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**RBL OXFORDSHIRE COUNTY COMMITTEE**

**STRATEGIC PAPER 2025**

RBL Oxfordshire County Committee

Strategic Plan 2025 - 2027

**Introduction**

The events and changes during 2024 going into 2025 with the election of a new County Chair has determined the need to determine a County Strategic Plan that compliments the County Plan. The County Plan is to form the working document that holds roles and activities to account for the County.

Since the implications and effect of COVID 19 are slowly being cast to the future, it has become very apparent that the administration of the County needs to be returned to a foundation that will enable the County to be fit for purpose for 2025 and beyond. The introduction of a detailed County Plan outlines the activities to move the County forward, but the purpose of this document is to focus the County Committee Senior Management to formulate our Plans for the next 3-years. Given the complexities and importance of issues this document will break each area down to its constituent parts.

The process of the annual MS1 Returns has highlighted significant issues and flaws with the lack of communication with Branches in the viability of Branch Committees and ensuring compliance of the Royal Charter, RBL Rules and Regulations under the auspices of the Membership Handbook.

**Background**

* **Objectives**: The objectives in the next section should be clear and have measurable goals for the strategy aims to achieve. These are to be duplicated in the County Plan assigned to specific roles to enact and report on to the County Committee and its Branches. Significant progress has been made to the management of the County post COVID to ensure that compliance with the Royal Charter and the Membership Handbook.
* **Method**: Under the analysis section each concern or issue will be detailed as a decision point ahead of a proposed meeting. These will be converted into Strategic Options determined on dealing with each situation and finally framed for inclusion into the County Plan as necessary.

**Analysis**

* **MS1/MS1B and MS1CSB**
  + - **Post Submission Date Follow-up Actions:** it was established that one Branch (Kingham) had not submitted a MS1 since 2021. They had not formed a committee and moreover had members on both Branch and Club Committee against the Membership Handbook. The fact that there was no clear process post MS1 submission period for the County Committee or MEO to understand the reasons why a MS1 had not been completed and actually had a understanding of the branch management. This lack of understanding or knowledge of the requirements of branch administration was displays across a number of Branches (an example was Deddington). Following the submission of County MS1s the MEO is to notify the County Chair of those Branches that are not compliant. The Chair to then organise contact and visits to these Branches and guide them through the process and have them submit an interim MS1.
    - **Status Change of Branches to CSB:** a number of Branches when contacted expressed issues with the formulation of a Branch Committee going forward across a number of reasons. The lack of communications with the Branch across the year means that at the end of the reporting period could be too late to guide and assist the Branch on the requirements to remain viable or change of statue to CSBs. It was established that one Branch (Kingham) had not submitted a MS1 since 2021. They had not formed a committee, and moreover had members on both Branch and Club Committee against the Membership Handbook. It may also be appropriate like the incident at Kingham to place the Branch into Administration (as advised by the MEM) for failure to adhere to the Membership Handbook and not submit the required MS1 and in this Branches situation be contrary to the tenancy agreement of their Club.
    - **Potential Closure of Existing CSBs:** some of the CSBs have not been contacted for some time and the POCs were no longer active or in the case of one Branch (North Leigh) both POCs were having to Stand-down due to their age. This left the SB as the only contact for the Branch. The MEO/Chair to reach out to the Branch Membership to ascertain alternative POCs or move the Branch into Closure. This again can only be understood and acted upon if the MEO/County Committee had interceded earlier and actions being undertake. Finding out as part of the MS1 submission process is too late and places additional administrative burden on the MEO/County Officers.
    - **MS1B:** the results of the MS1B submission with nominated Standard Bearer details is shared with the County Parade Marshal (CPM) to ensure that compliance to the Ceremonial Handbook is adhered to and encourage attendance at County Ceremonial Training Events. This is also an opportunity to ensure that Standard Bearers dress and deportment is accurate and to provide guidance where required. Additionally, those Branches that have failed to submit their respective MS1B should be followed up the MEO/Chair and CPM to understand why and if necessary, recover the Standard and accoutrements.
    - **MEO/Chair/Committee Member Branch Visits:** the following should be given precedence for visits, with a schedule agreed by the Chair and MEO:
      * Those Branches that have failed to submit MS1/MS1B or MS1CSB
      * That at least 80% of the County Branches are visited across the year. 80% is the optimal number as the requirement that a County must achieve as part of the MS1 process to make the County Compliant.
    - **Branch Contact List:** the existing Branch Contact List determined from details in the CARE system is inaccurate and potentially contravenes GDPR regulations in holding contact details which are not accurate or relevant. The Chair ensure that the MEO has updated the CARE System in timely fashion following the 15 Jan (this is the date that all MS1s etc are to be submitted to Haig House) and that an updated version of the Branch Contact List is made available to the RESTRICTED DOCUMENTS Folder for use by the County Senior Management and moreover provide a mechanism to increase communication with Branches.
    - **Branch Recruitment Strategy:**
      * **CRO:** many of the incidents identified by the MS1 process stem from Branches not being able to form Committees from their membership. The County Recruitment Officer (CRO) plays a critical role in encouraging membership to take officer and to increase membership across the County. This should be achieved through Branch visits and events hosted by the Branch supported by the CRO, and public recruitment events at shows, events and recruitment stands being inaugurated across the County. A measured success rate needs to be reported via the County Plan.
      * **Publicising of the 4 Branch Membership to Boast Failing Branches:** where Branches are struggling to formulate a Branch Committee advertise the need to the wider RBL County Community of the requirements and to the ability that the membership can be a member of up to 4 Branches. This may be sufficient to address failing membership and may hold a Branch to compliance. The County Newsletter and webpage may be the mechanism to deliver this.
* **Accounts Returns**
  + **County Supported Branch Accounts:** the raising and submission of the CSB accounts by the County Treasurer requires no interaction with the active Points of Contact of the Branch, this highlights a flaw in the process as without the contact with the CSB’s, County is unaware of any changes (during Dec 24 and the MS1 process where contact has been made it was found that many CSBs were no longer able to perform the duties required of the POC).
  + **County Branch Accounts:** during the 2023-2024 accounting period considerable effort was made by County Chair, Treasurer. Secretary and MEO to ensure that Branch Accounts were submitted by the required deadline so that Branches would be compliant. Great success was achieved and the County results for correctly submitted Accounts was logged at 97%. Moving forward through the subsequent Accounting Periods needs this result to be maintained.
* **Terms of Reference of MEO and Activities:** during the course of 2024 the actual role of the new MEO post versus that of the previous MSO post has become blurred and difficulties have been experienced in obtaining the TORs of the role. The TORs were particularly vague and focused only on communication with Branches. It has become apparent from interactions between the County Committee and MEO has resulted in tasks, previously managed by the MSO role being pushed back or directed to the County Secretary role (it must be remembered that the County Secretary role is voluntary, and the incumbent may not have the scope to carry out some of these tasks). Clear distinction between the two roles needs to be established as the TORs for the MEO position are contrary to the Membership Handbook.
* **Communication**
  + **MEO:** the chair raised concerns regarding the lack of communication and support from the MEO (a similar situation is faced by our sister County also supported by the same MEO). Although there has been some recent improvements however, with communications between both County and Branches, Branches report that in many instances actions requested of the MEO, like the raising of RBL.Community emails for Branches, they do not receive timely responses that the MEO is actioning requests. This lack of basic acknowledgment to emails received or any required response has raised concerns.
  + **County Branches and CSBs:** the contact between County and Branches during Decembers MS1 process it was very apparent that many Branches are not following the requirements of the Membership Handbook (one Branch stated that they do not hold their AGM until May outside of the required period). Greater use of the following must form the strategic process in managing increased communications:
    - **Newsletters:** increased use of the newly implemented publication of the County Newsletter and Special Editions must be capitalised by the County Committee, which County roles providing articles and accounts to guide and achieve that specific County roles can achieve their aims of the County Plan.
    - **Branch Meetings:** attendance to Branch Meetings by the MEO/Chair and County Committee Members to observe, guide and ensure compliance of Branch Management processes. The Chair should oversee a schedule of meetings to ensure that 80% of the Branches are visited at least once per annum.
    - **RBL.Community emails:** MEO/Chair and County Committee should ensure that all Branches and CSBs have at least one RBL.Community email address ideally encouragement should be to have at least 5 of the Branch Officers enrolled which progress updated and recorded as part of the County Plan. Under the auspices of the County Plan this is incumbent on the Chair and County Training Officer (CTO) however all County Committee Members and MEO should be encouraged to participate increasing the take up rate with Branches.
    - **RBL Clubs:** recent events have demonstrated the lack of integration between RBL Clubs and County, whilst the County has no jurisdiction over Branches it is apparent that a lack of inclusion has resulted in failures of compliance. Following liaison with the RBL Regional Manager for Clubs it was agreed that best practise is to have a RBL Club Liaison to act as a conduit between Club and County but to hold no responsibility for the running or management of the Club. This should be taken under advisement by the Chair and to consider a role on the County Committee to either:
      * Appointment of a RBL Club Liaison Officer
      * Divide the 5 Clubs across the existing County Committee to act as RBL Club Liaison Officer

The Chair with the Secretary to determine clear TORs for the role.

* **Branch Management Training:** a number of the issues prescribed above is inherent in the lack of understanding the requirements of the management of the Branch and the Handbook. The requirement of Branch Committee Members having undertaken training on Branch Management would address this issue. The appointment of the County Training Officer should be utilised fully in visiting Branches and providing County based training to meet the RBL Training Policy.
* **Conversion of Errant Branches to CSBs:**  Where a Branch is experiencing difficulties in being compliant the County Committee should advise and liaise with the Branch on the possibilities of becoming a CSB.
* **Closure of Errant CSB’s and Branches:** Where a CSB or Branch, has reached a point where they can no longer hold the status of Compliance, County Committee should, at the earliest stage possible, advise and liaise with the CSB or Branch on closure. This action requires immediate action in order to maintain County Compliance.
* **Liaison with RBL Clubs:** Liaise with National and County Club Managers to ensure that branches affiliated with Clubs are following the rules and regulations required.

**Recommended Strategy**

**Chosen Path Analysis Steps**

The following list of steps are required to complete the implementation of the plan.

* **Branch Compliance with Annual Submissions of MS1 Forms and Accounts:**

**Current Position**: During the 2024 MS1 and Accounts submissions considerable work was carried out by the County Officers to ensure that the County received sufficient returns of MS1s and Accounts to regain compliance with 80% submissions on both MS1s and Accounts:

(1) MS1 Submissions County received sufficient submissions to just reach 80%.

(2) Accounts Submissions County achieved a significant number of submissions to get 97%.

**Aim:** To improve the level of MS1 Submissions and to maintain the level of Account Submissions.

**Actions:**

* 1. Ensure that the progress of compliancy submissions is monitored to identify Branches with issues responding.
  2. Take immediate action to induce compliance at an early stage of the submission timeframe, using the steps below on Communications and Management Training.
* **Review current Terms of Reference for County Officers and local RBL supporting staff:**

**Current Position:** Over the last 2 years efforts have been made to reinforce the membership of the Oxfordshire County Committee to fill all the officer posts required. Over this period new appointments of County Volunteer Secretary (CVS), County Parade Marshal (CPM), County Training Officer (CTO) and County Recruiting Officer (CRO).

**Aim**: Although the above provides improvement, there is still an urgent requirement to be able to fill all the required roles and to provide sufficient Committee Members to take on the role of County Committee Liaison members to groups of Branches by area. Without improved liaison it will be difficult to provide the level of communications between County and Branches required for further improvement.

**Actions:**

(1) County Officers need to fully understand the implications of changes in National Staff roles from Membership Support Officers (MSOs) to Membership Engagement Officers. Once this is achieved the difference in the expectations in engagement roles needs to be communicated to Branch Officers, particularly those appointed to admin roles, Chairman, Secretary and Treasurer

(2) Identify and list roles against the current County Committee to identify recruitment requirements.

(3) Produce copies of Committee Members Membership Handbook Roles TORs and any additional County requirements, such as County Branch Liaison. Provide County Officers with written documents of their roles and any additional, County requirements.

(4) Produce a County TOR for the County Committee Branch Liaison Role to be, also to be provided to County Branch liaison committee Members in documented format.

(5) Identify candidates for open roles and actively endeavour to complete recruitment to County Committee.

* **Communications:**

**Current Position.** County Chair, Secretary and Treasurer are already carrying out a review of current communication difficulties and limitations. In short current Communications are hampered by:

1. GDPR Limitations.
2. Lack of take up by Branch Officers to use @RBL.Community Email addresses for Communications, access to RBL documentation and Branch Membership reports. Very recently it has been announced that additional County and Branch RBL.Community Emails have been allocated.
3. Some Branch Committees have low levels of IT Literacy and are unable to communicate via online Communications.

**Aim:**

(1) Liaise with Membership Council and National Engagement Team to better understand the GDPR when using all types of Communications.

(2) Utilise the County MEO, Officers and Branch Liaison Committee Members to interface with Branch Officers on the benefits of RBL.Community Emails, especially for new ones just released.

(3) Provide information via CRO and County Officers on training and instruction on Branch Officer IT Communications.

**Actions:** Endeavour to expedite the Aims above.

* **County and Branch Management Training**

**Current Position.** During 2024 a CTO was recruited and a National Management Training Package released. It is very early days in the deployment of County Branch Management Training and all County and Branch Officers, including CSB POCs will need, as soon as possible to take the relevant courses.

**Aim:**

1. Advertise and explain the training requirements, to County and Branch Officers and CSB POCs.
2. Provide information on mandatory requirements.
3. Provide information and instructions on how to achieve compliance.

**Actions:**

1. Via the MEO and CTO monitor and record County, Branch Officers and CSB POCs qualifications and additional training requirements.
2. Use Branch Liaison Committee Members to spread the new training requirements.

* **Conversion of errant Branches to CSB’s and Closure of errant CSBs and Branches:**

**Current Position:** During the 2024 Accounts and MS1 submission periods it was noted that outstanding conversions from Branches to CSBs and closure of errant Branches was, particularly with MS1 submissions, having a detrimental effect on the Counties Compliance Percentages. Compliance Percentages are a simple calculation of total number of Branches/CSBs against the submission required. Roughly each errant inactive or defunct Branch still considered required to submit returns drops the Percentage by 3 to 4 Percent. This drop is erroneous as correct Branch admin would remove them from the required submissions list.

**Aim:** To ensure that all errant Branches and CSBs are identified, classified either for conversion to CSB or closure in a timeframe commiserate with the Accounts and MS1 submissions period.

**Actions:** Immediate review to identify all County errant Branches and CSBs and action requirements to avoid any impact on

* **Liaison With RBL Clubs:**

**Current Position:**  It has been noted that one or two of Oxfordshire Clubs are not correctly run in conjunction with Branches. Although clubs are not under the control of the county it is desirable that any issues are resolved.

**Aim:** To liaise as required with National County Club Managers on the status of Branches affiliated with Clubs to identify any issues Oxfordshire County needs to help resolve with the affiliated Branches.

**Actions:**

1. To approach National County Club Managers for advice and resolution of any affiliated Branches.
2. The County Chair Appoint a co-opted member to the County Committee to take up the role. It must be made clear that this is a Liaison Role only the appointee would have no powers to interfere with the management or running of the Branch they are simply to act as a conduit between County and Club.
3. Determine clear TORs for the role and ensure guidance in accordance with best practise determined through liaison with the National Club Manager and the Membership Council Representative.

**Conclusion**

To follow, peer review of the Chosen Path.