**Introduction**

This document is a summary of the bulletin provided to the Board of Trustees in October. It provides an overview of activities and developments taking place across the Legion since July 2013 and encompasses the four pillars of our mission, fundraising and other key supporting services.

Going forward, it is intended that this summary be circulated to the Membership Council, County Chairs and all Legion staff shortly after the issue of each Board of Trustee bulletin. The information is not designed to replace existing formal reporting processes, but aims to provide general context and consistency about the Legion’s activities across all of our internal audiences.

If you have any questions about this bulletin, please contact Sarah Odams, Internal Communication & Engagement Officer, sodams@britishlegion.org.uk, 020 3465 9354.

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Project teams have been working at full stretch, to reach the point when all teams have transferred fully to the new ways of working, our Area public phone lines have switched to the Contact Centre, the Contact Centre is operating a 7 day, 8am – 8pm service and the new national Freephone number is ready to go live. This goal is in sight for completion by the end of October with a full promotional campaign and formal launch to kick in post Poppy Appeal.

**Staff and training:**

* 75 out of 78 vacancies at Area and Regional office level have now been filled – with the remaining 3 posts likely to be in place by the end of November.
* The main tranche of Case Officer (CO) and AIO (Advice & Information Officer) training across all three regions is now complete.
* Training for the specialist teams has now also been carried out. The regionally-based “train the trainer” courses also took place during July and August, which means that all future CO and AIO training can be carried out at local Area level by the Advice & Information Team Leaders (AITLs).
* Lone working and safeguarding policies have been signed off .

**Volunteers and training:**

* The role specifications for all welfare-related volunteering roles have now been finalised.
* A full list of all Legion volunteering roles is available in a new introductory leaflet which will be launched and distributed shortly. A copy will be made available to download from the Legion’s website.
* As part of a pilot scheme active CMS trained Caseworkers are the first to be offered the chance to transfer over to the new enhanced Caseworker role. The training is being carried out by local Advice and Information Team Leaders (AITLs).

**Contact Centre Operation:**

* Over 18,000 calls, letters and emails (combined) have been recorded by the Contact Centre since going live in early May.
* A dedicated team of 12 operators is now trained and in place to handle all incoming calls and correspondence.
* 8am – 8pm trial running has been under way on a Mon-Fri basis since July.

**Area offices:**

* Transition plans are now developed for all Area teams as they prepare to become fully operational in the new ways of working. Detailed coordination planning is under way to ensure that the telephone switchover for each of the Area teams is achieved with minimum disruption and confusion. This includes making sure that there is visibility and access to the Area team and County Secretary’s direct contact numbers for internal staff and key membership contacts as appropriate but these direct lines will not be promulgated more widely. Internal directories will be updated accordingly and should be a first point of reference.
* The switchover is taking place on Wednesdays over a 6 week period between 11 September and 23 October. The fit-out for the new Area Advice and Information Centres in Liverpool and Leeds has just been completed and the offices are now being made ready for staff occupation.

**Promotional activity:**

* Executive summaries of all Area plans are being produced to be made available on the Legion website.
* Updated versions of *About the Legion* and *Legion Support Services* printed literature are currently in development - along with a revised publications catalogue to guide on the range of corporate literature available for use as appropriate.
* On a national level, a campaign to herald the launch of the Freephone number is also in development. And in tandem with this, the digital team will introduce design and navigational improvements to the Home page of our website in order to showcase the Knowledge Base portal, and to make it more visible and accessible to new or infrequent users. These changes will be entirely compatible and complementary to other improvements currently under way across all pillars of activity on the website.

**2 Welfare**

**Defence Recovery Programme**

* Attendance of the multi-activity course now stands at around 90%. In July and August three courses were run - two of these were mountain bike courses and one a rock climbing course. These were well attended and proved hugely successful.
* The official opening of the Personnel Recovery Centre (Catterick) took place on 17 September. This is the last of the five PRCs to be completed.

**Grants**

* The Central Grants Team is now turning around all new applications received since August within 48 hours. The Team has also been asked to process over 900 old cases waiting to be processed in county offices to help ease the backlog of cases.
* More than 19,000 Immediate Needs Grants (ING) totalling approximately £9million have been awarded in the current year. It is estimated that, by the end of 2013, this will reach 22,000 grants totalling £11 million. (Note that the increase in year-end target figures in the previous report did not include ‘crisis’ grant categories.)
* The CivvyStreet website is once again fully operational with several system security improvements in place. So far this year, 200 employers have registered on the site to promote job vacancies, 600 beneficiaries completed online learning courses and more than 6,000 individuals have registered on the CivvyStreet website.
* Be the Boss has facilitated mentoring for more than 150 entrepreneurs this year and a total of 117 received funding. Applicants on our waiting list for loans have been offered access to the Start Up Loan Company providers.

**Break Services**

* Break Centre family holidays have now finished for the summer with 2013 being the most successful year in terms of numbers and positive feedback. The service will now provide themed family breaks during half term holidays (ie: Halloween and Easter).
* Byng House and the Cheshire & Merseyside Area team have recently started a pilot scheme in which the break centre will host welfare clinics for local beneficiaries and guests. The clinics will provide support and advice on any relevant issues beneficiaries may have. If successful, the service will be extended to all Break Centres.
* Our Poppy Appeal supporters ‘Union J’ recently visited an Adventure Break, and were warmly welcomed by the children. The visit was televised on BBC Newsround and provided much welcome positive publicity for the service.
* The Family Holiday service has been awarded £921,850 in Armed Forces Covenant (LIBOR) funding for 2013/14.

**Information, Advice and Guidance Services:**

* Over the past few months, the Legion has been engaged in negotiations with Advice UK – the preferred bidder for the new BMA service -  but negotiations have folded. We are now examining options for the immediate continuation of the service.
* The in-house BMA team advised 90 new clients in the month of August. This Service is currently providing personalised, ongoing support to 297 beneficiaries across three regions as well as providing practical support to Area Offices and their new teams.
* All members of the Independent Living Advice (ILA) Team are on track to exceed their yearly targets. There has been a rise in referrals from beneficiaries seeking ILA representation at statutory disablement benefit appeals, which is continuing in line with the government’s thinking on welfare change and the impact this is having on disabled people in general.

**3 Remembrance**

* The Board of Trustees held its annual away day at the NMA in September, receiving a presentation on the NMA and a site tour. Trustees were updated on the proposed building project, changes to external project management personnel and a likely recommendation, supported by the full design and consultant team, to re-tender the project on the basis of a single-stage competitive tender.
* A new RBL “Never Forget” memorial with Everlasting Poppies was dedicated in September, receiving widespread national media coverage.
* The new post of Head of Heritage and Learning at the NMA was filled in August by Aysha Afridi; this post will be funded by the Heritage Lottery Fund.

**Remembrance -Centenary**

* The Greenhithe Branch’s Real Poppy Campaign has been adopted nationally as the Centenary Poppy Campaign and will be rolled out shortly in partnership with retailer B&Q.
* An agreement in principle has been reached with The Woodland Trust to create a 1,000 acre, 1 million tree Centenary Remembrance Wood in England in partnership with the Legion; similar smaller woods are to be created also in Wales and Scotland. Further details are to be decided.
* An agreement in principle reached with Fields in Trust to partner with the Legion in Centenary Fields. The project will identify and secure, through the Trust, several hundred playing fields and green spaces set aside around war memorials across the UK. There is the potential for involvement of Membership in identifying and securing the fields. Further details to be decided.
* An expression of interest has been received from the Tower of London to partner with the Legion in the installation of 800,000 ceramic poppies in the Tower Moat during the Centenary. Further details to be decided.
* Planning is well under way for D-Day 70 in Normandy. Initial meetings have been held at the MoD and as this will be the last major anniversary which many Normandy Veterans will be able to attend, there will be a high profile series of events.

**4 Representation – Public Affairs and Public Policy**

**Lobbying Bill:**

* The Legion has been a leading force in ongoing efforts to improve the Government’s *Transparency of Lobbying, Non-party Campaigning and Trade Union Administration Bill 2013-14.* The Bill threatens to curtail the ability of charities and other non-party campaigners to lobby central Government in the year preceding an election. An [opinion piece](http://www.telegraph.co.uk/news/politics/10282641/Lobbying-Bill-Why-asking-politicians-to-back-our-troops-could-be-stopped-under-this-sloppy-law.html) was published in the Daily Telegraph on 3 September outlining the Legion’s objections. The Director General is also working with the National Council for Voluntary Organisations to produce non-statutory guidance on lobbying and campaigning for charities.

**Legion survey of the Armed Forces community:**

* The purpose of this research programme is to provide further detailed and robust evidence on the size, profile and welfare needs of the Legion’s beneficiary group in the UK and their awareness of, experience of and attitude towards the Legion and its activities. This could inform and provide evidence for the organisation’s business performance evaluation, future strategic planning, marketing and campaigning. A tender process has been carried out and a preferred company has now been chosen. The project is being funded from savings in grants provided by the Department of Health.

**Community Covenants:**

* The updated *Best Practice Guide to Community Covenants* was launched at all three main party conferences. More than 360 councils have now signed a Community Covenant (out of 407) and we continue to push for the remainder to sign.

**Service Complaints Commissioner**:

* After behind the scenes pressure from the Legion, MoD Ministers have accepted that change must happen. We are awaiting the results of internal discussions within the MoD. It is hoped that improvements will be announced by Christmas.

**Parliamentary Engagement:**

* The series of region-based Parliamentary drop-ins for MPs has continued. In early September the Legion invited all London MPs to meet the London Area team and beneficiaries at a reception in Westminster. Over one third of London MPs attended, including Work and Pensions Secretary Iain Duncan Smith.

**Remembrance Parades:**

* The Director General has written to all Chief Constables and all Council Leaders, jointly with the President of the Association of Chief Police Officers and the Chair of the Local Government Association respectively, insisting that Remembrance parades should be policed without cost to the Legion. The vast majority of councils have responded positively and we continue to monitor the situation and to urge local parade organisers to contact us should they have problems in their area. The letters have been copied to County Chairmen, County Secretaries and the Membership Council.

**Strategic Health Partnership:**

* The Partnership has been preparing a Work Plan for the next year and will shortly be putting together a toolkit for Clinical Commissioning Groups on commissioning for the Armed Forces Community.

**Wales - £2m announcement:**

* In June the Housing Minister, Carl Sargeant, announced £2m of new funding to support the housing needs of the Armed Forces

1. **Comradeship**
* Returns from the Regions and the relevant Divisions are now being consolidated to create a National Events List (NEL) to encourage a cross departmental approach. Membership leaders were briefed at Staverton and individual stakeholder requirements will be identified prior to publishing the 2014 NEL on Sharepoint by the end of 2013.
* Currently under discussion with the Membership Council is the future use of the Mobile Display Unit (MDU). The trailer is looking tired in its presentation at Legion events and will require a refresh. Discussions are being held on the future of the MDU and whether we should invest more or simply sell the vehicle. Again the decision on this will be part of the budget paper coming to Trustees in October.
* The replacement of the PRO2000 Membership database by an upgraded version of the CARE system currently employed by Fundraising, will also provide support to the wider Comradeship strategy.
* Current membership statistics of interest are listed below:
* Membership 323,405
* Military membership 1,042
* Youth membership 486 (down from 639 in April)
* Youth affiliations 1,087
* Direct debit payers started to receive their 2013-14 cards from 30 August, with Overseas and Cash Payers cards being distributed by mid September. A trial using Facebook is being conducted to alert members that it is time to renew.
* The Complaint Procedure process has been updated and will be published shortly along with details of the Membership compliance audit process which has been developed in conjunction with the three Assistant Directors for Operations. Referrals from the Compliance Auditor to the LCC have increased which should improve the recovery rate for misused funds. The first digital Membership newsletter was published in late August and contains information about Membership Council activity, Head Office updates, an events calendar and coverage of Branch and County/District activities. Initial feedback has been positive.
* The Membership Council had an Away Day at the NMA in July and a meeting with the Conference Committee and Trustees in August to discuss Annual Conference 2014.
* Military Membership was launched on Facebook in late August and will go live on the ArmyNet in the Autumn. Increasing effort will go into promoting the benefits of Military membership into the Armed Forces.
* Head of Armed Forces Engagement (AFE) has now developed an effective working engagement with the outer office of all three Service Chiefs and this is currently providing valuable support to the London Poppy Day planning process.
* The AFE team has now completed briefings to The Royal Army Physical Training Corp (RAPTC) at all levels with a view to securing their support for activities in support of the Legion; the DG was recently a VIP guest at the unveiling of the RAPTC Memorial at the NMA.
1. **Fundraising**

**Events:**

* **Newmarket Raceday:** This is the first time we have been allowed to hold this as an annual, rather than a biennial, Raceday, and tickets sold out at the Gala Lunch, with just under 900 Legion members buying discounted tickets to attend on the day. The Racecourse has already agreed we can return on 9 August 2014.
* **Pedal to Paris:** This year’s P2P saw all cyclists arriving safely and 20 minutes early at the Arc de Triomphe, with many cyclists voting it the most successful so far. It will raise around £400k.
* **Exmoor 30:30:** 15 teams headed across the wet and freezing moors for 30 miles, in order to raise at least £30k. General Sir Mike Jackson attended the post-event celebrations, and was hugely complimentary about the Legion.
* **Christmas Celebration:** This event will continue to run for two nights this year – tickets are now on sale and going fast. A number of corporate organisations have already signed up for tables, and a high level of advertising support is being achieved.
* **Other Challenges:** The Events team are researching potential new challenges to add to our portfolio, and have already signed up for the Tough Guy challenge in January next year.

**Corporate Partnerships:**

* Income of £2.7m achieved to date versus a budget of £2.468m in 2012-13 – this is primarily due to the success of Coventry Building Society Poppy Bonds/ISAs, and of Warner Charity of the Year which has reached £100k versus their initial £30k target. Forthcoming activity includes:
* **B&Q** – are our national retail partner for the Centenary Poppy Campaign, which originated in the Greenhithe and Swanscombe Branch of the Legion. Packs of poppy seeds will be sold instore from October (and online in 2014) for £2 with a £1 donation to the charity, alongside in-store poppy sales and collections, and additional activities still under discussion.
* **Marks and Spencer –** a range of 5 products will be sold in store from mid October including two sizes of the new Buckley poppy brooch, cufflinks, a bracelet and a small pin, with 30% of the retail price being donated. Increased product quantities could mean over £400k for the charity, more than double the total raised last year
* **QVC –** will be selling the two sizes of Buckley poppy brooches via their TV sales channels in November
* **Jon Richards –** a new partner**,** the jewellery provider for Debenhams will be selling a Poppy ring through all stores and on their website, with us receiving 30% of the £12 RRP
* **Coventry Building Society –** will be launching a Poppy Bond again this Remembrance. Details are still to be confirmed and will only be released close to the launch date. A group of 12 staff will be attending a team building exercise at Battleback in November, helping to further engage staff across their business.
* **Sainsburys –** will be launcing a range of products to benefit the charity in October, including flower bouquets, bakery products, and a Jute shopping bag, with a minimum 10% donation of the RRP
* **Lyons Coffee –** will include a sample coffee bag with Legion News in October to incentivise sales, with a donation to the charity of 3p for every pack sold
* **National Express –** a new partner - they were one of the first companies to sign up to the Corporate Covenant, and will provide free travel for benefiaries to our Break Centres, and enable customers to make a donation to the charity whilst purchasing tickets via their webiste
* **Kleshna –** will again be selling a range of bespoke hand crafted poppy jewellery through the Poppy Shop, the Ideal Home shopping channel, online and through various independent retailers
* **Warner Leisure Hotels –** our Charity of the Year partnership in 2013 has reached £100k vs. their original target of £30k, and due to its success they have confirmed they are extending the partnership for another year until October 2014

**Direct Marketing**

* Never Forget mailing featuring case study Amanda Binnie was mailed out in mid August. Highlighting the introduction of a new Memorial at the NMA whereby supporters can arrange for a poppy to be planted with the name of a bereaved relative or friend.
* Never Forget website has been re-launched with new web provider, [www.neverforget.tributefunds.com](http://www.neverforget.tributefunds.com) offering a website for the bereaved to remember loved ones on-line and to offer a facility to fundraise on-line.

**Raffles & Poppy Lottery**

* Summer raffle was drawn on 30 August. Gross income was just over £1 million, slightly more than forecast.
* In July we finally reached the target of 120,000 players of the Poppy Lottery. Each player pays £52 per annum to take part in the scheme and this should generate in excess of £6.2 million over the next 12 months.

**Legacies**

* Legacy income for the months July and August generated a substantial £1,856k of benevolent income, a small increase on last year’s equivalent figure.

**Poppy Appeal**

* Latest figures for the 2012 Appeal stand at £36,541,839 and we surpassed the projected £36m with two weeks still to go.
* Distribution of 2013 Poppy Appeal stock is well under way with over 75% of orders already dispatched**.** New products have been well received as they have been taken round to the PAO seminars throughout the summer .
* Poppy production at Aylesford is being well managed and on target to meet the requirements of this year’s Appeal.
* Organisation for London Poppy Day has been well managed under the guidance of the new Coordinator Julia Armitage, and the aim to surpass £1m looks on course.

**Trading and Poppy Shop**

* New Poppy Shop product ranges have been developed and produced to retain existing customers and gain new customer audiences.  In the Autumn/Winter Poppy Shop Catalogue there will be 90 new Legion branded products on offer to customers.
* In March, the Poppy Shop had two branded clothing items for sale.  By the beginning of October, the Poppy Shop will be selling 39 branded clothing items. The clothing includes hooded tops, polo shirts, rugby shirts, t-shirts, running vests and cycling shirts.
* This new range of Poppy Shop merchandise is to be sold at key Legion events such as London Poppy Day, Festival of Remembrance in November and the British Military Tournament in December.
* Poppy shop income for this financial year is £2.26m. This is £420,000 higher compared to last year’s Poppy Shop income of £1.84million for the same period.

**Major Donors & Trusts**

* The Major Donors & Trusts department is currently ahead of its income budget, at £1.6 million for the year to date. Fundraising from Charitable Trusts is having a particularly good year, with £830k. Major Donors are not far behind on £668k. Major Donors & Trusts are confident they will meet their fundraising target for 2012/13.
* The MOD Libor Fund has awarded a grant of £921k in support of the Legion’s Family Breaks programme in 2013/14. **Please note that this information is confidential until a public announcement is made by the government, currently scheduled for early October**. Major Donors & Trusts hopes to submit 3 new applications for funding to the MOD Libor Fund during its next funding round in October.
1. **Marketing & Communications**
* A national competition to find members of a band comprising Armed Forces children has proved a great success, with more than 1,000 auditions received from as far away as Kuwait and Gibraltar. The result is a five-member band of Service children ages 10 to 16, called The Poppy Girls, who have recorded the official Poppy Appeal single *“The Call (No Need To Say Goodbye*) with musical accompaniment from the RAF Central Band. There is a full schedule of TV and radio promotion set to kick off on 23 October with appearances on *The* *One Show, BBC Breakfast, This Morning,* to name a few. The girls have signed to Decca Records for a Christmas album with 50p from the sale of every single going to the Legion, with a minimum guarantee of £20,000.
* The Poppy Appeal Launch will take place at RAF Northolt on Thursday 24 October with a free concert for 2,500 Armed Forces families. Artists confirmed include: The Saturdays, Union J, Tich and The Poppy Girls. More details to come.
* Trafalgar Square has been booked for Silence In The Square on Monday 11 November, with a simultaneous webcast available to viewers worldwide.
* The Director General appeared as the feature charity interview on BFBS British Forces News to discuss the work of the Legion, with additional interviews appearing on BFBS Radio stations BFBS1 and BFBS2. The link to the interview was carried on the front page of the Legion’s website for a number of weeks.
* The Poppy Appeal 2013 field pack containing key messages, sound bites, press release templates and a PA launch planning guide has been completed and distributed to CFRs, with wider circulation to follow.
* The new ‘*In support of*’ logo has been rolled out to allow the Legion to recognise altruistic supporters while protecting the charity’s official trademark. Extensive guidelines have been produced and presented to Fundraising and Armed Forces engagement staff.

***Sarah Odams***

***Internal Communication & Engagement Officer***

***October 2013***