ROYAL BRITISH LEGION

Y SERVICES BRANCH PLAN 2026 - 2029

1. INTRODUCTION AND BACKGROUND

1.1 This plan follows on from that agreed as a narrative format at the District Conference in 2025 and has been formatted into the standard layout provided in the Membership Handbook

1.2 The Y Services Branch Plan is agreed by its members at the AGM held in Loughborough on the 7 November 2026 and covers the three (3) years starting 7 November 2026, until the AGM in November 2029. It is the intention to increase membership whilst acknowledging membership is ever changing across the entire Legion, and to lead that change through embracing technology in the way that our Branch conduct business. Statistics as at January 2026 give an indicated total of Branch members of 431, down slightly from January 2025. This Branch intends to continue to set an example with its continued commitment to being MS1 compliant every year and achieving Gold Standard with the Beacon Branches checklists. We will continue to use O365 accts, electronic voting and attend regularly National Branches District meetings through our representative and support the District, as well as the wider RBL

2. OBJECTIVES

2.1 Community Support.
2.2 Fundraising
2.3 Remembrance and Ceremonial.
2.4 Membership, Recruiting and Legion Events.
2.5 Training and Continuous Professional Development.
2.6 Administration and Finance.

2.1 Community Support

As part of the National Branches District we are a countrywide Branch and, as a consequence, our members are at risk of inadvertent conflict with local Counties and Districts when dealing with community support cases which have been brought to our attention. Y Services Branch and its members will continue to improve "sign posting" to services by referring such cases either through our Branch Community Coordinator representative who will pass information to the Contact Centre, by direct report to the relevant operational point of contact as well as raising awareness in the communities.

Objective	Target date	Responsibility	Key Performance Indicator(s)	Budget estimate
2.1.1. The Y Services Branch will continue to update Members in relation to RBL welfare offering and monitor community events via BCC.	Ongoing	Branch Chairman Y BCC1	Update NBD with Y Services briefing at Annual NBD Conference. Update at Y Services AGM and publish the report to members.	*Nil*
2.1.2 Should the Branch become aware of community support cases, it will give the necessary advice and assistance.	Ongoing	Branch CC plus the Committee	BCC to report number of cases passed up to District and Contact Centre for processing at our AGM and our NBD rep to report at their AGM.	*Nil*

2.2 FUNDRAISING

All members of the Branch are to be encouraged to support their local "geographic" Branches where possible, to assist in collections at Remembrance tide, at National fund-raising events as well as Y Service Branch interest specific events where possible.

Objective	Target date	Responsibility	Key Performance Indicator(s)	Budget estimate
2.2.1 Y Service Branch members are encouraged to undertake appropriate fundraising or assist and support local branches in doing so	Ongoing	Branch Chairman Branch Cttee	Y Service Branch will report events held for Fundraising through its newsletter and email and report events at Branch Meetings and Committee Meetings as well as reporting to the NBD via our Branch representative.	Nil
2.2.2 Y Service Branch will run at least one major fund raising event during each year	Ongoing	Branch Committee	Achieve one fundraising event per year and report at the AGM ie Golf Day or other such activities undertaken by members to raise funds.	Nil

2.3 REMEMBRANCE (AND CEREMONIAL)

The RBL, as the Custodian of Remembrance, is responsible for National observances such as the Festival of Remembrance at the Royal Albert Hall and the Cenotaph Parade and 'March Past'. The Branch has a dedicated Y Services Plot at, the National Memorial Arboretum in Staffordshire and holds a Summer Gathering for members at the NMA each Summer to conduct an act of Remembrance at the plot and allow members to meet and pay their respects to the fallen. Y Services Branch will endeavour to support the Cenotaph and March Past as a Branch, as well as attend the Remembrance Service at St Mary's in the Elms at Woodhouse Eaves with our Standard and key Committee members due to our close ties with the local council and village.

Objective	Target date	Responsibility	Key Performance Indicator(s)	Budget estimate
2.3.1 The Y Services Branch Standard Bearer will be the ceremonial representative at the Woodhouse Eaves Church where the Standard will be carried and the Committee members will attend in support.	Ongoing	Branch Chairman, Branch President and Branch Standard Bearer	The Branch Standard Bearer is expected to attend: • NBD AGM, • Woodhouse Eaves Remembrance Sunday • Official functions or events as authorised by the Branch Committee, as and when required. His or her expenses will be paid from Branch Funds.	Variable dependant upon location and distance travelled.

2.4 MEMBERSHIP, RECRUITING AND LEGION EVENTS

The Y Services Branch will encourage promotion of the Legion's image, purpose and policies of the Legion in all areas where appropriate and support locally-based Legion bodies. Efforts and initiatives to establish contacts and foster recruiting with Y Service Regular and Reserve Units and enhance awareness of the Branch across the National Branches District and the wider RBL community will be actioned. The Branch will support the NBD initiatives for recruiting at legion events when and where appropriate. The main aim is to boost membership numbers from the Y Services community.

Objective	Target date	Responsibility	Key Performance Indicator(s)	Budget estimate
2.4.1 Retention: Branches should ensure that they are undertaking all reasonable efforts to retain members (i.e. regular communication with members, events)	Ongoing	Branch Committee	Branches to report back to District at quarterly committee meetings on Branch membership numbers and efforts taken to retain members.	Costs based on letters and correspondence to retain members.
2.4.2 Branch Website & newsletters: The Y Services Branch website is to be kept up to date and monthly newsletters are to be emailed to all members giving up dates on Branch activities and matters of interest to members.	Ongoing	Branch Chair Branch Sec & Committee members as and when required	The Branch has and will maintain an effective website and/or newsletters circulated to all members who have opted in for digital communication on a monthly basis. Report activity to District. Extract items from the District Digest as appropriate and include in Branch newsletter.	Nil
2.4.3 Recruitment: Y Services Branch maintains a close relationship with a number of Y Service Regular and Reserve units in order to encourage recruitment.	Ongoing	Branch Membership Secretaries via Branch Chairman / Branch District Rep	Y Service Branch to report back to NBD on results of recruitment activities and follow-up enquiries on an ongoing basis.	Travel costs as required.
2.4.4 Attendance at Legion Events: The Branch will seek to nominate two delegates to the Annual Conference.	Ongoing	Branch Committee and Members	2 members to attend the Annual Conference as delegates. Other members may attend as visitors but will not be able to claim for costs.	Travel costs through central funding.

2.5 TRAINING AND CONTINUOUS PROFESSIONAL DEVELOPMENT

All Y Service Branch Committee members are to be aware of the Legion's Objectives, contained within The Royal Charter, and how they are to be achieved in compliance with the Charities Acts 2011 & 2016. Membership Training is arranged throughout the UK at various venues and Branch Committee Members are to be encouraged to attend locally-based or virtual training wherever possible to minimise cost.

Objective	Target date	Responsibility	Key Performance Indicator(s)	Budget estimate
2.5.1 Each member of the Branch Committee is to attempt to complete, at least, the nationally-run County/Branch Management and where appropriate County Conference courses within the period of this plan if not already completed	Ongoing	Branch Committee Members Conference Committee Members	It is desirable that at least 50% of the District Committee will have completed the revised County/Branch Management Course. It is desirable that members of the District Conference Committee will have completed the County Conference Management course. NBD Rep to report at the NBD AGM on training completed. Individual CPD records to be kept by all committee members and submitted as evidence of completion of RBL courses for Beacon Branches audit.	Nil (covered by Central funding)
2.5.2 All Branch Officers to remain conversant with the Legions current ways of working via Branch Mgt Training / Secretary or Treasurer training in relation to role.	Ongoing	Branch Officers	A record of those who have completed the relevant courses will be kept centrally on Discover and the Branch will report via Beacon Branches report to NBD. Individual CPD records to be maintained and shown for audit.	Nil – Central funding
2.5.4 Continue to progress E-Business where appropriate for effective administration for members.	Ongoing	Branch Committee	Y Services Branch to continue to use Office 365 and vote electronically. Electronic voting to be used alongside traditional methods of voting. Continue adoption of virtual training delivery	Nil – Central Funding.

2.5.5 Branch Recruitment Advisor. Have at least one committee member to be a Recruitment Advisor.	Ongoing	Branch Chair and the Committee	Nominated Branch members to attend Recruitment Advisor training delivered by DTO branch membership numbers to be reported to District in quarterly branch reports. Input from individual CPD records.	As Required, costs borne by branch where possible
2.5.6 Maintenance of Safeguarding Awareness through members completing the online Safeguarding training.	Ongoing	Branch Chairman Branch Secretary	All relevant members to have read and remain up to date with RBL Safeguarding guidance / policy on MAP supported by DTO as required Complete self-declaration as part of Branch MS1 and District MS1A from CPD records.	Nil
2.5.7 Informal Resolution: All Branch Officers to attend Informal Resolution training during their tenure to support timely conflict resolution and minimise escalation to District / LCC	Ongoing	Branch Chairman And Committee	It is desirable that at least 50% of the Branch Officers will have completed Informal Resolution training by the next NBD Ann Mtg, record of attendance via Discover and placed on individual CPD records.	Nil – Central Funding

2.6 ADMINISTRATION AND FINANCE

The Y Services Branch will ensure it is administered in compliance with RBL policies and procedures and that the MS1 documentation is completed and submitted with the Treasurers audit outcomes in a timely manner to meet NBD deadlines for submission in order for the Branch to remain compliant. The Beacon Branches initiative will continue to be completed with the aim of attaining every year a Gold standard achievement.

The Y Services Branch NBD representative will attend all NBD committee meetings and ensure that quarterly Branch reports are provided to the NBD committee to keep them informed of Branch activity.

The Y Services Branch committee will meet 4 times per year to ensure that the Branch continues to be administered effectively and our MEO will be invited to Branch meetings.

Objective	Target date	Responsibility	Key Performance Indicator(s)	Budget estimate
2.6.1 To run cost effective Branch Committee meetings whilst ensuring and encouraging full representation from members who reside across the UK.	Ongoing	Chairman and all committee members.	Branch Committee meetings to be held at least 4 times per annum. February - Virtual April - Virtual July – Face to Face (at the NMA SG) November – Face to Face at the AGM Continually review provision eg: use of virtual solutions, RBL premises such as the NMA	Travel Expenses and overnight accommodation for the weekend gatherings.
2.6.2 All committee members to be cognisant of Legion Data Protection Policy and GDPR	Ongoing	All Committee Members	Show knowledge and awareness by reporting GDPR breaches or noteworthy instances at quarterly meeting • All committee members are cognisant of Legion Data Protection Policy and GDPR • Update District in branch quarterly report • Show individual CPD records for audit	Nil

Objective	Target date	Responsibility	Key Performance Indicator(s)	Budget estimate
2.6.3 Gift Aid. Encourage all eligible members who have not done so to sign up to Gift Aid	Ongoing	Branch Chair All committee members	Update District in branch quarterly reports	Nil
2.6.4 Process for claims when attending official events on behalf of the Branch as directed by the Committee. This includes all Committee members, members attending the Annual Conference as voting delegates and our SB attending events and funerals.	Ongoing	Branch Chair, Branch Sec and Branch Treasurer	All claims once received by the Treasurer to be processed and cheques sent to claimants within 14 days of receipt.	To be estimated at the AGM based on previous years and projected events.