of Form A and full needs assessments. Where a volunteer caseworker cannot complete the assessment in a timely manner or the needs presented are of a complex nature, the DWC inform Overseas Casework Coordinator straight away to enable guidance to be provided and the case to be progressed without delay.

The DWC also reviews completed applications for assistance and query any anomalies with the volunteer caseworker, ensuring corrections are completed. When the case is ready, the DWC submits the application to the Overseas Casework Services Team via the inbox. The DWC should escalate any issues to the Casework Services Manager.

In order to support the delivery of welfare overseas, overseas districts and standalone branches may retain funds that were raised through the Poppy Appeal. These funds are managed via the SC22 process (see below for more detail).

Welfare boundaries for branches should be agreed with the Directorate.

BCS

Branches should note that BCS is separate from the welfare provision provided through the Overseas Casework Services Team. BCS is a membership-wide activity, which combats social isolation. BCS home visits, hospital visits and telephone buddies, which form BCS, should only be undertaken by trained BCS supporters who are managed via the Membership Directorate – while overseas branch caseworkers may visit beneficiaries at home as part of the delivery of welfare casework this is separate from BCS home visits where a beneficiary has specifically requested BCS as a support service. Overseas caseworkers should not undertake BCS activities unless they have also undertaken BCS training. As for UK branches, BCS should only be carried out with beneficiaries who have been referred to the overseas branch by the BCS staff team.

The difference between Casework and BCS

BCS refers only to beneficiary who requires home visits, hospital visits or a telephone buddy to alleviate social isolation.

Casework applies to all other support or welfare needs including the following (this list is not exhaustive):

- When any financial support is required to meet a need eg: to purchase white goods or flights for repatriations. A Form A and full needs assessment is required to assess eligibility and financial and welfare needs as well as assess any additional needs.
- When a beneficiary requires advice and guidance relating to a welfare issue, including but not limited to financial, health (physical and/or mental), well-being, housing or employment.
- When a beneficiary finds themselves in an urgent support situation and the crisis grant provision has been utilised. Follow up referral to the Overseas Casework Team or Urgent Support Team (if out of hours) and/or completion of Form A and full needs assessment is required to identify any additional needs.
- When a beneficiary asks RBL for support but isn't specific as to how we can help. Following an initial conversation where needs cannot be met by sign posting, the Form A and full needs assessment can identify what support RBL can provide.
- When a beneficiary is in receipt of a Regular Charitable Payment (RCP) issued by a regimental association or benevolent fund and it requires yearly renewal. A Form A and full needs assessment is required to consider the renewal plus any additional needs.

If you are unsure if a potential referral is Casework or Branch Community Support, don't hesitate to check with the Overseas Casework Team or contact bcs@britishlegion.org.uk to speak with the BCS team (district branches should make queries via the DWC).

Subscriptions

A fixed exchange rate is set at the beginning of each Corporate Financial Year for the bulk payment of affiliation fees.

Training

Membership training is available for branch committee members and members. Details for training can be obtained through the Membership Training team or district training officer (DTO).

As a general rule, Overseas members will rarely be invited to attend training sessions in the UK. Training will as much as possible be delivered locally to save on travel expenses. Until confirmation of place being allocated on any national course is received, no travel or accommodation commitments should entered into.

SC22 Annual Return

If they would like to retain funds from the Poppy Appeal for welfare for the coming year, all standalone branches must submit SC22s and districts must submit a consolidated SC22 for its district branches. To ensure that there is oversight of the spend, the SC22 must include the relevant OSC incident number. Any cases where OSC numbers have not been received can be checked with CSC via the Overseas casework email.

The annual returns completed overseas are the same as any other branch less for the SC22 (link to form) which is only completed and used by the overseas branches. The SC22 is completed annually, and it is used to determine the level of funds a branch can retain from its Poppy Appeal fundraising to support welfare work carried out by the branch, based on the previous year's welfare spend.

Retained Poppy Appeal funds should not be used to fund BCS activities and funds can only be used where a beneficiary has been appropriately recorded with the Overseas Casework Services Team and the spend has been authorised by the Overseas staff.

Timelines

Branches should submit their SC22 between 1st Nov and 31st Dec each year:

Standalone branches should submit this to the Overseas Casework Team, copying in the MEO.

District branches should submit their return to the district secretary.

Districts should consolidate their SC22 return and submit by the end of the second week in January.

SC22 Process

Branch must include a copy of page 3 of the branch accounts form which detailing Direct Welfare Payments to support the retention requests. Without page 3 of the branch accounts form, the retention request cannot be processed and authorisation to retain funds cannot be given.

Branches must ensure that beneficiary case numbers and the nature and number of incidents must be recorded.

Branches should retain the Letter of Authority provided by the Overseas Casework Services Team to support completion of the SC22.

Failure to complete the form fully can lead to delays or refusal of retention requests.

Overseas Roles

District Welfare Coordinator

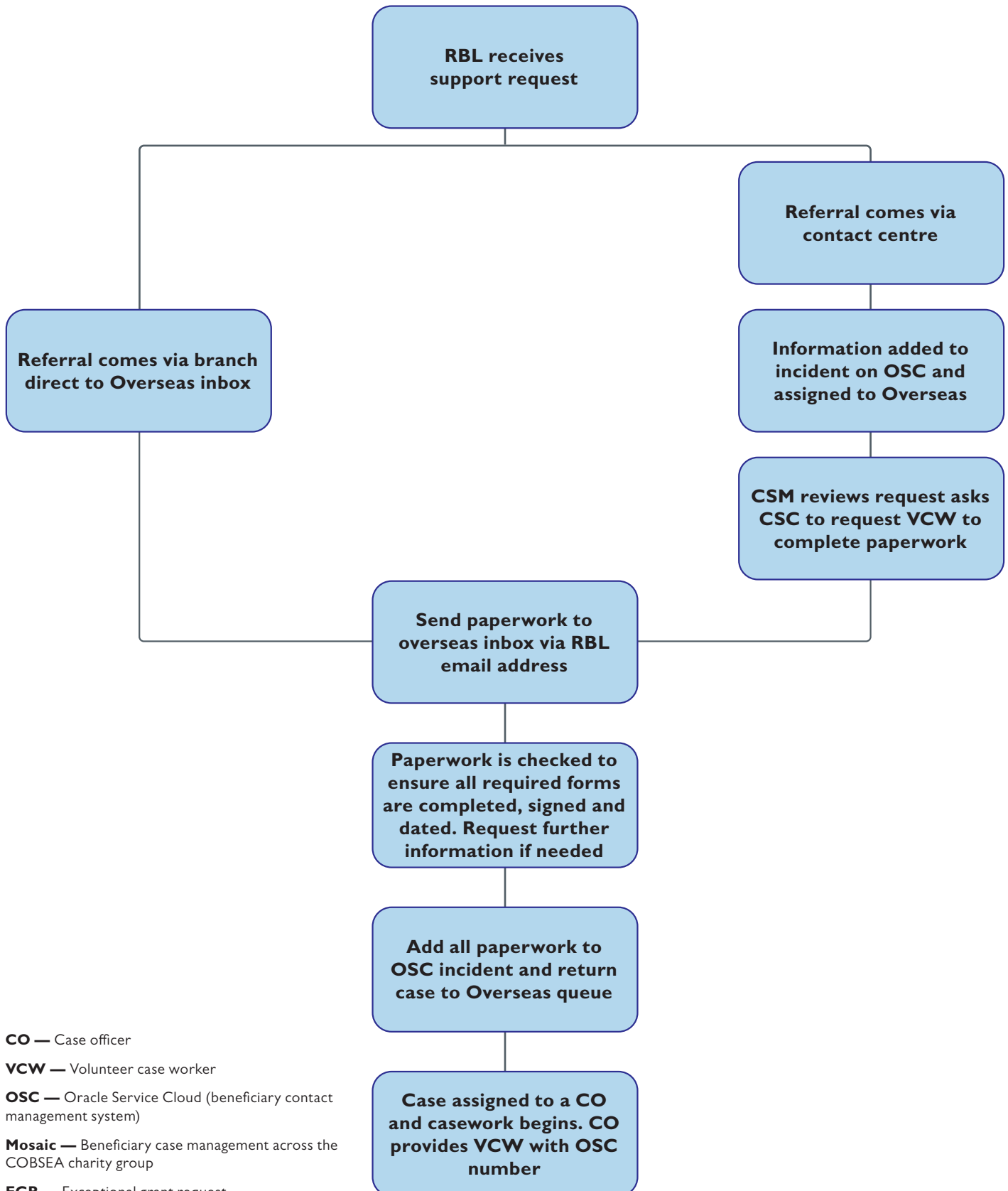
The District Welfare Co-ordinator (DWC), acts as the liaison between the Overseas Casework Services Team and the volunteer caseworkers, distributing requests for assistance appropriately depending on the need, experience and location. Responsible for the timely progression of assessments, they respond to queries where able. Providing local knowledge and guidance to volunteer caseworkers and forward on any more complex queries to the Overseas Casework Services Team.

Terms of Reference

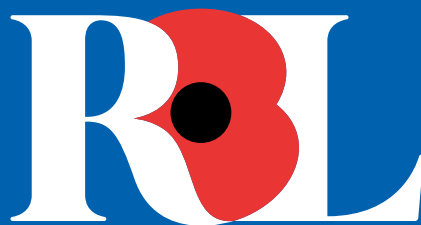
1. The district welfare coordinator is responsible to the Overseas Casework Team and district committee.
2. Notifies the Overseas Caseworkers Services Team of any beneficiary requesting RBL support with a welfare need as soon as the referral is received.
3. Provides support to local team of volunteer caseworkers by providing significant depth and breadth of expertise as a volunteer caseworker and own country knowledge.
4. Acts as point of contact for the Overseas Casework Services Team to receipt information and updates to guidance and ensure that all relevant correspondence received is communicated to the volunteer caseworkers.
5. Regularly liaises with Overseas Casework Services Team, to feedback information or developed knowledge, providing reciprocal response network.
6. Builds rapport and maintain positive relationships with their team of volunteer caseworkers and with the Overseas Casework Services Team.
7. Applies a good understanding of the need for discretion and confidentiality, including the limited circumstances when it would be appropriate to break confidentiality.
8. Reviews the submissions of Form A's, Full Needs Assessments and supporting documentation for assigned cases from volunteer caseworkers. Agree sending to the Overseas casework email inbox when ready, avoiding unnecessary delays.
9. Maintains an overview of RBL policies and procedures. Including GDPR, Safeguarding and Cyber Security.
10. Uses Legion.org.uk email address only to share any information relating to individual cases, requests for assistance or communication with the Overseas Casework Services Team.
11. Reports any concerns relating to GDPR and safeguarding to the Overseas Casework Services Manager or Urgent Support Team if out of hours without delay.
12. The DWC should additionally carry out regular checks on assigned cases to volunteer caseworkers to ensure timely progression of Form A and full needs assessments.

13. Review and submit completed applications for assistance.
14. Compiles Letters of Authority received from the Overseas Case Officers to complete financial information relating to welfare spend on SC22. Requesting OSC reference number for Casework Services Coordinator through the Overseas casework inbox if not received.

Overseas Casework



Branches in the Community



ROYAL BRITISH LEGION

BCS

Branch Community Support (BCS) is a volunteering programme through membership that enables trained members to become BCS Supporters to promote the objectives of the Royal British Legion by supporting local RBL beneficiaries. Through BCS, Supporters engage in activities such as telephone buddying and home or hospital visits to veterans and their families who are socially isolated. Referrals to BCS are received through the RBL Contact Centre to ensure the suitability of the service.

Members interested in becoming a BCS Supporter can enrol by contacting their regional MEO. MEAs are available to assist with training and Disclosure and Barring Service (DBS) requirements.

Branches exist to promote the Royal British Legion's work in their communities and the best way to accomplish this is to engage in Branch Community Support (BCS). There are three roles that members can hold that support BCS. At Branch level, members can train to become BCS Supporters to help reduce social isolation in the form of telephone buddying, home and hospital visits. Branches can also nominate up to 4 members to be Branch Community Coordinators. Their role within BCS is to promote BCS and share resources. BCS is not:

- 1) Welfare support such as assistance with food, finances, employment, or housing.
- 2) Mental health support.
- 3) Physical support.

At county level there should be a county community support coordinator who encourages and advises branches on the delivery of BCS. They work closely with the BCS Team and MEO who can provide professional advice and support. CCSCs are required to be RBL members and to complete BCS training. Find out more about these roles [here](#).

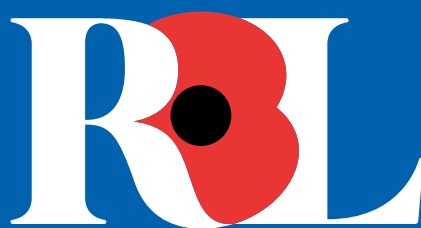
Please note: Members cannot be the point of contact for welfare cases where a referral is on behalf of a beneficiary. In the first instance the beneficiary themselves should be the contact, however, in exceptional cases where a beneficiary cannot advocate on their own behalf, the point of contact for welfare support should be a family member or close friend of the beneficiary.

Music for Events

The Royal British Legion does not possess an umbrella music licence and branches must review licensing requirements in their area if they wish to do so.

The Performing Right Society website (<https://www.prsformusic.com/licences>) will give branches all the information they need to acquire a short-term licence to play music.

Clubs



ROYAL BRITISH LEGION

RBL-licensed Clubs

RBL members can apply to join RBL licensed clubs (referred to here as clubs). Membership of the club is at the discretion of the club committee.

Club membership is additional to RBL and RBL branch membership and club members may need to pay an additional club membership fee, set by and collected directly by the club.

The clubs are independent Mutual Societies and not part of the Charity. They are their own legal entity, registered by the Financial Conduct Authority, whose registration grants the club limited liability status.

Clubs use the RBL name and logo under a licence agreement with the RBL, which they need to apply to renew annually.

The RBL licence has specific conditions and failure to operate within these conditions may risk the continuation of the licence.

The issuing of the licence is the responsibility of the RBL Membership Council.

Clubs operate under a set of club rules, provided by the RBL, but adopted by the club members.

Clubs are managed by officials and a committee elected by the club members.

The majority of clubs occupy a property held in trust for the charity, either in corporate trusteeship (where the RBL acts as landlord) or local trusteeship (where local trustees are landlord). Some clubs operate from their own or third-party owned properties.

Clubs in corporate or local trusteeship are tenants of their landlords, operating under a lease agreement. Rent paid should be paid to their landlord (or agent) and **MUST NOT BE PAID DIRECTLY TO A BRANCH.**

Club officers and committee members should not be local trustees. Branch officers and committee members wishing to be local trustees should consider the terms of the trust and any possible conflicts of interest.

Club officers must not also be branch officers and vice versa. Club officer is defined as president, chairman, vice chairman, secretary and treasurer.

It is illegal under charity law for a branch to support a club financially using branch funds.

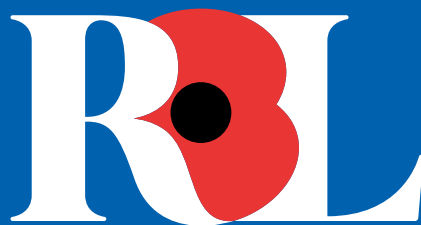
The activities of RBL clubs are supported by RBL Regional Clubs Relationship Managers (RCRMs) and an RBL Club Compliance Coordinator (CCC).

RCRMs and CCC may offer management guidance to clubs, but as independent businesses, the decision making always lies with and is the responsibility of the club.

Counties / districts should monitor clubs' activities and inform the RCRM or CCC if they have any concerns. Counties / districts must not offer clubs advice or interfere with a club business.

For any further guidance on clubs contact the CCC at clubs@britishlegion.org.uk or your local RCRM.

Glossary



ROYAL BRITISH LEGION

Almonisation A process through which the Royal British Legion seeks to share the cost of a grant made to support a beneficiary. Counties are encouraged to contribute their funds to the cost of community support interventions in their area. RBL also almonises from regimental associations and other charities and organisations able to give a financial grant.

Branch event An event held by branches in their area with the aim of recruiting new members, raising funds for the branch or for the purpose of Remembrance.

Beneficiary: Individuals as defined by the Royal Charter who are eligible for support from the RBL.

Compliant branch A compliant branch is one that submitted its annual accounts before 30th September for the financial year that ended on 30th June of that year, and submitted its MS1 form before 31st December of that year. (County Supported branches do not submit accounts and are therefore compliant if they submitted the MS1 form by 31st December.)

Compliant county: A compliant county can send a delegate to Annual Conference. A compliant county is one that submitted its MS1a by 28th February in the year in which that Annual Conference takes place and submitted its annual accounts by 30th September in the previous year.

Counties which submit motions to Annual Conference must be compliant in order for that motion to be accepted. Counties that are a seconder for a motion must be compliant in order to do so.

County supported branch A branch operating under a specific set of amended governance and finance structures.

Delegated authority limit The amount that a Treasurer can spend without the specific approval of the Committee. Only the Committee can authorise proposed spending above this limit.

Formation A RBL branch, county, district or section. A branch is a group of members that can form locally or based on shared interest. A county (which is the same as district or section) is a group of branches that can encompass a geographical area (for example, Kent county or Northern Ireland district) or shared interests such as Women's section or National branches district.

LOMAS RBL Online Membership Administration System, where Treasurers manage a formation's finance.

Membership Council A committee established by and accountable to the Board of Trustees with such responsibility for the management and administration of members and membership issues as the Board of Trustees may from time to time determine.

Negative voting Voting 'against' a candidate by any annotation other than the one required by ballot paper sign to vote for a chosen candidate.

Quorate Having the necessary number of people present for decisions to be allowed to be made.

Quorum The number of people needed at a meeting so that decisions can be made.

Remembrancetide The period between 14th October and 14th November when Poppy Appeal and Remembrance activities take place to commemorate those who serve and raise funds for those who need support.

Ringfenced Fund Is a fund designated for a specific purpose.

Spoilt ballot paper A spoilt ballot paper is one that cannot be counted because there is no vote for a candidate, a vote against a candidate or a required signature is missing.

Women's section Women's section is a group of branches that welcome both women and men. It used to run as a sister charity to the Royal British Legion until 2015. Its proud history and legacy is safeguarded by Women's section Central Committee, which also oversees specific funding schemes for which the Women's section fundraise.

Br branch

BFI branch Funds Initiative

BPT branch Property Trust

BCS branch Community Support

CSB county Supported branch

IE Independent Examiner

LCC Legion Complaints Committee

MAP Membership Administration Portal

MEO Membership Engagement Officer

MH Membership Handbook

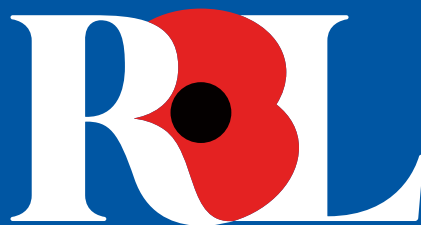
RBL Royal British Legion

SGM Special General Meeting

TOR Terms of Reference

WS Women's section

Supporting Forms



ROYAL BRITISH LEGION

MS1 BRANCH INFORMATION

FOR THE YEAR COMMENCING 1ST OCTOBER 2025



All sections of this form must be completed IN CAPITALS at or after the branch Annual General Meeting. Completed forms must be sent to the Membership Engagement Officer by 31st December (hard copy by post—recorded delivery, or scanned copy by email). One copy must be retained by the branch for their records.

SECTION 1 – BRANCH INFORMATION

BRANCH NAME:		BR CODE:	BR
WEBSITE ADDRESS:			
MEETING ADDRESS:			
MEETING DETAILS:		TIME:	
Monthly/Bi-monthly/Quarterly/Other (please specify):			

SECTION 2 – BRANCH ACCOUNTS CONTACT DETAILS

Please confirm below the branch contact that the information for the completion of branch Accounts and the information should be sent to. In the first instance, this should be the Treasurer and Chair respectively and should be the rbl.community email address.

If the email box is left blank, paper copies will be sent to the nominated contact.

Branch Accounts email address contact:	
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SECTION 3 – BRANCH OFFICERS AND APPOINTMENTS

BRANCH OFFICERS

Please note that the following positions must be fulfilled – Chair, Treasurer, Secretary (except for a Vice Chair who is not a compulsory Officer) – and one person cannot hold more than one of the Branch Officer positions. Close family members, as well as any individuals in a personal or other relationship where a conflict of interest could reasonably be perceived, must not approve each other's expenses, authorise bank account transactions or supervise, review, or otherwise evaluate each other's activities.

By completing the form below, I confirm that I am eligible for election to the Branch Committee and I have been duly elected or appointed. I acknowledge my responsibility as a Branch Officer/Committee Member and agree to follow in every respect the duties and responsibilities as contained in the Royal Charter and the Membership Handbook and as required by the Board of Trustees, and the Membership Council. I have never worn medals I am not entitled to, nor falsely claimed to have been a member of Armed Forces nor lied about my Service. I will be vigilant in serving the interests of the Royal British Legion at all times. I will adhere to the data protection rules outlined in GDPR.

The contact details you have provided on the form will be used for communications between Branch Officer/Committee Members, and for communications from RBL staff relevant to your role via the rbl.community email addresses. These contact details may be shared with individuals within RBL who need to contact you in relation to branch matters. We would like to ensure that your contact details are accurate and up-to-date and would ask that you inform your Membership Engagement Officer (MEO) if there are any changes.

SAFEGUARDING SELF DECLARATION

As your role is one on which the reputation of the RBL will rest or you may be managing RBL finances, all roles are required to read the MS1 Self Declaration document and must sign below to say that they confirm that the statements are correct.

By signing below, I confirm that: the statements in the MS1 Self Declaration to be true and, where a statement is not true, I have made a disclosure(s) to the Safeguarding Team via my MEO which has been accepted by the RBL and does not prevent me from carrying out this role.

I will inform RBL of any changes in my circumstances which would affect the veracity of this declaration.

BRANCH CHAIR									
MEMBERSHIP NUMBER									
NAME									
ADDRESS									
TELEPHONE									
EMAIL (<i>Personal</i>)									
EMAIL (<i>RBL Community</i>)									
Name:				Signature:		Date:			
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.						YES		NO	
BRANCH VICE-CHAIR (OPTIONAL)									
MEMBERSHIP NUMBER									
NAME									
ADDRESS									
TELEPHONE									
EMAIL (<i>Personal</i>)									
EMAIL (<i>RBL Community</i>)									
Name:				Signature:		Date:			
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.						YES		NO	
BRANCH SECRETARY									
MEMBERSHIP NUMBER									
NAME									
ADDRESS									
TELEPHONE									
EMAIL (<i>Personal</i>)									
EMAIL (<i>RBL Community</i>)									
Name:				Signature:		Date:			
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.						YES		NO	

BRANCH TREASURER (APPOINTED, NOT ELECTED)				
MEMBERSHIP NUMBER				
NAME				
ADDRESS				
TELEPHONE				
EMAIL (Personal)				
EMAIL (RBL Community)				
Name:		Signature:		Date:
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.		YES		NO
BRANCH PARADE MARSHAL				
MEMBERSHIP NUMBER				
NAME				
ADDRESS				
TELEPHONE				
EMAIL (Personal)				
EMAIL (RBL Community)				
Name:		Signature:		Date:
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.		YES		NO
REMAINDER OF COMMITTEE				
The committee members listed below are aware of their responsibilities detailed above and have read the Safeguarding Self-Declaration, are aware of the Safeguarding Statement, and confirm that they have nothing to declare. Where members are appointed to the roles, the list below must include Branch President, Membership Secretary, BCC and general committee member.				
COMMITTEE ROLE	MEMBERSHIP NUMBER	NAME		

PLEASE PRINT DUPLICATES OF THIS SHEET IF REQUIRED

BANK SIGNATORIES		
Branch Chairs must ensure that the bank signatories are Branch Officers, one of which must be the Treasurer.		
1.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
2.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
3.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
4.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	

MID-YEAR AMENDMENT FOR BRANCHES & COUNTIES (ONLY PRINT IF RQD.)

SECTION 1 – BRANCH & COUNTY OFFICERS AND APPOINTMENTS BRANCH & COUNTY OFFICERS

Please note that the following positions must be fulfilled – Chair, Treasurer, Secretary (except for a Branch Vice Chair who is not a compulsory Officer) – and one person cannot hold more than one of the Branch/ County Officer positions. Close family members, as well as any individuals in a personal or other relationship where a conflict of interest could reasonably be perceived, must not approve each other's expenses, authorise bank account transactions or supervise, review, or otherwise evaluate each other's activities.

SECTION 2 – DECLARATION OF ACKNOWLEDGEMENT OF RESPONSIBILITIES

This section must be fully completed and signed by all Officers/Committee Members/Appointments.

Where an Officer/Committee Member/Appointment is elected/appointed during the year the declaration must be read and agreed by them. This action must be minuted at their first meeting.

By completing the form below, I confirm that I am eligible for election to the Branch/ County Committee and I have been duly elected or appointed. I acknowledge my responsibility as a Branch/ County Officer/Committee Member and agree to follow in every respect the duties and responsibilities as contained in the Royal Charter and the Membership Handbook and as required by the Board of Trustees, and the Membership Council. I have never worn medals I am not entitled to, nor falsely claimed to have been a member of Armed Forces nor lied about my Service. I will be vigilant in serving the interests of the Royal British Legion at all times. I will adhere to the data protection rules outlined in GDPR.

The contact details you have provided on the form will be used for communications between Branch/ County Officer/ Committee Members, and for communications from RBL staff relevant to your role. These contact details may be shared with individuals within RBL who need to contact you in relation to branch matters. We would like to ensure that your contact details are accurate and up-to-date and would ask that you inform your Membership Engagement Officer (MEO) if there are any changes.

SAFEGUARDING SELF DECLARATION

As your role is one on which the reputation of the RBL will rest or you may be managing RBL finances, all roles are required to read the MS1 Self Declaration document and must sign below to say that they confirm that the statements are correct.

By signing below, I confirm that: the statements in the MS1 Self Declaration to be true and, where a statement is not true, I have made a disclosure(s) to the Safeguarding Team via my MEO which has been accepted by the RBL and does not prevent me from carrying out this role.

I will inform RBL of any changes in my circumstances which would affect the veracity of this declaration.

The committee members listed below are aware of their responsibilities detailed above and have read the Safeguarding Self-Declaration, are aware of the Safeguarding Statement, and confirm that they have nothing to declare.

Branch and County Officers are asked to please sign.

BRANCH NAME		BR CODE	
COMMITTEE ROLE	NAME AND MEMBERSHIP NUMBER	PRECEDING INDIVIDUAL'S NAME	
OFFICER ROLE	NAME AND MEMBERSHIP NUMBER	PRECEDING INDIVIDUAL'S NAME	
OFFICER SIGNATURE:			
OFFICER SIGNATURE:			

PLEASE PRINT DUPLICATES OF THIS SHEET IF REQUIRED.

MS1 FOR COUNTY SUPPORTED BRANCHES

FOR THE YEAR COMMENCING 1st OCTOBER 20



All sections of this form must be completed IN CAPITALS at or after the branch Annual General Meeting. Completed forms must be sent to the Membership Engagement Officer (MEO) by 31st December (hard copy by post— recorded delivery, or scanned copy by email). One copy must be retained by the branch for their records.

SECTION 1 – BRANCH INFORMATION

BRANCH NAME:		BR CODE:	BR
WEBSITE ADDRESS:			
MEETING ADDRESS:			
MEETING DETAILS: Monthly/Bi-monthly/Quarterly/ Other (please specify):			TIME:

SECTION 3 – DECLARATION OF ACKNOWLEDGEMENT OF RESPONSIBILITIES

This section must be fully completed and signed by all Branch Points of Contact and Appointments.

Where a Point of Contact/Appointment is elected/appointed during the year the declaration must be read and agreed by them. This action must be minuted at their first meeting.

By completing the form below, I confirm that I have been duly elected or appointed. I acknowledge my responsibility as Branch Point of Contact or in my Branch Appointment and agree to follow in every respect the duties and responsibilities as contained in the Royal Charter and the Membership Handbook and as required by the Board of Trustees, and the Membership Council. I will be vigilant in serving the interests of the Royal British Legion at all times. I have never worn medals I am not entitled to, nor falsely claimed to have been a member of Armed Forces nor lied about my Service. I will adhere to the data protection rules outlined in GDPR.

The contact details you have provided on the form will be used for communications between Branch Points of Contact or those holding Branch Appointment, and for communications from RBL staff relevant to your role. These contact details may be shared with individuals within RBL who need to contact you in relation to branch matters. We would like to ensure that your contact details are accurate and up-to-date and would ask that you inform your Membership Engagement Officer if there are any changes.

SAFEGUARDING SELF DECLARATION

As your role is one on which the reputation of the RBL will rest or you may be managing RBL finances, all roles are required to read the MS1 Self Declaration document and must sign below to say that they confirm that the statements are correct.

By signing below, I confirm that: the statements in the MS1 Self Declaration to be true and, where a statement is not true, I have made a disclosure(s) to the Safeguarding Team via my MEO which has been accepted by the RBL and does not prevent me from carrying out this role.

I will inform RBL of any changes in my circumstances which would affect the veracity of this declaration..

SECTION 4 – BRANCH POINTS OF CONTACT

POINT OF CONTACT 1

MEMBERSHIP NUMBER		
NAME		
ADDRESS		
TELEPHONE		
EMAIL (Personal)		
EMAIL (RBL Community)		
Name:	Signature:	Date:

Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.		YES		NO	
POINT OF CONTACT 2					
MEMBERSHIP NUMBER					
NAME					
ADDRESS					
TELEPHONE					
EMAIL (<i>Personal</i>)					
EMAIL (<i>RBL.Community</i>)					
Name:		Signature:		Date:	
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.		YES		NO	
BRANCH COMMUNITY COORDINATOR					
MEMBERSHIP NUMBER					
NAME					
ADDRESS					
TELEPHONE					
EMAIL (<i>Personal</i>)					
EMAIL (<i>RBL.Community</i>)					
Name:		Signature:		Date:	
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.		YES		NO	

PLEASE PRINT DUPLICATES OF THIS SHEET IF REQUIRED.

MS1A COUNTY INFORMATION

FOR THE YEAR COMMENCING



Please complete this form IN CAPITALS and return to the Membership Engagement Officer (MEO). All sections of this form must be completed. Section 1 of this form must be completed by the County/District Secretary no later than 28th February.

SECTION 1 – COUNTY/DISTRICT INFORMATION

COUNTY/DISTRICT:		COUNTY/ DISTRICT CODE:	CN
WEBSITE ADDRESS:			
MEETING ADDRESS:			
MEETING DETAILS: Monthly/Bi-monthly/Quarterly/ Other (please specify):			TIME:

MEETING DETAILS:

Monthly/Bi-monthly/Quarterly/Other (please specify):

This section must be fully completed and signed by all Officers/Committee Members/Appointments.

Where an Officer/Committee Member/Appointment is elected/appointed during the year the declaration must be read and agreed by them. This action must be minuted at their first meeting.

By signing below I acknowledge my responsibility as County or District Officer/Committee Member and agree to follow in every respect the duties and responsibilities as contained in the Royal Charter and the Membership Handbook and as required by the Board of Trustees, the Membership Council and the Charity Act. I have never worn medals I am not entitled to, nor falsely claimed to have been a member of Armed Forces nor lied about my Service. I will be vigilant in serving the interests of the Royal British Legion at all times. I will adhere to the data protection rules outlined in GDPR policy.

The contact details you have provided on the form will be used for communications between County/District Officers and Committee Members, and for communications from RBL staff relevant to your role via the rbl.community email addresses. These contact details may be shared with individuals within RBL, including members, who need to contact you in relation to membership matters. We would like to ensure that your contact details are accurate and up-to-date and would ask that you inform your MEO if there are any changes.

SAFEGUARDING SELF DECLARATION

As your role is one on which the reputation of the RBL will rest or you may be managing RBL finances, all roles are required to read the MS1 Self Declaration document and must sign below to say that they confirm that the statements are correct.

By signing below, I confirm that: the statements in the MS1 Self Declaration to be true and, where a statement is not true, I have made a disclosure(s) to the Safeguarding Team via my MEO which has been accepted by the RBL and does not prevent me from carrying out this role.

I will inform RBL of any changes in my circumstances which would affect the veracity of this declaration.

SECTION 3 – COUNTY/DISTRICT COMMITTEE OFFICERS AND APPOINTMENTS

CHAIR

MEMBERSHIP NUMBER		
NAME		
TELEPHONE		
EMAIL (Personal)		
EMAIL (RBL.Community)		
Name:	Signature:	Date:

Are you happy for your telephone number to be published on the County website so members of the public can contact you about membership matters.		YES		NO	
VICE CHAIR					
MEMBERSHIP NUMBER					
NAME					
TELEPHONE					
EMAIL (<i>Personal</i>)					
EMAIL (<i>RBL.Community</i>)					
Name:		Signature:		Date:	
Are you happy for your telephone number to be published on the County website so members of the public can contact you about membership matters.		YES		NO	
SECRETARY					
MEMBERSHIP NUMBER					
NAME					
TELEPHONE					
EMAIL (<i>Personal</i>)					
EMAIL (<i>RBL.Community</i>)					
Name:		Signature:		Date:	
Are you happy for your telephone number to be published on the County website so members of the public can contact you about membership matters.		YES		NO	
TREASURER					
MEMBERSHIP NUMBER					
NAME					
TELEPHONE					
EMAIL (<i>Personal</i>)					
EMAIL (<i>RBL.Community</i>)					
Name:		Signature:		Date:	
Are you happy for your telephone number to be published on the County website so members of the public can contact you about membership matters.		YES		NO	

YOUTH OFFICER					
MEMBERSHIP NUMBER					
NAME					
TELEPHONE					
EMAIL (Personal)					
EMAIL (RBL Community)					
Name:	Signature:		Date:		
Are you happy for your telephone number to be published on the County website so members of the public can contact you about membership matters.			YES		NO
PARADE MARSHAL					
MEMBERSHIP NUMBER					
NAME					
TELEPHONE					
EMAIL (Personal)					
EMAIL (RBL Community)					
Name:	Signature:		Date:		
Are you happy for your telephone number to be published on the County website so members of the public can contact you about membership matters.			YES		NO
REMAINDER OF COMMITTEE					
The committee members listed below are aware of their responsibilities detailed above and have read the Safeguarding Self-Declaration, are aware of the Safeguarding Statement, and confirm that they have nothing to declare.					
COMMITTEE ROLE	MEMBERSHIP NUMBER	NAME			
President (optional)					
Training Officer					
Recruiting Officer					
Community Support Coordinator (CCSC)					
County Standard Bearer					

Committee member		
Committee member		
Committee member		
Committee member		
Committee member		
Committee member		
Committee member		
Committee member		

BANK SIGNATORIES

1.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
2.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
3.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
4.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	

PLEASE PRINT DUPLICATES OF THIS SHEET IF REQUIRED.

MS1B STANDARD BEARER AND PARADE MARSHAL DISCLAIMER

FOR THE YEAR COMMENCING

SECTION 5 – STANDARD BEARER/DEPUTY STANDARD BEARER/ PARADE MARSHAL PHYSICAL FITNESS CONFIRMATION

This section must be signed by the appointed Standard Bearer, Deputy Standard Bearer and Parade Marshal. During competitions and Remembrance events the Royal British Legion will make every effort to ensure their safety, however, as with any physical activity, there are health risks and a minimum level of physical fitness is required.

I confirm that:

- In accordance with Chapter 6 of the Ceremonial Handbook, I have read and understood the responsibilities and risks associated with being a Standard Bearer / Parade Marshal, including but not limited to:
 - Standard bearing / being a Parade Marshal is a physical activity and so I must ensure I am both physically fit and strong enough to carry a Standard in all reasonable weather conditions.
 - As a Standard Bearer / Parade Marshal I will be expected to be able to carry a Standard which is 8ft long and up to 3.5kg in weight (in wet or windy weather conditions Standards may become heavier and difficult to hold upright)
 - Some actions such as Dips may put a strain on the back and shoulders
 - Competitions and Remembrance events may prove demanding and stressful for some.
- If I am in receipt of any disability related allowance or benefit, I will inform the appropriate authorities of my intention to undertake the role of Standard Bearer/Deputy Standard Bearer/ Parade Marshal as this may affect my eligibility status.
- To my knowledge, I have no physical conditions or disability that could potentially put me or others at harm whilst performing my duties as a Standard Bearer/Deputy Standard Bearer/ Parade Marshal. If I have, or suspect I have, a health problem which means I may not be able to fulfil all duties required of the role safely, I undertake to inform the appropriate Ceremonial Officer in charge of the competition/Remembrance event.

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I will inform RBL of any changes in my circumstances which would affect the veracity of this declaration.

STANDARD BEARER

MEMBERSHIP NUMBER			
BRANCH			
NAME			
ADDRESS			
TELEPHONE			
EMAIL (Personal)			
EMAIL (RBL Community)			
Name:	Signature:	Date:	
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.		YES	NO

PARADE MARSHAL					
MEMBERSHIP NUMBER					
BRANCH					
NAME					
ADDRESS					
TELEPHONE					
EMAIL (<i>Personal</i>)					
EMAIL (<i>RBL.Community</i>)					
Name:	Signature:	Date:			
Are you happy for your telephone number to be published on the branch website so members of the public can contact you about branch matters.		YES		NO	

PLEASE PRINT DUPLICATES OF THIS SHEET IF REQUIRED.

MS1C GROUP INFORMATION

FOR THE YEAR COMMENCING 1ST OCTOBER



Please complete this form IN CAPITALS and return to the Membership Engagement Officer (MEO). All sections of this form must be completed. Section 1 of this form must be completed by the Group Secretary after the Annual Meeting of the Group.

SECTION 1 – GROUP INFORMATION

GROUP:		
MEETING ADDRESS:		
MEETING DETAILS: Monthly/Bi-monthly/Quarterly/Other (please specify):		TIME:

SECTION 2 – DECLARATION OF ACKNOWLEDGEMENT OF RESPONSIBILITIES

This section must be fully completed and signed by all Officers/Committee Members/Appointments.

Where an Officer/Committee Member/Appointment is elected/appointed during the year the declaration must be read and agreed by them. This action must be minuted at their first meeting.

By signing below I acknowledge my responsibility as Group Officer/Committee Member and agree to follow in every respect the duties and responsibilities as contained in the Royal Charter and the Membership Handbook and as required by the Board of Trustees, the Membership Council and the Charity Act. I have never worn medals I am not entitled to, nor falsely claimed to have been a member of Armed Forces nor lied about my Service. I will be vigilant in serving the interests of the Royal British Legion at all times. I will adhere to the data protection rules outlined in GDPR policy.

The contact details you have provided on the form will be used for communications between County/District Officers and Committee Members, and for communications from RBL staff relevant to your role via the rbl.community email addresses. These contact details may be shared with individuals within RBL, including members, who need to contact you in relation to membership matters. We would like to ensure that your contact details are accurate and up-to-date and would ask that you inform your MEO if there are any changes.

SAFEGUARDING SELF DECLARATION

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I will inform RBL of any changes in my circumstances which would affect the veracity of this declaration.

SECTION 3 – GROUP COMMITTEE OFFICERS AND APPOINTMENTS

CHAIR

MEMBERSHIP NUMBER		
NAME		
TELEPHONE		
EMAIL (Personal)		
EMAIL (RBL.Community)		
Name:	Signature:	Date:

SECRETARY		
MEMBERSHIP NUMBER		
NAME		
TELEPHONE		
EMAIL (<i>Personal</i>)		
EMAIL (<i>RBL.Community</i>)		
Name:	Signature:	Date:
TREASURER (Optional unless group current account held)		
MEMBERSHIP NUMBER		
NAME		
TELEPHONE		
EMAIL (<i>Personal</i>)		
EMAIL (<i>RBL.Community</i>)		
Name:	Signature:	Date:
OFFICER		
MEMBERSHIP NUMBER		
NAME		
TELEPHONE		
EMAIL (<i>Personal</i>)		
EMAIL (<i>RBL.Community</i>)		
Name:	Signature:	Date:
OFFICER		
MEMBERSHIP NUMBER		
NAME		
TELEPHONE		
EMAIL (<i>Personal</i>)		
EMAIL (<i>RBL.Community</i>)		
Name:	Signature:	Date:

STANDARD BEARER		
MEMBERSHIP NUMBER		
NAME		
TELEPHONE		
EMAIL (<i>Personal</i>)		
EMAIL (<i>RBL.Community</i>)		
Name	Signature:	Date:

BANK SIGNATORIES		
Branch Chairs must ensure that the bank signatories are Branch Officers, one of which must be the Treasurer.		
1.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
2.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
3.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	
4.	NAME	
	MEMBERSHIP NUMBER	
	EMAIL ADDRESS	

MS5A BRANCH CLOSURE

To: The Membership Council via the Membership Compliance & Policy			DATE:		
COUNTY/DISTRICT/SECTION:					
1.	At a meeting of the County/District/Section Committee on				
	it was agreed to recommend: Closure of branch:				
	BRANCH CODE:	BR			
2.	The County Committee has explored other options but there is no prospect of maintaining this branch at its present status.				
	a. explored the option of CSB	YES		NO	
	b. explored the option of AMALGAMATION	YES		NO	
3.	The County Recruiting Officer (CRO) attempted to revive the branch		YES		NO
4.	The branch Minutes are attached to confirm the branch's wish to proceed with closure		YES		NO
5.	The reasons for closure are:				
6.	Number of members in branch:				
7.	Arrangements have been made for remaining branch members to transfer to:				
	BRANCH CODE:	BR			
8.	The branch has a RBL Club relationship.		YES		NO
	The Club will now be affiliated to the branch:				
	BRANCH CODE: (for administration purposes)	BR			
9.	Branch is not subject to any investigation:				
10.	Following confirmation of branch closure by the Membership Council, the branch Standard should be:				
	a. Laid up in accordance with current procedure in the Ceremonial Handbook OR	YES		NO	
	b. Passed to the County/District Committee for use by the County/District Parade Marshal for safekeeping or training	YES		NO	

11.	The following arrangements have been made for the continuation of the Poppy Appeal:					
12.	FINANCE			ASSET TOTAL:		
	BANK ACCOUNT(S):	£	BFI ACCOUNT:		£	
	Assets have been transferred to:					
	Head Office:		YES		NO	
	County:		YES		NO	
	Poppy Appeal:					
	Not Transferred/Other <i>(please provide reason and last known location as well as any evidence of chasing the remaining funds)</i> :					
	Restricted/Ring-fenced Funds <i>(Please detail below)</i> :					
	Is there a Branch Property Trust?		YES		NO	
	Bank Statements Attached		YES		NO	
	Point of contact relating to Finance during closure <i>(only)</i> :					
	UNSPENT BRANCH LEGACY TRUST		ASSET TOTAL:			
SGM DATE:						
SUMMARY OF DECISION TAKEN:						
SOP163 COMPLETED & SUBMITTED		YES ☐	NO ☐	DATE SUBMITTED:		

13.	ADDITIONAL COMMENTS: <i>(please note: this section should be used for any narrative to add to the previous page such as: why CSB or AMALGAMATION option wasn't suitable, if funds are still remaining, were all the letters sent to officers and banks).</i>				
	a. MEO notified audit team of closure	YES		NO	

	Signature:	Name:
COUNTY CHAIR		
MEMBERSHIP ENGAGEMENT OFFICER		
MEMBERSHIP COUNCIL REP		

MS5C BRANCH AMALGAMATION

To: The Membership Council Secretary		DATE:	
COUNTY:			
AMALGAMATION			
1.	At a meeting of the County Committee on it was agreed to recommend the Amalgamation of: Branch with: Branch	DATE:	
		BRANCH CODE:	BR
		BRANCH CODE:	BR
2.	The County Committee has explored other options but there is no prospect of maintaining this branch at its present status.		
3.	The County Recruiting Officer (CRO) attempted to revive the branch.	YES	NO
4.	The branch Minutes are attached to confirm the branch(es) wish to proceed.	YES	NO
5.	The County has received a request for the name change of the Amalgamated branch. The Amalgamated branch will be called:	YES	NO
6.	The reasons for Amalgamation is:		
7.	Number of members in branch now (<i>members/Life members</i>):		
8.	The branch has a RBL Club relationship: The Club will now be affiliated to this branch for administration purposes:	YES	NO
9.	The branch Standard is to be laid up in:		
10.	The following arrangements have been made for the continuation of the Poppy Appeal:		

	FINANCE		ASSET TOTAL:		
	UNSPENT BRANCH LEGACY TRUST (BR_____)		ASSET TOTAL:		
	UNSPENT BRANCH LEGACY TRUST (BR_____)		ASSET TOTAL:		
	Restricted/Ring-fenced Funds <i>(please detail below)</i> :				
	Assets have been transferred to:				
	Head Office		Amalgamated branch		
	Poppy Appeal		Branch Property Trust		
	Not Transferred/Other <i>(please provide reason and last known location)</i>				
Bank Statements Attached		YES		NO	
11.	Additional Comments:				

	Signature:	Name:
COUNTY CHAIR		
MEMBERSHIP ENGAGEMENT OFFICER		

MS5D CHANGE OF BRANCH NAME

To: The Membership Council Secretary		DATE:	
COUNTY:			
BRANCH NAME CHANGE			
1.	At a meeting of the County Committee on	DATE:	
	it was agreed to recommend the		
	Branch	BRANCH CODE:	BR
	is renamed to:		
	Branch		
2.	The branch Minutes are attached to confirm the branch wishes to proceed	YES	NO
3.	Additional comments:		

	Signature:	Name:
COUNTY CHAIR		
MEMBERSHIP ENGAGEMENT OFFICER		

MS9 BRANCH FORMATION

THE ROYAL BRITISH LEGION FORMATION OF A BRANCH

We request that the following branch be registered with The Royal British Legion:

BRANCH CODE:
(to be allocated by
Head Office)

BR

At a meeting of members of The Royal British Legion held at:

DAY:

MONTH:

YEAR:

the following resolution was adopted:

RESOLVED

“That this meeting hereby accepts the Objects of the Royal Charter of The Royal British Legion and formally establishes a branch. The branch will adhere to the Royal Charter, the Membership Handbook and all policies and procedures relevant to the formation.”

Minutes of the Meeting are attached

BRANCH OFFICERS WERE ELECTED AS FOLLOWS:

CHAIR

VICE CHAIR (Optional)

TREASURER

SECRETARY

HEADQUARTERS OF BRANCH

ADDRESS (for correspondence)

PHONE NUMBER

EMAIL

SECRETARY

Signature:

Name:

Note: the completed form should be sent to the MEO.

BALLOT PAPER ELECTION OF THE COUNTY CHAIR

Candidates are listed in alphabetical order.

Please mark a cross against the name of your branch's preferred candidate.

Should more than one candidate have a mark against their name, the ballot paper will not be included in the ballot and will be considered a spoilt paper.

Candidate's Name:		Preference (X)
BRANCH NAME:		
CHAIR	Signature*:	Date:

**Where the branch's Chair is standing, the Vice Chair, or in their absence, a Committee member, will sign.*

The Completed Ballot Paper must reach:

INSTRUCTIONS FOR ELECTIONS BY THE FOR CHAIR OF THE COUNTY COMMITTEE

Within the timescale, the Branch Secretary must place the ballot paper and candidates CVs before the meeting of the branch.

The branch meeting will decide on its preference and mark the ballot paper with a cross against the name of the preferred candidate. Should more than one candidate have a mark against their name, the ballot paper will not be included in the ballot but will be considered a spoilt paper.

The Branch Secretary will record the decisions in the minutes of the meeting.

The Branch Chair will sign the completed ballot paper and place and seal it in the appropriate envelope provided. The sealed flap of the envelope is to be signed by two Branch Officers.

The envelope is then to be placed in the pre-addressed envelope provided by Head Office. Ballots should be sent to Haig House. Ballots must be received by 5pm on the second Monday in December.

The Area Manager will appoint two disinterested individuals to act as Scrutineers for the vote count.

To be elected as the new County Chair a candidate must have received a simple majority of the votes cast.

VOLUNTEER EXPENSE CLAIM FORM

Please complete all sections fully, legibly and accurately, attaching receipts where relevant. See overleaf for explanatory notes. We aim to pay your expense claim within 4-6 weeks of receipt; payment may be delayed if there is missing or incomplete information.

NAME:		PAO REF./VOLUNTEER NO. (if applicable)	
ROLE:			
ADDRESS (incl. postcode):			
EMAIL (for remittance advice)			
PHONE NUMBER			
BANK ACCOUNT NAME			
SORT CODE:		ACCOUNT NO:	
COURSE DETAILS			
COURSE TITLE			
COURSE LOCATION			
COURSE DATE			
DATE	DETAILS OF EXPENDITURE (See examples overleaf. Include CMS Case ref no. where relevant but do NOT include beneficiary personal details)	AMOUNT	
TOTAL	Total Note: for additional claims please attach a separate sheet		

I understand that the information I have provided will be used only for the purpose of reimbursing out-of-pocket expenses, in accordance with RBL policy and procedures. I certify that the above details are true and accurate and that I incurred the expenses wholly, necessarily and exclusively whilst engaged on official RBL business. Where claiming mileage for use of my vehicle, I confirm that I have a valid driver's licence, road tax, MOT and insurance which covers business use.			
CLAIMANT		Signature:	Date:
MEMBERSHIP DEPT USE: I confirm that I have checked this claim for accuracy in accordance with the RBL expenses policy and that all relevant receipts are attached. APPROVED BY:			
Name:		Signature:	Date:
Position:			
UNIT CODE:	4271-D010-	ACTIVITY CODE:	422000 Volunteer Expenses
Please return to: Membership, The Royal British Legion, Haig House, 199 Borough High Street, London, SE1 1AA			
ELIGIBLE EXPENSES			
This form applies to all unpaid volunteers, including members carrying out activities on the RBL's behalf. Please see the table below for guidance on what can be claimed. Expenses will only be reimbursed if they comply with the principles and procedure set out below.			
Travel – Public Transport	We will only reimburse 2nd class rail travel Taxis are only reimbursed in certain circumstances (for reasons of personal safety, needing to carry heavy items, where public transport is more expensive or not available or where you have a registered disability).		
Travel – Driving (Please specify number of miles in Details of Expenditure)	Cars	45p per mile for first 10,000 miles, 25p thereafter	
	Motorcycle	24p per mile	
	Bicycle	20p per mile	
	Car parking fees/tolls	As charged	
Accommodation	Hotel accommodation is booked centrally. Your course joining instructions include information about accommodation if the course is residential and provide a contact for booking requests if you feel overnight accommodation is required. Please give as much notice as possible, but even on the day of requirement a booking is possible, should an emergency occur. Accordingly accommodation costs will not be repaid if incurred outside these instructions.		
Subsistence (meals)	Breakfast (if leaving before 6.30am or not provided by hotel)	Up to £8	
	Lunch	Up to £10	
	Evening meal (when working after 8pm)	Up to £18	
	Evening meal (when taken in hotel and not included in accommodation price)	Up to £28	
Notes: 1. Attach all original itemised receipts. Where this isn't possible, please provide an explanation. 2. Expense claims must be submitted within three months from the date when the expenditure was incurred, unless there are exceptional circumstances, e.g. illness. 3. There is the option to waive your claim or claim less than the maximum rates above. This would be appreciated. 4. Both the claimant and authoriser must ensure that claims comply with the RBL's policy, SOP42 'Staff, Volunteers and Trustees' Expenses.			

		COUNTY BYELAWS
As authorised by the Membership Council		
APPROVED		
CHAIR OF THE MEMBERSHIP COUNCIL	Signature:	Date:
The following County byelaws are supplementary to The Royal Charter of Incorporation and Schedules of The Royal British Legion hereafter known as “the Royal Charter” and procedures as laid-down in the Membership Handbook. They shall be binding on all Groups and branches within the RBL County of:		
After being passed by a two-thirds majority of those delegates present and qualified to vote on the appropriate motion at the previous Annual Meeting of the County Conference, all alterations and amendments to these byelaws shall be submitted to, and approved by the Membership Council on behalf of the Board of Trustees, before they may be implemented.		
1.	County name and number:	
2.	County meeting place, frequency and timings of meetings:	
3.	County Committee appointments:	
4.	County sub-Committees and their Terms of Reference:	
5.	Groups within the County (<i>only to be included by Counties which have a Group structure</i>):	
To assist the County Committee in the management of the County, and in compliance with the Royal Charter, branches are placed into the following Groups for administrative purposes:		
Group List branches:		
Group List branches:		
Group List branches:		
Group List branches:		
Group List branches:		

		DISTRICT BYELAWS
As authorised by the Membership Council		
APPROVED		
CHAIR OF THE MEMBERSHIP COUNCIL	Signature:	Date:
The following Overseas District byelaws are supplementary to The Royal Charter of Incorporation and Schedules of The Royal British Legion hereafter known as “the Royal Charter” and procedures as laid-down in the Membership Handbook. They shall be binding on all Groups and branches within the RBL Overseas District of:		
After being passed by a two-thirds majority of those delegates present and qualified to vote on the appropriate motion at the previous Annual Meeting of the Overseas District Conference, all alterations and amendments to these byelaws shall be submitted to, and approved by the Membership Council on behalf of the Board of Trustees, before they may be implemented.		
1.	District name and number:	
2.	District meeting place, frequency and timings of meetings:	
3.	District Committee by function and appointments:	
4.	District sub-Committees and their Terms of Reference:	
5.	Groups within the District <i>(only to be included by Overseas Districts which have a Group structure)</i> :	
To assist the District Committee in the management of the District, and in compliance with the Royal Charter, branches are placed into the following Groups for administrative purposes:		
Group List branches:		
Group List branches:		
Group List branches:		
Group List branches:		
Group List branches:		

SOP 163 APPENDIX A APPLICATION FORM

REQUEST A PAYMENT FROM A BRANCH LEGACY TRUST			
TRUST DETAILS			
1.	NAME OF TRUST		
2.	TRUST CODE	(if known i.e. LXXX)	
3.	Branch/County/District Details (include BR code if applicable):		BR
4.	Amount requested	£	
5.	Purpose of request:		
6.	Charitable Object to be met and why this is an effective use of charitable funds:		
7.	Confirmation of who will benefit (Beneficiaries/Members/Public or other):		
8.	Where should funds be paid to (please tick)	Branch BFI	
		Branch Bank Account	
		County/District Bank Account	
		Account Name	
		Account Number	
		Sort Code	

9.	Application details:		
10.	Application completed by		
	Position		
	Signature:		Date:
COUNTY CHAIR CONFIRMATION			
NAME OF COUNTY CHAIR:			
Comments on application:			
Signature:			Date:
HEAD OFFICE PROCESSING			
Confirmation Objective will be met			
Decision			
Name of deciding officer			
Position			
Signature:			Date:
Following Approval the Branch Account team will process payment which will be approved by the Chief Finance Officer or Director of Finance in line with SOP 146: Financial Delegations of Authority.			

SOP 163 APPENDIX B APPLICATION FORM

APPEAL A LEGACY TRUST ACCOUNT DECISION			
1.	NAME OF TRUST		
	TRUST CODE		
2.	Branch Details (include BR code):	BR	
3.	Amount requested	£	
4.	Purpose of original request:		
5.	Date of original request submission:		
APPEAL DETAILS			
6.	Appeal Reason/Response to original decision:		
7.	APPEAL COMPLETED BY		
	POSITION		
	Signature:		Date:
HEAD OFFICE PROCESSING			
Appeal Decision by Director			
NAME OF DECIDING OFFICER			
POSITION			
Signature:			Date:
Following Approval the Branch Account team will process payment which will be approved by the Chief Finance Officer or Director of Finance in line with SOP 146: Financial Delegations of Authority.			

1. INTRODUCTION AND BACKGROUND

In this box describe what the County has achieved in the past year and how you now need to amend the Plan to take your County forward whilst fitting in with the policies and procedures and the general direction of the Royal British Legion. Describe any major changes that took place and how they have impacted on your delivery.

2.i COMMUNITY ENGAGEMENT

In this box describe how your County will deliver community engagement in the next three years and how this fits in with national initiatives.

OBJECTIVE	TARGET DATE	RESPONSIBILITY	KPIs (Key Performance Indicators)	BUDGET ESTIMATE
WHAT do you want to achieve?	WHEN do you want to achieve this?	WHO is going to achieve this?	HOW will you measure whether you have achieved the objective?	HOW MUCH will it cost you to achieve this?
				Cost impact: positive or negative?

2.ii FUNDRAISING

In this box describe the work that your County undertakes to increase fundraising support and income.

OBJECTIVE	TARGET DATE	RESPONSIBILITY	KPIs (<i>Key Performance Indicators</i>)	BUDGET ESTIMATE
WHAT do you want to achieve?	WHEN do you want to achieve this?	WHO is going to achieve this?	HOW will you measure whether you have achieved the objective?	HOW MUCH will it cost you to achieve this? Cost impact: positive or negative?

2.iii REMEMBRANCE

In this box describe which Remembrance and Ceremonial events you organise throughout the year and what you hope to achieve with this.

OBJECTIVE	TARGET DATE	RESPONSIBILITY	KPIs (<i>Key Performance Indicators</i>)	BUDGET ESTIMATE
WHAT do you want to achieve?	WHEN do you want to achieve this?	WHO is going to achieve this?	HOW will you measure whether you have achieved the objective?	HOW MUCH will it cost you to achieve this? Cost impact: positive or negative?

2.iv MEMBERSHIP, RECRUITMENT AND EVENTS

In this box describe how you want to develop membership in your County and what events you will need to organise to achieve this. Keep in mind National policies on Direct Debit subscriptions, Gift Aid, etc.

OBJECTIVE	TARGET DATE	RESPONSIBILITY	KPIs (<i>Key Performance Indicators</i>)	BUDGET ESTIMATE
WHAT do you want to achieve?	WHEN do you want to achieve this?	WHO is going to achieve this?	HOW will you measure whether you have achieved the objective?	HOW MUCH will it cost you to achieve this?
				Cost impact: positive or negative?

SCHEDULED YOUTH ACTIVITIES AND ENGAGEMENT WITH YOUTH ORGANISATIONS				
OBJECTIVE	TARGET DATE	RESPONSIBILITY	KPIs (<i>Key Performance Indicators</i>)	BUDGET ESTIMATE
WHAT do you want to achieve?	WHEN do you want to achieve this?	WHO is going to achieve this?	HOW will you measure whether you have achieved the objective?	HOW MUCH will it cost you to achieve this?
				Cost impact: positive or negative?

2.v TRAINING

In this box describe what training you want to organise for your County and Branch Officers, Committee members and branch members.

OBJECTIVE	TARGET DATE	RESPONSIBILITY	KPIs (<i>Key Performance Indicators</i>)	BUDGET ESTIMATE
WHAT do you want to achieve?	WHEN do you want to achieve this?	WHO is going to achieve this?	HOW will you measure whether you have achieved the objective?	HOW MUCH will it cost you to achieve this? Cost impact: positive or negative?

2.vi ADMINISTRATION AND FINANCE				
In this box, describe which administrative changes you wish to make, in addition to maintaining established key returns and reports. Keep in mind National initiatives like the Branch Funds Initiative.				
OBJECTIVE	TARGET DATE	RESPONSIBILITY	KPIs (Key Performance Indicators)	BUDGET ESTIMATE
WHAT do you want to achieve?	WHEN do you want to achieve this?	WHO is going to achieve this?	HOW will you measure whether you have achieved the objective?	HOW MUCH will it cost you to achieve this?
				Cost impact: positive or negative?

DRAFT GROUP MODEL RULES

FOR GROUP OFFICERS, REPRESENTATIVES AND MEMBERS

Each branch in the Group (list branches by name) is entitled to send as many members as they wish to Group meetings.

Each branch is to provide an official Branch Representative, authorised to take appropriate decisions, within the remit of the Group, on behalf of the branch; otherwise the representative is to refer to their own Branch Committee all matters requiring consultation. The Branch Representative elected to the Group Committee is to provide information and reports required by the Group.

It is for each branch to determine how their representative is provided (by election/voting, nomination by Branch Committee) and to determine who is eligible to be nominated (Branch Officer, Branch Committee member or branch member).

Only the nominated Branch Representatives are authorised to vote at Group meetings, irrespective of the number or standing of any other branch member(s) present at the time. Only one voting member per branch is permitted. Normally a Branch Representative is brought onto the Group Committee at the Group AGM. It is recognised that branches need continuity of representation and change may be necessary outside the normal routine. The branch is to notify the Group Chair when there is a change to the nominated representative.

There are to be two Group Officers, the Chair, and the Secretary. If the Group is to hold an Account then a Treasurer must be appointed. If the Group has a Standard then a Group Standard Bearer is required. The Group is entitled to appoint and send Group Representative(s) to the County Committee in accordance with the County direction in force at the time. The Group Representative(s) will be nominated and named at the Annual Meeting of County Conference and considered elected to the County Committee. Should it be necessary to change Group Representatives between the Annual Meetings

of County Conference, the Group will inform the County Chair/MEO of the change. The new Group Representative will be formally co-opted at the next available County Committee meeting and have voting rights from that point forward.

The Group Chair is to run all Group meetings. The Group will elect its Group Representative to take their place on the County Committee. The Representative can be any branch member from within the Group. The Group Representative must be willing to take full part in County Committee business; to positively participate in discussion and activity; and to be a member of County sub-Committees as appointed. If the County rules in force at the time allow more than one Group representative, the additional Representative(s) is/are to be elected by the Group at its AGM. If a Group is permitted more than one Representative under the County rules in force at the time and cannot, or does not wish to, provide more than one Group representative to the County Committee then that Group will so inform the County Chair/MEO prior to the Annual Meeting of County Conference. The Group Representative position released by a Group will be filled at the Annual Meeting of County Conference by electing, from the floor at the conference, an individual member who is formally proposed and seconded to the vacant position. Anyone so elected is not required to represent the Group whose position they fill. Once elected, the individual will hold the position for the period of election, after which the Group may choose to fill it themselves or continue to release the position.

If it is necessary for the Group Committee to vote on any proposal then this will follow the voting rules laid down within the Membership Handbook (MH). As there are no specific rules for Group voting, the Group will follow the rules for branch voting as the Group is made up of elected branch members.

The Group Representative(s) to the County Committee is/are to provide a written record of action or major information points to branch Representatives of the Group following the County Committee meeting. This is to be concise, distributed as soon as possible after the meeting but not more than 14 calendar days, and is not to be seen to replicate or replace the County's official record of the meeting. It is for Branch Representatives to distribute the notes within their branches according to their Branch Committee requirements.

The responsibilities of the Group Officers are to be found in the MH. There is no County requirement for a Group to have a Group President. The role of the Group is communication.

Management of Group Finances is covered in the MH. There is no requirement for a Group to hold a Branch Funds Initiative (BFI) Account but some Groups may need to hold an Account, to cover administration costs, which is limited to £250 and they will be required to submit an annual account for audit. The County Committee are responsible for authorising a Group to hold an Account. The expenditure is limited to those items allowed under the current RBL regulations. Income can be raised in the form of branch subscriptions. Groups should consider raising branch subscriptions that enable the Group to conduct its business.

This should meet the requirements of the MH by ensuring the Group raises its funds at a fixed rate and manages its business without generating any excessive funds. A Group may fundraise for a specific purpose and accept donations.

It is for branches to correctly record their subscriptions to the Group in their financial records. These are normally in the form of expenses only.

The Secretary is to record and distribute action points made at Group meetings.

Branches are to provide concise written notes on points that they wish raised at the next County Committee meeting to ensure accuracy of their intent. The Group Representative(s) will then have all points to take forward to the next County meeting.

The Group Secretary is to issue an agenda no less than seven calendar days prior to a previously arranged Group meeting. Any branch wishing to add an agenda point must do so through their elected representative to the Group Secretary prior to the issue of the agenda.

The Group meeting agenda will follow a set format, as will the Group AGM.

A quorum will consist of (group to insert number) Branch Representatives.
Group Officers and Representatives shall be elected for a (two or three year appointment – Group is to decide, but a one year appointment is not recommended), which is to coincide with the County Committee calendar. For continuity, Group Officer and Representative appointments should be staggered so that the Chair and Secretary and any other Group Representative to the County Committee do not change in the same year.

A voting system of a simple majority of those present and authorised to vote will be used.

Group Representatives may become full members of the County Committee at the Annual Meeting of County Conference if the County so decides.

The Group meets at the same intervals as the County Committee meeting (currently quarterly). The Group meets in advance of the County meeting in order that Branch Representatives can provide the Group with a report on activities over the past period, a forward plan of activities for the next 12 months (where known), and raise in writing any issues that the Group needs to bring to County attention.

These rules can be changed at any Group meeting by a simple majority of those authorised to vote, provided that the proposed change is submitted in writing to the Secretary in good time for the Secretary to distribute the proposed changes one month (31 calendar days) prior to the next Group meeting. This is to ensure that each branch has a chance to review the proposed changes at a regular branch meeting prior to the next Group meeting. Guidance is to be sought from the County Committee to ensure that there are no breaches of County rules/regulations and the County Committee agree to the proposed changes.

	Signature:	Name:
COUNTY CHAIR		
MEMBERSHIP ENGAGEMENT OFFICER		

BRANCH NOMINATION FOR COUNTY CHAIR

To:	[Membership Engagement Officer]									
We certify that:										
was nominated for the election of:	COUNTY/DISTRICT									
FOR COMPLETION BY THE NOMINEE <i>(Please use tick box as appropriate)</i>										
- I do not have any unspent conviction for an offence involving dishonesty or deception - I am not an undischarged bankrupt - I have not been disqualified as a company director under the Company Directors Disqualification Act 1986 - I have not been removed from trusteeship of charity by a Court of Law or the Charity Commission - There are no medical reasons preventing me from fulfilling the duties of County/District Chair										
	I accept the above Nomination and certify that all the above statements are true.									
Signature of Nominee:	Date:									
MEMBERSHIP NUMBER:										
FOR COMPLETION BY THE BRANCH <i>(Please use tick box as appropriate)</i>										
	A CV and a passport-sized photograph of the nominee are enclosed.									
	Evidence of current membership has been seen and verified.									
	Branch Accounts and MS1 have been submitted.									
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 30%;"></th> <th style="width: 35%;">Signature:</th> <th style="width: 35%;">Date:</th> </tr> <tr> <td style="padding: 5px;">CHAIR</td> <td></td> <td></td> </tr> <tr> <td style="padding: 5px;">SECRETARY</td> <td></td> <td></td> </tr> </table>		Signature:	Date:	CHAIR			SECRETARY		
	Signature:	Date:								
CHAIR										
SECRETARY										
CONTACT DETAILS FOR BRANCH CORRESPONDENCE										
NAME:										
EMAIL:										
PHONE NUMBER:										
ADDRESS:										
FOR OFFICE USE ONLY										
Date of Receipt:	Signature of MEO:									
Comments:										