EVENT GUIDANCE FOR BRANCHES

LIVE ON

This booklet offers guidance to assist you with planning and delivering safe and successful events in your local communities on behalf of the Royal British Legion. It is inspired by some of the most popular events on the Legion calendar and activities hosted by our dedicated Membership community year after year.

Whether you are looking for tips on delivering your first fundraising activity for the Poppy Appeal in your local area, or a new approach to planning branch events to engage your local community and recruit members, this booklet will prepare you for each stage of the process.

We thank you for the effort and commitment you dedicate to planning and delivering Legion activities in your local communities.

The events you host raise awareness of the outstanding work of your branch and the vital funds your raise assist us in delivering services to our Armed Forces personnel and their families.

EVENTS

Membership Events

Membership activity takes place throughout the year with six key areas of activity taking place in every branch calendar. The following events raise awareness about the services and support we provide to our Armed Forces Community, promotes the work of our dedicated Membership, and recruits to sustain our supportive network of members.

POPPY APPEAL

Our charity's largest fundraising campaign brings together Branches, Community Fundraisers (CFRs) and Poppy Appeal Organisers (PAOs) to deliver fundraising activities throughout November, the period of Remembrance. For more information, contact your local CFR or PAO.

LOCAL BRANCH FUNDRAISING

Branches are responsible for raising funds for their Branch activities, enabling members to continue their work for our Armed Forces Community. These events engage the whole community for enjoyment and sponsorship. For inspiration, check out our case studies in the Event Resource Area on Office 365.

RECRUITING MEMBERS

Branches host events to promote the Legion in their local areas and raise awareness about the Royal British Legion and our Membership. For advice on recruitment and events, contact your County Recruitment Officer (CRO)

NATIONAL EVENTS

The Legion arranges mass events to engage the general public in support of the Poppy Appeal, to which Branches sponsor events such as the London Marathon Team, Pedal to Paris, and Race Days. Check out the Mass Events webpage or ask your CFR for more information.

MEMBERSHIP MEET-UPS

The Legion has hosted a series of regional events since 2018 and have met over 900 members in their local communities across the UK. To find out how your Branch can get involved, Check out britishlegion/meet-ups to find one taking place near you.

COMMEMORATIVE EVENTS

Marking anniversaries of the sacrifices made by our Armed Forces Community, past and present, branches pay their respects and commemorate with Remembrance events. Ask your MSO or check our Membership e-newsletter for upcoming event details.

Managing your Event

In this section we differentiate between event management and planning, providing you with structure and understanding of what responsibilities you can expect to have. See below for tasks and top tips for managing your first event.

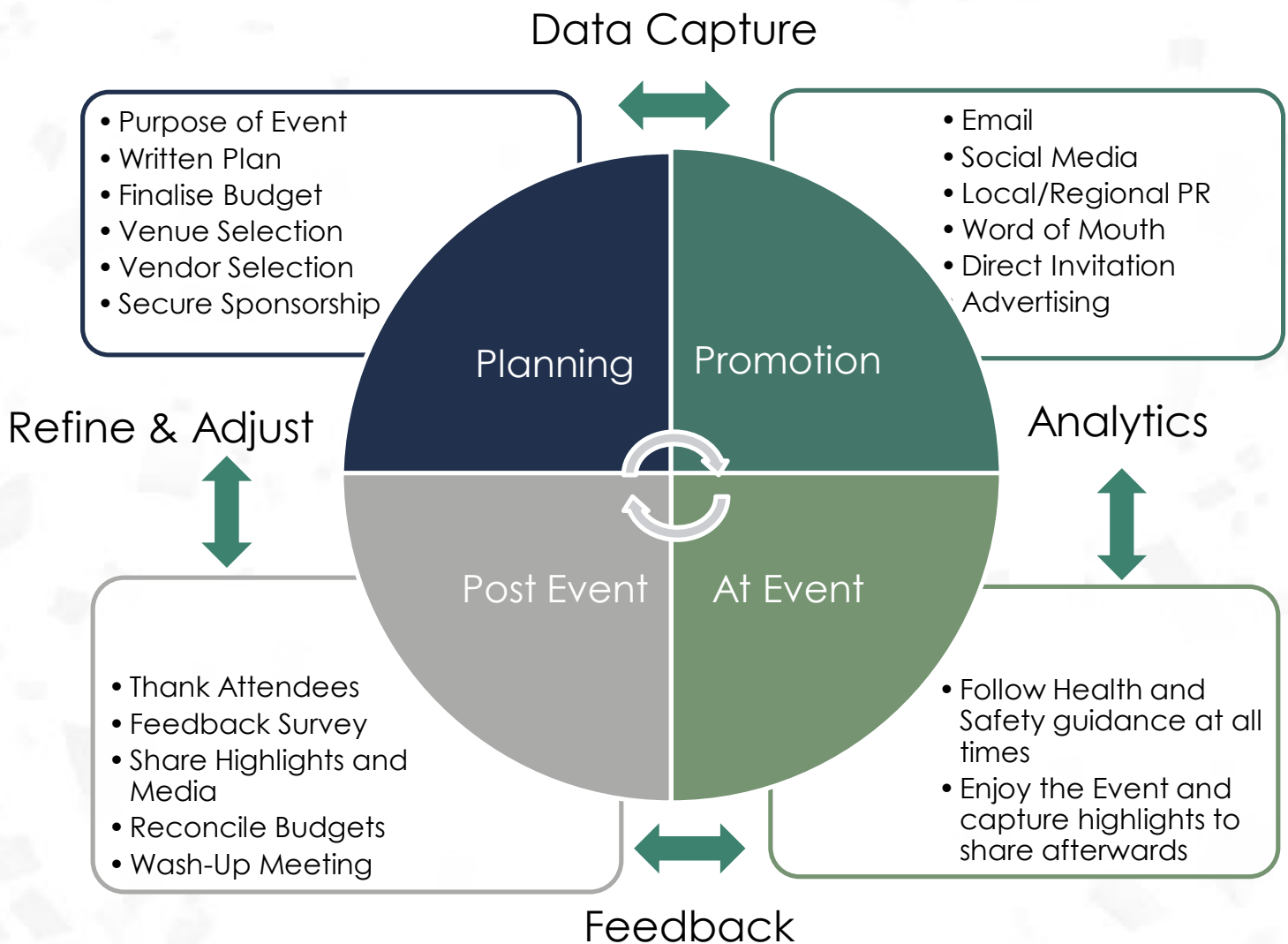| Event Management	Event Planning
Reserving a location for the event	Selecting an overall event theme
Agreeing use of external companies	Negotiating venue contracts
Guiding the event team	Hiring a catering service
Resolving event situations on site	Marketing & Event promotion

Top Tips for managing events

1. Know your Budget
2. Dream big, then get realistic
3. Assign responsibilities fairly and in accordance with the persons skillset
4. Communicate effectively with your team and keep them informed
5. Negotiate contracts
6. Have a back-up plan
7. Do a run through and review before and after the event

An event plan is highly recommended for ensuring the safe and successful delivery of your Legion activity. Here is an example of the event planning cycle you can refer to when planning events with your branch for your local community.

Data Capture

Planning
- Purpose of Event
- Written Plan
- Finalise Budget
- Venue Selection
- Vendor Selection
- Secure Sponsorship

Promotion
- Email
- Social Media
- Local/Regional PR
- Word of Mouth
- Direct Invitation Advertising

Refine & Adjust

Post Event
- Thank Attendees
- Feedback Survey
- Share Highlights and Media
- Reconcile Budgets
- Wash-Up Meeting

Analytics

At Event
- Follow Health and Safety guidance at all times
- Enjoy the Event and capture highlights to share afterwards

Feedback

TIP: Check out our Event Resource area on Office 365 for planning and promotion materials you can personalise to assist you with planning your events.

Establish Your Team

Depending on the nature and capacity of your activity, you can nominate yourself and others to support with event planning and delivery. You can start by considering what responsibilities are required for your event, then gauge and plan which tasks can be allocated, giving branch members the opportunity to participate and ensure the event is a success.

EVENT TASK MATRIX

Things to consider:	Branch Social Event	Branch Fundraising Activity	Recruitment Activity	BCS Activity e.g. Veteran's Breakfast Clubs	Poppy Appeal Fundraising	Remembrance Parade	Remembrance Service
Central Reporting		✓			✓		
Engaging Local Contacts					✓		
Event Funding	✓	✓	✓	✓		✓	
Event Promotion	✓		✓	✓	✓	✓	✓
Health & Safety, Risk Assessment	✓	✓	✓	✓	✓	✓	✓
Site Hire/Visit	✓	✓					

Now you have an idea of what tasks are required, you can gauge which members have the relevant skillset and capability to complete them. It is important that each member should have the opportunity to participate and gain the experience to develop their skillset, as this will contribute to the successful delivery of future events.

TIP: Branches can adjust the range of activities to meet their management capabilities and Membership requirements, steadily building up the range and scope as the Membership grows.

Funding your Event

Once you have decided the type of activity and the key responsibilities, you now need to prepare the event budget. You can achieve this by consulting with your branch treasurer regarding the allocation of the branch event fund.

Remember, your event committee must always discuss, agree, and reference use of funds in your branch meeting minutes, and funds must only be allocated to the cause or purpose that they were raised for.

Funding Availability

Not all activities can be funded in the same way. This is because there are some activities as part of the Branch experience that do not directly further the aims and objectives of the charity. Below is a guide of the potential sources of funding for each type of activity.

	Centrally Supported Funding	Area Support	County Support	Third Party Support	Branch General Fund	Member Funded
Awareness Events		Yes		Some cases	Yes	
Branch Community Support		Yes		Some cases	Yes	
Community Engagement				Some cases	Yes	
Fundraising *					Yes	Some cases
Recruitment	Yes		Yes		Yes	
Branch Social Events						Yes
Branch Training Events	Some cases		Yes			
Remembrance Events				Some cases	Yes	

* All fundraising activity must make a profit (the amount of funds raised must exceed the cost of running the activity). When organising branch social events, fundraising activity may be required.

Types of Funding

Support from within the Legion

Central Support

Branches can apply for support from The Central Event Fund via their County, with applications processed by the Branch Chairman.

Such activity may include Training and Recruitment. However, please be aware that the amount of central funding available is limited, therefore not all applications will be 100% successful.

Area Support

Areas are responsible for raising awareness of the Legion across a specific geographical spread and help operate a co-ordinated approach to Branch Community Support, so you may be able to apply for support from the Area Team.

County Support

Counties have budgets for Training and Recruitment which help to co-ordinate their County Plans. Funding may be available for promotional materials as well as training events not organised by the national training team.

Third Party Support

Sponsorship

You can approach local businesses in your community and give them the opportunity to support your event with a sponsorship. This is an effective way of bringing the local community and businesses together to promote and support the services of the Legion.

Corporate and Local Authorities

Depending on the nature of your event, you may be eligible for National Lottery Funding. Here are some useful links to funding guidance and application forms:

Heritage Fund Grant www.heritagefund.org.uk/funding
Arts Council Funding www.artscouncil.org.uk/funding
Gov.Uk Council Funding https://www.gov.uk/apply-funding-community-project

Self-Funding

Branch General Fund

Your branch can fund most activities using finances held within the Branch General Fund. The fund is used for day-to-day operation of the branch, including running events that contribute to its success, including recruitment, remembrance and promotion of Legion activity.

Member Funded

Unless an event is advancing the aims and objectives of the Legion, it must be self-financed. Under no circumstances are Branch Social Events to be subsidised by the branch, yet funds can be raised by individual members for this purpose. This includes social activities such as day trips and dinners.

Venue & Location

Research

Some branches may not have an accessible building and will require a venue for their event. Your choice of venue, location and date has the potential to be your biggest cost or your biggest saving, so take time to do some research. You will need to consider the following:

- A criteria to help structure your venue selection; view their website or call in advance to find out if their venue facilities meet your requirements prior to the viewing
- Is there any potential event clashes such as County or regional events?
- Is the location and venue easily accessible for everyone?
- Viewing the venue and conducting a risk assessment
- The Space e.g. maximum capacity, floor space, stage
- Licenses – Is the correct license, allergens and food safety certificates provided?
- Cost, does the venue offer any discounts for charity organisations?
- Do you have any professional or personal contacts who can help source a venue for you?

Negotiating Contracts and Bookings

It is advised that you inform the venue of your budget and event requirements before attending a viewing for time and cost efficiency. You can include this in a standardised email and send this to multiple venues. It is at your discretion to ask for a charitable discount if the costs exceed your budget. Once agreed, you will now be ready to negotiate the contract and secure the booking following the steps below:

1. Ensure the cost of the event has been agreed with your Treasurer at a branch meeting prior to any bookings and include this in your minutes.
2. Aim to communicate by email so you have a point of reference should you need it.
3. Specify exactly what you need and prepare to negotiate by being flexible but also be very clear about what is non-negotiable.
4. Secure the booking and ensure that both parties adhere to the contractual terms to avoid a contract breach and potential cancellation of your event.

TIP: Utilise your contacts and enquire about booking your local RBL Club or hosting your event at your local Area Office.

Safety First

Lone Working

You may be faced with many scenarios where you will be working alone. Always follow the appropriate guidance and refer to our Lone Working Guide found in the MAP Resource Area prior to the activity.

- **Assistance:** If you require assistance, ask another member of the branch event committee to attend with you.
- **Share information:** inform a close friend or family member where you will be and what time you expect to leave. Try and stay in regular contact with your designated person so they know you are safe.
- **Check in:** contact your designated person when you arrive safely home.

Reporting an Incident

All members who are delivering events must familiarize themselves with the Accident and Incident Reporting Procedure. If any incident of aggression or violence has occurred (including verbal threats and threats of self -harm), members must report the incident by following the procedure below:

- For general concerns please contact and inform your MSO.
- Remember that you should not, under any circumstances try to investigate the incident yourself as this could put you and/or others at risk.
- Leave the premises immediately if you feel threatened, and contact the police or safeguarding helpline immediately before the situation escalate.

Risk Assessment

Conducting a risk assessment is compulsory for all RBL activities whereby groups of individuals are in attendance. The designated in-branch risk assessor will identify potential hazards and risks that could cause any level of risk, enabling you to take action to reduce or eliminate the risk where possible. Please refer to the following guidance:

- **Always speak to your Regional Health & Safety Advisor or Community Fundraiser** for guidance on completing a Risk Assessment.
- **Go through your event step by step** and think of anything that could pose as a risk or a hazard. Risks include but aren't limited to: building capacity, mobility/space for wheelchair users, cause of injury, manual handling and Lone Working
- **Prioritise** these risks as low, medium or high
- **Record what actions you need to take** to remove or control those hazards
- **Carry out control measures** prior to your event and review your assessment continually throughout your planning and delivery

Legion Insurance & Policy

Public Liability Insurance

To ensure your event is delivered safely, it is required to adhere to the compliance of the Legion's policy, including public liability and insurance. Follow the step-by-step instructions below for attaining the mandatory Public Liability Insurance Certificate for your event.

1. Email your MSO/CFR/PAO to request our Public Liability Certificate, or visit MAP to download a copy
2. Update your Risk Assessment to state you have attained a copy for the event
3. Provide a copy to your venue if required
4. Keep the certificate on file for the duration of the event and 6 months after

Risk Management and Compliance

Whilst managing the event, you are responsible for ensuring yourself and those involved have received the appropriate guidance to carry out the tasks at hand. You must have completed RBL mandatory training such as GDPR, Safeguarding, and Manual Handling via Office 365 prior to delivering the event. If you have booked a venue and external vendors such as catering staff, always request Fire Safety Evacuation Procedure, Food Hygiene & Safety certificate, and licenses; always check they are in date and update your risk assessment with the details.

Not all events may be covered by Legion insurance. Always refer to the RBL insurance policy and all other safety documents found in the MAP Resource Area prior to any event you intend to host.

Photo Consent Forms

In the likelihood that you will be taking photographs of people who are in attendance, you will only be able to use pictures of individuals if they have provided their consent. To do this, we advise using a photo consent form which explains how the picture will be used and how long it will be stored. Find templates provided on Office 365.

Safety Posters

To help make sure that your volunteers and attendees are in the know, it may be useful for you to provide signage that explains the safety procedures you have in place.

For guidance on event safety plans and to obtain copies of safety posters, visit www.hse.gov.uk.

Protecting Data

When creating a register of attendees you will be capturing personal information. As a result, it is important to know how to appropriately store data, and how and when to delete data too.

For more guidance on GDPR visit MAP and search for the GDPR guidance for Branches.

EVENT PROMOTION

Planning Communications

To generate interest and maximise attendance for your event, you will need to inform your audience with all the important details within a specific timeframe. Here is an example of how you can structure your communication plan to ensure the message of your event is concisely delivered.

Key Message	Date for Delivery	Channels	Audiences	Author of Message
Promote event and send first round of invitations	12th Aug - 6th Sept	Yammer (Office 365), printed posters & leaflets, membership e-newsletter, Regional Facebook	Public, RBL Members	Branch Secretary, MSO, County Recruitment Adviser

Comms channels

Here are our recommended channels to promote your event. Remember to always refer to GDPR guidance before attaining and securing personal data.

- Word of mouth – tell a friend/relative
- Invitations via post or email
- Social Media/Facebook (branch/regional)
- Office 365/Yammer
- Branch or County newsletter
- Regional PR contact
- Posters at local meeting points
- Your local Pop-In or Club
- Regional RBL, Branch and Community Facebook groups
- Local magazine, newspaper or radio
- A local celebrity or spokesperson to help get local press coverage

Gizzits, Freebies, & Take Aways!
TIP: You can find a variety of promotion materials and a step-by-step Promo Item order guide in our Event Resource area on Office 365.

Ticket Sales

Where possible, sell tickets in advance and include information on how to buy tickets, the venue location, and refreshments in your promotion materials. For free online ticket sales, visit Eventbrite.co.uk or wegottickets.com . Secondly, ask your members and supporters to help attract attendees; you could even set a target for ticket sales to incentivise a little light-hearted competition. Remember to keep track of registration numbers and always prepare for a 10% increase or decrease in attendance rate on the day.

TIP: If your event aims to exceed over 100 attendees, you could speak to your CRO for further guidance on creating an event promotion campaign to attain the number of audience you require.

Event Delivery

It is essential that you hold a team briefing to inform them of the operational details, and to review the event after to assess the highlights and lessons learned. The checklist below can be used during the briefing to ensure the event runs successful and in accordance with H&S.

Event Delivery Checklist

- Fire exits are checked, cleared and appropriately lit

- All public areas are clean and clear

- The appropriate level of first aid provision is available

- Effective signage and directions are in place well in advance of the start time of the event

- All required materials and documentation are available

- All stewards and volunteers attend the on-the-day briefing

- Name badges are provided to identify key personnel and volunteers

- Phone numbers of all key event contacts (band, entertainer, speakers) are stored safely and securely and emergency contact numbers are to hand

- All banking materials (float, cash box, receipt books) are stored safely and securely

- Volunteers and staff are briefed to make sure you've covered key roles and responsibilities, health and safety elements, all the information on the venue (toilets, fire exists, parking etc.) and who to talk to if anything goes wrong

Reflect and say thank you!

Now the event has been delivered successfully, thank your attendees and give yourself and team the recognition of an event well managed. You can take time to review the event and hold a wash up team meeting considering the questions below:

- What were the pitfalls/successes?
- How can we improve?
- What went well?
- Things to improve?
- Did the attendee list reflect who you were expecting to see there?
- Were they satisfied/did you receive positive feedback from attendees?

TIP: You can share a feedback form with your attendees by email or ask for verbal feedback and make notes. Once this have been reviewed, be sure to incorporate the lessons learned into your next event plan.

In the Membership Administration Portal (MAP) area, look for this icon to access resources to support your Branch Events and Activities.

Membership Documents Library

membershipcomms@britishlegion.org.uk

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