

# ROYAL ENGINEERS ASSOCIATION



## THE SAPPER CHARITY

All communications to be  
addressed to:

The CEO  
RE Association  
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in Scotland)

### Minutes of the meeting of the Royal Engineers Association Board of Trustees on Friday 20<sup>th</sup> September 2024, 5 Marble Arch, London.

In Person		
Alasdair Dickinson	President	AD
Matt Bazeley	Vice President and Chair of the Benevolence Committee	MB
Ken Kirk	CEO	KK
Rowan Adams	Trustee and Chair of the Fundraising Committee	RA
Mark Ruddy	Trustee and Honorary Treasurer	MR
Colin Basnett	Trustee	CB
Martin Heffer	Trustee	MH
Jeffrey Jupp	Trustee	JJ
Mark Lancaster	Trustee	ML
Chris Toulmin	Facilitator	CT
Nick Gunnell	Secretary	NG
Online		
Richard Hawkins	Trustee and Corps Colonel	RH
Claire James	Trustee and Chair of the Recruitment Committee	CJ
Ian Sidebottom	Corps Treasurer	IS
Absent		
Spencer Eardley	Trustee and Corps Sergeant Major	SE

#### ITEM NUMBER 1 - WELCOME AND APOLOGIES

1. **AD** welcomed everyone to the committee and thanked **RA** for the use of 5 Marble Arch.
2. **SE** sent his apologies in advance for his non attendance

## ITEM NUMBER 2 – CONFIRM THE MINUTES OF THE PREVIOUS MEETING

3. **AD** stated that the wording of the minutes of the previous meeting in paragraph 1 should be amended from “...removed...” to “...stepped down from...”. Including this amendment the minutes were proposed to the Board of Trustees (BoT). **Action - NG**

**Proposer: AD**

**Secunder: MH**

## ITEM NUMBER 3 - CONFLICT OF INTEREST

4. **MR** declared that he is no longer in the employment of the Forces Employment Charity

## ITEM NUMBER 4 - MATTERS ARISING FROM PREVIOUS MEETING

5. How will the potential increase of private / public school fees affect the Sapper Charity Children’s Fund? **ML** and **CJ** provided an update on the situation, whereby all parties are awaiting further direction from the Government.<sup>1</sup>

6. With reoccurring McCabe Grants being requested set rates and guidance should be produced for applicants. **Action KK** is to provide CUBs grant guidance for 2025.

7. The Impact of outreach on fundraising and membership is to be provided to the Board. In addition to the detail contained in the dashboard, **NG** provided the following outreach statistics:

- a. 23 Units received an REA brief
- b. 8 of the 23 Units have since fundraised and applied for CUBs Grants.
- c. 2 of the 23 Units have not fundraised but have applied for CUBs Grants
- d. LinkedIn: Jan - Aug followers have increased to 1,371 (and increase of 720)
- e. Newsletter Subscribers HQ Distribution List: 754 LinkedIn Subscribers: 782  
Total: 1531

## ITEM NUMBER 5 - REPORTS

8. **REA Dashboard.** **KK** provided an overview of the REA Dashboard (Annex A). The following action points were recorded.

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<sup>1</sup> State Boarding schools will be exempt from the VAT increase.

- a. Currently there are no applications to the Ballard Fund – **Action RH**
- b. Requested that the CUBs form could be adjusted to ensure the applicant details the number of people the grant is for. **Action - KK**
- c. Dashboard to be amended to reflect trends – **Action - NG**

9. **Honorary Treasurer's Report & Proposed Budget.** **MR** presented the Treasurer's Report (**Annex B**) and proposed the Budget (**Annex C**) to the board and proposed the Budget for 2024.

Proposed - **MR**

Seconded - **CB**

Proposition was carried unanimously

10. **Alternative Funds.** **IS** provided an update on the Central Charitable Trust's progress for alternate funds.

11. **Benevolence.** **MB** provided an overview of the benevolence report (**Annex D**). The issue of compassionate flights for Foreign and Commonwealth Soldiers remains. After a discussion **JJ**, with assistance from **NG & CJ**, is to draft a letter to present to the board with the intent to send it to the Ministry of Defence outlining the issue. **Action: JJ, NG, CJ.**

12. **Fundraising.** **RA** presented the Fundraising report (**Annex E**). In the first 12 months of fundraising £26,000 was raised, this exceeded the initial target, set in Sep 23 by £20,000. A fundraising manager is due to be appointed in October who will assume responsibility for fundraising from **NG**.

13. **Strategy Discussion.** **CT** led two discussions on the future of Fundraising (**Annex F**) and Membership (**Annex G**) of the REA. The discussions resulted in the following action points:

- a. HQ REA to review the data that is used to inform the strategic review - **KK**
- b. Review the future of the Recruitment and Management committees – **CJ, KK**
- c. Fundraising opportunities to be presented to the board - **KK**

14. **Any other Business.** The President thanked the members of the board and the members of Staff.

15. **Summary of Action Points.**

<b>Serial</b>	<b>Action Point</b>	<b>Responsibility</b>	<b>To be Completed by</b>
<b>1</b>	The wording of previous minutes to be changed.	<b>NG</b>	1 <sup>st</sup> Nov 2024
<b>2</b>	Provision of CUBs grants guidance for 2025.	<b>KK</b>	1 <sup>st</sup> Jan 2025.
<b>3</b>	Encourage applications for the Ballard Fund.	<b>RH</b>	18 <sup>th</sup> Dec 2024
<b>4</b>	The CUBs form is to be adjusted to ensure the applicant details the number of people the grant is for.	<b>KK</b>	31 <sup>st</sup> October 2024
<b>5</b>	Dashboard to be amended to reflect trends.	<b>NG</b>	30 <sup>th</sup> Nov 2024
<b>6</b>	A letter regarding the REA's position on the funding of compassionate and welfare flights for Foreign and Commonwealth Soldiers is to be drafted and presented to the board.	<b>Action: JJ, CJ, NG,</b>	To be presented NLT the next Board of Trustees meeting 24 <sup>th</sup> Jan 2025
<b>7</b>	HQ REA to review the data used to inform the strategic review.	<b>KK</b>	Review to be included at in the papers of the next Board of Trustees meeting 24 <sup>th</sup> Jan 2025
<b>8</b>	Review the future of the Recruitment and Management committees	<b>CJ, KK</b>	Review to be completed and presented NLT the spring Board of Trustees meeting (Date tbc)
<b>9</b>	Confirmation of the House of Lords for the next Board of Trustees Meeting	<b>ML</b>	1 <sup>st</sup> Nov 2024

16. **Date of Next Meeting. 24<sup>th</sup> Jan 2024 – Action ML to confirm availability of the House of Lords.**

**Dated:** 20<sup>th</sup> September 2024

Operations Director

Minutes Approved

**Dated:**

Chairman

- Annex A - REA Dashboard
- Annex B - REA Honorary Treasurers Report
- Annex C - REA Actuals & Budget
- Annex D - REA Benevolence Report
- Annex E - REA Fundraising Report
- Annex F - Future of Fundraising Discussion Paper
- Annex G - Future of Membership Discussion Paper

# REA Dashboard – May - Aug 2024

## Benevolence

Cases received	May - Aug 2023	May - Aug 2024
	158	183
Declined	42	34
Approved	114	132
Total assistance	£83,353.67	£86,010.85

## Membership

New members	May - Aug 2023	May - Aug 2024
	179	195
New branches	2 (May – Aug 2024)	
Average age of new members	Average age: 51.75 Youngest: 20 Oldest: 87.25	

137 Life, 3 Comp Life, 5 All Arms, 47 Friends & Family, 3 Widow/Widower

## Funds



- No of families: 11
- Amount granted: £20,961.89
- Running total 2024: £47239.75
- New applications: 1



- New applications: 1
- No of grants given: 1
- Amount granted: £25000
- No applications for 2025



- New applications: 1
- No of grants given: 1
- Amount granted: 2773.97
- Running total 2024: £2773.97



- New applications: 16
- Applications approved: 13
- Applications rejected: 3
- No of grants given: 13
- Amount granted: £40,826.29
- Running total 2024: £66163.29

## Finance (Jan – Sep 2024)

Income £665,740

Expenditure £966,372

Current investment valuation £11031361.73

\*incl. main, deposit & Sapper Charity Children's Fund  
 \*\* incl. main, Sapper Charity Children's Fund & McCabe

## Fundraising

Amount raised (Sep 23 - present) £26,932

Number of events/individuals 22

## Governance

The REA has been awarded the Defence Employer Recognition Scheme Gold Award for 2024

Job advert for Fundraising Lead put out on COBSEO, Indeed, Sappers Network. Closing in Sept 2024.

Trustees Annual Report and Impact Report printed and being distributed. (Aug)

# REA Dashboard – May - Aug 2024

## Member Services May - Aug

Notifications of death via SCRM	38
Notifications of death via other means	22
Coffin drapes out	24
Requests for representation at cremations / funerals	12
Medical discharge notifications via APC	22
Obituaries - Sapper magazine	39

## Outreach Activity May - Aug

Branch Visits	11
Unit Visits	6

## Social Media

Website	Avg users 1.87k Avg views 4.6k
Facebook (Compared to May - Aug 23)	<b>REACH: 83,900</b> <b>(Down 79.3%)</b> <b>CONTENT INTERACTIONS: 8,400</b> <b>(Down 63.7%)</b> <b>LINK CLICKS: 1,300</b> <b>(Down 23.1%)</b> <b>Followers: Increase of 63</b>
Instagram (Avg May - Aug)	<b>Followers: 533.25</b> <b>Content Interactions: 56.25</b> <b>Accounts engaged: 42.5</b> <b>Accounts Reached: 603.5</b>
X (formerly Twitter) (Avg May - Aug)	<b>Followers: 1,055</b> <b>Engagement: 62</b>
Sappercom (May-Aug)	<b>New Members: 23</b> <b>Total: 1,024</b>

Honorary Treasurer's Report to the 2023 AGM  
of the Royal Engineers Association  
14<sup>th</sup> September 2024

1. In the current state of global political and financial uncertainty, it is pleasing to report that REA finances remain healthy. BlackRock has continued to ensure that our investments return a very satisfactory dividend (c£101k per quarter in 2023) and, overall, we continue to meet costs from current income.
2. The forecast surplus for 2023 was £82,601. The year closed on 31<sup>st</sup> December 2023 with a surplus of £71,628 against budget. As in previous years the budget was managed by judicious oversight of spend, plus a very generous legacy, and our cash flow remains healthy. The surplus would have been even larger had the £500K payment for the Chatham Pavilion, due to be paid in 2022, not slipped (due to completion delays) into 2023. The RE Days' Pay Scheme income remains buoyant as the Corps continues a 95% uptake however your Finance Committee will continue to monitor this key source of income as the Corps reduces in size over the next few years. Regular weekly allowances were made to 45 applicants totalling £111,542 and £8,275 distributed as Christmas grants. The annual grants to ABF (£68K) and SSAFA Forces Help (£30K) were also made.
  - a. **Benevolence:** This remains a key part of our *raison d'être*. In 2023, £750,346 was spent against a budget of £867,200.
  - b. **Unit and Branch Support Grants:** This annual allocation of £100K to support worthwhile initiatives that are not supported through the Public Purse has continued to be welcomed by Units and Branches. 2023 again saw great success with more than £152K being disbursed to subsidise a wide range of initiatives which have materially improved the 'wellnesses of the recipients.
  - c. **Other Grants:** These are perennial allocations designed to improve the lived experience of the Sapper Family and include:
    - i. **Adventurous Training.** Annual budget £68K. Expenditure 2023 - £24K.
    - ii. **Op Tour Welfare Grants.** Annual budget £10K (max of £5k for major units; £2.5k for minor units). Expenditure in 2023 - £2.7K.
    - iii. **Recruits 'tribal' RE items** (e.g., stable belts, TRFs, Short History of the Corps etc) – Annual budget £26K. Expenditure 2023 - £9K. New CR111 stable belts ordered but not yet approved for wearing.

- iv. Sports Scholarships (for aspiring National/Olympic sportsmen/women). Various grants based on Level achieved – annual budget is based on numbers selected. Expenditure in 2023 was £28K.

3. **Investments:**

a. **Market Investments:** REA capital is invested in the Armed Forces Charities Growth & Income Fund. On 1<sup>st</sup> September this year the capital value (including the Kitchener and McCabe Funds) was £10,517,873. No further capital was invested during 2023 and £600K of stock was realised to fund the final element of the Chatham Station Pavilion project (£500K). Our portfolio manager, BlackRock, continues to achieve commendable income and have recently increased dividends to 2.25p per unit per quarter (up from 2.15p). That said, capital growth has not been as strong as we, and BlackRock, would like as they underperform against their benchmark. BlackRock is working hard to remedy this, and the Finance Committee continue to monitor their performance (as do the other Sapper charities invested).

b. **Investment Property:** At the end of 2021, the REA purchased a three-bed property in a new development in Ebbsfleet Valley for £475K (revalued at audit in 20203 as £505K). This was a conscious effort to diversify our portfolio in an uncertain market and generate rental income commensurate, as a minimum, to the yield returned from our market investments. This property continues to produce a 5.2% yield. After fees and costs, this delivers £24,540 per annum to the charity.


4. **Finally:** My third year as your Honorary Treasurer has flown by. My understanding of the role of the REA and the fiscal complexities of charity finances continues to grow and I am extremely grateful for the hard work that is done on the Association's behalf by the CEO, Ken Kirk, the Corps Treasurer, Ian Sidebottom, and the rest of the REA HQ team.

Once a Sapper, always a Sapper

Colonel (retd) Mark Ruddy  
REA Honorary Treasurer



Annex C to  
REA BoT Meeting  
20 Sep 2024

THE ROYAL ENGINEERS ASSOCIATION															
ACTUALS 2023, BUDGET 2025 AND ANNUAL FORECAST OUT TO 2029															
 ROYAL ENGINEERS ASSOCIATION THE SAPPER CHARITY															
Serial	Activity	Budget 2020	Actuals 2020	Budget 2021	Actuals 2021	Budget 2022	Actuals 2022	Budget 2023	Actuals 2023	Budget 2024	Budget 2025	Budget 2026	Budget 2027	Budget 2028	Budget 2029
<b>Revenue</b>															
1	50% of Days Pay Scheme	356,895	366,721	356,000	389,428	360,000	394,472	380,000	404,923	390,000	387,000	381,503	376,230	369,575	368,000
2	H & M Trust	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500
3	Membership Subscriptions	2,500	1,262	2,500	639	2,500	2,319	500	3,394	2,000	2,000	80,000	80,000	80,000	80,000
4	Bank Interest	2,250	104	500	25	300	33	100	192	100	100	100	100	100	100
5	Refunds from issued grants	12,500	4,095	12,500	6,972	10,000	25,679	7,000	22,339	7,000	10,000	10,000	10,000	10,000	10,000
6	Donations & Legacies	40,000	140,104	50,000	221,534	50,000	120,306	750,000	1,243,254	200,000	100,000	100,000	100,000	100,000	100,000
6a	Stable Belt Income	0	0	0	0	0	0	0	8,942	0	0	0	0	0	0
7	Investment Dividends	394,759	430,686	432,952	427,900	414,047	417,306	402,697	410,287	409,188	428,200	430,341	432,493	434,655	436,828
7a	Sale of Investment Units	220,000	250,000	0	0	500,000	0	0	0	0	0	0	0	0	0
8	Activity Generated Income (Fundraising)	0	0	0	0	0	616	0	0	10,000	150,000	150,000	200,000	200,000	200,000
8a	Events Receipts	0	0	0	0	0	0	0	3,000	0	6,000	6,000	6,000	6,000	6,000
9	Property - Rental Income	0	0	0	0	16,000	17,938	24,540	24,540	24,540	24,540	24,540	24,540	24,540	24,540
	<b>Total Income</b>	<b>1,031,404</b>	<b>1,195,472</b>	<b>856,952</b>	<b>1,048,998</b>	<b>1,355,347</b>	<b>981,169</b>	<b>1,567,337</b>	<b>2,123,371</b>	<b>1,045,328</b>	<b>1,110,340</b>	<b>1,184,984</b>	<b>1,231,863</b>	<b>1,227,370</b>	<b>1,227,968</b>
<b>Disbursements</b>															
<b>Benevolence:</b>															
10	Grants	456,000	269,264	456,200	345,451	456,250	487,005	456,200	472,657	488,200	450,000	450,000	450,000	450,000	450,000
11	Weekly Allowance	141,500	125,767	141,500	121,810	135,000	104,191	135,000	111,542	110,000	110,000	110,000	110,000	110,000	110,000
12	Special Christmas Grants	20,000	11,503	15,000	9,305	15,000	8,855	15,000	8,275	9,000	9,000	9,000	9,000	9,000	9,000
13	ABF	50,000	50,000	60,000	60,000	60,000	60,000	66,000	66,000	66,000	70,000	70,000	70,000	70,000	70,000
14	SSAFA	20,000	20,000	30,000	30,000	30,000	33,970	30,000	30,000	30,000	32,000	32,000	32,000	32,000	32,000
15	Other Charities	3,000	0	3,000	0	3,000	0	5,000	0	5,000	0	0	0	0	0
16	RBLI	220,000	220,000	220,000	220,000	120,000	280,000	160,000	160,000	0	105,000	0	0	0	0
	<b>Sub Total</b>	<b>910,500</b>	<b>696,534</b>	<b>925,700</b>	<b>786,566</b>	<b>819,250</b>	<b>974,021</b>	<b>867,200</b>	<b>848,474</b>	<b>708,200</b>	<b>776,000</b>	<b>671,000</b>	<b>671,000</b>	<b>671,000</b>	<b>671,000</b>
<b>Esprit de Corps:</b>															
17	Corps Activities	167,500	298,124	182,500	225,679	641,000	160,930	214,000	788,369	192,000	250,000	250,000	250,000	250,000	250,000
18	Groups & Branches	20,000	21,535	20,000	37,602	23,000	56,733	40,000	34,837	50,000	50,000	50,000	50,000	50,000	50,000
19	Annual Dinner	7,658	0	8,041	0	7,500	5,264	9,000	10,884	10,000	10,000	10,000	10,000	10,000	10,000
20	Recruiting	5,000	5,342	5,000	588	5,000	1,101	5,000	6,988	5,000	6,000	6,000	6,000	6,000	6,000
20a	Events Expenditure	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20b	Fundraising Expenditure	0	0	0	0	0	0	0	0	0	50,000	50,000	50,000	50,000	50,000
21	Sapper Sunday Lunch	1,289	0	1,302	0	1,300	1,295	1,400	1,596	1,414	700	700	700	700	700
22	Memorials M&R	0	0	0	0	0	0	0	0	0	24,000	10,000	10,000	10,000	10,000
23	Ballard Award	0	0	0	0	0	0	25,000	25,789	25,000	25,000	25,000	25,000	25,000	25,000
	<b>Sub Total</b>	<b>201,447</b>	<b>325,001</b>	<b>216,843</b>	<b>263,869</b>	<b>677,800</b>	<b>225,323</b>	<b>294,400</b>	<b>868,463</b>	<b>283,414</b>	<b>415,700</b>	<b>401,700</b>	<b>401,700</b>	<b>401,700</b>	<b>401,700</b>

Annex C to  
REA BoT Meeting  
20 Sep 2024

Serial	Activity	Budget 2020	Actuals 2020	Budget 2021	Actuals 2021	Budget 2022	Actuals 2022	Budget 2023	Actuals 2023	Budget 2024	Budget 2025	Budget 2026	Budget 2027	Budget 2028	Budget 2029
	<b>Administration</b>														
24	Salaries/ National Insurance	175,437	192,384	177,191	175,712	194,307	212,653	240,483	286,225	277,375	329,457	332,752	336,079	339,440	342,834
25	Pensions	13,353	12,662	13,687	22,817	12,915	13,599	17,499	15,597	15,862	19,119	19,310	19,503	19,698	19,895
26	Printing/Stationery/Membership Cards	2,500	2,579	2,500	2,398	2,500	9,523	2,500	5,586	5,000	5,000	5,000	5,000	5,000	5,000
27	Postage & Telephone	5,384	4,680	4,000	8,151	5,000	8,950	8,000	9,035	8,200	9,000	9,090	9,181	9,273	9,365
28	Audit Fees	8,300	7,152	7,000	7,182	7,140	8,400	7,283	9,840	7,356	9,000	9,090	9,181	9,273	9,365
29	Solicitors/Professional Fees/Subscriptions	1,000	7,546	1,000	7,855	5,000	4,118	1,000	202	1,000	1,000	1,000	1,000	1,000	1,000
30	Travel & Subsistence Expenses	9,000	2,999	4,000	4,471	4,000	8,665	5,000	21,447	10,000	10,000	10,000	10,000	10,000	10,000
31	AGM	4,594	1,398	4,686	172	4,000	3,121	5,000	0	5,000	5,000	5,000	5,000	5,000	5,000
32	IT and Office equipment	3,000	10,605	8,000	11,895	4,000	4,984	5,000	5,438	5,000	6,000	6,000	6,000	6,000	6,000
33	IT Development (incl App)	0	0	0	0	0	39,135	45,000	11,488	5,000	5,000	5,000	5,000	5,000	5,000
34	IT Trg	250	0	250	0	250	0	250	0	250	250	250	250	250	250
35	Insurance	5,166	2,869	3,000	3,034	3,060	1,500	3,121	2,373	3,000	3,060	3,121	3,184	3,247	3,312
36	Property Purchase / Expenses	0	0	0	500	425,500	672	1,000	675	600,000	550,000	1,000	1,000	1,000	1,000
37	Sundry Expenses / Bank Charges	2,000	1,840	2,000	1,572	2,000	7,802	2,000	3,069	2,000	4,000	4,000	4,000	4,000	4,000
	<b>Sub Total</b>	<b>229,984</b>	<b>246,714</b>	<b>227,314</b>	<b>245,759</b>	<b>669,672</b>	<b>323,122</b>	<b>343,136</b>	<b>370,975</b>	<b>945,043</b>	<b>955,886</b>	<b>410,613</b>	<b>414,378</b>	<b>418,181</b>	<b>422,023</b>
	<b>Total Disbursements</b>	<b>1,341,931</b>	<b>1,268,249</b>	<b>1,369,857</b>	<b>1,296,194</b>	<b>2,166,722</b>	<b>1,522,466</b>	<b>1,504,736</b>	<b>2,087,912</b>	<b>1,936,657</b>	<b>2,147,586</b>	<b>1,483,313</b>	<b>1,487,078</b>	<b>1,490,881</b>	<b>1,494,723</b>
	<b>Proving Balances:</b>														
	<b>Revenue</b>	<b>1,031,404</b>	<b>1,195,472</b>	<b>856,952</b>	<b>1,048,998</b>	<b>1,355,347</b>	<b>981,169</b>	<b>1,567,337</b>	<b>2,123,371</b>	<b>1,045,328</b>	<b>1,110,340</b>	<b>1,184,984</b>	<b>1,231,863</b>	<b>1,227,370</b>	<b>1,227,968</b>
	<b>Disbursements</b>	<b>1,341,931</b>	<b>1,268,249</b>	<b>1,369,857</b>	<b>1,296,194</b>	<b>2,166,722</b>	<b>1,522,466</b>	<b>1,504,736</b>	<b>2,087,912</b>	<b>1,936,657</b>	<b>2,147,586</b>	<b>1,483,313</b>	<b>1,487,078</b>	<b>1,490,881</b>	<b>1,494,723</b>
	<b>Surplus / (Deficit)</b>	<b>(310,527)</b>	<b>(72,777)</b>	<b>(512,905)</b>	<b>(247,196)</b>	<b>(811,375)</b>	<b>(541,297)</b>	<b>62,601</b>	<b>35,459</b>	<b>(891,329)</b>	<b>(1,037,246)</b>	<b>(298,329)</b>	<b>(255,215)</b>	<b>(263,511)</b>	<b>(266,754)</b>
	<b>Fixed Assets:</b>														
	Tangible Assets		90,762		89,226		79,676		77,774						
	Investments		12,499,695		13,392,892		10,902,083		10,343,398						
	Investment Property		0		0		500,000		505,000						
	<b>Current Assets:</b>														
	Cash at Bank		662,117		629,988		511,261		1,140,787						
	Debtors		169,606		345,364		173,453		170,253						
	<b>Creditors:</b>		30,786		44,840		74,843		73,954						
	<b>Net Assets</b>		<b>12,590,457</b>		<b>13,482,118</b>		<b>11,481,759</b>		<b>10,926,172</b>						
	<b>Charity Worth</b>		<b>13,318,617</b>		<b>14,165,434</b>		<b>11,550,333</b>		<b>12,198,717</b>						
	<b>Including investment revaluations</b>		<b>13,391,394</b>		<b>14,412,630</b>		<b>12,091,630</b>		<b>12,163,258</b>						
	<b>Notes:</b>														
1	LS 7. Based on 2.25p per unit per quarter.														
2	LS 8. Increased from 2025 with recruitment of Fundraising Manager.														
3	LS 8a. Increased from 2025 onwards to include new events.														
4	LS 9. Based on £2,045 pcm.														
5	LS 13. ABF Grant increased by 6% from 2025.														
6	LS 14. SSAFA Grant increased by 6% from 2025.														
7	LS 15. Removed wef 2025.														
8	LS 16. £105K agreed by Board for 2025 (possibly to be split across 2025/26)														
9	LS 17 in 2022 included £500k for Chatham Sports Pavilion (not paid until 2023).														
10	LS 17 from 2025 onwards is made up of: £30k Annual Grants; £35k Sapper Games; £500 NMA flag renewal; £5k RE Annual Dinner & Awards; £50k grant to RE Museum and £100k REA Welfare Grant.														
11	LS 20b. New LS linked to the income shown at LS 8.														
12	LS 21. Reduced with proposal to increase personal contribution for attendees.														
13	LS 22. New serial from 2025. £24K 'surge' followed by £10K per annum.														
14	LS 24 and 25 increased from 2025 to facilitate recruiting of Fundraising Manager and provide 3% headroom for remuneration committee.														
15	LS 36. Includes purchase of new investment property in 2025.														

**ROYAL  
ENGINEERS  
ASSOCIATION**



**THE SAPPER CHARITY**

**All communications to be  
addressed to:**

The CEO  
RE Association  
Brompton Barracks  
Chatham  
Kent ME4 4UG  
☎ 01634 847005  
🌐 www.reahq.org.uk  
✉ info@reahq.org.uk

(Registered under the Charities Act 1992 and a charity registered  
in Scotland)

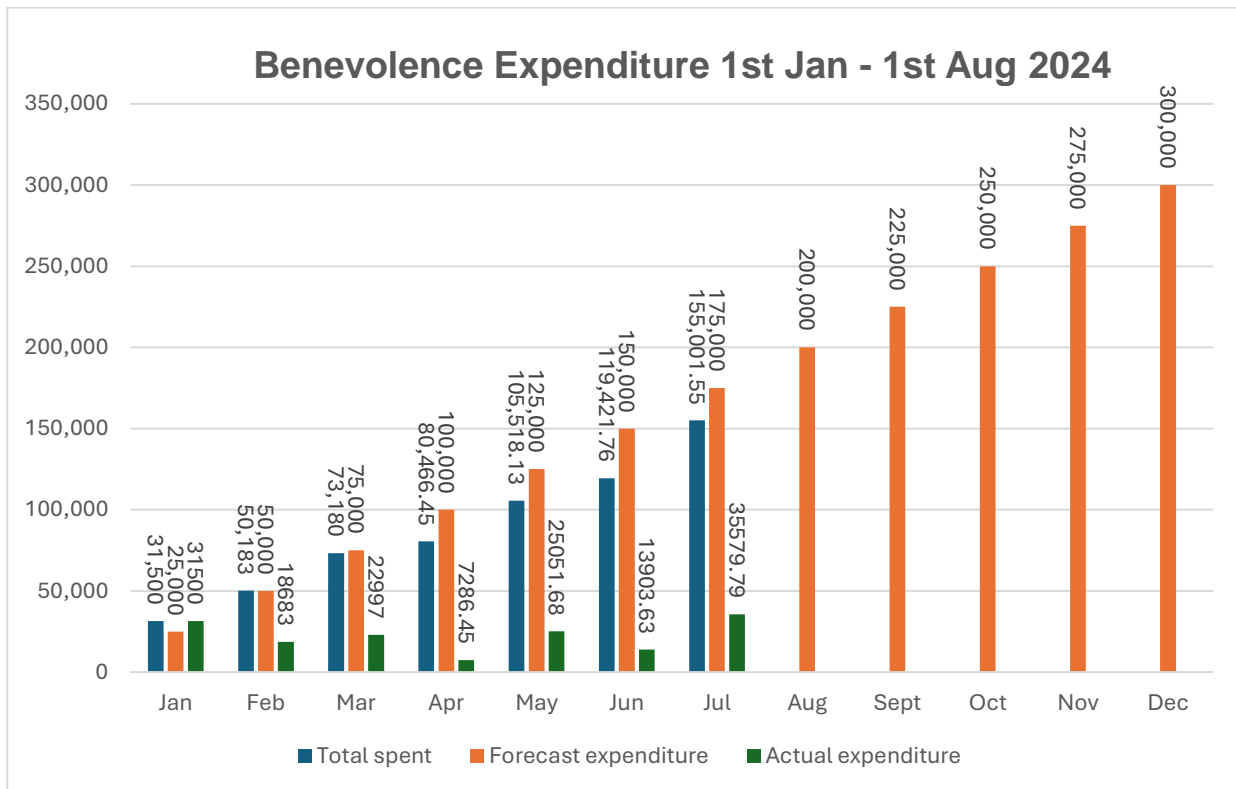
**ROYAL ENGINEERS ASSOCIATION BENEVOLENCE REPORT 1<sup>st</sup> JANUARY TO 1<sup>st</sup>  
AUGUST 2024.**

1. **Summary.** Compared to 2023 there has been an increase of 25% in the number of cases assessed (See table below) and an increase in the number of cases declined (See para. 8). Age demographics remain consistent with 40-49 age category requesting the most assistance (see para 4). Spending remains within the allocated budget (See para. 2). It is likely that despite increased costs of per case expenditure will remain within budget due to the decreasing veteran population.<sup>2</sup>

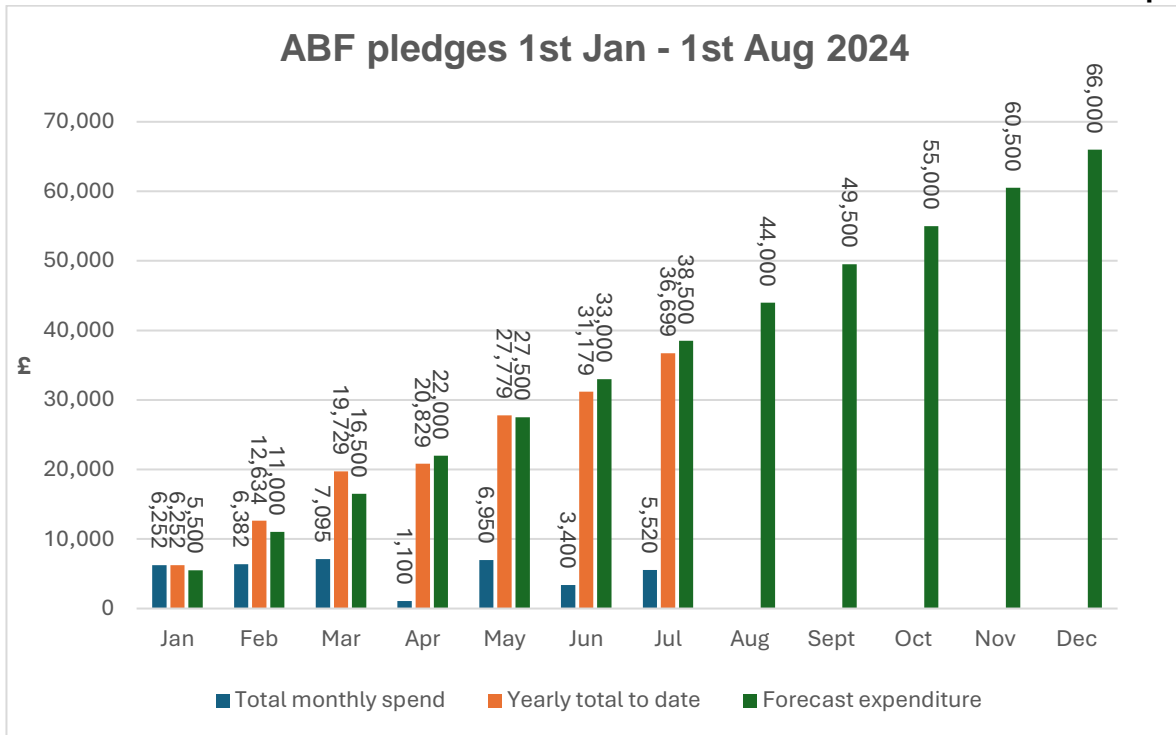
Serial	Data	2024	2023	2022
1	Number of cases assessed	325	260	250
2	Number of cases assisted	256	217	207
3	Number of cases declined	69	43	43
4	Out Of Committee cases	8	-	-
6	Number of weekly grants in care homes (£##):	£3,744	£2,496	£2,762.50
7	Number of weekly grants at home (£##):	£22,880	£23,595	£25,350
8	Special Christmas Grants	£3,005.00 (Expected)	£3,005.00	£3,195
9	Cases referred by SSAFA, ABF and UWO which were assisted.	175	-	-
10	Cases referred by RBL and other charities which were assisted.	158	-	-
11	Cases referred to ABF	82	-	-
12	ABF grant total to date	36,699	-	-
13	Total granted (£)	155,001.55	131,923.20	123,029.97

<sup>2</sup><https://www.ons.gov.uk/peoplepopulationandcommunity/armedforcescommunity/articles/veteranssurvey2022/demographicoverviewandcoverageanalysisuk/december2023> Accessed 31 July 24.

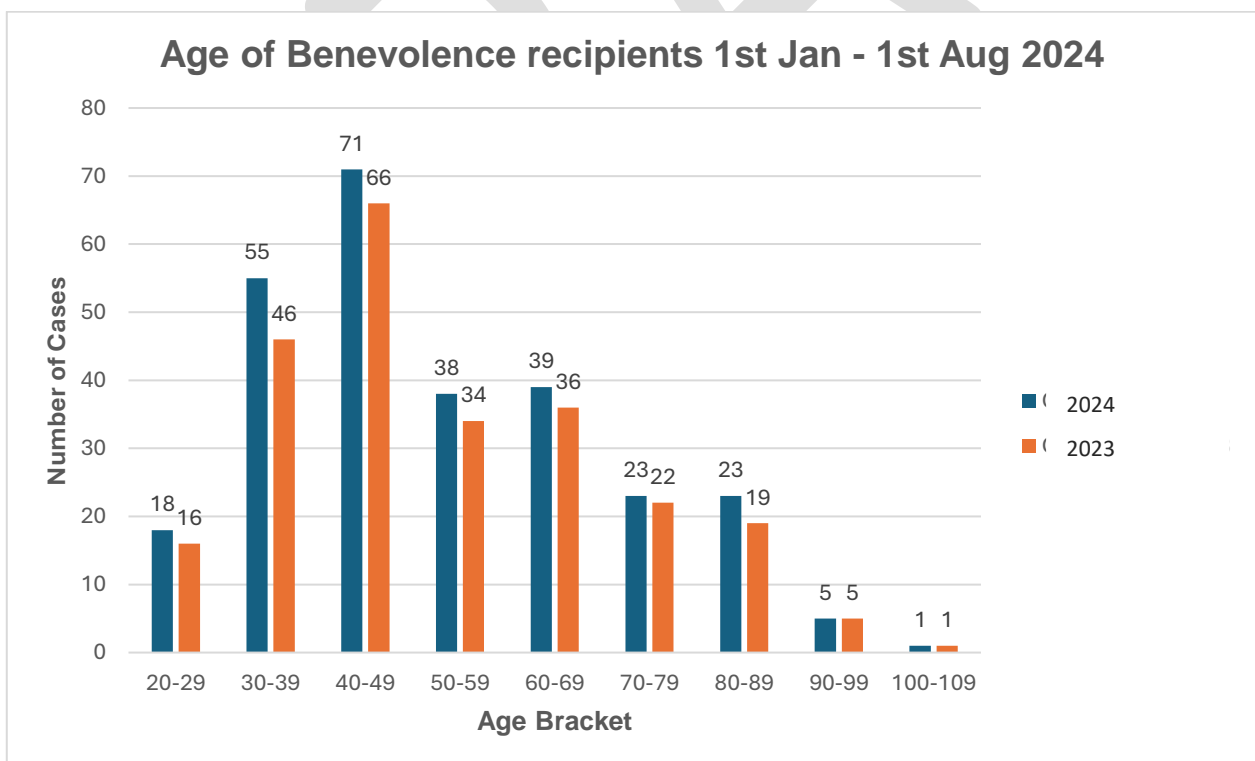
2. **Expenditure.** July saw the greatest expenditure on benevolence in 2024. A contributing factor was the financial assistance to service personnel whose families were been affected by Hurricane Beryl and a number of out of committee decisions. Spending remains within budget.



3. **Army Benevolent Fund Contribution.** In 2024 the REA granted the Army Benevolent Fund (ABF) £66,000. To inform future REA grants to the ABF an understanding of how / if the ABF supports the Sapper family above £66,000 is required. Currently the ABF does not grant money to the Sapper Family unless it is requested by HQ REA. Comparative data for 2023 is unavailable.

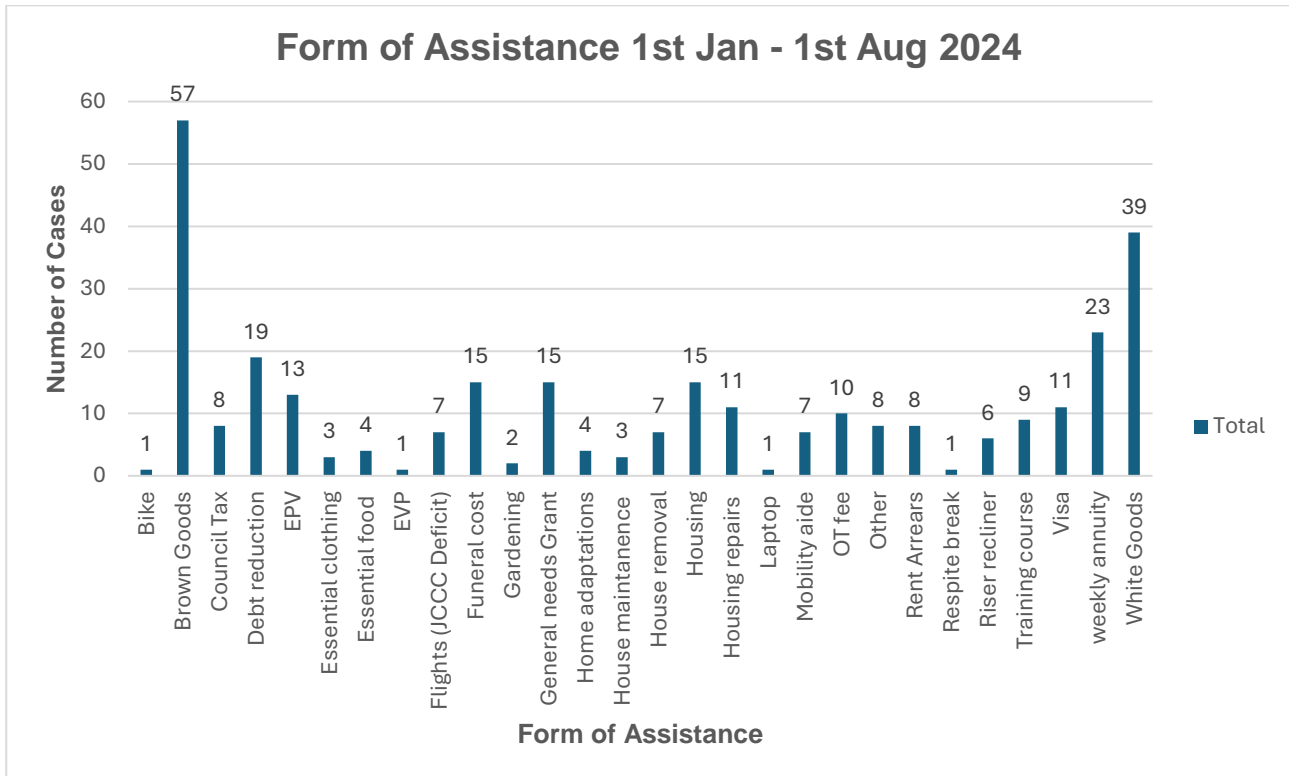


4. **Age.** The average age of new REA members in July 24 was 51 years old. If there is a link between REA involvement and less requirement to need benevolence, then there should be a focus on increasing participation of the 30-49 age group in REA activities.



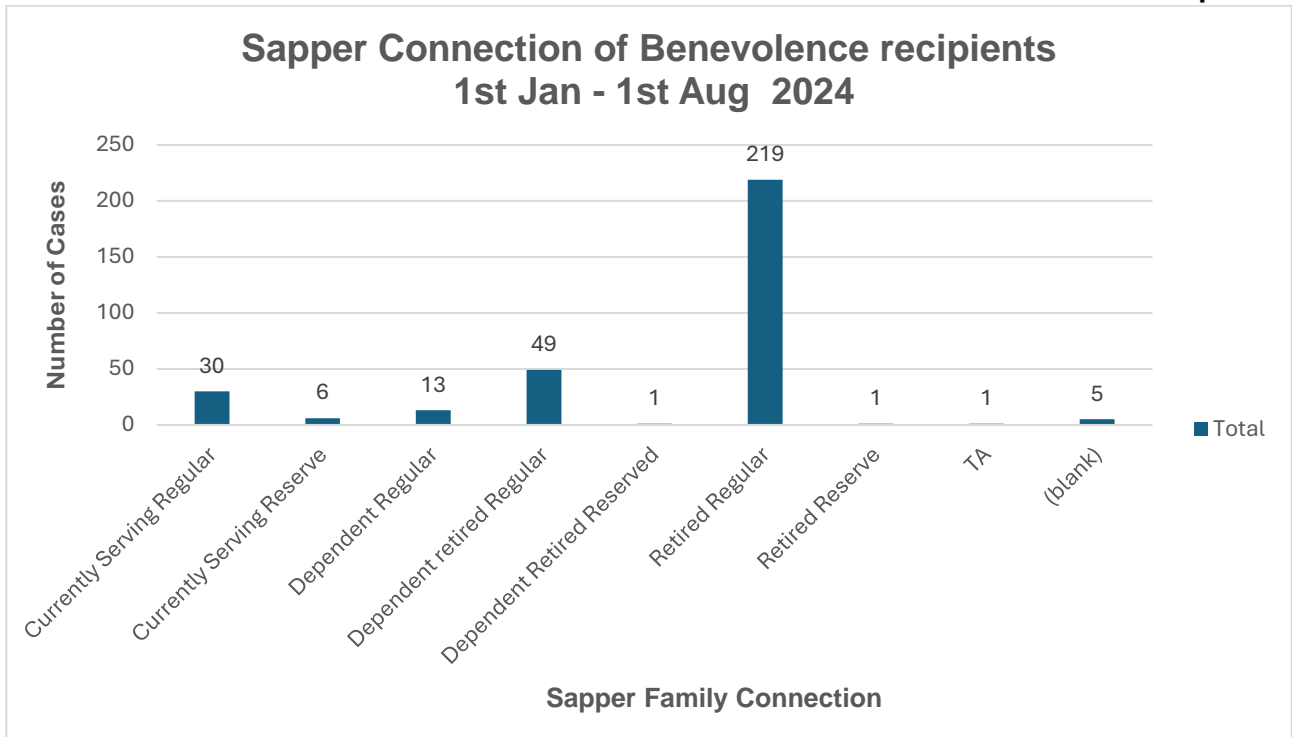
5. **Form(s) of Assistance.** The most common request for benevolence remains domestic goods (brown and white goods). This is usually due to the recipient having to start

afresh due to; separation, divorce, prison release, rehousing etc. Comparative data for 2023 is unavailable.

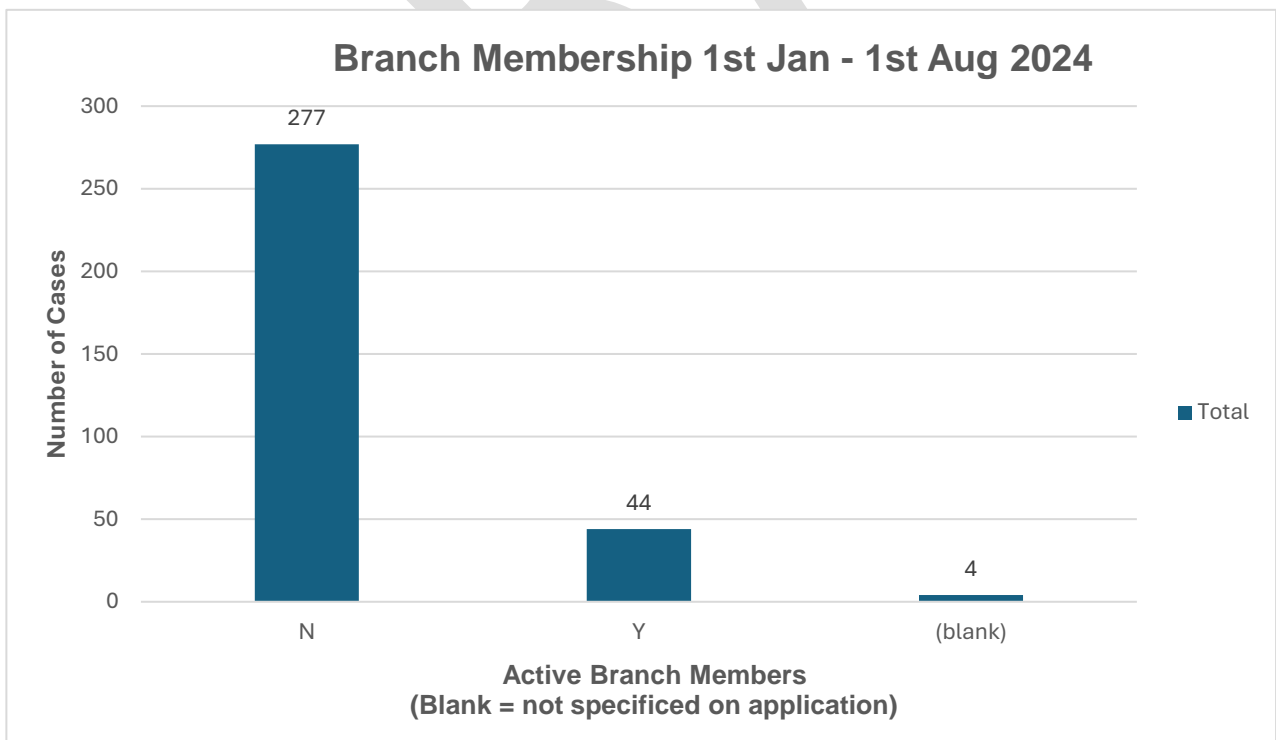


6. **Recipient Sapper Family Connection.** Retired regulars and their dependents remain the largest and second largest cohort of benevolence recipients. If the expansion of REA membership categories is successful it is likely that the dependents categories will increase. Comparative data for 2023 is unavailable.<sup>3</sup>

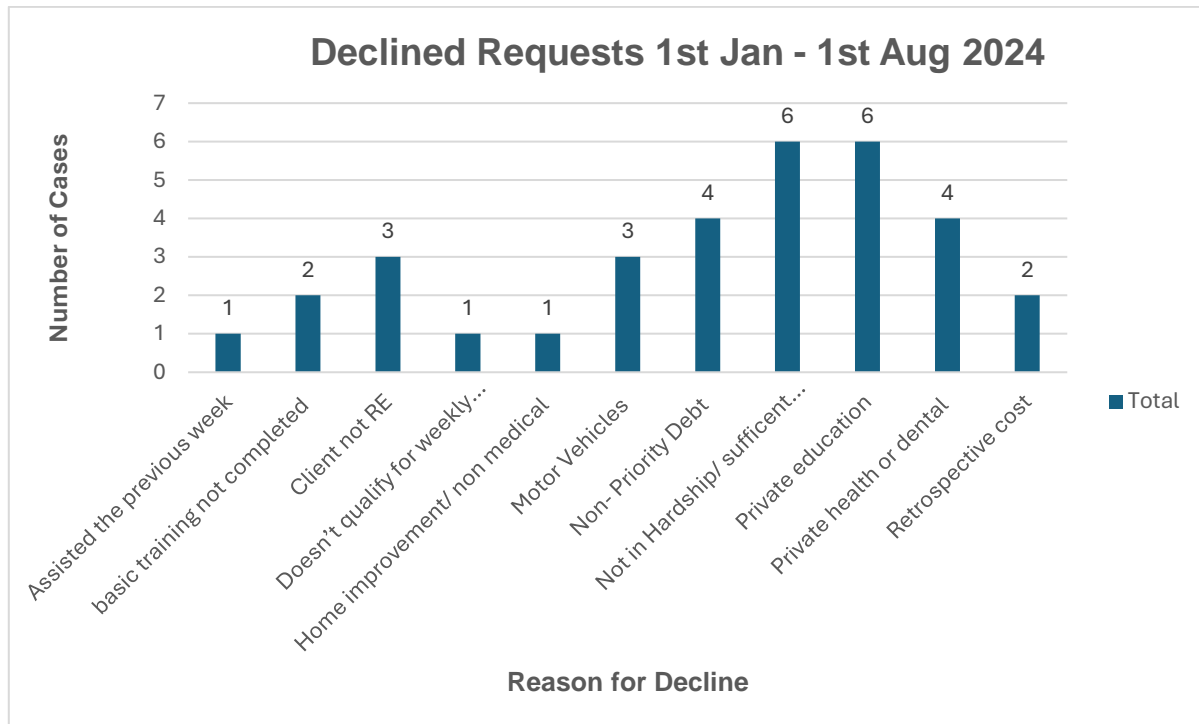
<sup>3</sup> Requests where no connection is listed e.g. BLESMA who do not use MOSAIC



7. **Branch Membership.** Over 7 months 15% of benevolence applications have come from active branch members. This would suggest that membership of a branch reduces the likelihood of individuals requesting benevolence. A greater understanding of branch membership and the impact on benevolence is required to identify any relationships. Comparative data for 2023 is unavailable.



8. **Reasons for Case Declines.** Although difficult to prove, there is likely to be a connection between case workers not wanting to say “no” and still submitting cases knowing that the REA will say no. It should be noted that whilst the [REA Benevolence Handbook](#) provides guidance on the eligibility for benevolence it is not treated as dogma, allowing each case to be assessed within its unique context. Comparative data for 2023 is unavailable.



9. **The Sapper Charity Children’s Fund.** The Sapper Charity’s Children Fund (formerly the Kitchener Fund) is currently supporting 11 families and 15 children.

10. **Gabriel Fund.** No change. The Gabriel Fund assisted with the retraining of one individual at a cost of £25,000.

11. **Summary.** The statistics in this report highlight the symptoms that faces the local branch structure of the REA. The decreasing veteran population and shrinking branch footprint means that fewer cases will be assessed but of those assessed a greater percentage will not be involved with a branch where there is potential for the Sapper Family to intervene with benevolence issues at an earlier opportunity. Measures have been taken to reinforce the branch structure by amendments to membership rules.

N Gunnell  
 Operations Director



## REA FUNDRAISING UPDATE AS AT 16<sup>th</sup> Sep 2024

1. **Introduction.** During the Sep 2023 Board of Trustees meeting the Fundraising committee

outlined its communication strategy and provided a fundraising target of £6,000 - £10,000 over a 12-month period. This paper outlines the fundraising that has taken place and the observations that have been gathered.

### 1. Fundraising Events since Sep 2023

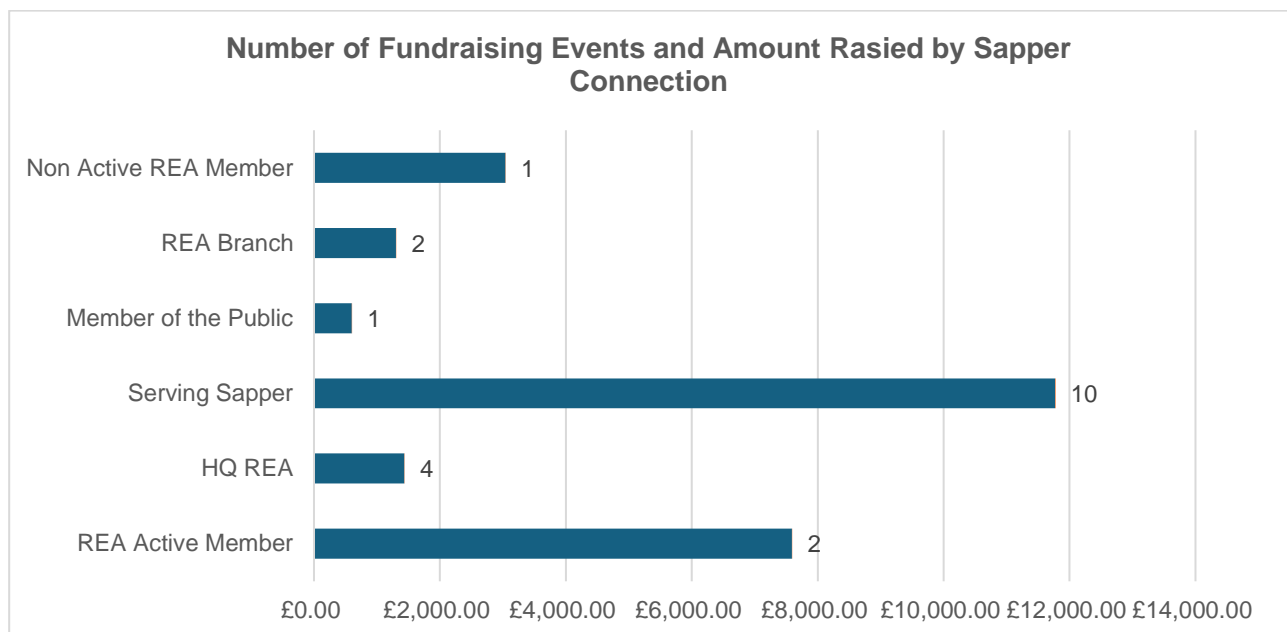
Serial	Raised By	Activity	Money Raised
1	<a href="#">Steve Craddock</a>	Curry Lunches, cycling, etc.	£7,530.35
2	Ken Kirk	Marathon	£900
3	Katie Bristow	Half Marathon	£200
5	RSM 26 Engr Regt	Donation	£200
6	HQ REA	Rugby Shirt Raffle	£280
7	HQ REA	RAF v Army Tickets	£54
9	WO1 Dunford	Clay Pigeon Shooting	£1900
10	39 Engr Regt	Own initiative	£436
11	<a href="#">Spr Wyatt</a> 1 RSME	Manchester Marathon	£436.30
12	<a href="#">Spr Graybrook</a> 1 RSME	Spr Graybrook (As at 2 Apr 24)	£540.25
13	<a href="#">ARMCEN</a>	The Oner (As at 2 Apr 24)	£1,126.25
14	Capel Military Show	Donation	£3,039
15	26 Engr Regt	Dartathlon	£655
16	36 Engr Regt	Donation	£165
17	<a href="#">RSM 39 Engr Regt</a>	Ultramarathon	£1675.20
18	<a href="#">Rob Drew</a>	Golf Day	£60
19	Martin Hopkins	Garage MOT Fundraiser	£600
20	Kev Street	Branch BBQ	£300
21	Salty Sappers	Olympic Row	£4,633.13
22	Lancashire Sappers	D-Day Dinner	£1,000
		<b>Total</b>	<b>£25,730.48</b>

## 2. Forecast of Fundraising Events

Serial	Organised By	Activity	When
1	<a href="#">Cpl Wilkinson</a>	Snowdon Triathlon	Sep 24
2	<a href="#">Cpl Mackenzie</a>	Snowdon Triathlon	Sep 24
3	<a href="#">Julie Kline</a>	Trek in Jordan	Oct 24
4	James Ingman	Bournemouth 10k	Oct 24
5	Emma Knox Johnston	Bournemouth Half Marathon	Oct 24
6	Alexander Carroll	Forth Bridge 10k	Nov 24
7	42 (Geo) Engr Regt	Various	Aug -

3. **Observations.** The following observations have been gained from outreach activity (to units and branches) and analysis of the fundraising statistics.

- a. The idea of raising funds for the Sapper Charity resonates more with serving sappers than REA branch members.
- b. Units which have received an REA brief are more likely to fundraise for the REA.
- c. Drawing a comparison between branches who have received an REA brief and fundraising would be unfair as the brief format between units and branches differs.
- d. An REA brief is not the sole instigating factor for fundraising for the REA e.g. the member of the public and the non-active REA member (see chart).
- e. REA branch members do not like to view the REA as a charity.



4. **Supporting and Co-ordinating Fundraising.** Supporting and coordinating the fundraising activity over the previous 12 month has not been complex. However, it requires time and organisation to properly support events with merchandise and publicity.

5. **Communications.** The past 12 months has demonstrated that the Comms Hub do not have the appetite to provide fundraising communications. Apart from two interviews HQ REA has been responsible for most fundraising communications. The HQ will continue to provide communications in support of fundraising activity.

6. **Collaboration.** There is not an appetite for charities to collaborate with the REA. Several larger charities have been approached to collaborate, but these attempts have been unsuccessful. The REA is often viewed as a charitable foundation and source of funds not as a charity.

7. **Fundraising Manager.** The appointment of a fundraising manager will provide the dedicated resource to develop products (including publications and merchandise) and maintain the momentum in fundraising.

8. **Summary.** The previous 12 months have proven that there is appetite to fundraise and support the Sapper Charity, the key for the next 12 months is the maintenance of momentum and changing the culture and perception of branches to one that recognises the Sapper Charity.

N Gunnell

Ops Director

DRAFT



## Fundraising update & discussion paper

### Current position

Following agreement of the new fundraising strategy in May work has commenced on the preparations to enact the strategy. Phase 1 has included an overhaul of data and IT provision – Digital Transformation. As a result, REA HQ has now fully converted to the Microsoft 365 infrastructure and is now free of any binds or restrictions resulting from use of MOD servers and data management. It was important to complete this work ahead of recruitment to ensure all teams are working on the same platform and independent of other organisations. We are actively recruiting a Fundraising Manager; interviews are expected to take place in October with appointment to the post following soon after.

As the development of the fundraising strategy has been running concurrently with a strategic review of membership, it has provided the opportunity to better understand the potential of membership as a fundraising resource which extends beyond the wellbeing aspect associated with giving and good works. However, a deeper dive into the demographics of RE veterans also indicates some areas of need that have not been addressed.

This combined work has led us to several observations and questions which we would like to discuss.

### Observations

- Using the recent Census data and using our benchmark calculation |10% of Army = RE we can extrapolate that approximately 2500 RE Veterans are currently receiving Universal Credit. This could represent a significant area of need if they were made aware of the benevolence available from the REA.
- There is a large untapped opportunity across active and inactive membership groups.
- Clarity on the purpose and destination of fundraising and DPS – Benevolence, Grants, Corps Activities, capital projects
- A dedicated marketing resource to support, inform and promote fundraising activity will be essential.

### Questions

- Should we ring fence DPS for benevolence only and how should we consider the destination of other fundraising efforts?
- Should we actively seek out those veterans in receipt of UC?
- Could we meet this significant increase in benevolence cost through fundraising?
- Should we introduce membership fees including a donation to the charity? What's the value proposition to accompany this?
- Should we address the confused messaging between Association and Charity – Is the future separate entities working in lockstep?

September 2024



## Membership discussion paper

This paper is intended to be a starting point for a discussion on REA Membership – looking at the current position and future opportunities. As part of this evaluation, it is also necessary to review the status of the branch structure as it forms a significant part of the active membership. Whilst the management team have already begun to consider all aspects of membership as part the ongoing development of the REA's future strategy, it recognises the importance of board engagement in this process too.

### Key Insights

Based on our benchmark calculation that RE personnel make-up approximately 10% of the Army population both serving and veteran, we have the following key insights regarding membership of the REA. We have arrived at this using a combination of in-house data (SCRM) and the most recent ONS Census data which for the first time included questions on the armed forces.

TOTAL NUMBER OF MEMBERS	INACTIVE MEMBERS	ACTIVE MEMBERS
<b>28,000</b>	<b>20,000</b>	<b>8,000</b>
<b>31%</b>	<b>71%</b>	<b>29%</b>
From a potential membership of 96,000	Of total registered members	Of total registered members
Estimated figures		

The most committed members – those who actively participate in all REA events on an annual basis make-up just 5.5% (440) of the active membership or 1.6% of the total membership. It is important to recognise that this small but important group take up a significant amount of REA team bandwidth and their attendance of events is subsidised at a cost of £62,000 a year from REA funds.

### Observations

- Whilst it is unlikely we would ever capture 100% of the potential membership pool it could be better.
- A very significant amount of REA resources are devoted to 1.6% of the membership on an annual basis.
- Feedback suggests that many members do not realise that the REA is a charity and therefore understand it's charitable mission to support Sappers and their families throughout their lives.
- There appears to be a tension between the bottom-up/independent approach of the branches and a perceived top-down approach of REA HQ.

### Questions

- Is our current membership model sustainable?
- How do we become more relevant to the significant proportion of inactive and passive members?
- Is the current Branch structure fit for purpose?
- Should we engage sooner and more proactively with the serving population to improve take-up of membership?
- How should we address the confused messaging between Association and Charity?