

## FROM NATIONAL CHAIRMAN'S OFFICE

Haig House  
199 Borough High Street  
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Date 18 December 2015

Membership Council  
County and District Chairmen  
Branch Chairmen

### **Comradeship Project and Renewals 2015 Frequently Asked Questions for County Conference**

#### **How many members renewed in 2015?**

Across the legion, we have received renewal payments for 197,000 members (16 Dec) and, since 1<sup>st</sup> June 2015, have had 8,000 members joined using the new payment methods.

#### **Is the Comradeship Project now complete?**

The functionality, within the new payment system, that was critical to allow us to process the 2015 renewals has now been delivered. We now need to complete a series of fixes and smaller IT development items to make sure that anniversary renewal runs smoothly and we remove parts of the process that need a lot of manual intervention. These will be complete by the end of March 2016.

#### **Why are these changes important?**

The changes are important to improve our relationship with our members and to modernise our systems. Our old database was obsolete, which represented an unacceptable risk from both an operational and security perspective for the Legion. By updating our systems, we will be able to support the Legion through the 21<sup>st</sup> Century.

The new system will bring longer-term savings and benefits. We will be able to streamline our existing processes, and have increased new payment options for our members. Meanwhile, bringing all of our members' details into a single, updated database will allow us to improve communications.

#### **Will there be a project review and how will we improve the renewal process for 2016?**

Yes, there is a full review that is underway and will be complete in February 2016 that will analyse the root causes of issues experienced during delivery of the Comradeship project (particularly the 2015 collection of renewals) as well as documenting what worked well. It will enable us to

- Identify immediate fixes to high priority issues
- Make recommendations for improvements to the 2016 renewal process
- Make recommendations for how future membership change projects can be more successful]

The review will include input from across the membership.

#### **Why have some branches been able to make bulk payments this year?**

The functionality to be able to process a cheque for multiple family members was put in place on the 30<sup>th</sup> November 2015. This same functionality enabled us to accept cheques from branches for multiple members in exceptional circumstances (e.g. our international branches and branches that agreed a specific requirement with their MSO). We have put this

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in place as a transitional arrangement as an acknowledgement that communications to both members and yourselves could have been clearer and more timely.

### **How many renewal letters were returned to the Legion as undeliverable?**

We received approximately 4,000 letters returned which is around what would be expected for a mailing of this size. Improving the quality of the contact information that we hold for members will be important to reducing returns going forward and we make sure that we update our records every time a member contacts us and we would ask you to do the same.

### **What has been done to reduce call wait times?**

After the renewal letters were sent call wait times rose to an unacceptable level (the longest call wait time was 39 minutes and 3 seconds on 30<sup>th</sup> September 2015). To address this further call centre agents have been employed, training has been improved and we have also increased the information on Care that the call centre have visibility of. When we plan the 2016 renewals, using the lessons learned from the review, we will ensure that the timing of the letter despatch minimises this spike in calls.

### **When will disbursements be sent to branches and clubs?**

The first disbursement payments have now been sent and these will be made on a quarterly basis throughout the year.

### **What new methods payment are now available?**

Traditionally, TRBL relied on DD, cheque and cash payment methods at branches. TRBL can now offer members the option to pay online, by telephone or by bank transfer using credit and debit cards, cheque, cash at PayPoint or in branches, bank transfer or by PayPal.

### **Why is Gift Aid always being talked about?**

Gift Aid, on donations and membership fees is reliant upon consent of individual donors, details for which must be accurate, available and concur with HMRC data. HMRC rebate TRBL at a flat rate of 25% of the fee or donation received, as long as the member is a UK tax payer.

### **Why do I have to wait to receive my Membership Card?**

Cards are now issued after payment has been received unlike the old system where cards were issued in advance and reconciliation occurred Mar – May of the following year;

### **Why did some people not receive renewal letters?**

At the point of data transfer, some 280,000 records were migrated from PRO 2000 to CareNG; however, much of the raw historical data came from branches, thus verification was difficult. Huge swathes of data, particularly those members already on DD (approx 122,000), were acceptable and transferred easily; other data was found to be corrupt or inaccurate and could not be verified using industry standard processes.

### **How much has this all cost?**

The project budget was based on the old membership renewal processes plus £552k capital expenditure investment. As the programme has taken in other parts of the organisation, the actual cost is £658k. The general fund has been impacted with £40k overspend, which we will look to save over the remainder of the year.

FROM NATIONAL CHAIRMAN'S OFFICE

Yours sincerely

A handwritten signature in cursive script that reads "John Crisford". The signature is written in black ink and has a long, sweeping underline that extends to the right.

John Crisford  
National Chairman