

Membership Management Handbook - September 2023 Updates

Page Number	MMH Section	Details of Change
5	Purpose and Value of Membership	Purpose and Value of Membership diagram updated so improved quality and enlarged
7	2.a.(1) Holding meetings	Holding meetings table updated to include Objectives to the table related to instructions on holding meetings.
13	VAT (Value Added Tax)	Financial management section sub-title changed from VAT to now include 'Value Added Tax' as an explanation of the abbreviation.
13	Gift Aid	Title of Change: Financial management section wording change - Gift Aid Members are encouraged to Gift Aid their membership fee when they join. They can add or remove a Gift Aid declaration at any time by contacting membershipservices@britishlegion.org.uk or by logging into the Membership Self-Service Portal
15	Dos and Don'ts for spending Branch and County funds	Title of Change: Financial management – clarification and addition of the points; Use funds for paid employment, procure your own resources, branded products are available via your MEO all year round and from Poppy Shop during Poppy Appeal.
17	How to deal with legacies	Financial management – sub-section on how to deal with legacies, working changed to read “To make a withdrawal from a legacy Trust the Branch should use form SOP 163 which is available from the Legacy Admin Team or on the intranet.”

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18	Training	Training section – wording change: Training is provided by the Membership Training team in Head Office or by the County Training Officers. Any queries about membership training should be sent to: membershiptraining@britishlegion.org.uk . More information about training can be found in the Membership Training Handbook, available in Office 365 on MAP
19		Amalgamating Counties and Branches – inclusion of County Secretary to the list of roles at point 9.
20	Forming a County	Forming a County – grammatical correction, removal of the duplicated word “Chairman” in the sentence, so it now reads “The Chairmen and Committees of the Branches wishing to form a new County agree to the restructuring and to write to the Chairman of the Membership Council for approval, copying in the relevant Membership Council representative.”
23	Returning to full branch status from County- Supported Branch	Returning to full branch status from County-supported Branch or sub-Branch – removal of references to ‘sub-branches’.
26	Going to Annual Conference	Going to Annual Conference – change of functional mailbox point of contact for support to memebr-shipservices@britishlegion.org.uk

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26	Procedures for different kinds of complaints	Complaints – change in point of contact so section now reads “If you have received a complaint about a member or you want to make a complaint about a member, you’ll find the information you need from the Legion Complaints Committee (LCC) at legioncomplaints@britishlegion.org.uk or it will be available through Office 365”.
37	Fundraising	Fundraising – Change in point of contact so now reads “If you have any questions, contact your Poppy Appeal Manager, or contact Supporter Care (supportercare@britishlegion.org.uk)”.
38	Where to go for help	Where to go for help - Change in point of contact so now reads “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”.
40	Protecting people’s data	Protecting people’s data – updated so now reads “Members’ details are held in the central database managed by Legion staff. Branches and members should report any changes, such as changes of address, here or by emailing memberservices@britishlegion.org.uk to or via the Membership Portal (include link)”

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41	Data Protection at Membership level	Data Protection at Membership Level section, updated information Membership listings can be accessed online via Office 365 system. O365 users must not share their login details with others. Only authorised Branch Officers who signed the form can have access to membership listings. Only Branch/County Officers who signed the MS1(A) form and Membership Council members can obtain membership data.
53	Branch Property Trusts	Branch Property Trusts section updated, no reads "Some Branches are connected to properties that are held on trust. If you need more information on your Branch's property trust please contact the Regional Property Manager"
59	National awards	Awards section clarification, now reads " Every Member, excluding Youth Members, Life Members and Members awarded a National Certificate of Appreciation, must pay an annual membership fee to the Legion."
77	Volunteer County Secretary	County Secretary Terms of Reference updated
N/A	N/A	Financial management – Form SOP131 added to the suite of forms on the Membership Administration Portal.
Throughout	N/A	References to the Queen changed to reference HRH King Charles III
Throughout	N/A	Font changed to Arial 12 as a minimum to meet accessibility standards
Throughout	N/A	Hyperlinks updated throughout document

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Throughout	N/A	References to the Membership Administration Portal (MAP) and also Microsoft Office 365 (O365) made consistent throughout the document.
Throughout	N/A	Terminology change – Chairman now referred to as Chair to utilise more inclusive language
Throughout	N/A	General update on role name change - Community Fundraisers now referred to as Poppy Appeal Managers (PAM)
Throughout	N/A	Removal of references to Area Offices and Area Teams