



Central News – June 2023

Inside this issue

Title	Page	Summary
Important dates	1	What's coming in the next few months
Annual Conference	2	A few highlights from Annual Conference 2023
Branch Annual Returns	2	It is the Branch Annual Return Season again
Branch Social Accounts	4	A reminder on the usage and separation for social funds
Regional Central News	4	A new added feature in Central News to celebrate the local success stories
Gift in Wills	4	Resource requests for the Legacy Team
Private Site and Professional Fundraisers	5	Information on where to find local Private Site and Face to Face Fundraising Campaigns
Military Compensation	5	The Campaigns Team need your help
New Faces in the Membership Directorate	6	An update on new team members
National Chaplain, the Venerable Martyn Gough	6	We share the passing of our National Chaplain, the Venerable Martyn Gough
Data Clean	6	A request to help us improve our data quality

Important dates	
24 June 2023	Armed Forces Day
30 June 2023	Branch Financial Year End
30 September 2023	Deadline to submit Branch Accounts

Annual Conference: 19-21 May 2023

Annual Conference 2023 saw almost 500 delegates and visitors in sunny Torquay, with many also attending online. It was an eventful three days in which we said goodbye to the retiring National President, Lieutenant General James Bashall and welcomed his successor, Vice Admiral Sir Clive Johnstone. Another highlight was the Sunday morning parade in which the sun was shining across Torquay seafront, which made for an impressive and moving display. With our brilliant Standard Bearers once again taking centre stage, we are so grateful and proud of the way they have represented RBL in the last year. With the Charging of the Standards, the Closing Ceremony was led by The Right Reverend, Robert Atwell, Bishop of Exeter, and Annual Conference was completed for another year. We look forward to welcoming everyone to Newport next year!

We also wanted to recognise all those branches who came together across the network to attend Conference virtually. A fantastic example of this is in Belfast where between the MEO and the District Secretary a viewing party and Conference Hub was organised. Several branches and delegates who could not make the journey to Torquay were still able experience Conference and take part in the voting process, as well as catching up with old friends and meeting new. This is a great example of branch and member engagement, and one we would encourage everyone to participate in whether during Annual Conference or in general throughout the year.

Branch Annual Returns

We are fast approaching the Branch Financial Year End for 30 June 2023 and all the branches should receive the year end Accounts Pack either by post or email from your MEO by 1 July 2023. The Branch Accounts Team have covered here some really important FAQs, though please do let us know if you need any further clarification at this crucial time.

1. **Is everything the same as last year?**

Broadly speaking, yes. For a full list of changes made, please see the page 3 of the Branch Return Guide 2023, which will be send as part of the Accounts Pack.

2. **What are the benefits of completing the electronic Excel template return rather than a paper copy?**

- Totals will be populated automatically throughout meaning you cannot make a mistake when adding up!
- There are number of built-in checks which will alert you to any identifiable errors/omissions when you are preparing the return so these can be fixed before you submit and will reduce the chances of your MEO/Finance having to reach out to you later with follow up queries.

- Reduce processing time for the Finance team, which will improve the response time for queries from Finance where they are necessary.

3. Who is your point of contact for queries?

- Contact your MEO in the first instance with all queries.
- Contact branchaccounts@britishlegion.org.uk if you are unable to reach your MEO or they are unable to help you.

4. Where to send the completed return?

- E-mail to your MEO wherever possible. Even if you have completed a hard copy form, if you are able to scan/take a photo and email that helps us to reduce the amount of physical post we have to process at head office.
- If you are unable to email completed returns to your MEO, send your return by post using recorded delivery, addressed to: Branch Accounts Team, Finance Department, Royal British Legion, Haig House, 199 Borough High Street, London, SE1 1AA.
(You should keep a copy of the Branch Return and recorded delivery receipt with you just in case of postal delays or loss)

5. Is it ok to wait for the deadline of 30th September to submit the accounts?

- **Please do not wait until 30th September if at all possible;** send your documents as early as you can. Your MEO needs to review the documents and upload to the Finance system by 30th September and therefore your MEO needs time to do their checks and query anything with you.

6. If there are no transactions for the month of June, how can we get a bank statement to show 30th June balance?

- If you can deposit £1 cash to your bank account (the £1 can come from the branch petty cash pot if you have one) after 15th June, the bank will be obliged to produce a bank statement as there has been a recent transaction. Usually if a statement is not received, it is because there have been no transactions, so by forcing a transaction to take place, this will ensure a statement has to be produced by the bank.

7. We have more than £5000 in our bank account. What should we do with the surplus funds we cannot spend?

- Any surplus balance over £5,000 that you cannot spend or donate to the Poppy Appeal should be deposited into the branch's BFI in line with the requirements of the Membership Handbook.

Branch Social Accounts

In relation to the end of year annual accounts information, here is some further clarity around the need for branches to have a separate, non RBL related account in which to hold funds belonging to members, but used for non RBL activities i.e., social events.

The requirement is that branch funds and social funds must be kept separate i.e., the branch bank account must not be used for receipts and payments that relate to social activities organised for the benefit of members where there is no charitable element. Examples would be social events such as dinners and trips out.

If branches are organising a lot of social activities for members rather than as a one off, it would be good practice to have a bank account to record the receipts and payments. If there is a social club attached to the branch, where members pay an annual or quarterly amount to take part in a variety of activities, there should be some reporting back to members on how the money was spent.

The principle point is that transactions should not be included in the branch bank account or the branch annual return, as they are not charitable income and expenditure.

Regional Central News

As we strive to improve your membership experience, we wanted to announce a major new feature that will be live in the next Central News Newsletter. From July onwards the newsletter will have a regional voice.

We know the outstanding work that the Branches, Counties and Districts do, and this is your opportunity to shout about it. We want to share your stories of success, good committee management and effective practise all which allow you to run an engaged and fruitful branch or county.

Each month we will highlight these examples across all the regions. So please share any examples and stories with your MEO for inclusion in future editions of Central News.

Gift in Wills

Thank you to everyone who came to visit us on our Gifts-In-Wills stand at the Annual Membership Conference in Torquay. We thoroughly enjoyed meeting you all and chatting about Gifts in Wills. We hope that we were able to answer your questions and provide your Branches and Counties with

plenty of resources to take back to your members.

If you would like to request additional Gift in Wills resources to take back to your Branches or County, or you would like to order some for the Armed Forces Days celebrations coming up, please email freewills@britishlegion.org.uk. To ensure you receive deliveries in time for the Armed Forces weekend, please order by **Sunday 18th June 2023**.

Following the Annual Conference, we would also love to hear your stories about why you may have left a gift in your Will to RBL or your branch. Additionally, we would like to hear your feedback if you have used our free Will-writing service, with the hope of using these stories for our future fundraising campaigns and materials. If you would like to be involved, please send any stories and photos to: freewills@britishlegion.org.uk. Again, it was lovely to see so many of you at the Annual Conference and we hope to see you all again soon.

Private Site and Professional Fundraisers

As most of you are already aware, our team of Professional Face-to Face Fundraisers are actively engaging people nationwide, encouraging them to make regular donations to support the vital work we undertake in assisting our armed forces community and beneficiaries. Whilst their stand can only be used for this activity, we invite you to visit, show your support and provide the fundraisers with encouragement. For additional information, please refer to the [weekly list of sites which is now available on MAP](#).

Military Compensation

Armed Forces compensation (such as a War Pension) is often considered an income source when benefit rates like Pension Credit are calculated, whilst civil compensation is not. As a result, veterans and their families are receiving less financial support. RBL are campaigning to fix this, but we need your input.

Our Campaigns team want to hear from people that have been disadvantaged under the current system. If you or your local members have applied for any benefits while receiving Armed Forces compensation of any kind, we would like to hear from you.

Sharing your experiences will help us to end this unfair treatment of the Armed Forces community. [Please click here to fill out a short survey](#) telling us about your experiences. Alternatively, you can email us at: publicaffairs@britishlegion.org.uk

New faces in the Membership Directorate

For those we met in Torquay a few weeks ago it was lovely to be able to introduce lots of fresh faces in the Membership Directorate to our members. Over the last 18 months there has been a lot of turnover in the team, and we are pleased that now we are filling those vacancies and new roles with new team members. As was mentioned at Annual Conference we have some new roles in the Central Services Department, and two of these team members are starting this month. Louise will be our new Membership Communications Manager and Sally will be our new Membership Development Manager, looking after Branch Community Support. More details about this role and the plans to develop the wider BCS offer in line with solidifying the branch offer will follow in the next few months as Sally settles in. We ask for patience and understanding as new staff settle into their roles and the team, and we look forward to all working together to improve the experience for our members.

National Chaplain, the Venerable Martyn Gough

It is with great sadness that we share the passing of our National Chaplain, the Venerable Martyn Gough. Our thoughts are with his family and friends at this difficult time. Martyn had been battling cancer, and sadly died recently. He spent almost 25 years serving the Royal Navy before becoming the Royal British Legion National Chaplain, a voluntary role, which he held since 2021. He officiated at the Festival of Remembrance at the Royal Albert Hall the year he joined. In 2013-14 he was appointed as the Forces' senior chaplain in Afghanistan before returning to the UK first as Deputy Chaplain of the Fleet and, from August 2018, Chaplain of the Fleet and Archdeacon for the Royal Navy. That same year he was also appointed a Queen's Honorary Chaplain.

Data Clean

With our Bulk renewals fast approaching we are keen to make sure that our data is in the best possible state to ensure that everyone receives their renewal reminders and notifications in time. In order to do this we would appreciate the support of all Membership Secretaries to review the contact details for their members. If you notice any inaccuracies in the postal and email addresses for your members please do highlight these with your MEOs who will then work with Membership Services to update these details on CARE.
