

The path to transformation

For organisations thinking about undergoing a major structural change, there are lessons to be learned from the experience of the Royal British Legion. After ten years in the making, Stuart Gendall explains the massive change programme the Legion has implemented

In the last 18 months, The Royal British Legion has embraced and implemented a huge change programme, "Taking the Legion Forward" (TLF), which has involved a complete overhaul of its decision-making structure, implementing cultural and practical changes to make its membership more inclusive, and the introduction of new programmes to raise awareness of its work and presence in the community.

A strong wind of change started to blow around the Legion in 1996 when its executive and trustees recognised the need for an in-depth look at long-term planning and strategy. In response, a ten-year strategic framework was drawn up and approved by the Legion's trustees. This strategic framework set out a new mission for the Legion, supported by defined strategic objectives.

Attention then turned to a detailed review of the structure of the Legion, concentrating on two critical areas.

The first involved adopting best practice: this included addressing our corporate governance structure to become more accountable and answerable to our regulators; implementing clearly divided and defined responsibilities for trustees and the executive; and ensuring trustees have the skills, knowledge and experience to run the charity.

The second involved revitalising the Legion membership: this meant finding ways to address our gradually declining numbers – including bringing in new blood by making membership more attractive, relevant and inclusive; and giving members closer involvement in the policies and development of their own organisation.

Then began more than 18 months of discussions with members, trustees and staff, detailed conversations with people in related organisations, and a thorough examination of the latest legal requirements for charities. It was, by any

standard, a massive undertaking. It is unlikely that any UK membership organisation has subjected itself to quite such a detailed internal consultation which included a questionnaire survey of the membership, with an exceptionally high response rate of 32 per cent, meetings all over the country, and a good many letters, both for and against the suggested changes.

The work was carried out by the 'future structure group', which was formed specially for this role and was made up of a mix of National Council members and outsiders with a wealth of experience which they were prepared to 'donate' to the Legion. In view of the scale of the review, we also engaged an outside consultant as project manager.

The future structure group's final report and recommendations were approved unanimously by the National Council in February 2003. The TLF action plan was then put in place with the objective of transforming the Legion into a thriving model charity.

That year became our "year of transition"; and 2004 our "year of action". Mixed project teams, of members and staff, focused on delivering results in 12 key TLF areas. Members and interested parties were kept informed by regular TLF newsletters.

We had an initial setback, where the vote went against the TLF single membership proposal by Annual Conference in 2003, but this was offset in 2004 when (after broad consultation), the conference voted unanimously in favour of both this proposal and a broad package of corporate governance reforms.

Change is never easy, and the immediate reaction by the membership tended to be negative and needed careful handling by the trustees and executive at every stage. The process was, however, a

good opportunity to create new bonds and commitment internally – and improved status and image externally.

In order to carry out our plans, our trustees had to be bold and imaginative, giving planning and implementation teams a lot of time and space. The success of the TLF project was equally dependant on the executive team being pro-active and forward-looking, and much time and great care was taken when it came to core decision-making.

In May 2005 the Legion adopted its new model charity structure. With an open structure and a culture that is much more outward looking, the charity is actively engaged in examining new ideas and ways of working with other like minded organisations to help the ex-service community.

Stuart Gendall is director of corporate communications at the Royal British Legion

Legion's lessons learned:

- Recognise that the imperative for change will almost certainly develop over a considerable period of time – in the Legion's case, a decade
- When time is right to act, have firm strategic objectives for change – but keep an open mind to the way you achieve them
- Form a separate working group, chaired by an outsider, with a mix of trustees, directors and outsiders. Give it a forward-sounding name and draw up clear terms of reference. Bring in an outside consultant to be its 'eyes and ears'
- Recognise from the outset that the change programme will go through four Stages – consultation and analysis; recommendation of changes; final assessment and decision; implementation – and inform the whole organisation at each new stage