**Strategic Transformation Committee**

## **Output from the Consultation on the Options Study**

## **Completed July 2024**

**(For discussion at Special Conference Sept 2024)**

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## **Executive Summary**

This paper details the total feedback of RBLS Scotland Branches and others who commented on the consultation for potential changes to primarily balance the books, but also to improve the functioning of the RBLS. Additional copies of the Options Study can be provided on request.

The feedback and analysis has been collated by the Strategic Transformation Committee and is provided for further discussion and decision making at the Special Conference, to be held on Saturday 28th of September.

It is essential that the output from those discussions will decide on which proposals should be worked on by the Strategic Transformation Committee (STC) to work on the details necessary for motions to be produced and voted one prior to the Annual Conference in 2025. Also, where possible, to make some early decisions that can be enacted without waiting for a vote in 2025 to save money.

This is all focused on the future needs of the organisation, our objectives and critically our beneficiaries.  As recognised through consultation this WILL require change.  That change is unlikely to suit the entirety of expectations of every individual member.  Therefore, we must discuss and decide selflessly, and in terms of our organisation's future.

It is important to remember that this was a consultation, not a vote, so it does not determine the actions to be taken, merely better informs the reader of the arguments and strength of feeling across the membership who have engaged with the process so far.

Many Branches reported a significant apathy and low numbers from members engaging with this consultation. 26 Branches returned a feedback form, plus two Areas.

1. **The feedback**

All comments given on the feedback forms have been noted in this report, but some have been summarised in places due to the length of the responses. If there is anything that is missing that is important, please let the STC know.

The responses are collated below, together with a degree of analysis. All questions raised have all been noted and answered in Appendix A. Ideas raised have all been collated at Appendix B.

1. **Tests**

To remind the reader, there are three tests that we have applied to any changes being proposed:

* **Efficiency** – Will it improve the efficiency of the organisation? Does it solve the financial difficulties of RBLS? Can a financial benefit and sustainability be demonstrated by the option presented? Is it efficient use of resources?
* **Effectiveness -** How effective would the course of action be? What is the impact at a grassroots level, and does it fulfil our charitable objectives? Does it fit into a clear and unambiguous Governance structure? Will it have a positive impact on membership?
* **Engagement** - How will everyone buy into the proposed course of action? Ease and duration of implementation. What does it look like for our members looking up through the Branch, Areas, and Head Office, does it meet their needs? Does it improve the teamwork between Branches, Areas and the corporate centre (Head Office)?

1. **Review of the solutions and options**

There were 26 Branches that responded and 2 Areas. Feedback was also included from various other pieces of correspondence received and the feedback from Conference is also included.

The feedback form asked for comments on the 4 SOLUTIONS to determine if there was a preference for one in particular. Unfortunately, some Branches interpreted this as feedback on the OPTIONS, therefore feedback has been considered for both the Options and Solutions and is summarised below.

Table 1: Summary of feedback on preferences for Options and Solutions

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|  |  |  | **Options** | | | | | | **Solutions** | | | |
|  | **£5 capitation Increase - Yes** | **£5 capitation increase - No** | **2 light - Income/membership activity - HQ participation only** | **2 full – Income/membership activity - HQ and Branch participation** | **4A - Dissolve Areas** | **4B - Areas bid for /reduced funding** | **5B - Reduce Head office to critical/essential tasks only** | **5C - No change/Efficiency and/or cost cutting measures at Head Office** | **Solution 1 - 2 light, 4B, 5B** | **Solution 2 - 2 light, 4B, 5C** | **Solution 3 - 2 full, 4B, 5C** | **Solution 4 - 2 full, 4A, 5B** |
| **Branch**  **Totals** | **10** | **6** | **1** | **13** | **8** | **9** | **4** | **10** | **0** | **0** | **6** | **3** |
| **Grand Totals** | **11** | **6** | **1** | **13** | **8** | **10** | **4** | **10** | **0** | **0** | **7** | **4** |

Totals are those taken from Branch returns only. Grand totals include several miscellaneous comments and from the two Areas.

As the feedback represents almost 20% of RBLS Branches this is taken to be an indicator of a potential “direction of travel” only in most cases. Nevertheless, there are clear and preferred set of Options:

* Implement Option 2 in full, i.e., do **the maximum change practicably achievable to recruit new members, improve our image and increase our income**. 13/26 Branches believed this the right way forward, and many more not included in these figures talked about many of the topics included in this Option. Many ideas and comments for increasing funding, saving costs and increasing membership were voiced as well, however, there were much fewer suggestions on how this could be achieved. Full comments are provided in Appendix B. Please note that this Option is for this activity to be a joint Head Office/Area/Branch activity, **not just Head Office**. This does not include an increase in Capitation at this time as the members voted against this.
* For **Areas to change**, most believing that they **need restricted budgets**, but a large minority indicating they should be dissolved. 17/26 Branches/Areas were in favour of change. There were some strong views aired on this Option with some alternative ideas shown below. There are clearly significant differences on how the Areas function, which is something that needs to be addressed if Areas remain in the future, so everyone knows who is doing what and we all work as one team.
* For **Head Office to remain substantially as it is at present**, but with the **need for a thorough review** by trained audit staff, independent from Head Office. 10/26 Branches/Areas believed this the right approach, with 4/26 believing it should be significantly reduced or even eradicated, something that OSCR would certainly not accept for a National Charity. The majority felt that it needs significant review to ensure the money is being used wisely, procedures followed are efficient and savings are made wherever possible, without impacting the functioning of our national charitable status.

In terms of the Solutions that Branches chose, the Options shown above indicate a choice of either Solution 3 or Solution 4, with no one indicating a preference for Solutions 1 or 2.

The only remaining issue was that more Branches were in favour of an increase in Capitation, with several suggestions on staged increases to it being driven by the annual rate of inflation, however, as the recent motion for the increase failed this will have to be revisited.

1. **Review of alternate ideas suggested in feedback (Appendix B)**

Some alternative ideas were raised, and these have been summarised in the table below.

Table 2: Summary of feedback on alternative ideas to consider

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|  | **Alteranate choices proposed** | | | | | | |
|  | **Capitation regularly increased/in line with inflation** | **Complete Legion review - purpose, Remembrance image** | **Increase Area employed manpower, reduce Head Office staff** | **Areas to take on Head Office tasks to reduce Head Office costs** | **Maximise on-line/digital correspondence including magazine. Forms, etc.** | **Change conference location/use of RBLS Clubs/1 day** | **Leave Areas untouched, raise capitation fee with same HO/Area split** |
| **BranchTotals** | **4** | **1** | **1** | **2** | **3** | **2** | **1** |
| **Grand Totals** | **4** | **1** | **2** | **2** | **3** | **3** | **1** |

Totals are those taken from Branch returns only. Grand totals include several miscellaneous comments and feedback from two Areas.

The numbers underlying these alternative choices are small, but they are nevertheless worthy of comment:

* To prevent the situation we presently find ourselves in with respect to the capitation increase, an agreement to automatically raise the fee by an amount/in line with inflation would appear sensible. Everything RBLS does from travel, accommodation, staff wages, etc rises annually, so to keep pace, we cannot leave capitation fixed. Several Branches raised this idea. A motion to implement an incremental increase over the period of several years could be more palatable.
* A complete review of the Legion, including our image is clearly necessary and is raised in the original Options Study paper, but this activity needs to consider that at present we are in a financial crisis, which only deepens the longer we take to mitigate it.
  + If agreed, changes need to be programmed into a change programme and timetabled in parallel but linked with other changes and prioritised.
  + Appendix C is an indicative programme about how this might take place.
  + This review of the Legion has clear support from members to look at Head Office, but to be comprehensive, it should also include Areas and NBT. This would seem a very sensible suggestion to take forward.
* Increasing Area paid manpower and areas taking on Head Office tasks. This is an interesting suggestion, but has a few difficulties to its implementation:
  + Areas must all act in the same way if any activity undertaken by them affects the RBLS charitable purposes. It does, however, have merit where activities undertaken by areas are not essential for the charity to operate.
  + Areas must engage productively with all Branches and also link positively with Head Office, ie. act as one team.
  + The biggest issue, however, is that it does not meet the test criteria for cost. It is far more efficient to put one person in Head Office rather than 5 in each area. This is the reason why many organisations are shutting satellite facilities at present. Nevertheless, there may be some activities better conducted by Area volunteer staff rather than Head Office and this should be included in the reviews undertaken.
* Maximise online/digital activity, or more importantly, minimise postage which is annually increasing and potentially becoming prohibitive. This is also mentioned in the original options study. Branch Office Bearers would need to ensure they can provide working email addresses to receive all correspondence from Head Office and to be able to access and use digital forms rather than printed forms. This is clearly the way ahead and mentioned in many Branch returns. Postage costs are prohibitively high.
* Digital distribution of the Legion Scotland Today magazine rather than producing thousands of hard copies. The cost of producing this and sending out to all members is approximately £81k per year. Making the magazine fully digital with an offering to opt in for hard copy would significantly reduce this outlay. This is clearly the way ahead and mentioned in many Branch returns. Postage costs are prohibitively high.
* Conference changing to 1 day, with perhaps the evening before being used for a social would save considerable costs. This also seems sensible now we have one member, one vote. Also, using a centrally located RBLS Branch Club to host it would save further costs. This could also be combined with a change in format to allow more time for discussions and deliberation on key activities.

1. **Answers to questions raised in Feedback (Appendix A)**

These have all been extracted from the feedback forms, collated and grouped under similar headings and answered individually in the attached Appendix.

1. **Ideas for saving/raising money, increasing membership and addressing our image (Appendix B)**

Most of the ideas for saving money, raising money and increasing membership were already included in the Options Study which was circulated by the STC in June 2024.

There were a lot of comments on image (all listed), but little in the way of actions to resolve this. Major change is most certainly needed, but as one comment says, it will need a “leap of faith” by our existing and older members to change.

Everything we do creates an image from being welcoming, to relaxing our dress code, not taking off hats in Clubs, encouraging and supporting new ideas, etc. The strongest advert to join is our members; first impressions count and staring at a new visitor isn’t a way to welcome them.

The only exception is the idea for Branches to raise money to support the overall Legion. Any proposal is assumed to consider the results of any review done of Head Office and any changes implemented in Areas.

Branches of the RBLS are part of RBLS. They are not individual, isolated and self-governing. Clubs on the other hand are aligned to a particular Branch.

In any other national charity, the Branches raise money for the national charity. Take the RNLI for instance. All monies raised do not go to a local lifeboat, but to their Head Office in Poole, Dorset. That is the way, alongside donations from individuals that the RNLI raise funds. Rotary International is similar where the Branches all support Head Offices, but they also can distribute money locally.

Therefore, it is perfectly reasonable, assuming that if Head Office spends the money wisely and for the purposes of the charity, that Branches raise money to support central funding, as RBLS cannot depend on isolated grant funding alone.

Raising these funds can be done in many ways from a fundraising fortnight or week to the donation of a percentage of all Branch funds raised to the donation of a fixed sum annually. Raising funds in this way takes some of the pressure off any future increases in capitation.

1. **Comments on Head Office (Appendix B)**

There are several direct questions raised on Head Office and these are noted in Appendix B.

There was a lot of emotion in many of these comments, something we should be very guarded against as it will affect our very loyal and dedicated staff. The arguments can be split into 3 main areas of thought:

* We don’t trust Head Office; they are feathering their own nest, and their numbers should be minimised.
* Head Office is good, but undermanned and should be supported.
* Other different and balanced/creative comments.

The options paper made the case that a Head Office is essential for a National Charity but there still seems to be some strong feeling that it is not required in its current capacity.

Whatever the answer, we should conduct a thorough review with properly qualified individuals to ascertain the facts and then take decisions based on this information.

1. **Comments on Areas (Appendix B)**

As above, very differing feelings on Areas and may well reflect how the Areas currently operate very differently. As suggested by many Branches with Head Office, we should also review Areas to find out how they operate, take decisions, deal with their finances and support their Branches. This would give us a much better picture of the Legion.

1. **The National Board of Trustees (Appendix B)**

Although there are just a few comments on the NBT, it would make good sense to review the National Board of Trustees as part of this process. Its Governance, composition, expertise, skills set, representation, decision making processes and training. This should include reviewing other similar charities operating models, the RBLS purpose, strategy and future direction of travel.

This could go as far as looking at the national image projected at Remembrance events, something that has remained the same for decades and is probably not in step with the younger generation of today. This would be a long-term project but is worth considering.

1. **Programme for change (Appendix C)**

An indicative programme for the time period pre-2025 conference and post conference is shown at this Appendix. It considers the various interactions, timescales, accountabilities for delivery and responsibilities for support.

1. **The Strategic Transformation Committee**

It is recommended that this committee remains in place until all the decisions are taken and a way ahead is clearly articulated. At that point, a Strategic Implementation Working Group (SIWG), responsible to the NBT and with representation from every Area should take its place to produce a comprehensive and costed programme, properly timetabled and managed for delivery to hold everyone to account for their actions.

**Appendix A**

**Questions raised on feedback to consultation**

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| Q1 | Merger:   1. You have brushed over a merger 2. We should be considering merging with other veterans’ organisations. There are 17 in the Inverness area alone. Fewer organisations to fight over the funding available. 3. Consider a merger with Veterans Scotland. 4. Why dismiss so quickly? Merge with Poppyscotland so that we can be like TRBL. 5. The confusing relationship with Poppyscotland needs addressing. Merger. 6. Recommend amalgamation. 7. No merger (x2) 8. Why are there separate British Legions? 9. Merge with RBL to create RBL UK wide (x2) |
| A1 | Q1-7  This was covered in Appendix D of the Options paper. To achieve any merger, the parent organisation that RBLS would wish to merge with will require the RBLS “house to be in good order”.  RBLS is likely to be required to make considerable changes and to take remedial action to ensure the organisation can demonstrate they are in a good financial position with good governance to withstand due diligence from any external organisation who would consider merging with us.  With a continuing annual deficit, no other organisation would currently accept us. This option is therefore not currently feasible in the present, but that does not mean it is discounted entirely, it can be revisited at an appropriate time in the future.  Q8. Why are there separate British Legions?  The organisations have always been separated since their formation in 1921 (albeit only a few weeks apart). The consideration of RBLS merging with TRBL has been tabled, discussed and rejected many times during our 103-year history and continues to be a topic of interest.  The Royal British Legion could be one of several charities that RBLS could consider a merger in the future, just not at present. |

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| Q2 | Financial situation:   1. Did not realise the depth of the financial difficulties. 2. Surprised management had let deficit accumulate without remedial action. 3. Why has deficit risen to £164k so sharply? 4. "Appears you wish to dissolve areas so that all funds presently held go into your account to secure your survival". 5. Is the money at NBT/Head Office being spent wisely? 6. More transparency with Head Office costs. 7. Who covers costs of empty premises? 8. How much of RBLS reserves is invested to gain a return? 9. Can branches see operating costs and specifically a breakdown of the second item "Governance". 10. Address the deficit before any changes, even if this means loss of central services. 11. Why do Scot Gov not support the RBLS? |
| A2 | Q1 and 2  The management of RBLS is conducted by the CEO and Head Office Staff. The financial budget is set and agreed annually by the NBT, where every Area has representation. The accounts are audited annually, and they are presented and explained to Conference. The figure should come as no surprise with this level of visibility. The NBT is responsible for the governance of our charity and must run it in a way that complies with our charity's governing document and the law, one aspect of which is to protect the organisation's financial status so it can meet its obligations – economic and social. The NBT has been confirming to the membership for some time that there is a deficit and action is required to remedy this.  Q3 Why has the deficit risen so sharply  The deficit for the previous 3 years was:   * 2019/2020 – a deficit of £111,261 * 2020/2021 – a deficit of £80,623 * 2021/2022 – a deficit of £117,986   This problem has been building for several years without action to mitigate it as the only source of income is the membership fee and donations and legacies are not guaranteed and reducing year on year. Running costs are annually increasing in all areas including postage, insurance cover, cost of Conference, Magazine, and much more. The NBT are managing a budget with ever increasing costs and no increase in income.  Reduction in membership numbers also affects the deficit, membership figures dropped during COVID from approx. 22,000 to 18,444. That was a loss of income of £53,340. At the same time donations and legacies have fallen as people are not able to give as much as before, and investments have been affected by unstable market conditions.  Q4  The Strategic Transformation Committee represent the length and breadth of Scotland. There is no us and them, or shouldn’t be, in the RBLS. We should be one team. All Areas are represented on the NBT and can suggest and act at any time to address problems. There are severe financial pressures on all companies and organisations at present and all are taking similar action to remain a going concern. The strategic work being undertaken is to secure the survival of the organisation as a whole, not just one part of it.  Q5  This is the reason the STC are suggesting a complete review of Head Office by trained personnel to look at procedures, activities and finance.  Q6  Page 15 of the Options Study that was circulated provided a breakdown of Operating Costs based on the last financial year. The costs were noted  under 8 main headings with further detail provided on what is included within those headings. If a full audit of Head Office proceeds it will look at the detail within each of these headings.  Q7  We presume this is a question of Club premises? The responsibility of insurance, checking and maintenance of any empty Club or Branch buildings is up to whoever has ownership.  Q8  The investment portfolio is approved by the Trustees annually as is the level of risk they are prepared to take with the investments. The higher the risk the higher the return but this would not be good management of charitable funds. The portfolio at present is a mix of medium risk assets. This is reviewed with Brewin Dolphin and the accountants at Chiene & Tait annually.  Q9  As noted in answer to Question 6, Operating Costs were shown on page 15 of the Options Study circulated. Governance costs were noted to include NBT, Working Groups/Committees and legal fees, which for the last financial year were as follows:   * NBT = £6,761 * Working Groups & Committees = £1,333 * Legal Fees = £62,834   Q10  To address the deficit, we need to address organisational changes. RBLS only has a single source of income which is the membership fee which has been static since 2018. With approx. 22,000 members paying £15 per annum (£330,00) and a third of that being paid back to Areas (£110,000) that leaves RBLS with £220,000 of income (£10 per member) annually, in a climate where all costs are increasing. There must be action to change for the deficit to be addressed.  Q11  Scottish Government finances are under significant pressure the same as all other organisations, but RBLS does benefit from funding when they can support us. Veterans Community Support Service receives an annual grant through Unforgotten Forces which received funding from Scottish Government and more recently a grant of £22,000 was provided to support the D-Day 80th Commemoration. The CEO regularly engages with Scottish Government and the Veterans Minister on opportunities for future funding initiatives. |

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| Q3 | Head Office   1. How many persons required in Head Office to replace areas? 2. Option 5B - examples would have been useful. Does less members = less Head Office staff? 3. Has Head Office way of working ever been reviewed? A lot of work is repetitive and can probably be automated. 4. Are 2 out of 11 the RBLS staff at Head Office paid for by Poppyscotland? 5. Visibility of CEO costs to compare with TRBL/Poppy Scotland CEO costs. |
| A3 | Q1  Until a full assessment of Head Office and Area functions are concluded it is not possible to predict the number of people required.  Q2  Less members do not equal less Head Office staff necessarily. When an organisation downsizes, it still needs to conduct the same tasks, even if volume is decreased. Irrespective of the number of members staff will still be delivering nationwide support through the Veterans Community Support Service and Pensions & Advocacy Department. National and local events still need to be supported and the annual Remembrance programme delivered as well as many other activities including creation and editing of the magazine, monthly membership bulletin, month end report, annual Conference and so on.  Q3  The STC has suggested a full review needs to be conducted at Head Office. It would be good if more confirmation could be given on what the membership feel is repetitive and can be automated. There are many projects that Head Office would like to deliver to automate membership services etc., but for these to be implemented would require substantial upfront costs.  Q4  Yes, Legion Scotland receive an annual grant from Poppyscotland to cover the cost of both staff in the Pensions & Advocacy Department. This has been in place for some years but is annually reviewed and may not be guaranteed in future.  Q5  It is neither fair or appropriate to request information on the salary of an individual so the STC will not be confirming exact figures and disclosing personal financial information. However, we can confirm that the current RBLS CEO salary is at least 25% less than that paid to the Poppyscotland Director (when he was in post) and approx. 40% less than the Director General for TRBL. When the CEO took up post in 2018 it was on a salary of approximately 15% less than her predecessor. |

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| Q4 | One RBLS team   1. Allegiance is to Branch not Head Office. 2. There is a clear undercurrent of distrust between parts of the organisation. For RBLS to thrive, this cannot be left unchecked and must be addressed during any change |
| A4 | Many of the comments received are composed as it there are different parts of RBLS – NBT, Head Office, Areas and Branches. If we are to survive, we need to resolve these problems and work together. If there are concerns, they need to be properly raised, addressed then put to bed. We have been established as a charity to support our military veterans and their families across Scotland and all of us are aware of the need for teamwork to get things done. This should be included as an action in our change programme – see Appendix C. |

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| Q5 | Other veterans’ charities - younger veterans’ charities are doing better than RBLS - why? |
| A5 | It would be good if examples of which charities were given in the comments for comparison. However, the STC are aware that there is a perception issue within RBLS and that younger veterans or those in service are not interested in joining the organisation as it is not attractive to them. This issue is something the organisation as a whole must address. It is not something Head Office or the NBT can rectify in isolation. Areas and Branches must all act and assume responsibility to ensure they are welcoming and all-encompassing for members and to provide an interesting and varied programme of activities to attract new or younger members. |

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| Q6 | NBT - The composition of the Board - The National Board of Trustees is legally responsible for Governance of RBLS. It has been suggested that there is insufficient breadth of knowledge, qualifications, experience or legal understanding on the NBT at present for it to operate as effectively as it should, in compliance with the OSCR guidance. Suggest:   1. Addressing the NBT composition, e.g., 4 to 5 persons nominated by the membership from different geographical regions, 4 or 5 members/external personnel chosen for their ability to contribute, i.e., the CEO (all company Boards have the CEO as a member), financial expertise, grant/fundraising expertise, the Chair or CEO of a similar Charity of organisation, etc. 2. Director training. if it is not already being conducted. |
| A6 | The current Board is a mix of retired and working individuals who all bring their own areas of expertise to the Governance function of RBLS. All Trustees complete a code of conduct and skills audit when they are nominated by their Area as a Trustee. As part of this all Trustees are also asked to identify any areas they feel additional training and expertise would be required.  All NBT meetings now include a training session for Trustees delivered by Turcan Connell (or other experts invited to attend) to ensure current legal and OSCR responsibilities are on the agenda and regular training is provided.  The composition of the Board is dictated by the Constitution, as 2 nominated/elected representatives per Area and the National Office Bearers (Chair, Vice Chair and Treasurer) and National President. The Trustees have the option to co-opt other professionals to the Board and this is being considered/reviewed.  The NBT, however should be reviewed as part of this entire process as it is closely linked to Head Office and the strategic direction of RBLS. |

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| Q7 | What is in it for the non ex-service members?   1. When over 2/3 of membership is non ex-military, do the aims, objectives, etc still remain totally relevant? 2. What are we able to offer the majority of members, 70% who are not ex-service? 3. Over 80% of membership is from Branches with Clubs - strategy needs to ensure they are maintained. |
| A7 | In many Clubs non ex-service members join only for the Club facilities and they have little interest in the Branch activity or RBLS purposes. This is a trend across Scotland and is unfortunately unavoidable.  However, many of those who have joined RBLS and have no military links either personally or through family do so because they want to support the work the Legion does, and they have the same commitment and passion as many ex-service members. If it was not for the non ex-service members many of the Branches and Club would fail to appoint Committees or run their programme of activities throughout the year, or indeed deliver Remembrance. As a single category membership organisation all members are important and a high proportion of them, irrespective of service background give so much to the organisation.  The composition of the membership does not affect our aims and objectives as they will always remain, everyone involve with the Legion is here to support Veterans and their families across Scotland, whether that is through membership, comradeship, events, or practical support.  What must be addressed as part of any future changes is how to ensure the organisation remains relevant and attractive to those who would join and that again ties into the perception issues which is a responsibility of everyone in the organisation. |

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| Q8 | What do members get for their capitation fees? What’s in it for members to increase capitation fee? |
| A8 | The Legion is a charity set up to help others. In the same way as other charities such as the RNLI, the members give their time and often money to support the cause they believe in. In our case this is to provide comradeship and support for veterans and their families.  It is not a case that joining means you get a joining pack (badge, booklet etc.,) although members do receive their magazine twice a year which under current costings is approx. £3.60 per annum per member. |

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| Q9 | Programme for the change process   1. Leadership through the change process - strong visible leadership is necessary at all levels, less emphasis on projects and committees. 2. The change process needs to be done quickly to avoid low morale and some Clubs reconsidering their options. 3. Do not make any snap decisions prior to a complete review of services. 4. Comments talk about timeframes of reviewing solutions. This is interpreted as a programme needs to be in place to properly scope the activity and assess benefits. 5. Depth of change will be hard for many to accept - a stepwise approach should be outlined. 6. Implement asap where possible to prevent further loss. |
| A9 | A programme for change will be created. This will show the various links between activities, indicative dates for action, who is accountable for the delivery of the task and who must support the activity. This will be owned and monitored for performance by the Committee that will replace the Strategic Transformation Committee so that risks can be mitigated and any opportunities spotted can be realised.  Feedback from Branches is a mix of it needs to happen quickly and it shouldn’t be pushed through too fast, so the NBT will be making careful and considered decisions about the way forward. |

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| Q10 | Work on the constitution should take priority. |
| A10 | The final draft of the Constitution is complete and will be circulated for the membership vote in 2025. The review of the governing document will continue throughout the strategic work to reflect any changes required which need to be accounted for in the Constitution. |

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| Q11 | What are the membership demographics? |
| A11 | Some statistics are provided below (please be aware these reflect what is on the database as of August 2024 and do not include any new members or adjustments to membership with credits currently being processed and, in some cases, not all members have disclosed gender, date of birth etc).   * Active members – approx. 23,000 * Where gender has been confirmed Male = 17,132, female = 6566 * 14,633 members are over 65 * 8,598 members are under 65 * For those who have confirmed service history, approx. 10% of members are Army. 2% Navy and 2.5% are RAF. * 84% of members are in Branches with a Club. * 30% of members are in AB&K Area * 11% of members are in AP&F Area * 19% of members are in EL&B Area * 18% of members are in GAD&G Area * 22% of members are in H&I Area   With almost 64% of the membership over 65 it further highlights the need to attract more younger members for the future. |

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| Q12 | Fundraiser/Fundraising organisation:   1. Need to employ an experienced person, so need to offer a competitive salary. 2. Do not employ a fundraiser. 3. Employment/contracting for fundraising - is this the best use of our funds? 4. Professional fundraisers - very expensive. 5. Employ a fundraiser. 6. How long to recover fundraiser's costs? |
| A12 | Obtaining a regular stream of grant funding, making applications, networking, seeking sponsorship and providing all follow up reports and statistics for any grants awarded requires a significant amount of time and also expertise. This is not something that any current staff at Head Office have the experience or time to commit to.  The CEO through day-to-day business, meetings, networking, links with Scottish Government and grant making bodies, is always seeking sponsorship and grant opportunities and has made several successful applications in the current financial year.  Head Office staff are also acutely aware of the need for fundraising and those employed through the events and Veterans Community Support Service also regularly pursue funding opportunities, sponsorship and donations to help support RBLS work.  However, it is a time consuming and often full-time pursuit that requires a dedicated person to focus on financial targets for RBLS.  The organisation has made a considerable outlay in previous years with two fundraising and marketing staff employed and many lessons were learned from that and if a fundraiser were to be considered in future, the pros and cons would be very carefully weighed against any expense of employing them so past mistakes were not repeated. |

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| Q13 | Of Branches lost in last 10 years, how many have clubs? Are current branches sustainable? |
| A13 | Most of the Branches which have closed since 2014 were smaller Branches who had been struggling with membership numbers and securing volunteers to run the Branch Committee.  In 2014 there were approx. 176 Branches and 66 Clubs, as of 2024 there are currently 138 Branches and 58 Clubs. It has not always been the case when a Club has closed the Branch then closes as a result.  Many Branches are doing extremely well, with or without a Club. |

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| Q14 | Membership process appears inefficient and needs review.  The whole membership was much quicker and less hassle for us as a branch when we dealt with it all in house. At the moment I think it is wasteful and “clunky” |
| A14 | The old system of capitation books issued to Branches to sell memberships locally was outdated, albeit for some Branches easier to manage. There was no central record of the membership or any real monitoring of our demographics as all information was held at Branch level.  The organisation is required under OSCR rules to keep a register of their members, and this was implemented some years back with the Database and a switch to personalised membership cards and the system we have in place today.  It is not perfect and for the staff is incredibly time consuming, there are changes and improvements that we would like to make but do not have the budget to do so.  It would be good to get further feedback on what is inefficient and what the membership feels needs reviewed. All Branches were asked to provide feedback on this in the Branch Surveys in 2023, but comments were limited. |

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| Q15 | Why emphasise pride and inclusivity? |
| A15 | Further clarification on what is meant by this comment would be helpful. The STC would refer all members to the Constitution and the Charitable Purposes and Principles where it is noted that we are a non-political and indeed non-judgemental organisation.  All who support our aims and objectives and wish to be part of the legion to volunteer and be involved in the good work of RBLS should be welcome irrespective of colour, creed, gender, political background etc. |

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| Q16 | Why were the suggestions made at National Conference on second day not on the "ballot"? |
| A16 | There was no ballot. This was a consultation of the membership to see which direction to take. As was stated at Conference, these suggestions should have been put on the feedback form and picked up alongside other information so that they could be put to the Special Conference in September for review by other members.  There has been no vote on any strategic changes and there was no requirement to add anything to the ballot papers which were circulated in July on the strategic work. |

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| Q17 | "We are bemused that area management has been raised during this period". |
| A17 | There is a strength of feeling by a number of Branches that Areas do not perform the same function as in the past, especially with the advent of modern digital technology and demise of Area sports. There is only one RBLS, consisting of Branches, Areas, Head office and NBT. No stone should be left unturned.  In order to review the organisation as whole Areas must be looked at as part of a thorough process. |

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| Q18 | Conference:   * Condense conference to 1 day. Keep it close to Edinburgh to reduce costs for Head Office staff. * Use our own RBLS Clubs to host the event and save costs. * Reduce conference to 1 day. * Head Office hours would have been significant, including set up and take down. Dumfries incurred higher costs for delegates attending that normal. Suggest reducing conference to one day at a more central location. |
| A18 | The Special Conference in September will be taking place in an RBLS Club at Prestonpans. This will give everyone the opportunity to see if using an RBLS facility in future for Conferences is possible. With one member one vote, the conference purpose has clearly changed so it a good opportunity to review whether we move to a 1-day event, perhaps with a social gathering the night before.  Annual Conference takes weeks if not months of preparation by Head Office and is planned and delivered alongside all other work which is always ongoing. Attendance is down year on year and if there is a feeling in the membership it is time for a different format that is something RBLS would be keen to explore to ensure better use of resources (both financial and in terms of time for staff). |

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| Q19 | If 80% of the memberships come from clubs, how many of those members actually support the Legion and are not just paying a fee to use the club. A lot of members have expressed their concerns over this and the increase in membership fees could in turn lead to a further reducing in memberships. Has the bigger picture been looked at, rather than just a quick stop gap. |
| A19 | Under the Constitution members of a Club MUST be members of the Branch as well. Any Club accepting Club only members is in breach of the Constitution.  RBLS is aware that a high proportion of members who have joined a Club (and Branch) are only interested in the social activity of the Club and do not support the work of the Branch throughout the year.  While Head Office can provide guidance to Branches and Clubs this is ultimately something that must be monitored at a local and Area level to ensure all members engage and are retained. There is no simple solution, and it does require a good bit of effort to ensure both Branch and Club are successful, but many do manage it and do it exceptionally well.  The time has come to take the best decision that minimises the impact on current members and makes us a more attractive organisation to join. This may result in losing existing members who are resistant to change but change is required. |

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| Q20 | Out of the 58 Clubs left, which takes in the most number of members, how many of those clubs are struggling with the increasing day to day running costs and may not be able to remain open for the next 5/6 years? |
| A20 | The largest Clubs (in terms of members) are in Aberdeen, Banff & Kincardine and Highlands and Islands. Irrespective of the number of members all Clubs across Scotland have been affected by the long-term effects of COVID and ongoing increases in cost of salaries, utilities and so on.  Some are running at a deficit and if unable to change their business model may not survive into the future. The same is being seen right across the hospitality and leisure sector.  Where possible information is shared with Clubs on cost saving opportunities and grants, something that was adopted during COVID and RBLS has the support of the TRBL Commercial Team (at no cost) to meet with and advise Clubs on finances and their business models.  It is also interesting to note that those areas of Scotland how have the highest population concentration and not those where we have the largest Legion Clubs. |

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| Q21 | Digital/online   1. Magazines, bulletins - paperless. 2. Reduce to 1 Legion news per household to save costs. One household gets 4 copies! 3. Go digital on all paperwork, e.g., membership forms. Handwritten forms can be scanned and forwarded online. 4. Digital correspondence to be the norm - postal services only used by exception 5. No postal ballots, magazines. If members want hard copies they should pay. 6. Magazine on-line/reduce postage, hard copy on request |
| A21 | Digital correspondence is the way ahead, not least for cost savings but also to ensure we are doing our bit for Net Zero and reducing the impact on the environment and paper waste.  The membership monthly bulletin and month end reports are digital and where possible (especially during COVID) larger Branch mailings and Conference packs were issued remotely via email.  Printing and posting materials, whether in house or the magazine are a substantial cost annually for RBLS. However, many members, especially Office Bearers do not have an email address or are not prepared to provide one. This makes a complete switch to digital very challenging. It is also difficult when Head Office receives complaints about using email too much as many insist on having hard copies of information circulated or confirm they are unable to print documents locally.  We also have to consider the members who are not IT literate or have access to online information.  If there is enough interest and support from the Branches and membership to move more of the communication function to digital that is something we would be keen to explore. Perhaps for further discussion at Special Conference. |

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| Q22 | A member from Head Office mentioned they did not want Branches running their own Remembrance events, but to support national events. Is this correct |
| A22 | This is totally incorrect. RBLS needs the local Branches to conduct local events as it is important for the process of Remembrance. If the person who mentioned this could tell the CEO who said this, she will address it. |

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| Q23 | 80% of members have access to Clubs - what is the levy on Clubs? |
| A23 | The members of Clubs all pay the capitation (or should). Hospitality in this country is already under considerable financial pressures and we should not make it worse by putting a levy on these clubs. |

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| Q24 | Is there potential for Branches to merge/partner with local organisations with similar aims. |
| A24 | Some of the more successful Branches and Clubs have fantastic relationships with local organisations and do a lot of collaborative work. This is done without a formal merger as that would require one or other party to relinquish their status which presumably RBLS Branches would not wish to do as it would mean closing the Branch.  There are many options for partnership working which Branches can explore locally if they are keen to do so. |

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| Q25 | Has Head Office done any forward thinking before now on all the topics raised and its modern-day mission? Branches, Areas and Head Office all need proper review on the way they operate individually and together embracing membership recruitment, retention, operating costs and how they together can project a more positive image of RBLS. |
| A25 | Yes, everything that has been noted in the Options Study has been under consideration for some time, indeed much of the work on change and future sustainability started with the Danzig report in 2012. Changes which have come into effect such as the SCIO, Club FCA registration and Club Model Rule Book, single category membership, one member one vote, a membership database and new process. All have been the first steps to ensuring the organisation modernises and remains for the future.  However, we are now at a point, financially where further change is required to ensure the organisation remains beyond the next 5-6 years. |

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| Q26 | Organisation audit for compliance and effectiveness. Has the constitution implementation ever been checked at Branch level? |
| A26 | If the question is asking if NBT/Head Office police whether the Constitution is properly adhered to across all Branches the answers is yes in so far as this is possible through annual checks and administration requirements.  The Constitution confirms matters such as when Branch AGMs should take place, accounts and other paperwork is submitted and proper process on how Areas and Branches should run. Regular communication with Areas and Branches and chases on returns etc. throughout the year are a means of checking in with the Branches to ensure they understand their governance and administrative responsibilities. However, Areas must also carry some of this responsibility and should be regularly liaising with all their Branches to ensure they are complying with the rules, including holding the required meetings, submitting accounts and other administrative documents.  If the question is referring to the current draft Constitution being checked at Branch level (i.e., distributed to Branches for review), multiple copies were issued to all Branches in August 2023 for a consultation with the membership from August 23 to January 2024.  Understanding and adoption of the governing document at Branch level will certainly be reviewed as part of the comprehensive audit that will be undertaken. |

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| Q27 | Areas get 1/3 of membership fee. How many members in each area? |
| A27 | See answer to question 11 for percentage breakdown across Areas. |

**Appendix B**

**Introduction:**

There were a lot of additional questions, comments, ideas and thoughts put forward in the consultation responses. These have been separated below into Head Office, Areas, Fundraising/Savings and Membership to ensure they have all been captured. Many raised questions and these are included and answered at Appendix B.

The vast majority of ideas for savings/fundraising are already included in the Options Study paper under Appendix C Option 2.

**Consultation comments on Head Office**

1. Concerned that Head Office staff are far exceeding working hours, taking advantage of good will.
2. If reducing Head Office staff numbers, redundancy payments need to be considered.
3. 8 Items listed page 28 as functioning essential – don’t raise funds and RBLS still seems to operate.
4. Cut our cloth to suit our revenue. Head Office staff hard working and major asset to RBLS but we just can’t afford them. Some retirement needed.
5. Option 5B is partial short-term solution, but consideration to be given to using skills and experience of members/volunteers to step up and support Head Office staff.
6. NBT and Head Office need to take leading role in ensuring RBLS survives. We cannot continue to drain reserves or maintain current level of staff now.
7. We often deal with Head Office direct and find them very helpful and efficient. Responses are prompt, simple and clear.
8. See also questions at Appendix B.

**Consultation comment on Areas**

1. Some feel Areas provide a better service. The personal touch helps.
2. If areas dissolved, all funds should go to Branches.
3. Areas to take on Head Office tasks to reduce Head Office costs.
4. Shut Head Office in favour of Areas.
5. Leave areas as they are, increase employed staff at areas and reduce head office staff, Branches and Areas to manage membership and events locally.
6. Area 5 of RBLS is considered an exemplar of good practice.
7. Areas to be clear what funding is spent on.
8. Why shouldn’t Branches and Head Office not bid for funds as well?
9. Suggest Head Office passes enquiries through area so responses go back through areas. Also, all complaints to go to area without Head Office input.
10. Retain the areas but streamline them.
11. Bidding for funds may affect one area that has good financial control and invested, whereas another with poor financial control might benefit as they have no investments to use.
12. Do areas budget. If so, they need to include support to branches for milestone events, Options 4A and 4B should be considered together.
13. Propose that Branch comradeship and events funding remains with areas.
14. Reduction of face-to-face area meetings plus using online technology.
15. Option 4B must be with consent of Area, but in short term worth considering must be seen fair to different Areas.
16. No need for areas in this day and age. Saves costs, improves communications and more efficient if done by Head Office. We get no benefit. (x2)
17. Review area expenditure, support, structure and function asap, especially to Branches.
18. Do areas really add to the organisation?
19. Main expense is the secretary - significantly reduce (reduce hours) or remove (voluntary position).
20. Service membership unlikely to increase what it is now. By law, we need a central committee to manage the charity. Any changes would therefore fall onto Areas and Branches. Combining Branches is not an option due to the rural nature of many, but even Branch changes would not provide the savings necessary leaving Areas and Head Office to deal directly with Branches. This leads to more Head Office costs and an impact on any savings. If, however, Head Office could manage with the staff they have, contact with Branches could be via meetings every 2/3 months with technology being used to minimise and travel.
21. We get no support, advice or feedback from Area. They do not serve a purpose for our Branch, and it would reduce costs.

**Ideas for saving/raising money raised in feedback**

1. Gift aid

* Promote
* Essential it is promoted
* Option 2 - with recent Govt increases to pensions, many more pensioners are in the lowest tax band. Reinforces the need to adopt gift aid more widely.

2. Branches

* We spend 2 weeks a year raising money for Poppyscotland, do the same for RBLS.
* Raising funds - each branch to raise/donate £1000 a year.
* Fundraising events for RBLS/percentage of Branch fundraising to go to RBLS.
* Branch fundraising for Head Office - could compete with Poppyscotland and Branch fundraising. Yet another fundraiser might be difficult to resource with elderly membership. It also is very dependent on Cadet forces support.

3. Areas to take on fundraising campaigns.

4. Piggyback on other charities for fundraising events.

4. Consider sponsorships or partnerships with veterans supporting agencies.

5. Options paper is too complex and pessimistic and Head Office centric.

6. Advertising, press notices, talks, local forces establishments.

7. Implement sponsorship - RBLS Remembrance and War Memorials.

8. Raising funds - each branch to raise/donate £1000 a year.

**Ideas for increasing membership raised in feedback**

1. RBLS purpose and image

* Complete review of the Legions purpose and operational structure to make it fit for 21st century, not just Head Office and funding.
* Remembrance centres on 1914-18. What about other conflicts. Would different events attract newer members?
* Image is poor and both need a complete rebrand to attract new younger members, including ex services.
* The image of the RBLS needs significant change to move away from an old man’s club.
* Public perception is very poor. Need to work on perceptions and concentrate on benevolence, remembrance, comradeship regardless of age, service or civilian status.
* Style and image needs improving. Support necessary for Branches for recruitment and retention.
* Image of the Legion needs to change radically to appeal to younger and some older members that will require a bit of a leap of faith.
* Wider membership campaign, remove stigma by recruiting younger members. Focus on those leaving the service.

2. Comms and advertising campaign:

* Are Branches able to live up to and deliver a comms campaign to attract new members?
* Membership and Comms campaign conducted by Head Office and Branches (x2)
* Membership campaign through Forces TV, Forces news on line, BFBS, etc.
* Involvement with schools, colleges, universities.
* Format by head office, implemented by Branches and Head Office.

3. Service leavers

* Encourage service leavers to sign up before leaving the service.
* RBLS to be included at Career Transition workshops for the military.
* Resettlement information for service leavers.

4. How do we attract the younger generation with no connections to the military?

5. Solutions to increase membership are not viable.

6. More emphasis on RBLS support to veterans and possibly existing service personnel.

7. Production of an RBLS App - simple to use to allow easy access to Head Office and Branch information.

8. Involvement of Cadet Forces and their family’s excellent idea for implementation.

9. From a Canadian viewpoint, they seem to be far more active engaging the youth and fringe fundraising. Their efforts are focussed on sponsoring youth sport, social events and competitions, in-house entertainments, etc. The Legion magazine dedicates pages to these events. They raise a lot of money from sponsorships. Look at RCL magazine.

11. There is no effective Members Handbook especially in relationship to Branches.

12. Head Office could produce leaflets for Branches to hand out. Handbook for those leaving the services.

**Appendix C**

**Indicative Programme for Change**

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| **2024** | | | | | **2025** | | | | | | | | | | | | **2026** | |
| **Aug** | **Sep** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** | **Mar** | **Apr** | **May** | **Jun** | **Jul** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** |

**Special Conference Preps**

**Head Office**

**Implementation**

1. Form Strategic Implementation Working Group (SIWG) to replace STC

2. Review constitution for necessary changes and produce motions

3. Produce new processes and procedures

4. Produce detailed implementation programme

5. Monthly SIWG to review progress

Notes:

1. All activities will be closely monitored and approved by the NBT.

2. The SIWG will be a subcommittee of the NBT, with appropriate Terms of Reference and membership

**SIWG**

**Post conference activities**

1. To address practical and administrative requirements arising from conference

**STC**

**“Early movers” actions**

As decided by Special Conference **NBT**

**Communications campaign**

Multi-faceted to keep members informed **Head Office**

**NBT Review**

Governance, composition, training, function STC

**Purpose of RBLS**

1. Review the purpose of the organisation, consider the strategic direction of RBLS, review against other similar charities for overlap/gaps. 2. Propose changes where necessary, engaging with Areas. **NBT**

**Areas Audit**

Efficiency and savings review **STC**

**Branch Audit (sample only)**

Efficiency and savings review **STC**

**Head Office Audit**

Efficiency and savings review **STC**

**Produce details**

1. Produce project plan

2. Work on and discuss details arising from conference and produce proposals

3. Produce motions for Conference **STC**

**Special Conference – 28th**

1.Sufficient direction from conference to STC to allow progress and production of motions.

2. Agree on “early movers”

**Conference**

**Progress**

1. Member comms

**Head Office**

**Conference review**

1. Review motions

**NBT**