



MEMBERSHIP TRAINING HANDBOOK

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(Version 1 - Issue January 2015)

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MEMBERSHIP TRAINING – GLOSSARY OF TERMS

AM	Area Manager
CTO	County Training Officer
C/DTO	County/District Training Officer
DTO	District Training Officer
HR	Human Resources
IE	Independent Examiner
MSO	Membership Support Officer
MTA	Membership Training Administrator (Staff Member)
MTO	Membership Training Officer (Staff Member)
NPM	National Parade Marshal
TAG	Training Advisory Group
TNA	Training Needs Analysis
TTT	Train the Trainer
VSU	Volunteer Support Unit

1. AN INTRODUCTION TO MEMBERSHIP TRAINING

1.1. Membership Strategy.

- 1.1.1.** The Membership Strategy seeks to create an outward looking, productive membership which provides relevance and tangible support to the Legion's core objectives.
- 1.1.2.** Under Charity Law the volunteer Legion members in positions of authority from National Trustees down, are accountable for the activities of the Legion. There is a need for all volunteer members holding Legion positions at all levels to be trained and instructed to carry out their duties and responsibilities in their roles effectively. It is a responsibility of the Board of Trustees to ensure that these training needs are met and evolves to satisfy these needs over time.

1.2. Aim and objectives of Membership Training. The aim of Membership Training is to provide all Legion Members filling volunteer appointments with the necessary knowledge to enable them to discharge their duties efficiently and effectively.

1.2.1. Objectives:

- 1.2.1.1.** To train Officers and Committee members at every level in preparation for their appointment.
- 1.2.1.2.** To train Officers and Committee Members at every level in sound financial and management procedures
- 1.2.1.3.** To train selected members for specific advisory, supervisory and instructor appointments at National and County/District level.
- 1.2.1.4.** To provide training for members in a timely, relevant and cost-effective manner.

1.3. Legion Policy Applied to Training

- 1.3.1. Data Protection.** Anyone processing data in the RBL is responsible for understanding and complying with the procedures that the RBL has adopted in order to ensure data protection compliance. As a result delegates' information in connection with Membership Training courses will only be stored for as long as it is needed or required. Accordingly individual applications for training will be destroyed on completion of training by the delegate and salient information, particularly: name; membership number and contact details will only be retained for any follow up action and registering successful completion of the training. All Members may request access to data stored in respect of their training, in the first instance the request should be through Membership Training, although more complex requests will be coordinated through the Legion's Data Protection Officer (DPO).
- 1.3.2. Equal Opportunities and Diversity.** The Royal British Legion applies an equal opportunities and diversity policy in respect of both paid staff and volunteers. We are committed to ensuring that Membership Training programme is accessible and attractive to our Members and volunteers from all communities. We include equality and diversity training within the Membership training programme.
- 1.3.3. Health and Safety.** Members and volunteers are covered by The Royal British Legion's health and safety policy whilst undertaking Legion activities. All

volunteers are covered by the Legion's personal accident and public liability insurance policies whilst they are on Legion training. As there is an obligation to provide appropriate safety and support, all delegates must complete an individual application for training. However, personal possessions are not insured and the Legion's insurance policy does not cover any additional car insurance costs associated with using a private vehicle on Legion business and delegates' attention must be drawn to the provisions of SOP 42 when they sign to claim expenses.

1.4. Membership Training Organisation and Structure

1.4.1. Training Advisory Group (TAG).

1.4.1.1. The TAG is responsible for the formulation of Membership training policy and the development and validation of Membership training within the Legion. The TAG initiates Training Needs Analyses (TNAs) when notified of perceived training deficiencies within the Membership by either the Board of Trustees, the Director General (DG), Divisional Directors or County/District Committees. When the training need is verified the TAG will, with the assistance of the Membership Department, define what training is required (training objectives), for whom, how often, at what level and how that training is to be delivered. Financial considerations will always be a critical factor in such deliberations.

1.4.1.2. The TAG reports to the Membership Council. The Membership Council Chairman appoints three Membership Council members: the TAG Chairman and two other MC members on the TAG, currently to include the member responsible for volunteering. Other members of the TAG are representatives of the Women's Section, Operations, HR (Volunteering and Learning and Development) and Membership including the Membership Support Manager, who is Secretary of the TAG. The TAG usually meets three times per year.

1.4.2. National and local training. The Membership training structure is organised on three levels: National, County/District and Branch.

1.4.2.1. National level. At National level overall control is vested in the TAG and implemented on its behalf by the Membership training team. The focus of training is on officials at County/District level and specialist role.

1.4.2.2. County / District level. Only a limited number of Branch officers can be practically trained nationally. Ideally, County/District trainers are responsible for training Branch officers and the Membership training team provides training material for this task.

1.4.2.3. Branch level. Due to the frequent changeover of officer appointments within Branches it is impossible to train every Branch officer at national or even County/District level. Consequently, branches may have to take responsibility for training their own officers. An experienced Branch Training Officer may be appointed to carry out internal training, such as organising Branch training days or seminars, briefing new Members and liaising with the C/DTO over national course vacancies and County/District training courses.

1.4.3. Communication about Training. The National training programme and portfolio of courses is produced by the Membership training team. Once agreed by TAG, the information is published to the Counties/Districts. Course content is evaluated by course instructors and students at the end of each course and fed back to the TAG when it meets.

1.4.3.1. County/District officers must, whenever possible, be trained for their responsibilities at national level training and the County/District is responsible for ensuring that Branches are provided with the necessary knowledge and skills to enable them to fulfil their duties and responsibilities efficiently and effectively. Consequently, a major portion of Membership training takes place at County/District level.

1.4.3.2. Each County/District Committee appoints a County/District Training Officer to plan and implement the County/District training programme. The C/DTO is responsible for ensuring that an annual training budget, for County/District-level training, is incorporated in the County annual budget round. The C/DTO co-ordinates the County/District student selection process by which branches nominate members for national courses.

1.4.3.3. The inevitable large numbers of branch members requiring training make 'On-the-job' training the more realistic norm, especially with the timing of change-over of its officers. However, the appointment of understudies or deputies to the busier Branch Officers is a highly effective method of stimulating interest whilst training a replacement.

1.4.3.4. Besides the C/DTO, a number of volunteer trainers are appointed in every Region who can assist in the delivery of national training courses. These volunteer trainers all must qualify on the Train the Trainer course and must use standardised presentations and course materials. In such cases a member of the Membership Training Team would be expected to pay visits initially and then from time to time to observe such training.

1.4.4. Membership Training Team Responsibilities. The Membership Training team co-ordinates the implementation of the Membership training policy under the management direction of the Membership Support Manager.

1.4.4.1. The Membership Support Manager is responsible for:

1.4.4.1.1.1. the implementation of TAG directives

1.4.4.1.1.2. the development and implementation of the training portfolio, including the Membership Training Calendar.

1.4.4.1.1.3. the production and control of the Membership Training budget

1.4.4.1.1.4. the training and provision of instructors for national courses

1.4.4.1.1.5. the maintaining of a rolling training needs analysis for volunteers

1.4.4.1.1.6. a Membership training database and national registers of specially qualified volunteers

1.4.4.2. Membership Training Officers. Are responsible for training delivery at national level and local level, resources permitting, plus quality assurance at all levels when others are used as trainers.

1.4.4.3. Membership Training Administrator. The Membership Training Administrator (MTA) maintains a database record of all membership training undertaken at national level. C/DTOs should maintain their own records of volunteers who have attended County/District and Branch level training events in their County/District. The MTA also maintains a National Register of volunteers who have been specially trained to fulfil the duties of certain advisory, supervisory and instructor appointments. These registers are updated after every specialist course on the basis of the information forwarded by the Trainer. Some specialist qualifications remain valid for only two or three years (as defined in the Training Profiles) after which time revision training is required and recorded when complete.

1.4.5. Applications for National Courses. Course applications for delegates to be included on a national course must be sent to the MTA. All such applications must be endorsed by the County/District. If an application is not endorsed, the application form will not be accepted. On receipt of a correctly processed application form the administrator will send an acknowledgement to the originator confirming their course or, should the course be full, advising them of an alternative course of action.

1.4.6. Certificates. On successful completion of a National Membership Training course, delegates are presented with an attendance certificate signed by the Chairman of TAG. They are usually included in the course material for presentation when the training is complete. A record of certificates issued is maintained by the MTA. For courses where there is a pass or fail assessment, only those course delegates who pass will receive a certificate. Certificates are not issued for training seminars.

1.5. Membership Training Principles

1.5.1. The Membership Training principles were introduced in line with the new Membership Strategy and contain the service promises of the Membership Training team. The following training principles, incorporated into the Membership Training Handbook, focus on delivering high quality training to the people on the ground who assume responsibility and accountability for the membership volunteering roles.

1.5.2. Identification of Training Needs. As well as carrying out regular training needs analysis within Counties and Districts, County Chairmen, Branch Chairmen and County/District Training Officers (C/DTO) are requested to identify where there is a training need for groups or individuals. The C/DTO will be required to carry out an informal interview with the individual(s) to ascertain how best their needs can be met. The C/DTO will then take the necessary action to book individual training or agree and arrange for training of a number of members and appropriate documentation is completed.

- 1.5.2.1.** When a particular training need has been identified by one of the internal stakeholders such as: Internal Audit, the Legion Complaints Committee or a County/District Committee, these requests will be responded to as a priority and logged on a register so that the response is timely and accurate.
- 1.5.2.2.** Training Methods There is a wide variety of training methods to meet the needs of person centred learning, making use of blended solutions where appropriate. For those new to post, there are on-line induction packages which will assist them until they are able to attend formal training. Training methods will include where appropriate.
- 1.5.2.2.1.** Taster sessions.
- 1.5.2.2.2.** One day workshops
- 1.5.2.2.3.** Two day training courses
- 1.5.2.2.4.** Digital modules
- 1.5.2.2.5.** Webinars and ring-in sessions
- 1.5.2.2.6.** Specialist modules for specific role.
- 1.5.2.2.6.1.** The last three are aspirational as at this issue of the Handbook.
- 1.5.2.3.** Training Calendar. There will be a rolling training programme, with key courses identifiable up to 9-months ahead. To ensure that training opportunities are offered to the widest possible audience, training will be offered throughout the country. Training will be delivered as geographically close to the need as possible. A number of national courses will be pre-programmed throughout the country. Requests for training will be considered on an individual basis by the training team and they will be allocated to fit the geographical spread and type of training required as a whole.
- 1.5.2.4.** The live Membership Training Calendar is available to County District staff and officers with access to “My Legion” in Shared Membership Training documents, link:
<http://mylegion.britishlegion.org.uk/sites/Membership/training/SitePages/Membership%20Training.aspx>
- 1.5.2.5.** A hard copy calendar will be issued as an occasional document uploaded with Membership Training Updates onto the secure portal. They will not be updated until the next issue, but they will be dated so that the most recent might be identified.
- 1.5.2.6.** Overseas Training Requests for Membership Training from individuals based overseas will not normally be accepted for UK-based training, as arrangements are in place to deliver training more cost effectively in their location and when local issues might be more readily addressed.

1.5.2.7. Outline of Provision. Courses have been defined as standard or specific. All standard courses, unless specified on the Training Calendar are delivered by the training team in local areas. Specific courses are those which are offered to a large geographical area. Courses which fall into each category are as follows:

<i>Standard</i>	<i>Role Specific</i>
Branch Management	Qualified Panel Member
Branch Treasurers	Train the Trainer
County Management	County Training Officer
County Conference Committee	Independent Examiner
	County Recruiting Officers
	Recruiting Advisers
	Standard Bearer Judges*
	Parade Marshals*

Note: * Courses such as Standard Bearer Judges and Parade Marshals are organised by the NPM in close conjunction with the Ceremonial Working Group.

1.5.2.8. Course Content All course materials will be updated to reflect policy changes, otherwise at least once a year. Only 'in use' material will be kept in the relevant SharePoint Course Material folders.

1.5.2.9. Assuring Value for Money. Training must provide value for money and therefore the Membership training programme must not incur unnecessary expense. Where possible all correspondence from the Training Administrator to stakeholders and delegates will be carried out electronically. This includes Course Applications, Joining Instructions and pre-course work. Once a delegate has been accepted on to a course, it is their responsibility to attend. All 'no shows' will be investigated by the C/DTO and reported back to the relevant trainer. Where a delegate does not reasonably inform the MTA or the trainer that they would like to withdraw from the course and a cost has been incurred, the branch may be required to meet that cost. Delegates applying for courses must apply for those being held in their local area. Should there be a need to attend a standard course further afield; special permission must be sought from the Membership Support Manager.

1.5.2.10. Training Administration. To ensure that the training administration process flows in a logical and timely manner, the closing date for all course applications will be two weeks prior to the course start date, although a judgement will be made in viability of the course at the 4 weeks/1 month stage. Applications received after this time will not generally be accepted. If candidates are accepted late, the C/DTO will inform the delegate of their responsibility to complete any pre-course work. If they are unable to comply, they should be advised not to attend as they may hold up or distract other delegates. If delegates require accommodation, reservations are to be made through the MTA using the designated booking system. This also applies when a delegate has specific needs and is attending what is deemed to be a

local course. In this circumstance, the Administrator is to seek authority from the Membership Support Manager.

- 1.5.2.11. Training Evaluation** All courses will be subject to evaluation by both the trainers and delegates with the support of the C/DTO where necessary. Evaluations will be carried out in three stages:
- 1.5.2.11.1.** Stage 1. Immediate reaction completed on completion of training. Currently by means of an emailed link through Survey Monkey that permits prompt response.
- 1.5.2.11.2.** Stage 2. The second evaluation (Learning Evaluation and Behaviour) is to be carried out no earlier than 8 weeks and no later than 12 weeks after delivery and will focus on how beneficial the training has been to both the individual and Branch, County or District.
- 1.5.2.11.3.** Stage 3. There will be a third stage 360 degree evaluation by telephone to a select number of delegates, field staff and County/District officials. These will be selected on the basis of the second evaluation returns.
- 1.5.2.12. Validation** Whilst there is an element of knowledge testing / assessment on every course; certain courses, however, carry a mandatory pass or fail mark, as agreed by TAG namely:
- 1.5.2.12.1.** Independent Examiner and associated refresher course (2 years).
- 1.5.2.12.2.** Qualified Panel Member and associated refresher course (3 years).
- 1.5.2.12.3.** Train the Trainer
- 1.5.2.12.4.** County / District Recruiting Officer
- 1.5.2.13.** Further assessment criteria for courses will be evaluated by TAG and will be reflected in the Training Course Portfolio when agreed. Ceremonial training is sponsored by the Ceremonial Working Group (CWG) and run by the National Parade Marshal and may also have a pass/fail assessment and grading.
- 1.5.3. In Conclusion.** Members who are elected to serve on Branch or County / District Committees or selected for appointments within those committees are to be given the best possible chance of success. TAG is deliberating on mandatory subjects for Branch Officers who sign the MS1 to assist them in carrying out their responsibilities. Effective training creates confidence not only in the individuals who have been trained as they carry out their duties in aid of the Legion, but also reflects that confidence wider in the Legion that they project as they go about their duties and pass on their knowledge.

2. Membership Training Profiles

- 2.1. This section contains details of the range of training available for the Legion's Membership, together with information on applications and administrative arrangements for the courses. The training may be delivered at a variety of locations around the country and overseas by trainers from the Membership Training Team. Training members on their current, or prospective, Branch, County or specialist roles within the Legion; improves our effectiveness in so many ways, including increased member recruitment and retention of members and volunteers. Training can also help to ensure compliance with legislation and guidance from the Charity Commission and so preserves our good reputation. Refreshing or developing skills such as in communication, time management or leadership, makes it easier for members to carry out their roles, while improving relationships within the Legion. Training can reduce incidents or accidents that may leave the Legion open to unnecessary costs.
- 2.2. **County/District Training Delivery.** The Training Advisory Group, which oversees training for Members and volunteers within the Legion and is chaired by an elected member of the Membership Council, has agreed that the Branch Management and Branch Treasurer can be delivered by counties and districts. In order to ensure consistency and quality of training delivery these courses should be delivered by County/District training officers who have recently attended update training, the training materials used should be endorsed by a member of the Membership Training Team and the course should be evaluated using standard evaluation forms and reports.
- 2.3. **E-Learning.** Access to E-learning is through Membership Training and ultimately through the Learning & Development Department that controls access to a suite of on-line courses on the Charity Learning Consortium's website. While only some are Legion-specific, there are also many other useful and pertinent topics covered including IT skills, presentation skills, management and leadership modules. To gain access to the site you will require a password, which can be obtained through your County/District Training Officer.
- 2.4. **Summary of Membership Training Courses** The Membership Training Team works with the Membership Department and the wider Legion to sustain its work and there is a comprehensive programme of training events designed to help members manage their branches, counties or districts and to prepare members for specialist roles such as the Independent Examiner or Qualified Panel Member.
- 2.5. **Booking a Training Course** Please refer to Section 5.1 for greater detail. It is advisable to book as early as possible for training events for two possible reasons: demand for some courses is high and they can get booked up quickly, or courses that are slow to fill may be cancelled because they are not viable in time. Applications must be endorsed, at the appropriate level, to confirm that the delegate has a need for the training, before despatch to Membership Training.

2.6. The full Profiles of the courses listed below are provided in the following pages:

2.6.1. Branch Level Courses

- 2.6.1.1. Branch Management Course
- 2.6.1.2. Branch Treasurer Course
- 2.6.1.3. Branch Treasurer Refresher Course
- 2.6.1.4. Recruiting Advisor Course
- 2.6.1.4.1. Plus Workshops to meet local needs on all of the above

2.6.2. County/District Level Courses:

- 2.6.2.1. County Management Course
- 2.6.2.2. County Recruiting Officer Course (& Update)
- 2.6.2.3. Conference Committee Course
- 2.6.2.4. County Training Officer Course (& Update)
- 2.6.2.5. County Youth Advisor & Child Protection Course

2.6.3. Ceremonial Courses:

- 2.6.3.1. Standard Bearer Judge Course
- 2.6.3.1.1. Standard Bearer Judge Refresher/Upgrade Courses
- 2.6.3.2. Parade Marshal Course
- 2.6.3.2.1. Parade Marshal Refresher/Upgrade Courses
- 2.6.3.3. Band Workshop

2.6.4. Specialist Courses:

- 2.6.4.1. Independent Examiner Course (Assessed)
- 2.6.4.2. Independent Examiner Refresher Course (Assessed every 2 years)
- 2.6.4.2.1. IE Periodic Quality Assurance Check (See above)
- 2.6.4.3. Joint Finance and IE Course (Assessed)
- 2.6.4.4. Qualified Panel Member Course
- 2.6.4.5. Qualified Panel Member Refresher Course (Assessed every 3 years)

Branch Management Course

Aim To provide in-post and potential Branch Committee Members with an overview of complying with Charity Commission and Legion procedures; their duties and responsibilities as Branch Committee members and to develop or refresh the managerial skills required to carry them out in a Legion environment.

Content

- A Legion overview and Legion organisation
- Legion structure in support of the Branch and Membership.
- Legion Values and Code of Conduct
- Charter responsibilities and trusteeship
- Application of Part 4 of the Membership Handbook, including overviews of:
 - Branch finances
 - Branch activities
 - Branch meetings
 - Recruiting and retention
 - Local relations
 - Disputes and complaints procedure
- Branch involvement in the wider Legion
 - Elections
 - Annual Conference and preparation of motions
 - Corporate image, use of logo
 - Fundraising

Interface with other branch members on the course

Aimed at Priority 1 - Serving and or newly elected Branch Officers
Priority 2 - Elected Branch Committee Members.
Priority 3 – Members volunteering who might stand for election.

Duration Two Days

Outcome A Member with sound knowledge of Legion policy and governance applied at Branch level.

Notes

- There will be pre-course work for this course. Topics can be added to suit specific local needs.

Branch Treasurer Course

Aim	<ul style="list-style-type: none">• To increase RBL Members' knowledge of the Legion's financial provisions applicable to the Royal Charter and Charity Law• To train RBL Branch Treasurers in basic book keeping skills
Content	<ul style="list-style-type: none">• The Legal framework• The Royal Charter• The Membership Handbook particularly Branch responsibilities and the Treasurers role.• Accounting practices and Financial controls• Practical exercises<ul style="list-style-type: none">- Bank Reconciliation procedures Completing the year end branch accounts
Aimed at	Branch Treasurers, potential Branch Treasurers and Branch Committee members
Duration	Two days
Outcome	A Member who is confident to undertake duties as a Branch Treasurer.
Notes	<p>Pre-Course work is required for this course.</p> <p>Delegates from branches who are registered for LOMAS should attend day one only.</p> <p>LOMAS is currently trained as part of a separate project as at September 2014. Future provision will be LOMAS inclusion as "business as usual" when all branches are on the system.</p>

County/District Management Course

Aim To train County/District Officers (C/D Officers) and committee members on management structures and procedures; their duties and responsibilities and to practice and assess project planning skills.

Content

- County management structure
- Duties and responsibilities of counties
- Effective county meetings
- Leadership and Communication
- Effective county AGM
- Solving problems and planning projects
- Complaints procedure and Informal Mediation
- County budgeting and financial controls
- Trustee responsibilities
- Employment Law
- Inter-relationship with clubs
- County training
- Case Study – Developing a C/D Plan (assessed)

Aimed at Members who are serving or prospective County/District Officers, Committee members or filling specialist appointments on County/ District Committees.

Duration Two days

Outcome County or District Committee Members

Notes

There is pre-course work for this course and it will be required for the first session of the course.

Full participation in all aspects of the course is expected.

County Conference Committee Course

Aim **To train and develop members and potential members of the County/District Conference Committees (CCCs)**

- Content**
- Legion Annual Conference
 - The role of the CCC
 - Responsibilities of CCC
 - Model terms of reference
 - How motions are formulated and submitted
 - CCC obligations when scrutinising motions to go before the AGM
 - Procedures for nominations and elections
 - Syndicate Practical Exercises – Drafting and scrutinising motions

Aimed at All serving members and potential members of County Conference Committees.

Duration Two days

Outcome Experienced Members who serve on a Conference Committee and/or draft viable Motions to Conference

Notes

There will be pre-course work.

Full participation in all aspects of the course is expected.

Delegates who are in possession of laptops/memory sticks are encouraged to bring them to the course.

County/District Training Officer Course

Aim **To develop and assess the training skills of individuals who have been appointed as County/District Training Officers.**

- Content**
- County/District Structure
 - The Role of the C/DTO
 - Training Needs Analysis
 - Training versus Facilitation
 - The Systems Approach to Training
 - Learning & Training styles
 - Managing the Group
 - Communication – Questioning and Feedback
 - Evaluation – Levels 1,2, and 3
 - Assessed Training Delivery Sessions

Aimed at Those directly involved in the organisation and delivery of County/District Membership Training.

Duration 2 ½ days, (incl: first evening and pre-course work)

Outcome Delegates who pass the course will be added to the National Register of Legion C/DTOs and will be invited to annual updates (or updates as required)

Notes

Pre-course work will include the design of a short learning session to be delivered on the first full day of the course. Building on this, there will be a further 2 assessed training delivery sessions.

Delegates who have their own laptops/memory sticks are encouraged to bring them to the course

County/District Training Officers (C/DTO) Update

Aim To update all trained County or District Training Officers (C/DTOs) on current developments, practice and procedures concerning their role within the Legion and to review best practice.

Content

- National Membership update
- Training Update
- New Initiatives
- Best Practice
- Communication
- Training Needs Analysis – Planning for the Year Ahead

Aimed at Those who have previously passed the C/DTO course.

Duration 1.5 days

Outcome

Notes

There will be a requirement for pre-update work.

In cases where the C/DTO is unable to attend, a County/District representative should be nominated.

The C/DTO update may be run in conjunction with the C/DRO update. Groups will split for individual specialist subjects.

County/District Recruiting Officers (C/DRO) Course

Aim To train and assess selected individuals in order that they are able to deliver presentations; establish a County/District - wide network of volunteer recruiting Advisors; be able to advise formations on Legion in the Community initiatives, recruiting and retention strategies and to formulate the Annual County Recruiting, LIC Plan and associated budgets.

- Content**
- Why are we here – What the Legion does
 - The Four Pillars of the Legion
 - Using C/DRO Handbook
 - Relationships and Communication
 - Delivering Presentations and practice
 - Retention and Recruitment – organisation and planning
 - Legion in the Community
 - Finance – preparing the budgets
 - Direct Debit Subscription Payment (DDSP) and Gift Aid
 - Practical Exercises

Aimed at Legion members who have an interest and a flair for recruiting, an interest in running events and who also have an ability and the confidence to brief a variety of audiences.

Duration Two days

Outcome Delegates will be assessed on presentation delivery. Successful candidates will be added to the National Register of County and District Recruiting Officers

Notes There will be pre-course work for this course.

Principal County/District Recruiting Officers (PC/DRO) Update

Aim To update all trained Principal C/DROs on current developments, practice and procedures concerning their role within the Legion and to review best practice.

- Content**
- National Membership update
 - New Initiatives
 - Best Practice
 - Communications
 - Current Publications and other materials
 - LIC and Planning

Aimed at Those who have previously passed the County Recruiting Officer's course.

Duration 1.5 days

Outcome Updated County / District Recruiting Officers

Notes

There will be a requirement for pre-update work.

In Counties/Districts where there is a Principal CRO, the PCRO is expected to attend or nominate a deputy.

The C/DRO update may be run in conjunction with the C/DTO update. Groups will split for individual specialist subjects.

Independent Examiner Course

Aim To train and test volunteers, who have treasurers experience, to conduct an examination of Legion Branch accounts as laid down in the Legion's terms of reference for audit or independent review.

Content

- Charity Commission Guidelines and Directions on Independent Examination
- Review of LEGION branch accounting procedures
- Audit checks and verification of balances
- Independent Examiner's responsibilities
- Independent Examiner's documentation
- Practical knowledge test

Aimed at Experienced treasurers who display the potential to become an Independent Examiner.

Duration Two days

Outcome Successful delegates will be entered as qualified IEs on the National Register of Legion Independent Examiners for a two year period. Successful delegates will need to pass a refresher /quality assurance check every two years.

Notes Delegates must have attended the Branch Treasurer's course prior to the Independent Examiners course.

The knowledge test will take the form of a practical exercise which delegates must pass.

Independent Examiner Refresher Course/Arrangements

Aim To update and test existing Independent Examiners (IEs) to enable them to continue to independently examine Legion branch accounts effectively.

Content

- Review of statutory requirements
- Review of branch accounting records
- Review of checking accounting records
- Independent examiners work programme
- Practical exercises
- Practical knowledge test

Aimed at IEs who have previously attended and passed the test on the two day course.

Duration One Day

Outcome IEs who pass the test are retained on the IE Register with a revised lapse date.

Notes

The knowledge test will take the form of a practical task derived assessment which delegates must pass.

Independent Examiners are required to pass a refresher course every two years, although for experienced IEs it may be take the form of a briefing and an open book test in similar circumstance to carrying out an examination of accounts.

Qualified Panel Member Course

Aim

To train and assess those who show the potential to be Qualified Panel Members (QPMs).

Content

- The Legion Complaints Procedures
- Role of the Legion Complaints Committee
- The QPM Scheme
- Investigation Panel Convening Process
- Preparation of an Investigation Panel
- Collection of Evidence
- Panel Deliberations – Deciding an Award
- Record of Proceedings and presentation of evidence
- Right of Appeal and Legion Appeals Process

Aimed at

Legion Members who have been identified as having a sound knowledge of the Legion, application of its policies such as the Royal Charter and the Membership Handbook and who display the qualities of: neutrality, sound judgement and common sense.

Duration

Two days

Outcome

Delegates who pass the course will be entered on the National Register of Legion QPM's.

Notes

Course delegates must be realistic potential QPMs and the list of delegates will be as agreed by the LCC before issue of joining instructions and pre-course work.

During the course, delegates will be required to complete and pass both a written knowledge check and take part in an assessed mock Investigation Panel.

QPMs are required to attend and pass update training every three years to remain on the list.

Qualified Panel Member Update Course

Aim To update and quality assure Qualified Panel Members (QPMs) who wish to remain QPMs.

Content

- Revision of the Legion Complaints Procedures and the QPM Scheme
- Recent Legion Complaints Policy changes
- Panel finding trends
- Questioning and panel practice

Aimed at

Members who are already QPMs and completed training up to 3 years previously.

Duration

One day

Outcome

Confirmation of standard to be a QPM and revised expiry date on the QPM National register

Notes

Course delegates will be on the QPM Register and must remain realistic QPMs. They will have been invited to attend training by the LCC before issue of joining instructions and pre-course work.

During the course, delegates will be required to complete and pass both a written knowledge check and take part in an assessed Investigation Panel exercise.

Delegates who pass the course will be entered on the National Register of Legion QPM's.

Standard Bearer Judges Course

Aim	To accredit Standard Bearer Judges with the Legion's National Authority through training and assessment.
Content	<ul style="list-style-type: none">• Duties of Standard Bearer Judge• Standard Bearers equipment• Dress and bearing• Standard Bearer drill movements• The Legion Standard• Practical Standard Bearer judging• Individual assessment• Discussion period
Aimed at	Experienced Legion standard bearers who have demonstrated a potential to be Standard Bearer Competition Judges. Standard Bearers who are still actively competing in Standard Bearer Competitions cannot be eligible. (You do not have to have been a Standard Bearer to be eligible but it is certainly an advantage).
Duration	2 days (Including work on the evening of arrival)
Outcome	<p>This is a pass or fail and graded course; with successful candidates graded on assessment of their dress and practical Judging ability ie:</p> <ul style="list-style-type: none">• A (National Level),• B (Regional Level) and• C (County Level) <p>Standard Bearer Judges entered accordingly onto the National Register of RBL Standard Bearer Judges.</p>
Notes	<p>The Course is sponsored by the National Parade Marshal (NPM) who will screen all applications.</p> <p>Once qualified, Standard Bearer Judges can be reassessed for upgrading by inviting the NPM, or his Deputy, to witness his/her judging performance at a competition.</p> <p>A further one-day refresher/upgrading course is also available.</p>

Standard Bearer Judges Refresher & Update Course

Aim	To standardise the way in which Standard Bearer Judges within the Legion interpret the Ceremonial Handbook and Judge Standard Bearer Competitions.
Content	<ul style="list-style-type: none">• Duties of Standard Bearer Judge• Standard Bearers equipment• Dress and bearing• Standard Bearer drill movements• The Legion Standard• Practical Standard Bearer judging• Individual assessment• Discussion period
Aimed at	Qualified Standard Bearer Judges and SB Judges looking for an Up-grade.
Duration	1 day
Outcome	<p>This is a pass or fail and graded course; with successful candidates graded:</p> <ul style="list-style-type: none">• A (National Level),• B (Regional Level) and• C (County Level) <p>Standard Bearer Judges will be assessed on their dress, and practical Judging ability they are then entered accordingly onto the National Register of RBL Standard Bearer Judges.</p>
Notes	The Course is sponsored by the National Parade Marshal (NPM) who will screen all applications.

Parade Marshals Course

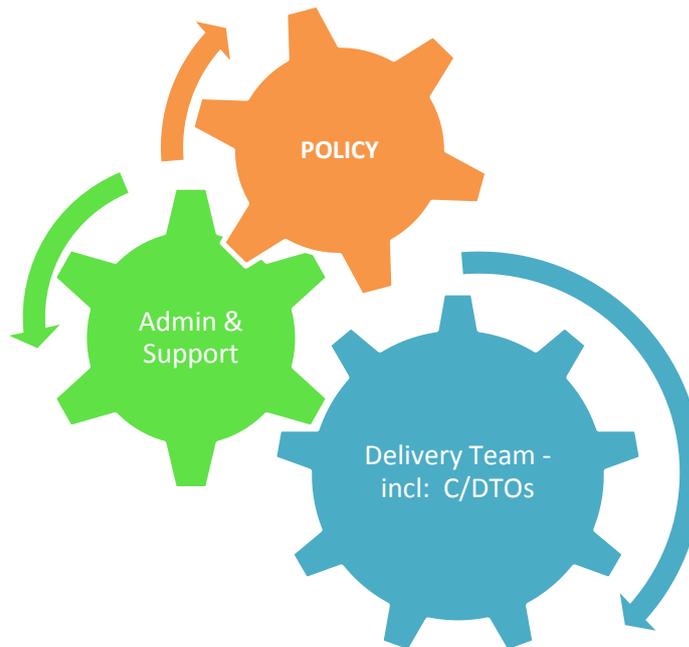
Aim	To standardise the way in which Parade Marshals within the Legion interpret the Ceremonial Handbook and organise Legion Parades and Dedications, etc.
Content	<ul style="list-style-type: none">• Interpretation of the RBL Ceremonial Handbook 2007• The selection and role of the Parade Marshal• Words of Command and Cane Drill• County & Branch Ceremonial Procedures• The Organisation of Parades & Dedications etc• Practical syndicate work and student presentations Discussion period.
Aimed at	Experienced County Legion Parade Marshals or any member who is currently acting as a County Marshal.
Duration	2 days (Including work on the evening of arrival)
Outcome	This is a pass or fail and graded course; with successful candidates graded <ul style="list-style-type: none">• A (Parade Marshal)• B (Assistant Parade Marshal)
Notes	<p>The Course is sponsored by the National Parade Marshal (NPM) who will screen all applications.</p> <p>Delegates will be assessed on their dress, words of command and drill. If considered competent, will be added to the National Register of Parade Marshals accordingly.</p> <p>A further one-day refresher/upgrading course is also available.</p>

Parade Marshals Refresher & Update Course

Aim	To standardise the way in which Parade Marshals within the Legion interpret the Ceremonial Handbook and organise Legion Parades and Dedications, etc.
Content	<ul style="list-style-type: none"> • Interpretation of the RBL Ceremonial Handbook 2007 • The selection and role of the Parade Marshal • Words of Command and Cane Drill • County & Branch Ceremonial Procedures • The Organisation of Parades & Dedications etc • Practical syndicate work and student presentations <p>Discussion period.</p>
Aimed at	Qualified Legion Parade Marshals.
Duration	1 day
Outcome	<p>These is a pass or fail and graded course. Delegates will be assessed on their dress, words of command and drill. If considered competent they will be added to the National Register of Parade Marshals as:</p> <ul style="list-style-type: none"> • A (Parade Marshal) • B (Assistant Parade Marshal)
Notes	The Course is sponsored by the National Parade Marshal (NPM) who will screen all applications.

3. Membership Training Organisation and Contacts

- 3.1.** Membership Training is line managed through the Membership Support Manager, although Membership Training is equally dependent upon the wide net that consists of a mix of training officers, administrator, County/District Field staffs , County/District Training Officers and Train the Trainer qualified volunteers.



- 3.2. Head Office Contacts:** All Membership Training Team members are on Membershiptraining@britishlegion.org.uk and should be contacted through here at least initially.

3.2.1. Membership Support Manager is : Beverley Harrison.

3.2.2. Membership Support Administrator: Monique Collins – Please phone 02030537221 or contact her through the main email above.

3.2.3. The Membership Training Officers are: Jo D’Souza and Jan Martin, who may also be contacted through Membership Training or as indicated for specific courses that they are delivering.

3.3. In the Field:

3.3.1. **Staff:** Membership Support Officers (MSOs)

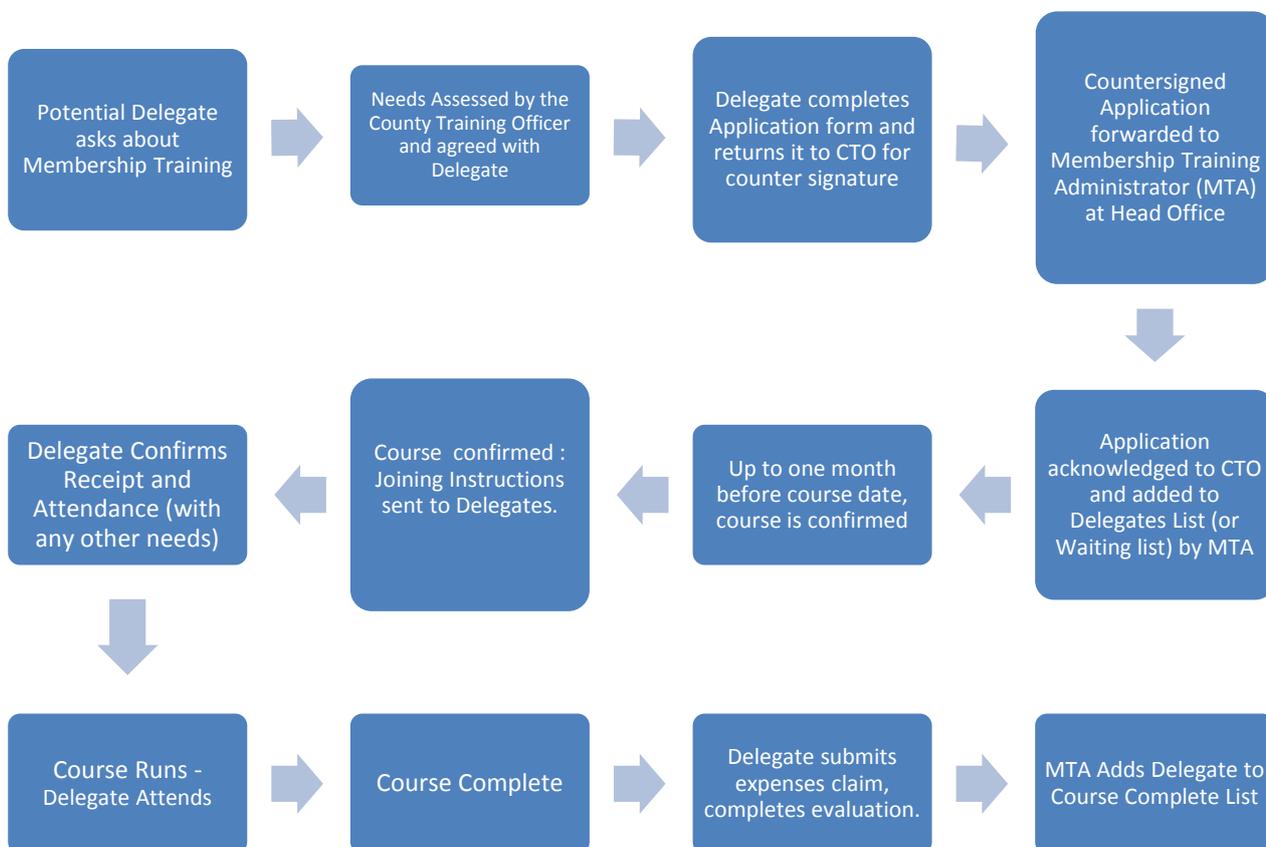
3.3.2. Members:

3.3.2.1 County / District Training Officer (or Co-ordinator if not Train the Trainer (TTT) qualified)

3.3.2.2. Train the Trainer – Member/Volunteers

5. Application Processes

5.1 Individuals' Applications



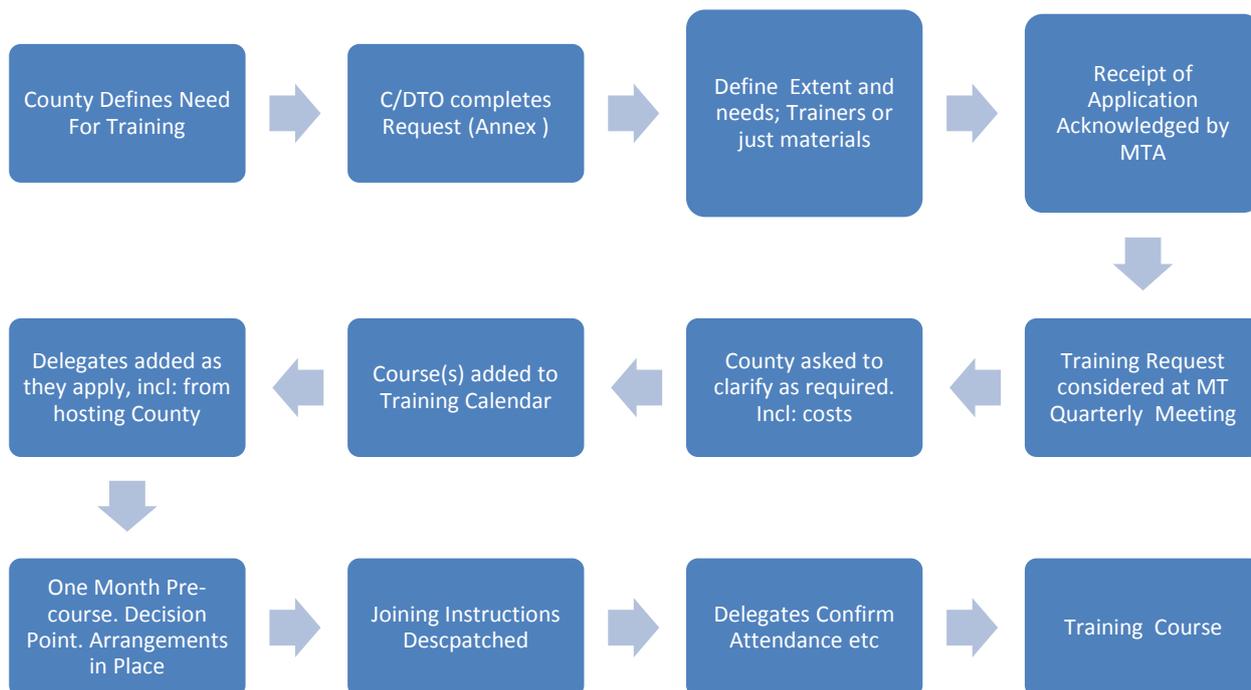
Notes

The current application for training is included in the Membership Training Handbook attached. There are specific variations to meet the needs of the Training Profiles that identify who should certify the individual applicant requires the training, such as:

CTO or MSO with dates of Branch Treasurer's Training in the case of Independent Examiners,

The County Parade Marshal or a County Officer in the case of Parade Marshal or Standard Bearer Judge applicant.

5.2. County or District Requests for Training



Notes:

Also see the following blank Rolling Update Form, with back page notes to explain the detailed provision.

National Training courses are funded from the Membership Training budget.

Counties and Districts are asked to arrange cost efficient training facilities and discuss any commitments to spend, if made, in advance of the course, with the Membership Training Administrator. An example of the facilities needed (for Branch Treasurer) is attached for guidance – requires more space.

Local training may be provided by the Membership Training Team at a locally arranged course. In the majority of cases those being trained on such courses will be from the immediate locality, with delegates only accommodated in cases where it is the closest course to meet the training need in a timely manner.

The same local training might be offered with the county or district providing one or more trainers from amongst the volunteers. All training material will be provided by the Training Team, so the application is required to identify that need and assure quality of delivery.

MEMBERSHIP TRAINING COURSE REQUEST – INCLUSION IN CALENDAR (See Notes)

Standard RBL training courses (described in the Training Portfolio) may delivered at local level on request. Such requests must be completed on this form and they will be discussed quarterly for inclusion in the Training Programme on a rolling basis. To request a course please complete this form in accordance with the notes on the back and send it by email to MembershipTraining@britishlegion.org.uk or post to Membership Training Administrator at Haig House, 199 Borough High Street, London SE1 1AA

County/District	
Training Required (see Profiles)	
Preferred days of delivery	
Preferred Month(s) or specific dates of delivery (subject to availability)	
Name of County Training Officer or Point of Contact (POC) for this Training.	
Proposed venue where the training will take place (Indicate Expected Costs)	
Do you anticipate that Overnight Accommodation will be required for some delegates? (In which case suggest closest possible)	
Proposed Numbers of Delegates. Do you plan to invite delegates from surrounding counties Are you happy for delegates to be added by Membership Training?	Yes / No Yes / No
Training Included in Programme:	Date: _____ Location: _____

NOTES

Courses requested on this form are delivered by the Membership Training Team and they are funded from the Membership Training Budget. As a result there needs to be sufficient planning detail to judge whether the Course being requested is a cost effective method of delivering the training. Please do not ignore courses being organised immediately “over the border” since they could fulfil your needs more cost effectively. Courses can be delivered during the week or at the weekend. For guidance, depending on facilities, the loading for the following courses is:

Course Name	Duration	Delegate Numbers
Branch Management	Two days	Min 8 Max 20
Branch Management Workshop	One day	Min 6 Max 20
Branch Treasurers	Two days	Min 6 Max 12
Branch Treasurers Workshop	One day	Min 6 Max 12
Independent Examiners	Two days	Min 6 Max 12
Independent Examiners Refresher	One day	Min 5 Max 12
County Management	Two days	Min 8 Max 12

Refer to the Membership Training Handbook and the Training chapters in the Membership Management Handbook before requesting other courses as they may be run centrally or have loadings vary from those suggested above.

Local Requirements

When training is requested on this form it is assumed that the County/District will arrange the venue for the training being requested. Costs will be met from the Membership Training Budget, although the preferred option is to deliver training at the lowest possible cost, such as use Area Offices, Pop In Centres RBL Clubs or Branch HQs.

Accommodation will normally only be provided for members in accordance with SOP42, so the majority of delegates attending should not require accommodation overnight.

If a booking is required for training facilities please provide the point of contact with the location details and a rough estimate of cost expected; so that the Membership Training Administrator can book the training venue and arrange any payment.

Inclusion in the Membership Training Programme.

It is planned to roll updates for the programme at quarterly Membership Training Team meetings, so it is advised that CTOs apply for training as soon as the need is identified (eg: to fit with County/District Plan objectives). This means that courses would ideally be requested at least 6-months in advance although shorter lead-in times may be possible after full consultation.

Delegates Listing A list of proposed delegates is required as a minimum a fortnight before the course is due to start, so that the appropriate pre-course work may be sent out to delegates. The ideal document is a completed Course Application that is still required from each delegate and must be available before he start of each course.

Points of Contact

Routinely send correspondence to MembershipTraining@britishlegion.org.uk rather than to individuals as material could be delayed. If you need to clarify anything please contact the Membership Training Administrator - 0203 053 7221 or the Membership Support Manager on 0203 053 7268

TRAINING NEEDS ANALYSIS (TNA) PROCESS
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Ser	Activity	Action
STEP 1	<u>Assessment/Reassessment</u> of Legion's Management Objectives.	Board of Trustees
STEP 2	<u>Identify</u> those of the Legion Membership affected by these Objectives.	TAG Directors
STEP 3	<u>Confirm</u> what is to be achieved and by whom.	TAG Membership Dept
STEP 4	<u>Identify</u> any weaknesses in competencies and skills that will prevent the Legion's Objectives being achieved.	Membership Dept
STEP 5	<u>Decide</u> <i>training or non-training</i> situation.	TAG
STEP 6	<u>Establish Profile</u> of Membership target audience who require training (National/County/Branch/others).	Membership Dept
STEP 7	<u>Identify</u> precise gaps in competency/skills/knowledge.	Membership Dept
STEP 8	<u>Design</u> teaching package (briefing/course/other).	Membership Dept
STEP 9	<u>Deliver</u> training (Method - Location - by whom).	TAG MTD
STEP 10	<u>Evaluate</u> Training and Report	Training Team & TAG
STEP 11	<u>Ratify Training</u> or Revise	

6. Evaluation of Training

6.1. Consistent evaluations of training at agreed times after the training has been delivered are essential to provide quality assurance and to assure consideration of improvements as the needs of the Membership evolve. Evaluation of Membership Training is based upon the four levels of Kirkpatrick's evaluation model which essentially measure:

6.1.1. Level 1: reaction of student - what they thought and felt about the training

6.1.2. Level 2: learning - the resulting increase in knowledge or capability

6.1.3. Level 3: behaviour - extent of behaviour and capability improvement and implementation/application

6.1.4. Level 4: results - the effects on the business or environment resulting from the trainee's performance

6.2. All these measures are recommended for full and **meaningful** evaluation of learning in organizations, although their application broadly increases in complexity, and usually cost, through the levels from level 1-4.

6.2.1. Level 1 Evaluation is conducted primarily by use of a Survey Monkey-based questionnaire that is picked up off an emailed link directly to the delegate to complete at home, ideally completed on the day of the course and certainly within a week. The results of evaluations submitted are incorporated into the Trainer's evaluation report.

6.2.2. Level 2 Evaluation also using Survey Monkey using the same electronic gathering method will be processed through County or District Training Officers

7. Expenses

- 7.2. Travelling and accommodation costs for national courses provided by Membership Training are met by the Legion General Fund through Membership Training, unless otherwise stated in the relevant SOP's. Locally arranged workshops, including local standard bearer training are funded through the County / District training allocation; care must be taken not to double account.
- 7.3. Delegates will be sent expense claim forms with their joining instructions, which should be completed and submitted with relevant receipts on return home, having incurred all costs and obtained receipts. Staff attending courses should claim expenses using the PROACTIS system.

MEMBERSHIP TRAINING EXPENSES CLAIM	
Claimants name (Include Membership Number)	No:
Course attended (title, date & location):	
Address number (including post code) & contact phone and e-mail address	

You will be paid faster by BACS transfer to your account if you supply the details below:

Bank (e.g. RBS)	Sort Code
Account in name of	Account Number

Otherwise payment is by cheque to the address that you supply.

Claim For	A/C Codes	Distance	Amount	Expense Detail
Vehicle Mileage(up to 45p per mile)	80501			
Fares/Tickets/Taxis(+ Receipts)	80501	N/A		
Tolls/Parking	80501	N/A		
Other Expense	80501	N/A		
Total				

I certify that the above details are true and accurate, that I incurred the expenses necessarily in accordance with SOP42 attending RBL Membership training and I have attached original receipts to support this claim. If claiming for mileage for use of my vehicle I confirm that I have a valid driver's licence and insurance, my car has been maintained in accordance with the manufacturer's recommendations and has a valid MOT Certificate (where appropriate)

Signed (Claimant):	Date:
<p>Please Note – Incomplete information is likely to delay payment as we will need to contact you again, so please complete the form as fully and accurately as possible and post it with all receipts, to the Membership Training Administrator, Membership Department, The Royal British Legion, Haig House, 199 Borough High Street, London, SE1 1AA. If you have any queries about its progress please email Membershiptraining@britishlegion.org.uk.</p>	

Cost centre	RV829
Date	
Budget Holder	Beverley Harrison
Signature	