Membership Forum Pre Submitted Questions

|  |  |  |
| --- | --- | --- |
| Question | Asked By | Answer |
| In the case of a veteran who is obviously suffering from PTSD, dementia, or for some other reason cannot apply for help himself, will the helpline accept referrals from an appointed member of the Branch Committee on the veteran's behalf and provide help that may be considered necessary? | Tony Keay Secretary Horley Branch | Yes, a person can contact us on behalf of a beneficiary, we must however have consent from the beneficiary, this can be given verbally by the beneficiary at the beginning of the call and is recorded in our systems. This is to comply with General Data Protection Regulation (GDPR).  There are exceptions, as some vulnerabilities may affect a beneficiary’s ‘capacity’. Under the Mental Capacity Act 2005, there are circumstances when individuals no longer have the mental capacity to make decisions for themselves. Examples include dementia, PTSD and other physical or mental health conditions. In these circumstances an individual’s capacity would be professionally assessed by qualified persons.  In these cases, a person with Lasting power of attorney or a Court appointed ‘deputy’ or advocate can call on behalf of a beneficiary.  Carers are also RBL beneficiaries and can also contact us on behalf of an individual. |
| If the veteran has registered the need for assistance with the RBL, will the welfare services automatically visit him, and how long should it take from the initial phone call to the visit, and will the local branch be informed and asked to assist? | Tony Keay Secretary Horley Branch | We do not automatically carry out a home visit. An initial conversation with each individual is carried out to assess and agree the best course of action, giving the beneficiary a choice in how we support them.  There are variations by service, but we are generally home visiting/meeting face to face with around 25% of our beneficiaries.  We assess each case for severity and urgency. For the most urgent cases we aim to be in contact within 2 hours, for standard and non-urgent cases it is between 5 days and three weeks depending on the individual circumstances. (It’s worth noting here that 90% of our beneficiaries feedback that they are satisfied with RBL and the service.)  Local branches are not informed unless the beneficiary gives their consent for their details to be shared and that they wish for some Branch Community Support. This is to protect the beneficiary and allow them to remain anonymous if they so wish and to comply with GDPR. |
| To ensure empathy between the veteran in need and the welfare support team, what percentage of call operators are ex-service personnel or have any connection with the ex-service community? | Tony Keay Secretary Horley Branch | We currently have two veterans working as advisors at our Contact Centre.  All our advisors are recruited, trained, and supervised to provide the highest standard of service. Calls are recorded and supervisors ‘listen in to calls’ for training and quality assurance.  Whilst we actively encourage applications from veterans and their families at our Contact Centre and across the RBL (RBL employs over 100 veterans), it is also vitally important that we employ appropriately skilled and experienced staff and maintain good staffing levels to meet the demands of the service. |
| Why is ongoing Legion policy seemingly aimed at moving the individual members further and further away from the decision-making process?  We give as an example the change to nominating our National Chairman instead of having that person voted into position. | Stephanie Stevenson  Branch Delegate, Thatcham Branch, | We are proposing these changes to better serve our Charity and ensure that we meet the needs of our Beneficiaries. We are all responsible for acting and behaving properly and responsibly to deliver the charity’s objectives. The overall number of Trustees will not change, and the new, still fully elected, role of National Chair of Membership will ensure that Members have an important voice in the Board’s considerations, in addition to the other elected Trustees. |
| The RBL is spending considerable amounts of money on recruiting campaigns.  Who are these campaigns aimed at and what is their success rate? We believe that Annual Conference should receive a report outlining the outcomes of recruiting campaigns, their effectiveness, and a breakdown of those recruited to the RBL.  As a branch we can offer the example of one of our new members only becoming aware of being able to become a member of the RBL from family former-military connections, otherwise she would never have known, having not served herself. | Stephanie Stevenson  Branch Delegate, Thatcham Branch, | We haven’t run any recruitment campaigns recently as there are specific reasons we don’t do these for membership. Media campaigns for Membership recruitment would be very expensive, a TV advert would be a minimum of £500k expenditure. The figures therefore do not add up, to recoup this cost, we’d need to recruit nearly 28,000 members, which is more than we standardly do in a year. Our vision is **‘To bring together our nations, communities, and individuals to create better futures for our Armed Forces Communities and their families.’** So, our priority remains to use these vital funds to support our beneficiaries. |
| How does someone establish a new Branch of the Royal British Legion, with new members, in a timely and efficient manner? | Paul Harding  Branch Secretary (National Cyclists Branch & Rickmansworth & West Hyde Branches) | For a new Branch to be established at least 15 members or potential members aged 18 or over would need to be recruited and then they would need to get together 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 Management 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 Membership Engagement Officer, must be completed. The Membership Engagement Officer 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. |
| It is clear to me that the members are literally dying off. What is actively being done to recruit new younger members? | Phillip Johnys  Stotfold & Arlesey Branch  Membership Secretary | We are aware that membership is in decline and that we need to attract younger and more diverse individuals, so they become active members.  We are exploring individual membership as well as opening a new digital channel that complements our traditional routes, including members belonging to a branch. By making it easier to join the RBL, the proposal is to create a larger pool of new members from which to recruit suitable branch members, as well as offering alternatives and more flexible ways of getting involved. Alongside the community engagement team, we are also working with County Youth Officers within regions to see how best they can engage a younger audience. Work has recently started with this but will include involvement with schools, clubs, youth groups and possibly universities. |
| While I support the Board of Trustees decision to implement a selection process for potential BoT members I would like to ask if they are considering a similar process to be introduced for Membership Council candidates? | Chris Black  County Training Officer, Derbyshire RBL | We are investigating this right now, and whilst still in the early stages, we will be putting proposals to the MC and Nominations and Governance Committee after Annual Conference. |
| When a veteran / beneficiary applies to the RBL for help are they means tested if the resulting help means an item has to be purchased? If the answer is yes, then:  Who carries out the means testing?  What monetary limits would mean the request was refused?  Are the monetary limits the same for the whole of the UK?  Ie, their annual income / savings. and is this against the individual or joint if this person is living with a partner.  If a request is refused / unsuccessful can the reasons be given in writing to the veteran? | Brian Douglas Chairman of Royton Branch | Yes, there are elements of our support that involve purchasing goods or services for a beneficiary that are means tested.  A financial assessment is undertaken with the beneficiary to understand their income, expenditure, debts, free available income, and savings by RBL staff.  If a beneficiary is in receipt of means tested benefits e.g. Universal Credit or tax credits the beneficiary is eligible.  The threshold for savings is £11,000 – this excludes any war compensation awards and the value/equity of the property lived in.  Individual household circumstances including how many people or how many children have different income limits.  We set the eligibility thresholds annually using the National Indices of Deprivation data, The Joseph Rowntree Foundation annual report and in collaboration with partner charities (SSAFA and RAFA) and Benevolent Funds (ABF, RAFBF, RNBF).  The above limits are for guidance and are general policy for staff to follow. We have an authorisation process in place for cases where an individual beneficiary’s circumstances require us to work outside of these limits.  Our staff are trained to explain the eligibility criteria and manage beneficiary’s expectations from the beginning of the process, a written response should not be needed. |
| Being an Overseas Branch with the problems of varying bank charges, our branch agreed to open a BFI account in order to assist with payment for membership renewals and new members. Our Branch Treasurer is always very prompt at making transfer via BFI and I then authorise the payments. Confirmation of these transactions and consolidated forms are sent immediately to our MEO who forwards them to Membership Services. It has been fraught with problems. Mostly concerned with the time it takes to process renewals and new members. Please can the system be reviewed, our members deserve better and I am continually apologising on behalf of the Legion for lack of cards/magazines etc. | Peggy Wyatt, Membership Secretary, Hondón Valley Branch (District North Spain) | Submitting a consolidated payment via the Branch Funds Initiative can be a complex process. Overseas branches without a LOMAS account submits the consolidated payment details to the Overseas MEO, who checks the documentation before sending it to Membership Services, who will send the request to Finance. Finance then sends the payment to our Payments and Applications team. Overseas branches with a LOMAS account can circumvent this chain by submitting the payment directly to Finance. To obtain a LOMAS account please contact the Overseas MEO. In regard to your branch, Hondón Valley RBL was subject to a severe delay in the processing of a consolidated payment in Autumn 2022, when a payment submitted by Finance was not received by the Payments and Applications team. Neither side were aware of the issue until the branch queried the delay. Membership Services is currently reviewing the process to ensure there is a direct line of sight for all future transactions between Finance and the Payments and Applications team.  Earlier this year a second Hondón Valley RBL consolidated payment was delayed due to a corruption (since resolved) in the Membership CRM’s data processing system, unrelated to the BFI submission process.  Membership Services is continuing to work on ensuring that future payments are processed without any unnecessary delays. |
| In the spirit of transparency - as acknowledged to be a priority by the Board of Trustees at previous National Conferences - the Board is strongly urged to publish in full the governance review of 2021 – the CGI “Berry Report” - as a matter of urgency.  The rationale and case for change in the Board’s Charter Motion is thin on detail and there is no supporting evidence in it as to what recommendations were made in the Berry Report regarding the significant changes proposed to Governance. To consider supporting or rejecting the Motion, Delegates need early sight of the Report’s recommendations.  Legal advice was received in 2019 in an extensive Governance report by the prestigious law firm Withers LLP. To support the proposed changes leading to the Royal Charter version 14 issued in Oct 2019, the draft Charter and a 50-page Appendix C – “Royal Charter Review – Destination Table (Feb 2019)”was included in a “Royal Charter Motion Pack” issued to delegates with the Provisional Agenda in March 2019 – “*for your review prior to Annual Conference 2019, with regard to the Royal Charter Motion”.* Clearly the Board at the time believed delegates should be given early sight of this information produced by Withers LLP.  In the Appendix, Withers addressed each of the Articles in the Charter noting “Changes Made” (or not required) and “Explanation” as to their recommendations. In clear contrast, there has been no such release of information to delegates from the 2021 review/Berry Report and National Chair has stated that it would not serve any purpose to publish the Report.  It is clearly beneficial for delegates being asked to vote on key changes to the Board’s governance of our charity, to be as comprehensively informed as possible. There should be no reason why the Board feels unable and unwilling to share the details in the Berry Report and to indicate those recommendations the Board has already implemented, those the Board intends to pursue, and those the Board feels have insufficient merit and have so far been rejected. | Roy Roberts Chair of Cheltenham and District Branch | Since the reporting to the Board of the GGI recommendations two years ago, we have undertaken two years of debate, discussion, and consultation. The result of this is that our proposals on changes to our governance have evolved from the original report, rather than being simply an enactment of it. While we remain committed to openness and appropriate transparency, the Board does retain the right to seek confidential external advice to assist in the fulfilment of its responsibility to RBL. That said, we will be engaging further around the proposed Royal Charter Motion and other governance changes in the coming months, as we continue to do with all major changes affecting our Membership. |
| The first relates to Family Membership, it was touched on last year but seems to have got lost in translation.  Certainly, Worksop Branch raised a motion last year but was withdrawn by conference Committee l think because it was on the agenda. There was no mention of family membership today. | Ray Fielding  Nottinghamshire County Vice Chair | Family membership was a Motion submitted in 2021 and we are still considering it as part of the Future Thinking of Membership. As referenced in Janet’s presentation, there are more complex areas we continue to explore such as the classes of membership, types of members and whether we should introduce family and/or honorary membership.  Discussions therefore continue with the Future Thinking Advisory Group and Membership Council. Over the summer months we are developing proposals to share with MC and County Chairs which will hopefully bring some of these aspects to life. |
| How are we supposed to chair the County Conference Committee.  It’s the county committee job but can’t do without the help of the MEO. It’s not clear if they will be part of organisation and if so what exactly they will do. | Ray Fielding  Nottinghamshire County Vice Chair | The Membership Engagement Team has been restructured so that each of the six Regions has a Membership Engagement Manager, Membership Engagement Officer Team and Membership Engagement Administrator who will work collaboratively with Counties and Branches. These redefined roles will be able to offer far more assistance to Branches and County Officers to support them to carry out their roles and responsibilities. In previous years, there have been gaps within this team meaning that the support offer was not available in some localities, however, the team is now in place and is further supported by colleagues across the Membership Directorate (Membership Services and Membership Compliance and Policy Teams) and wider RBL. |

Membership Forum Live/Online Questions

|  |  |  |
| --- | --- | --- |
| Question | Asked By | Answer |
| Please stop using language we do not understand when sending out comms, and through these comms let us know about things that are coming up as much as letting us know when they’ve already happened.  Training, members asking for it, BCS is on hold, and we want to know when can we commence. | John Johnson Lincolnshire County chair men | We are setting up a dedicated comms team in membership to address these issues.  BCS is not on hold; any BCS Supporters who are trained and DBS checked can continue to support our beneficiaries through home and hospital visits. Members who aren’t up to date with their training or their DBS check should not be undertaking BCS activities. BCS training has been reviewed and we have committed that from June until the end of the year we will run a training session on 2 Saturdays every month. We are also looking for other channels to deploy learning so we can help meet the large demand. |
| A member attempted to renew her membership, and despite the cheque being cashed, the issue took over 8 months to resolve. Why can’t we get the basics right? | Mark Mclaughlin Branch Chair Ballymoney | We apologise and acknowledge that sometimes we get things wrong. If more details can be provided, we can look into this specific reason as to why this issue occurred. Please be reassured that the majority go through the renewal process without difficulty. |
| What do you see as the role of the county committee, when the new MEO appears to be the point of contact for branches and has no responsibility to the county committee or a commitment to attend the county meetings. How are counties supposed to sustain this way? | John Kingsbury – Acting County Chair Surrey | MEOs are responsible for supporting our counties and branches and should be attending the majority of county committee meetings. Their focus is on engagement, relationship building and supporting compliance. They sit within the membership engagement function with Managers and Administrators all working together as a team with members to deliver on our objectives.  If there are instances when this is not working, please reach out to your MC Representative who will work with you and the Head of Membership Engagement to resolve any issues.  As part of the restructure and redefining of the Membership Engagement Team we have also agreed to a review point, to assess what is working and where there are still areas for improvement. Members involvement and feedback will be taken on board as part of this process. |
| Concern with the Annual Membership Awards, there is a reduction of number being awarded this year compared to last, can Board assure that these awards will not diminish. | Joseph Falzon Malta Branch | As a Board we would encourage maximum participation in the awards.  A huge amount of work has been done to make the awards/nomination process as seamless as possible as members deserve to be recognised for the work that they do. We want to celebrate these members and inspire others to join in on this great work. |
| We are hoping to recruit committee members, however the need for training is getting in the way, which is disappointing as ultimately we are all volunteers. | David Hawker Branch President Rushden | A range of county management training has been delivered since February, but we know that some time was lost due to the Covid pandemic, and we are now playing catch up.  With membership training now moved to the RBL Learning & Development team a new training strategy and policy will be launched in June, which will take us through the next 3 years. |
| Charles as DG in Southport at his first Annual Conference committed to improving comms, yet nothing has changed.  Numbers of members is decreasing for the last 11 years why has it taken us so long to address this issue.  Why has it taken us so long to hear about the new Membership Engagement structure, another example of poor communication. | Graham Aplin- Ross on Wye Branch Chair | We are reliant on the cascade approach to communications which starts with MC and our County Chairs who are then responsible for sharing information with their branches and wider grassroots members. We know that this happens with varying levels of success and our MEOs are already working with County Chairs to ensure greater consistency in approach. We have introduced our monthly Central News which has been gaining traction over the past 12 months. We are also putting in place other mechanisms to improve this area and have just recruited into membership a dedicated communications team.  Member get member is the most successful way to recruit new members and relies on active branches. There is work already underway to strengthen our branches whilst we take a longer-term view of membership and our commitment to bringing in younger and more diverse members. This is our future thinking work as shared at Annual Conference where we continue to engage with membership as it develops. |
| Last year there was a big thing about get young people into the RBL.  Youth officers do not have access to secondary schools, how do we encourage young people when the perception is that RBL is for old men.  HQ should do a campaign to encourage youths to join as there is only so much we can do at branch level. Members are volunteers who spend a lot of their own money to support the Legion. | Evelyn Penney Branch Vice Chair Fleet and District | Members should not be spending their own money when conducting activities for RBL, as that is what branch funds are for.  We are developing a youth strategy whilst recognising that we do a lot of work already with young people, schools, youth orgs across the organisation but we need to improve that. To do so we will need to embrace new technology. This is a priority for the whole organisation, so you can expect over the next year to see accelerations in this area. |
| Affiliated units programme why is this not more supported by the Legion. This would help ensure that RBL is kept in the heart of the national domain. | Ann Cottier Branch Secretary Isle of Man | Similar answer to above, we are developing a youth strategy that will include looking at how we work with youth organisations.  It is worth noting that all the work that is being done through the new Network Engagement team is based on overall engagement to the RBL cause and is not therefore membership specific. We will be engaging with Armed Forces and Youth going forwards on why RBL is relevant, important, and worth of their time and attention. If we do this really well it will benefit the whole.  We hope to bring an update on the progress in this area to the Board of Trustees later in the year. |
| You outlined the idea of automatically allocating a County to new members, how will that impact National District Branches? | Steve Garth Conisburgh and Denaby Branch | All branches will be available for individual members to join whether national, overseas, or local, just as they are now. |
| Need more policing over who is joining, committee need to have eyes on these people because of potential threat. Northern Ireland needs to be considered separately. | Martyn Mancini, Branch chair Waterside | We do understand that the security considerations in Northern Ireland are different. To this end, Albert Bell as NI MC is on the advisory group to make sure all these concerns are addressed and best mitigated. |
| No training for specifically for county secretaries, separate to the branch management course. It is an important role that needs recognising through training. | Lee Griffiths – County Secretary South Yorkshire | We are currently conducting a training needs analysis to find out what it is that branches need for the future and where the current gaps are. This will be at both branch and county level. |
| Current serving members, particularly younger ones do not know about the RBL as a member base. Would you consider working with the services catching them and their families earlier so that they join when they need it most. | Victoria Moxon  Lambourn Standard Bearer | We know we need to ensure RBL is relevant, that we understand the needs of those that are serving, and we need more initiatives to engage.  To do this we are changing our approach to those who serve in our armed forces by creating a new Armed Forces engagement team (we are currently recruiting individuals to fulfil this role). |
| We have produced a leaflet for youth membership and shared these at the exhibition. When I checked these were not on display and we were told it was because RBL hadn’t produced them. | Bob Goodman Devon County Youth officer | We encourage branches to use readily available assets and templates so that information about RBL is shared in a consistent, brand approved way. As shared at AC we are currently developing new recruitment materials for branches. But if there is a need for a new design, this must be approved by the Brand team before any assets are produced. We will share the approval process with you in due course. |
| Why are we charging youth affiliations for badges?  Teaching remembrance resources are not fit for those with special education needs. | Jane Lewis – Branch Secretary Chingford branch | The 50p charge for youth affiliation is to cover the cost of administration of purchasing the badges, though this is something that we will be reviewing.  We welcome feedback on our Teaching Remembrance resources and last year, we received feedback from teachers across the sector, who made clear to us that our resources need to be made suitable for SEND pupils and SEND teachers to use. With this in mind, we are currently undergoing this review process to produce resources for this purpose, and hope to have an offer produced in 2024. |
| Why has it taken RBL so long to make themselves relevant to the Armed Forces community? | Diane Findlay-Craig Branch Chair Benidorm | We have always engaged with the Armed Forces, but we want to make it more impactful and effective with a modern approach. The forces are changing and we need to change in line with them. |
| Is it or should it be procedure that when substantiated complaints are made against a member that it be made public information (not necessarily in full details, GDPR), for if that person applies for a branch, group or national committee position. This is so the members can make an informed decision when voting, instead of finding out at a later date that misconduct has taken place and the member is unsuitable for the position. | Sarah-Jane Hackett Conisbrough Secretary | When a person has a sanction made against them by the LCC, this is added to their CareNG record. The sanction is also communicated to the MEO, Branch Chair, County Chair and MC Representative. It is their responsibility to ensure that the terms of the sanction are kept and it also their decision as to how widely within their branch this information is shared, whilst meeting GDPR requirements. As we develop the Customer Relationship Management (CRM) system we want to ensure that such sanctions are more visible and easier to track for those who need to do so, such as Branch officials. |
| Janet mentioned Training. Are the team looking into making the training calendar more accessible to the membership. i.e., I am a member of a national Branch who does NOT have access to MAP, and we do NOT meet on a regular basis and have to wait for our secretary to send out any details. but they may be prohibitively far away. Surely we need to be able to see ALL the training for ALL to the Country so that we can make an informed decision on the local training. I am sure our secretary does not wish to go through 42 count calendars digging out all the training for us as members. | Derek Bradshaw Riders Branch | The Membership L&D team are working to ensure County and Branch members have access to a national training calendar. In July we will be implementing a new learning management system which will address this issue along with regular communication to members. We will also be undertaking a training needs analysis from July which will help us to develop a national training plan that will include what, where and when the training is taking place. The training plan will be ready by December this year. |
| Why do the Legion keep sending out handbooks such as the new MMH with the contents pages having the same numbers against different chapters, this keeps happening with other handbooks WHY? | John Walker | We recognise that there have been administrative errors in the publication of previous documents, which have created frustration and inconvenience. To ensure that these errors are reduced we have introduced a more robust system of internal proofing and formatting so any errors can be amended before circulation. |
| Will the RBL crest be changes to incorporate the King's Crown soon? Are there plans to introduce this into the RBL soon? | John Pinkerton Royal Hillsborough Branch | We don't know the answer right now. The Palace office know that we are waiting to hear and will no doubt endeavour to get back to us as soon as possible. We hope that this will not be too much longer now the Coronation celebration has ended. |
| Last week I was helping at an event in Elstead and the local vicar came up to me and asked who she should speak to and how to organise remembrance. She had asked at the local club, but the club said to speak to the branch. The club and branch should be working together to organise these events but it seems no one knows what is going on. | Nigel Thomas Aldershot Branch | The parades themselves, which the RBL takes part in, are the responsibility of the Local Authority/ Parish Council/ etc. The distinction is necessary as the RBL cannot take responsibility for road closures/insurance (other than for RBL parading representatives)/etc. The clubs always tend to throw open their doors after Remembrance services and parades, so everyone is welcome to raise a glass, however clubs would not be responsible for organising the event on behalf of the RBL. If the signposting to the branch by the club could have been better then do let us know. The MEO for your area should be able to point you in the right direction for more info and contact details of branch officers and more details on Remembrance Parades. |
| The Royal College of General Practitioners launched an initiative in 2019 called Veteran Friendly accreditation for General Practices. This offered training and a toolkit for GPs to have at least one lead in each Practice well-versed in the particular needs of Veterans, e.g., PTSD, Musculo-skeletal etc. and takes account of how such conditions impact the family as well. Roll-out has been slow. The RBL has a national voice on behalf of Veterans but I have seen no support to, or endorsement of, this significant initiative. | Bruce Morton Branch Chair Welwyn Garden City | From the inception of the Veteran Friendly General Practitioner Practice Accreditation, the RBL has played a key role. The charity has lent its expertise and best practice examples to the Royal College of General Practitioners (RCGP), contributing to the solidification of the accreditation process. Our robust advice touched on the challenges veterans encounter when accessing primary healthcare, strategies for GPs to identify veterans within their patient population and promoting the best methods when referring veterans for advanced care. In the present day, we steadfastly support the RCGP's veteran-friendly initiative and urge all members of the RBL to inquire whether their own GP practice is accredited. If not, we encourage them to consider joining the scheme. In a collaborative effort with local authority Armed Forces champions and Covenant Boards, we are working to amplify awareness of the program nationwide. The invaluable data from the 2021 census has significantly assisted us in pinpointing areas with a substantial veteran population. Furthermore, we are now cognizant of areas with the greatest numbers of veterans who have reported subpar health. This knowledge enables us to effectively allocate our resources in the future, ensuring GP surgeries in these areas consider joining the program. In the coming year, we are dedicated to exploring methods to enhance veterans' healthcare accessibility across all NHS tiers, with the Veteran's Friendly Accreditation scheme constituting a major component of this endeavour. We persist in endorsing and supporting this initiative. Our hope is to see a rise in the number of GP practices enrolling in the scheme. Moreover, we aim to assess its effectiveness in places where GPs have already joined, while also ensuring that the scheme incorporates the families of veterans. |