

# Good Branch Guide

2025 Version 1.0



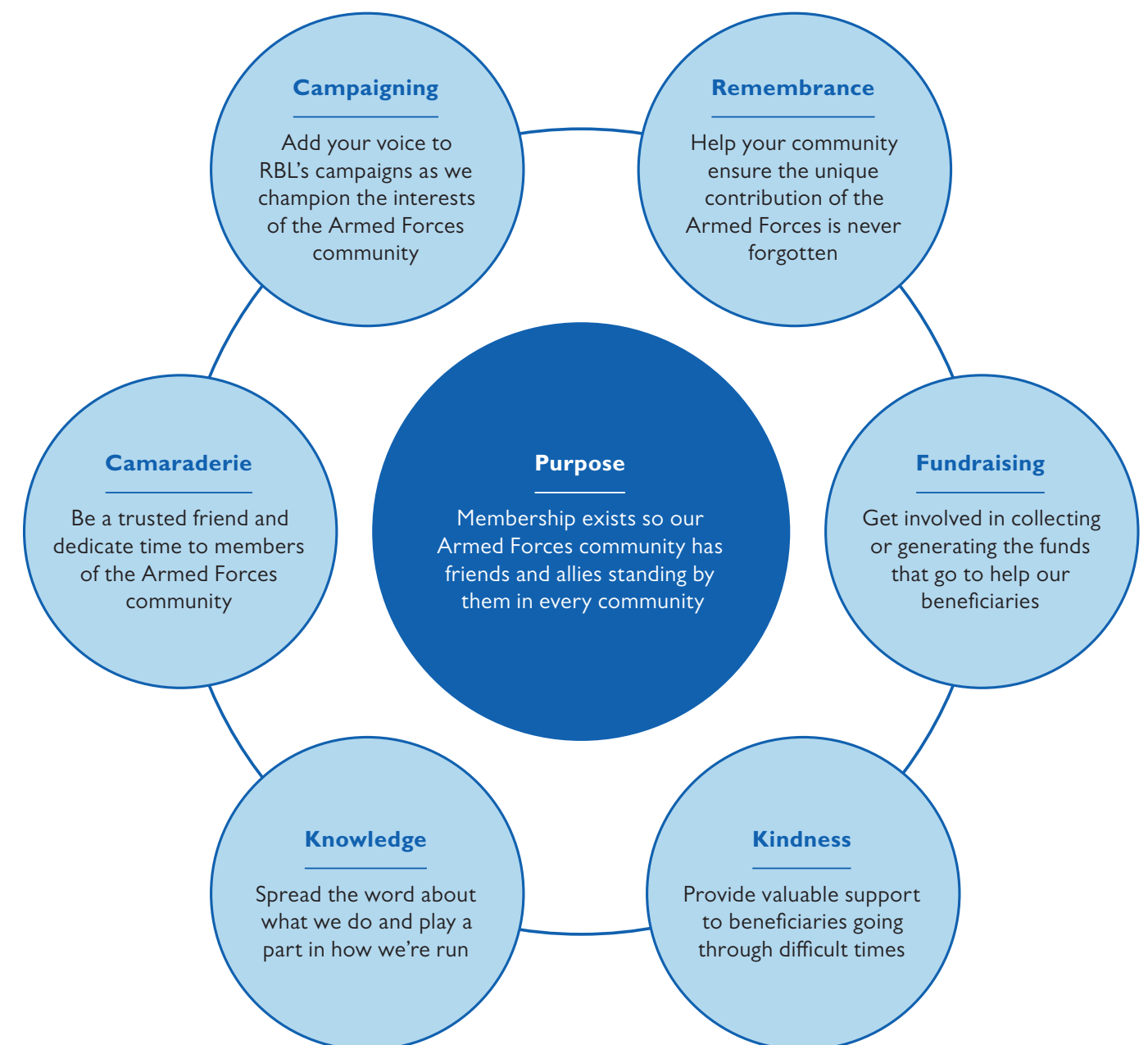
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# Contents

<b>Introduction</b> .....	4
<b>Section 1: Branch governance and compliance</b> .....	5
<ul style="list-style-type: none"> <li>a. Branch compliance.</li> <li>b. Branch accounts return.</li> <li>c. MS1 returns.</li> <li>d. How a good Branch Committee should function.</li> <li>e. Making best use of the tools available.</li> <li>f. Social media.</li> <li>g. Generating interest.</li> <li>h. Maintaining a link to the County Committee.</li> <li>i. Succession planning.</li> </ul>	
<b>Section 2: Governance</b> .....	9
<b>Section 3. Camaraderie and kindness</b> .....	10
<ul style="list-style-type: none"> <li>a. Achieving the purpose of membership.</li> <li>b. Breakfast clubs and coffee mornings.</li> <li>c. Branch Community Support (BCS).</li> </ul>	
<b>Section 4. Good branches and their role in Remembrance</b> .....	13
<ul style="list-style-type: none"> <li>a. Remembrance service.</li> <li>b. Relationships with the local community.</li> <li>c. Supporting the local authority.</li> </ul>	
<b>Section 5. Fundraising</b> .....	15
<ul style="list-style-type: none"> <li>a. Branch fundraising.</li> <li>b. Branch fundraising activities.</li> <li>c. Promotion of events and activities.</li> <li>d. How branches should spend the funds they raise.</li> </ul>	
<b>Section 6. Campaigning</b> .....	17
<b>Section 7. A good branch – checklist</b> .....	19

# Purpose and value members bring



# Introduction

Welcome to the *Good Branch Guide*. The efficient and effective running of an active branch is key to ensuring that our members feel fully engaged with the Royal British Legion (RBL) in their local community, regionally and at national level; and a good branch is the bedrock of membership. Without the hard work and support of our valued members, the RBL would not be able to support our veteran and Armed Forces community and allies, whilst maintaining our charitable aims and objectives.

We want all members to get the best from their membership experience, and this guide is for all branch officers, no matter what level or experience you may have. It is hoped this will provide some useful thoughts and ideas for your branch management strategy.

Examples of good practice have been provided by active branches, sharing their knowledge and experience of how to achieve both the charitable aims and objectives and remain active within their local area.

*An effective branch is one that:*

- is compliant and operates in accordance with the Membership Handbook (MH) and Royal Charter.
- is achieving the purpose of membership and bringing value to the RBL through the six key activities listed above.
- collaborates with the communities we support, RBL staff and other branches.
- connects with its members.

# Section 1. Branch governance and compliance

Whether you are a new branch officer or have been in post for several years, this guide is for you. If you are new, after completion of your online training this guide will inform your knowledge base.

The RBL is constantly evolving to ensure we remain relevant and operate in accordance with the most up-to-date charity law, compliance and governance policies. To that end, it is vital that branches achieve compliance. If a branch is non-compliant this will have a significant impact on its ability to function.

## a. Branch compliance.

During the membership year, there are two key dates for which Branch Chairs, Secretaries and Treasurers need to prepare and that have an important role in ensuring your branch is compliant.

The **30th of September** is the cut-off date for your submission of **branch annual accounts**. The **31st of December** is the cut-off date for the return of the fully completed **MS1 Forms**.

*Compliant branches can:*

- propose a motion at the county AGM for Annual Conference.
- send delegates to both county and annual conferences.
- apply for county grants.
- vote in elections for the Trustees and the Membership Council.

It is every branch's responsibility to ensure that its members have a voice in shaping the membership for the good and benefit of our Armed Forces community. To summarise, achieving compliance means that your branch can play a full and active role in the governance of RBL membership.

## b. Branch accounts return.

*Effective branches should:*

- attend branch accounts sessions alongside the Independent Examiner and MEO to ensure collaborative and supportive working.
- engage, through the Branch Treasurer, with the MEO who has oversight of submissions.
- through the Branch Chair, have oversight of the branch return.
- encourage Branch Treasurers to undertake necessary training ahead of time.
- encourage the use of the advanced accounts pack.
- keep branch accounts as a regular agenda item for branch meetings.

The County Committee has collective responsibility to ensure maximum compliance in its area. The County Committee will communicate with the Branch Chair, who leads on this at branch level in close collaboration with the Branch Treasurer. All have a significant part to play when it comes to achieving compliance for the branch annual accounts return.

Branch officers should be prepared to support the Branch Treasurer where required in the completion of the return. An example of this would be to ensure expenses are submitted on the correct SOP 42 form, with receipts attached for any expenditure claimed.

Your MEO is there to support and advise you regarding branch accounts and is a direct link to finance. Queries relating to branch accounts can be sent to [BranchAccounts@britishlegion.org.uk](mailto:BranchAccounts@britishlegion.org.uk).

## Section 1 continued: Good Branch Guide

Best practice would see your branch submit its return as early as possible, with the **1st of September** being a realistic and achievable date. This will provide ample time for the county, branch and MEO to carry out any checks, and request any further information from the branch that may be required.

### c. MS1 returns.

- Branches must hold the branch Annual General Meeting (AGM) between the 1st of October and 30th of November.
- The MS1 should be completed as soon as the AGM has concluded. The Branch Secretary will lead with this and submit completed MS1 forms to the MEO.
- The MS1 form must capture all the branch officers and committee members, including BCS and Standard Bearers.
- If you complete the form at the AGM, the committee can ensure the form is signed by all and submitted to the MEO immediately afterwards.
- It is vital that the safeguarding declaration is reviewed by all branch officers, if there is any part of the declaration that a committee member is unsure of, this must be explored as soon as possible with the MEO.

### d. How a good Branch Committee should function.

- All branch officer positions should be filled where possible. The Branch Chair should be proactive in encouraging and influencing suitable members to take an active role.
- Each branch officer should be familiar with their roles and responsibilities as found in the Membership Handbook.
- Branch management training must be completed by all branch officers and members who are considering joining the Branch Committee as branch officers, potential branch officers and new committee members.
- Branch meetings should be monthly with an effective method of communicating between officers to help manage the branch plan.
- Branches should have a Vice Chair, even though this is not a compulsory role on the committee, who can be called upon to stand in for the branch chair when required.

Training is available on the learning platform, Discover, and available to book in person via the Learning and Organisation Development Team. Please ensure that you register on Discover so that you can create your learning pathway and access the free available training and resources: <https://learn.britishlegion.org.uk/learn>.

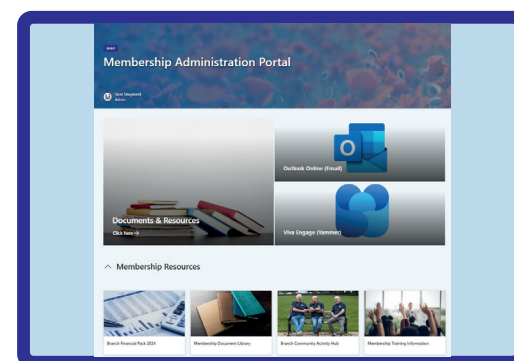
Your regional Membership Engagement Administrator (MEA) can support with your registration on the Discovery platform and match you up with the next available training.

### e. Making best use of the tools available.

A good branch will utilise all available resources. Good practices include effective use of the Membership Administration Portal (MAP). Features include:

- Full access to the latest RBL policies and procedures.
- Regularly updated with all current communications, membership forms and materials required for branches and specialist officers.
- An area to securely store and share minutes of branch meetings, current and future agendas, and keep committee members engaged with all branch business.
- A diary/calendar that is useful for coordinating the branch diary.

Please note that branch officers in key positions **must register for an official RBL Community email account** as the primary means of sending and receiving emails. This ensures that they remain GDPR compliant with all official RBL communications.



## Section 1 continued: Good Branch Guide

**Branch membership listings.** MAP provides your branch with the most up-to-date branch listing, which should be checked regularly.

- Branch listings show new members, creating an opportunity to interact with them by sending a welcome email. This form of introduction can be an effective way of inviting new members to the next branch meeting and gauging interest to see whether they can become actively involved with the local branch.
- The branch listing also provides a list of registered contact email addresses, so branches can connect with members and send out regular communications such as monthly newsletters.
- All branches are encouraged to share content with their MEOs for inclusion in the regional newsletter, to ensure that your local success can be shared.

### f. Social media.

Many branches run active social media pages. This is a great way to connect with the public, so they can understand what the branch is doing and how they can become involved.

Branches can use social media such as Facebook to advertise any local events and fundraising opportunities, and to highlight where they have any potential vacancies in the committee.

A branch also has the option to create a branch webpage. You can be supported with the set up via your Membership Engagement Administrator (MEA) and can find video resources on MAP showing you how to maintain your branch website.

Branches that do promote the RBL via social media must ensure that they adhere to the social media policy, available on MAP, and uphold the RBL's values and behaviours.

When setting up a social media page such as Facebook, branches must ensure that the Regional MEA email is added and granted administrator access. This will allow the MEA to support the branch to maintain the site and update/remove posts as applicable. The MEA, in the absence of an owner of the branch webpage, is also able to reset passwords, and remove or add new people.

### g. Generating interest.

Social media is an excellent resource that can encourage active membership.

Highlighting key events such as fundraising opportunities and branch meetings on social media, can maximise attendance and participation.

In an active and well-connected branch, the secretary will often invite guest speakers to talk about various topics. Guest speakers could include representatives from local veteran organisations or community charities that support our armed forces veterans' community.

When a good branch maintains these local connections, members will often remain active and show positive attendance at branch meetings. This approach to branch meetings also maintains interest and keeps members aligned with the values and purpose of membership.

### h. Maintaining a link to the County Committee.

Some counties have a group structure that allows them to maintain a connection with branches. Where there is a formal group structure, a Group Representative is responsible for establishing and maintaining contact with their allocated branches. Branches are encouraged to maintain this connection, so they remain aligned with the RBL charitable aims and objectives. The Branch Chair or Vice Chair should ensure they are informed who the county link is and keep open communication.

Branches should also send representation to county events that will inform their knowledge base, such as the County Chairs' feedback sessions that run after the County Chair has attended the County Chairs' Seminar. Having a meaningful connection with the County Committee is important to ensure members are kept updated with key information and updates.

Branch officers have a key part to play in maintaining the links between branch and county.

For example:

- Recruitment advisors (RA) should work with the County Recruitment Officer (CRO).





- Branch Community Support (BCC) should work with County Community Support Coordinator (CCSC).
- County Secretary should work alongside the Branch Chair.
- Branch Treasurer should work with the County Treasurer.

#### i. Succession planning.

Planning for when branch officers step down should be a constant consideration for the Branch Chair all year round and not just during elections or the branch AGM season.

All branch officers should be looking to recruit new members and making a conscious effort to ensure that the key branch officer positions are filled, where possible, with members who have the relevant experience and skills.

For new branch officers, the best support available is peer-to-peer and making use of the courses available on Discover. Your MEO will also be able to buddy you up with an experienced branch that can will offer insight and guidance to running a successful branch. This is particularly useful for newly formed branches.

### Richmond Branch, North Yorkshire, shared:

“The main feature with our branch is that we are very social.

“We have a summer and Christmas dinner, sometimes an extra for the likes of D-Day, plus an annual bbq.

“We enter a float in the Richmond Meet parade each year to advertise the branch (We have won 1st prize three times). We all work together throughout the Poppy Appeal period, sharing out the workload. The Poppy Appeal Organiser is a branch member.

“Although we have a committee, any member attending the meeting has an equal say and vote on any matter. Any member can put forward a proposition or idea.”

## Section 2. Governance

The Director General (DG) and Executive Board (EB) lead the RBL and as a group they are accountable for setting the strategic direction of the charity. In addition, the Board of Trustees (BoT) ensures our day-to-day organisational activities are managed effectively, by developing and implementing the activities of the RBL, ensuring our purpose and strategy can be achieved, and that the RBL is guided by a common set of values and objectives.

The Board of Trustees (BoT) is the overarching governing body for membership within the RBL. It instructs and advises the Membership Council (MC), counties and branches. Comprising elected volunteers, the MC represents the members of the Royal British Legion and upholds our values and standards.

Each region has an elected MC Representative who remains aligned with their County Committees. Any branch can approach its MC Representative when required.

RBL staff work to implement the policies and procedures agreed by the Board of Trustees and the MC. For branches, this means that when changes are communicated, they are the result of decisions taken at a BoT and MC level. Staff play a key role in implementing policy as directed by the Executive Board (EB) and in supporting branches with the progression required to keep the charity relevant and on track to deliver its charitable aims and objectives.

Good branches are part of positive change, and all branches play a vital role in our governance as mentioned above.

#### Annual Conference

Before Annual Conference, compliant branches may submit any motion for change that they feel is required. Prior to this, the County Conference Committee sends out a calling notice for the County Conference, which includes instructions for submitting a motion. Motions approved and passed at county level are submitted to the National Conference Committee for consideration at the RBL Annual Conference.

Compliant branches may send a delegate to National Conference where motions approved by the National Conference Committee will be debated and then voted on by other compliant branches. Achieving compliancy ensures your branch may fully participate in our membership's democratic process and that branches and members get the most out of their membership experience.

Furthermore, a compliant branch will be actively involved with our governance by being part of the voting process for candidates who have put themselves forward for election to either the BoT or MC. This enables branches to be involved in the decision making that informs membership policy; therefore, branches are strongly encouraged to be part of this process.



## Section 3. Camaraderie and kindness

Our membership exists to support our charitable aims and objectives, and members share common experiences that create a foundation for bonding with one another, developing friendships and a sense of belonging. Members demonstrate kindness and compassion in all they do to support the RBL and build trust among communities and beneficiaries. Members are also pivotal in maintaining and building relationships and can link to other services such as specialist welfare services, depending on the need of the beneficiaries engaged.

Camaraderie is the bond that develops among a group of individuals who share a common purpose, goal or experience. It involves mutual respect, support and a sense of belonging that fosters teamwork and unity. Kindness is the quality of being friendly, generous and considerate towards others. It involves showing empathy, compassion, and understanding, and acting in a way that positively impacts the wellbeing of others.

**Warminster Branch attends 'Spring in the Park' each year, which is a great opportunity to talk about the work the RBL does and to raise some funds.**

Both camaraderie and kindness are the foundation of the purpose of membership – to provide friends and allies to the Armed Forces community – and are key values that enable membership to support the Armed Forces community.

### a. Achieving the purpose of membership.

Membership exists so that the Armed Forces community has friends and allies in every community. Many of our branches undertake a wide range of activities and events throughout the year. For further information, please view the RBL Event and Activity guide and the RBL Health & Safety Guide; both of which can be found in the Events folder in MAP.

This guide is useful for branches that are planning to hold their first event and may also offer inspiration on ways to make positive connections with your local community.

There are various activities in which members actively participate within their communities. Some examples shared by branches include fence painting, picnics in the park, bake sales, and general gatherings centred on the community. Active branches will frequently join up with locally run clubs to facilitate breakfast and supper clubs. Branches also provide key local connections and support for beneficiaries and are often the first port of call for beneficiaries to inform us that they have a welfare need. Should a welfare request come to a branch, this should be referred to the contact centre, details below:

*By phone:* For welfare and general enquiries, 0808 802 8080 (calls free from Isle of Man). Lines are open 8am to 8pm, seven days a week. From overseas (including the RoI): +44 (0)20 3376 8080 (calls charged at full rate).

*By email:* [info@britishlegion.org.uk](mailto:info@britishlegion.org.uk)



### b. Breakfast clubs and coffee mornings.

Veterans' coffee mornings run by branches are an excellent way to make meaningful connections with both veterans and the wider community.

Branches must be able to self-fund the coffee mornings and ensure they are not run at a loss. Many breakfast clubs and coffee mornings are run collaboratively with other local charities. When this happens, the financial responsibility is often shared.

Please be aware that activities branches run to support our Armed Forces community should be considerate of any potential issues or barriers individuals may be experiencing. For example, a public house would not be a suitable venue for a breakfast club if we have a beneficiary who is in recovery for alcohol dependency.

**Paignton Branch recruited eight new members when it ran a coffee morning at their branch office, where people could come along to have a coffee and bit of cake, and to learn about the Royal British Legion.**

**It is also a great way of getting Poppy Appeal volunteers!**

### c. Branch Community Support (BCS).

Branch Community Support (BCS) provides camaraderie support to beneficiaries via local branches.

The RBL BCS programme successfully reduces social isolation and loneliness for beneficiaries in need of low-level support.

BCS offers support and assistance to beneficiaries through a network of valued RBL members who help to alleviate loneliness through telephone buddying and home or hospital visits. To know more about BCS, visit BCS hub on MAP.



### Tony from Paignton Branch shared his thoughts on BCS:

“My 34 years’ service in the RAF as a ‘medic’, initially as a nursing attendant and then as a medical administrator, gave me the background/experience to take on a welfare role within the RBL, initially as a Case Worker and then as a BCS rep.”

On telephone buddying he says: “We got in touch with [the beneficiary] and introduced ourselves and explained the referral. They were expecting the call.

“We tended to find that beneficiaries did not like asking for help but once they had, the floodgates then opened. They felt comfortable that someone who had a service background was easier to speak to – because of that environment and could associate with the language and humour.”

On home visits, Tony says: “Very much in the same ilk as telephone buddying, the main exception is [additional] safeguarding procedures that have to be carried out beforehand.

“There are many qualities a person needs to be a BCS supporter. Most come naturally but I would certainly say – and not in any particular order – be user-friendly, confident, patient, be able to listen, honest, sympathetic, compassionate, be able to hold a conversation and have common sense.”

## Section 4. Good branches and their role in Remembrance

Since its origins in 1921, The Royal British Legion has kept Remembrance in recognition of the service and sacrifice of the Armed Forces community and their unique contribution in safeguarding our freedoms and values. The Royal British Legion is recognised as a national custodian of Remembrance in England, Wales and Northern Ireland, with Royal British Legion Scotland recognised in this role in Scotland.

The purpose is to make Remembrance understood and available to all and to pass it on to the next generation. Remembrance is a social benefit which promotes cohesion, national unity and contributes to the fulfilment of the Armed Forces Covenant by the Nation.

Please refer to the Remembrance folder on MAP for further information.

### a. Remembrance service.

The familiar model Remembrance service, with event organiser status falling to the responsible Government (local) authorities and the RBL playing a supportive role, is replicated across the nation on Remembrance Sunday. Remembrance services and parades are civic events supported by the RBL and the community, and not RBL events supported by the authorities. Counties and branches are not permitted to fund road closures or pay for services relating to the Remembrance parade; this is funded and operated by the local authority.

Remembrance is the focal point of the remembrance year, when we come together as a nation to remember the sacrifices made on our behalf by our Armed Forces, past and present. Branches play a key role in the promotion and maintenance of national Remembrance within their communities, and without their influence, hard work and representation, Remembrance would look hugely different.

*Below are some of the principal areas in which counties can make a difference during Remembrance:*

- Linking with schools and encouraging use of the available resources for schools.
- Linking with the local community and other organisations.
- Establishing and maintaining links with local youth organisations.
- Having oversight of the events happening across the county.
- Advertising events through the county website, social media, etc.
- Communicating with branches about local opportunities.
- Ensuring local councils are aware of their civic responsibilities.
- Attending talks, when requested, about Remembrance.
- Encouraging branches to link with their local councils and be involved in the planning of Remembrance activities.
- Encouraging branches to link with schools, other community groups and other Armed Forces organisations in the local area.

All counties and branches have a significant part to play during Remembrance, and this is an extremely rewarding and busy time of the year for the RBL.

### b. Relationships with the local community.

This can take the form of speaking to local schools about the meaning of Remembrance, why we wear a poppy and the significance of local war memorials. It could also mean making connections with local community interest groups, and for them to work alongside the branch to champion Remembrance.



Greater Manchester County shared a good example of Remembrance, detailing how it holds an annual children's school service.

Volunteers attend an assembly that teaches primary school children about Remembrance, using the RBL resources that are available online.

### c. Supporting the local authority.

This is especially important in regard to the civic responsibility of Remembrance parades. Maintaining a close working relationship with the local authority allows the local community to come together and show their respect in a safe and controlled environment.

***It should be noted that Remembrance is a civic responsibility, and not the responsibility of the RBL.***

The local authority owns the parade or service, even though it is often arranged and run by the local branch.

Care must be taken when discussing traffic management orders and other matters relating to the highway. ***The RBL is not insured to cover this risk***, and it remains the responsibility of the local authority.

Branches often encourage a multitude of local groups and communities to join in the act of Remembrance. By championing the importance of Remembrance, branches can be instrumental in ensuring that a wide and varied cross section of the community is present.



## Section 5. Fundraising

The RBL has a dedicated Poppy Appeal team that covers England, Wales and Northern Ireland. Each region has a designated Poppy Appeal Manager (PAM) who engages with branches in their area of responsibility to make the Poppy Appeal come alive, and to engage with and build strong relationships with local members and communities.

Branches can support the Poppy Appeal by volunteering to become a Poppy Appeal Organiser (PAO) during Remembrance, which generally runs from the last Thursday in October to the Armistice weekend. This is a fantastic opportunity to raise funds for the Poppy Appeal and get actively involved with any local fundraising activities.

All branches have a significant part to play during Remembrance, which is an extremely rewarding and busy time of the year for the RBL.

Membership directly contributes a significant proportion of the RBL's Poppy Appeal income. This enables us as a charity to continue to deliver the vital work supporting our beneficiaries and the wider Armed Forces community.

Please note that branches must not undertake any branch fundraising during Remembrance and when fundraising for Remembrance, should use the official red Poppy Appeal buckets. All branches should be encouraged to connect with their regional Poppy Appeal Manager at the earliest opportunity.

Your Poppy Appeal Manager will be able to advise which areas have gaps and require volunteers. It is hoped that collaboratively you will be able to offer much needed assistance during the appeal.



### a. Branch fundraising.

Active branches achieve success by fundraising in their local communities and by being represented at community events and activities.

Branch fundraising is entirely separate from the Poppy Appeal. Branches must ensure that when fundraising for their local branch, supporters are made aware of this and that blue buckets are used.

Maintaining a visible community presence – for example, using an RBL stand – can contribute to success when fundraising for the branch.

Many branches hold raffles at local events and branch meetings to generate income.

Branches that have built a good network with local businesses and communities will often be gifted donations and prizes that can also be used to fundraise for the branch.





#### b. Branch fundraising activities.

Branches are encouraged to look at opportunities where they can positively represent the RBL and potentially raise funds for the branch.

Events and locations for fundraising opportunities include local fêtes, parks and town centres, or through supporting local authority-run events such as the turning on of Christmas lights, Easter events and Bonfire Night.

Branches can fundraise for a range of things that support our charitable aims and objectives; for example, to purchase a bench or gazebo to use in community activities to promote the charity.

Branches should be forward thinking in planning and consider any community events and activities community that may be able to support the branch.

#### c. Promotion of events and activities.

How you promote your event is important and social media, as previously mentioned, is invaluable to gauge wider interest. You could also use the local paper or promote your event via community groups.

If you are collaborating with a local event, you should utilise their network; for example, the local council or other charities, or other uniformed services such as the fire service and police.

#### d. How branches should spend the funds they raise.

Please review the *Good Spend Guide*, also available on MAP, which will provide an explanation on how charitable funds can be used.

## Section 6. Campaigning

### About Campaigns, Policy and Research (CPR)

The RBL CPR team represents the interests of our Armed Forces community to politicians and decision makers – ensuring that its voice is heard.

Through campaigns such as Insult to Injury and Stop The Service Charge, CPR has secured positive outcomes for the Armed Forces community in recent years; and guided by our 2024 General Election Manifesto, we want to ensure that our community remains a priority for national Government.

### How you can support our work

CPR campaigns are driven by dedicated supporters who win over politicians and decision makers. We value each and every person that campaigns with us, and so we invite branch officers to please join our RBL Campaigner Community via [www.britishlegion.org.uk/about-us/our-campaigns](http://www.britishlegion.org.uk/about-us/our-campaigns). In doing so, you will receive updates on our campaigns and how you can get involved.

We are keen to support branches to engage in our campaigning activity. If you would like to be more involved – for example, in hosting a politician – please email [publicaffairs@britishlegion.org.uk](mailto:publicaffairs@britishlegion.org.uk), and the CPR team will be happy to help.

### Protecting RBL independence

Although we do want to influence political debates on the Armed Forces community, RBL must remain impartial and refrain from making any statements or partaking in any activities that could be deemed party political. As per charity and electoral regulations, we must not favour one political party over another and must ensure that our political engagement is balanced.

If you are an active party-political campaigner, elected representative or candidate for public office alongside being a branch officer, make sure to separate these roles.

*In practical terms, this means considering:*

- conducting your party-political activities on a different social media platform to those you use for RBL roles.
- not naming associations to RBL on any autobiographical information, election materials or websites.
- never using the Poppy emblem on any party-political materials.

### Information about your local veterans

Through our Count Them In campaign, we successfully lobbied Government to introduce a question on Service in HM Armed Forces to the 2021 Census. This had never been asked before, and it means that we now have far more information about the Armed Forces community.

If you want to access factual information about veterans in your area, please do visit the Office for Veterans' Affairs dashboard via this weblink.

Branches can support our valuable campaigns, which aim to improve both the physical and emotional wellbeing of beneficiaries and to support the evolving Armed Forces community. The branch should make a connection with the local CPR officer. If you need support with this, please contact your regional inbox/MEO.

Branches complement the CPR team's work by developing local connections and partnership working. Branches that maintain a positive relationship with civic authorities and a connection with key civic figures, e.g.: the Mayor, High Sheriff and Lord Lieutenant, will increase the RBL's presence in their local community and ensure that the charitable aims and objectives are at the fore. Branches should work positively with local communities, civic authorities and covenant groups to promote the RBL.

### Developing your branch

#### a. Valuing your members.

Without the loyal and dedicated support of our members the RBL membership would not be able to achieve its charitable aims and objectives. Also, branches would not be able to operate and thrive in the community.

It is essential that all members feel valued and appreciated and there are various ways in which branches can achieve this. Branches can award certificates of appreciation. Branches may also be nominated to receive annual county awards that recognise success across all areas of membership.

The County Committee also has a reward and recognition scheme, which includes the County Chair award and the National Awards. A new initiative called the Beacon Branch scheme is being piloted by some counties and, it is hoped, will be adopted across the regions.

The Beacon Branch scheme contains a check list for counties to use as a supportive measure for branches and will allow regions to share good practice across neighbouring branches.

### Welcoming new members

Goole and Howden Branch sends a welcome email to new members with features such as an introduction to the Branch Chair, including email and telephone contact, and an insight into what is currently happening in the area.

The email also includes when and where branch meetings are held, how the branch supports Remembrance, veterans' breakfast clubs, how to connect on social media, and a yearly calendar of events.

Branches are encouraged to have a peer-to-peer support system, also referred to as a buddy system. This is particularly important for newly formed branches that may need support and guidance to get up and running or may just have general questions. Branches should link up with neighbouring branches to share best practice and may even form connections with branches outside of their region.

#### b. Recruitment and retention.

With the declining retention and recruitment rate in membership it is vital that we continue to positively promote membership within the RBL. Member-get-member is still the most effective way for new joiners, retention and recruitment. Although it's every member's responsibility to recruit, branches should appoint recruitment advisors to work with the County Recruitment Officer. Details can be found in the recruitment and retention information available on MAP.

There are various ways that branches recruit new members, with face-to-face promotion still being the most popular option.

Branches highlighting their positive work in the community by word of mouth and sharing good news stories with local community groups also gets 'buy in' from new members.

How you recruit can make a significant difference. If there are large events in the community, such as local fêtes and galas, you should utilise all available resources for recruitment.

#### c. Communicating with members.

Branches use various communication methods and have shared their best practice when connecting with new and existing members. All forms of communication are viable such as email and telephone including WhatsApp instant messaging, which can be helpful when arranging events or if there are last minute changes to plans. Many also use Facebook Messenger groups and Viva Engage (previously Yammer) as supplied via the Membership Administration Portal. *Please note you should obtain permission before adding members to messaging groups.*

## Section 7. A good branch – checklist

The following list is not exhaustive but is a good gauge for any new branch or any existing branch that has not recently achieved compliancy.

- MS1 and self-declaration seen, signed and submitted in time by all branch officers within the time frame required, 31st of December and branch accounts submitted on time, 30th of September.
- The branch has a full committee or continually promotes the opportunities to join the committee.
- The branch has a clear plan; examples of three-year plans can be explored when undertaking branch management training on Discover.
- Is the Branch Committee active? Does it have a clear understanding of the roles and responsibilities and hold regular, inclusive meetings for all branch members? The Branch Committee should agree the frequency and location of branch meetings and communicate this as widely as possible. Social media is a good tool for this purpose.
- All branch officers should be registered with an official RBL Community account and only use this for communicating RBL business.
- All branches are encouraged to use the Membership Administration Portal (MAP) to achieve GDPR compliancy and for secure storage of documentation. This ensures members are not personally liable in accordance with Data Processing Agreement (DPA) and General Data Protection Regulation (GDPR) law. It is strongly discouraged for any member to store personal RBL information on their own computer; if this data is lost it is the individual who may be prosecuted under the law.
- Branch officers should ensure they adhere to the RBL GDPR and DPA policies. You should not store branch account documents for longer than seven years and the retention of MS1s is five years. If you hold personal details, to ensure you adhere to the RBL GDPR policy they must be securely destroyed as per the guidelines. The RBL takes data protection seriously and has a dedicated team that ensures the RBL remains GDPR and DPA-compliant and can support members with effective data handling. Please refer to GDPR guidance available on MAP.
- Branches must only have one bank account with signatories being current and including the Branch Treasurer. Please note that the bank account should not exceed £5,000. If you have funds in excess of this, you may apply for a separate branch BFI account.
- Upholding and demonstrating the RBL's shared values and purpose of membership by embracing new ways of working, being considerate of the changing landscape of our veterans' communities, having new ideas and forward planning. Branches can also evidence promoting the role and purpose of membership by valuing its members and keeping them engaged and active in their local community.
- Attending and/or sending representatives to Annual Conference and other national events such as membership meet-ups and County Chairs' Seminars.
- Maintaining a collaborative working relationship with the MEM, MEO and all RBL Directorates, and having links with other regional staff such as the CPR team and PAM.