

Membership Handbook Management - March 2023 Proposed Changes:

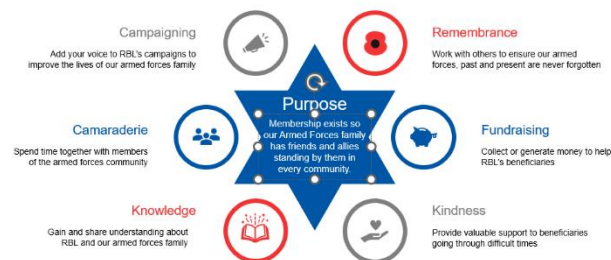
1. Title of Proposed Section: Purpose and Value of Membership

Page: 5

Proposed:

Purpose: 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.

The value members bring to RBL



2. Title of Change: County Elections

Page: 9

Proposed Change: That the MMH is changed to 4 weeks for motions and nominations for election to County Committee.

3. Title of Change: Funding and insuring Branch events

Page/Section: 18

Proposed Change:

Parade safety for Remembrance events is the responsibility of a Civic Authority. Temporary Traffic Management Operation (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.

The Legion 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 ie: 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. Individuals members may be the lead for a Branch event but should not organise events, including Remembrance events, acting as an individual.

4. Title of proposed section: CSB and Branches in County Administration

Page: 26

Proposed wording: CSBs are only required to submit their MS1's by the 31st of December to be considered compliant. Once CSBs are deemed compliant, they can participate in elections and send delegates to annual conference.

A branch in administration, whereby the County Committee are the surrogate Branch Committee, is not compliant and therefore is not permitted to vote in elections or send delegates to annual conference, including where the branch was compliant in the preceding year during a period where it was not in County administration.

5. Title of Change: Standing for Branch and County Elections

Page/Section: 33

Proposed wording: members are not allowed to hold office or be elected if... • They are deemed unsuitable by the LCC.

6. Title of Change: MC Elections

Page/Section: 33

Proposed Change: Remove specific dates.

7. Title of Change: MC Elections

Page/Section: 33

Proposed wording: The RBL Governance team will check if the nomination is valid and inform the candidate and the Branch that it has been received. They will also inform the Branch and the candidate if the nomination has been rejected due to branch non-compliance.

8. **Title of proposed section:** Elections ballot papers

Page/Section: 35 and 127

Proposed section: Amend the table to state that the envelope must be signed by two branch officers, must be clearly annotated with the County / District name and states that it contains ballot papers.

9. **Title of proposed section:** Merchandise

Page/Section: 40

Proposed wording: County/District branches are not permitted to produce their own branded merchandise.

10. **Title of Change:** Fundraising

Page/Section: 43

Proposed Change: All fundraising during the Poppy Appeal must be for Poppy Appeal and not the General Fund. Poppy Appeal merchandise can be used only for raising funds for the charitable objectives of the Legion via the Poppy Appeal and not for the running costs of the Branch. Outside of the Poppy Appeal Branches must make it clear to their donors if they are raising funds for the Branch funds and not the Poppy Appeal.

11. **Title of Change:** Poppy Appeal

Page/Section: 41

Proposed Change:

1. Key timings

The Poppy Appeal is the Legion's largest fundraising campaign; it launches at the end of October and concludes on Remembrance Sunday. The Poppy Appeal dates will be communicated each year. Street collections take place during this time with London Poppy Day generally being held on the first Thursday of November.

2. Roles and responsibilities

The Poppy Appeal is run by a community of just under 4,000 Poppy Appeal Organisers (PAOs). PAOs oversee the behind-the-scenes organisation of volunteers, collection locations and stock and are inducted and trained before they start their role. Branches should support the PAOs and Community Fundraisers in the successful delivery of the Poppy Appeal.

3. PAO and volunteer appointment and removal

PAOs are recruited and appointed by the Community Fundraising Team who have overall responsibility for delivering the appeal. Please note that new PAOs can only be recruited by the Community Fundraising team and not by branches.

As well as the above, the Community Fundraising team also manage the retirement, resignation and, in some cases, removal from post of PAOs. The decision to remove a PAO from post will be at the discretion of the Director/Head of Poppy Appeal only.

4. Charity and Trading activity

Please be aware that during the Poppy Appeal both charity and trading activity take place. The provision of poppies on stands, and affiliated lower value products, are offered for a donation only (these are the items likely to be seen on stands in local towns and supermarkets); there is no 'suggested donation'. All donations for these items must be freely given i.e., we cannot refuse to give away the product if no donation is forthcoming. Other items available during the appeal, such as wreaths, are classed as trading activity due to the allocation of VAT to these items. Items sold on Poppy Shop, including those used at City Poppy Days, are trading items also and RRP is received on all products.

If you have any questions regarding the difference between charity and trading activity, please consult your Membership Engagement Officer (MEO).

5. Where to go to for help and support

If you have any questions regarding Poppy Appeal activity or collections, please contact the Community Fundraiser for your area. In the event of a complaint or concern please contact your MEO and they will be able to escalate the issue according to the appropriate procedure.

For branch members who are also PAOs, please refer to the PAO Handbook, as this is the primary source of information for the Poppy Appeal. This is reviewed on an annual basis and may be updated, so please ensure you are referring to the most recent version, along with any communications from your Community Fundraiser during the year, such as the seminars and various mailings.

12. **Title of Change:** Grants

Page/Section: 43

Proposed Change: Branches must inform their MEO, County Chair, and the Donor Relationship team at Head Office at donorrelationships@britishlegion.org.uk of their proposed bid. A member of the Donor Relationship team will confirm whether the 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 Legions 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 acct and must be kept ringfenced for the specific project for which it was granted.

13. **Title of proposed section:** Formation and new branches

Page/Section: 51

Proposed Wording: 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.

14. **Title of Change:** Formations

Page: 51

Proposed wording: 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.

15. **Title of change:** County Plans

Page/Section: 55

Proposed wording: 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.

16. **Title of Change:** Removal of Branch Officers

Page/Section: 54

Proposed Change: The County Committee, in discussion with the MC Rep, may 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 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.

17. **Title of Change:** Legions Complaints Committee staff title

Page:65

Proposed Change: Delete Legions Membership Complaints Officer and replace with Membership Liaison Officer.

18. **Title of Change:** County Conference

Page/Section: 68

Proposed Change:

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).
- Motions, including the proposal of amendments to the Royal Charter and the membership rules.
- Nominations for membership of the Conference Committee.

Counties and Districts may chose 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.

19. **Title of Change:** County Conference delivery

Page/Section: 69

Proposed: 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 MAP.

20.

21. **Title of proposed section:** Social Media Policy

Page: 75

Proposed wording:

Social Media

Introduction

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 10 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 28 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.

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 (for example, 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.

22. **Title of Change:** County Administration

Page/Section: 27

Proposed Change:

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. 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 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. In this circumstance, prior to taking a Branch into administration, the County Chairman 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 MC Rep why it is felt necessary to take the Branch into County Administration. The MC 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 an 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 me 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 MC Rep to stand for any future officer appointment or to become a committee.

The process for the Membership Council taking a County into administration should follow the same guidance as above.

24. **Title of Change:** MS5 and MS5C amendments
Page/Section: 120-124
Proposed Change: Removal of reference to 'services or 'welfare'
25. **Title of Change:** MS1
Page/Section: 102
Proposed Change: PAO removed from MS1.
26. **Title of Change:** Group MS1
Page/Section: n/a
Proposed Change: Group MS1 to be created.
27. **Title of Change:** MS1
Page/Section: 102
Proposed Change: "in the first instance this should be an rbl.community email address" should be added to the points of contact section.
28. **Title of Change:** County Plan
Page/Section: 131
Proposed Change: Change of 'welfare' to 'BCS'
29. **Title of Change:** Media contact
Page / Section: 45
Proposed Change: 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 for you to respond. The press team will also help if a crisis occurs or if you are simply unsure of how to handle an issue.

30. **Title of change National Parade Marshall**

Page: 52

Proposed change: Any Membership Officer (Branch Chair, County Chair, MC Rep, BoT member) cannot hold a position of National Parade Marshal, Deputy or Assistant National Parade Marshal whilst in membership office.

31. **Title of Change:** Membership Support Officer

Proposed change: Membership Engagement Officer.