

Branch Role Descriptions

Branch President

The Branch President is an optional non-elected role, usually occupied by someone of important standing in the community.

The President is appointed by the Branch Committee for a tenure of up to 3 years, which can be repeated. They may advise the Committee but do not have a vote. Their role is only representative and advisory.

Terms of Reference

The President may attend and speak at the meetings of the Branch Committee but may not propose, second or vote.

1. Has both a representational and encouraging role and be able to counsel the Chair and Officers as and when necessary, in the execution of their duties.
2. When offering advice/feedback to the Branch Committee, the President should be clear, constructive, and encouraging.
3. Attend meetings and assist the Branch Committee at Branch events as required.
4. Represent the Legion in the local community and as such must be conversant with the services the organisation offers.
5. Preside at the opening of the Branch AGM and give the presidential address.
6. Present Branch awards.
7. Develop a good working relationship with the County President.
8. The President cannot attend County Conference as a delegate.
9. If required by the Branch Committee, discuss suitable successors for the role of Branch President with them and having arrived at a consensus, negotiate discreetly and confidentially with the chosen person, to establish a willingness to serve and accept the role and the duties it involves.

Branch Chair

To be eligible for the role of Branch Chair an individual must be aged 18 or above, be a member or Life Member of the Branch. They must not have an unspent conviction, have been disqualified as a company director or a trustee, or be undischarged bankrupt.

The Branch Chair is the most senior elected Officer on the Branch Committee. They are expected to show strong leadership, management, and diplomacy skills to ensure that a close bond and good relationship is maintained between the Branch Committee, the Branch members, and the County.

Terms of References

1. The Branch Chair is accountable for all Branch activities and must delegate activities in a manner that will ensure duties are performed effectively and in accordance with Legion policies and procedures.
2. As the senior Branch Officer, the Chair should have good basic I.T. skills and be able to access the Membership Administration Portal (MAP)) on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the Branch and County use.
3. Chair and manage meetings effectively ensuring that they are planned accordingly with an agenda and run to time, avoiding the imposition of personal ideas on the meeting but encouraging participation from members.

4. The Chair should be an effective leader, able to drive and implement decisions taken by the Committee, assist in the resolution of issues between members and direct activities to support the aims of the Legion.
5. The Chair is usually elected for a 3-year term and their tenure can be repeated. Should the Chair step down for any reason and there is no Vice Chair, a suitable candidate from the Branch can be co-opted to become the Chair until the next Annual General Meeting, when a fresh election for the role is held.
6. The Chair is accountable to the Membership Council and ultimately the Board of Trustees, through the County Committee for the smooth daily running of the Branch. However, they must be prepared to represent the views and concerns of the Branch through the County Chair and Committee. To this end, Chair must have extensive knowledge of all issues affecting the Branch.
7. The Chair must be conversant and compliant with the current Royal Charter, the Membership Management Handbook, policies, and procedures, which are all located in the resource area on Microsoft Office 365 (O365) and must be prepared to advise the Branch Committee accordingly.
8. The Chair must ensure that proper handovers take place between newly elected Branch Officers, elected Committee Members, and their predecessors. This includes access to Microsoft Office 365 (O365) (through the Membership Engagement Officer (MEO) and that all minute books, correspondence, Legion publications, Branch papers and keys are handed over.
9. The Chair must ensure the Treasurer has a correct audit/examination undertaken, that it is agreed by both the outgoing and incoming Officers and that both are satisfied with the security of cash and cheque books. In addition, and along with the Treasurer, the Chair must reconcile the Branch accounts with the Branch bank statement at least quarterly. This action must be noted in the Minutes at the earliest opportunity.
10. The Chair must set an example as an active member of the Legion and be available for advising both the Committee and Branch members when necessary.
11. The Chair must ensure that sub-Committees, individual Officers, and members for specialist functions are appointed where necessary. Those individuals concerned must be made aware of the policies and procedure linked to the role such as data protection and safeguarding adults and children.
12. The Chair must ensure that all Branch Committee members and Branch members are aware of and adhere to the Legion Vision, values, and code of behaviour for working together.
13. The Chair has a responsibility to ensure that any training/development need or organisational training requirement is discussed with the County Training Officer and that individuals are able to access the required training. In the absence of a County Training Officer, the Membership Engagement Officer (MEO) is to be consulted.
14. The Chair is responsible for ensuring that all new Branch members are welcomed and receive an induction to the Legion and maintain regular communications with their Branch membership.
15. The Chair has a responsibility to maintain a good working relationship with the Membership Engagement Officer (MEO) and should always seek their advice when necessary.

Branch Committee Member

To be elected to the Branch Committee, those Members standing for election must be Members of Voting Branches and must be aged 18 or above. They must not have

an unspent conviction, have been disqualified as a company director or a trustee, or be undischarged bankrupt.

A Branch Committee Member occupies a key place in the management of the Branch, They must follow in every respect the duties and responsibilities as required by the Board of Trustees and Charity Law.

As an elected member of the Branch Committee, they must be ever vigilant that they serve the interests of the Charity at all times.

Terms of Reference

1. Should possess good basic I.T. skills and be able to access the Membership Administration Portal (MAP) on Microsoft Office 365 (O365), use email and be familiar with social media platforms that the Legion, County and Branch may use.
2. Must be conversant and compliant with the current Royal Charter, the Membership Management Handbook and policies and procedures, which are all located in the Membership Administration Portal (MAP) on Microsoft Office 365 (O365).
3. Aid the Branch Committee, County Committee, Membership Council and Board of Trustees to carry out the work of the Legion and in particular actively promote the aims and objects at local level.
4. Must adhere to and actively promote the Legion Vision, values, and code of behaviour for working together.
5. Attend Branch Committee meetings, General meetings and the Branch Annual General meeting.
6. Attend any training required as directed by the Branch Chair or identified through organisational need in accordance with Legion policy.
7. Assist with the Poppy Appeal and other benevolent fundraising activities within the Branch.
8. Provide the County Committee, the Membership Council or the Board of Trustees with any information they may require in the interests of the Legion.
9. Assist the Branch Chair in appointing any necessary sub-committees.
10. Assist with the formation, and implementation of the three year Branch Plan and associated fiscal arrangements.

Branch Membership Secretary

The Branch Membership Secretary is a post held by an appointed member of the Branch Committee. The Branch Membership Secretary is accountable to the Branch Chair and Committee for the daily administration of the Branch membership.

This role may be combined as a complimentary role with for example, Branch Secretary or Branch Treasurer.

Terms of Reference

Encourage all potential new members to join electronically or by telephone. However, as a last resort, paper application forms can be completed. Once checked, the completed form is to be kept securely under cover, so it cannot be seen by others, all monies are to be passed to the Branch Treasurer and the form and Branch cheque are to be posted, by recorded delivery, to the RBL Membership Payments and Application Team in Northampton.

1. Where an annual Branch subscription fee is agreed that the Branch Rates Letter is completed and returned in accordance with Legion procedures.
2. Ensure that when handling, processing, or storing personal information GDPR requirements are strictly adhered to. This is achieved by following the Legion's Data Protection policy and procedures as laid down in Membership Management Handbook, para 7b. This information must be given to those Branch members involved in recruiting.
3. Attend training as directed by the Branch Chair and/or stated in Legion policies and procedures.

Branch Secretary

The Branch Secretary, assisted by access to Microsoft Office 365 (O365) and the Membership Administration Portal (MAP)), acts as a focal point for Branch administration, including the distribution of correspondence (ideally electronically), agendas and meeting minutes. They also safeguard vital Branch documents such as legal deeds.

In the absence of a Branch Membership Secretary, The Branch Secretary should additionally carry out the duties pertaining to this role as outlined in the relevant Terms of Reference.

If the Branch Secretary is carrying out both roles, their responsibility also includes being the first point of contact for any data protection queries before escalation to the Membership Engagement Officer (MEO).

Terms of References

1. The Branch Secretary is responsible to the Branch Chair and Committee for the efficient management of the Branch administration.
2. Organise and set up Branch General and Committee meetings to take place on a regular basis.
3. Regularly liaise with the County Committee to provide updates on information such as replacement Officers.
4. Act as point of contact for receipt of correspondence issued by the County Committee, staff, the Membership Council and Board of Trustees, and to ensure all correspondence received is communicated to the Branch Committee for appropriate action without delay.
5. Handle all vital documents pertaining to the Branch and, in the absence of a Membership Secretary, control all aspects of Membership.
6. Liaise with the Branch Chair in the preparation of the agendas for all Branch meetings, ensuring that all the Branch Committee members are provided with the relevant details within a reasonable timescale in advance of these meetings.
7. Attend and record minutes of all General and Committee Meetings and safeguard all papers and documents under lock and key.
8. Use Microsoft Office 365 (O365) to access all published handbooks, publications and guides for reference.
9. Register the Branch for Branch Community Support (BCS) as required by the Branch Committee.
10. Ensure all returns are fully completed, signed, dated and submitted within the determined timescale.
11. Attend training as directed by the Branch Chair and/or Legion policies and Procedures.

Branch Recruiting Advisor

The Branch Recruiting Advisor plays a key role in both Branch and County recruitment. At Branch level, they actively seek opportunities to promote the Legion and recruit new members. At County level, they provide support to the County Recruiting Officer at County events and work with other Branches who may be experiencing difficulty with recruitment and could be under a threat of closure.

This role is ideally suited to Branch Members with a background in sales, marketing and/or recruitment that enjoy meeting new people.

Terms of Reference

1. Branch Recruiting Advisors must be aware of and actively promote the Legion's vision, values and code of behaviour for working together.
2. Must attend a Recruiting Advisor course to provide them with the skills and knowledge for their role.
3. Must possess good basic I.T. skills and be able to assist potential members to join the legion online.
4. Must be conversant and compliant with the current Royal Charter, the Membership Management Handbook and policies and procedures which are all located in the Membership Administration Portal (MAP) on Microsoft Office 365 (O365). If these systems cannot be accessed, electronic copies of the relevant documents can be obtained from the Branch Secretary or Membership Engagement Officer (MEO).

Branch Treasurer

The role of a Branch Treasurer is to administer the financial management of the Branch, ensuring that the Chair and Committee are always aware of the financial state of the Branch.

The Treasurer is a Branch officer and is appointed to the role by the Branch Committee. They are responsible for running income and expenditure accounts. At Branch level, the use of the Legion On-line Membership Accounting System (LOMAS) is optional but recommended. There is also LOMAS training available for Branch Treasurers. Branch Treasurers look after all financial matters and must submit audited annual accounts by 30 September following the end of the field financial year on 30 June.

Terms of Reference

The Branch Treasurer must be conversant with the relevant provisions pertaining to all financial matters as prescribed in the Royal Charter, the Membership Management Handbook and other relevant policies and procedures, and must be prepared to advise the Branch Committee, accordingly, seeking advice from the County Treasurer, as required.

1. The Branch Treasurer must always bring to the attention of the Chair and Committee the financial implications of any decision they are considering.
2. The Branch Treasurer must report the Branch income, expenditure, and cash balances to the Branch Committee at least quarterly. The report must be accompanied by a quarterly bank reconciliation, which reconciles the cash book balance with the amount on the bank statement. They should present the accounts in a clear and intelligible way at meetings including at the AGM, bearing in mind that

many members may not be familiar with accounting procedures and should answer any questions in an open manner and in a way that will be understood by a lay person.

3. Undertake or attend the Legion Branch Treasurers' training and/or LOMAS training within timescales stated in the training guidance, and any refresher training in accordance with Legion policy.
4. Be responsible to the Branch Chair and Committee for all the financial affairs of the Branch, including the annual accounts and the Branch bank account.
5. Control all monetary transactions, ensuring that they meet with guidelines contained within the 'Use of Funds Policy' and record these in the Branch receipt and payment ledger. All receipts and supporting documents are to be held by the Treasurer on behalf of the Branch Committee. See below for further advice on storing information.
6. The Branch Treasurer is also responsible for maintaining records of Branch transactions, either electronically (in Excel or LOMAS) or hard copy (in a ledger book or similar). These transactions should be summarised by income and expenditure type in order to produce a quarterly report for the Branch Committee. The report should explain any large or unusual transactions or instances where income or expenditure differs significantly from what was planned. The report must be accompanied by a quarterly bank reconciliation, which reconciles the cash book balance with the amount on the bank statement.
7. When keeping records electronically, Branch Treasurers are advised to keep regular backups, using the Microsoft Office 365 (O365) auto-save function, to ensure that records are not lost. In addition, the Branch Treasurer is responsible for safeguarding the Branch cheque book, paying-in book and bank statements, as per the Membership Management Handbook.
8. The Treasurer is to ensure that the Branch accounts are examined/audited within the required time scale and are required to submit the Branch account return with supporting documentation to the Membership Engagement Officer (MEO). Branch Treasurers should always refer to the 'Guide to completing the year end Branch Return' issued annually by the Finance Department before completing their return. They should contact their Membership Engagement Officer (MEO) if they have any queries.
9. The Treasurer is to ensure that all cheques for payment are made out correctly and clearly show the registered Charity number and Branch title. All cheques must be signed by at least two (2) of the authorised signatories, one of whom is to be the Treasurer, that they are clearly endorsed 'A/C Payee only'. No signatory is to sign a blank cheque. Authorised signatories should not be family members or cohabitants.
10. The Treasurer can request the Branch Committee to authorise the limit the Treasurer may expend on a single item without prior reference to the Committee. This authority should be reviewed annually. The request and action taken must appear in the minutes of the meeting at each review.
11. The Treasurer is to ensure that all expenditure, other than petty cash, is by cheque. However, if the Legion's Finance Department has approved electronic banking by Lloyds bank appropriate procedures are to be observed.
12. The Treasurer is to report the details of all proposed expenditure to the Branch Committee at their regular meetings for their approval. All such reports are to be shown in the minutes of the meeting.
13. The use of petty cash must be Authorised by the Branch Committee and operated as an impress system. The petty cash book is to be checked monthly by

the Treasurer and at least one other Branch Officer and must be countersigned by these individuals as being correct. The petty cash limit should be no more than £50.

Branch Parade Marshal

A qualified Branch Parade Marshal should be actively involved in the planning and organisation of all Branch ceremonial events.

They are to be fully conversant with the Legion's Ceremonial Handbook, bearing in mind that when appearing before the public that the prestige of the Legion is in their keeping. Those involved in all ceremonial procedures must always strive to ensure continuity and uniformity in that their dress, turnout and bearing are of the highest order.

A qualified Branch Parade Marshal is subject to the Legion's screening programme detailed within the Legion's Safeguarding Policy. All screening and mandatory online training must be completed prior to commencing duties.

Terms of Reference

1. A Branch Parade Marshal must be aware of and actively promote the Legion vision, values and code of behaviour for working together.
2. Must have attended and passed the Parade Marshal course and where appropriate subsequent requalification courses every 3 years.
3. To be fully acquainted with the Ceremonial Handbook, and to give appropriate guidance on ceremonial matters to the Branch Committee.
4. To assist the County Parade Marshal at ceremonial events or training when requested.
5. To assist the National Parade Marshal when requested.
6. To liaise with the County Ceremonial and Parade Marshals in neighbouring Counties and to share best practice.