

COMMENTS - DRAFT RSL NSW STRATEGIC PLAN 2020 – 2025

NORTHERN BEACHES DISTRICT COUNCIL

PREAMBLE

The “Case for Change” put in the first four pages of the draft left no doubt as to challenge facing the organisation in the fight for survival. Unless we attract new members from those veterans who have served in the ADF since the early 1990’s we will go the way of many volunteer organisations who with an aging membership are also facing an uncertain future.

The success of any Strategic Plan is to achieve the initiatives and outcomes set and approved. There must be a system established to monitor progress and report on the milestones achieved. This has not been the case in the past. The RSL NSW website is the recommended vehicle to update membership on progress of the Plan.

PURPOSE (Mission Statement)

The purpose is succinct in the explanation for the reason of the organisations existence. The only other element that could be considered is lobbying. Reference to lobbying is referred to in Goal 2.1, however, it is a very important key element and a cornerstone that should be considered and referred to in the purpose.

VISION

This also is succinct in that it states where we want to be in 2025. In formulating this vision statement consideration must be given to the objectives being: Specific; Measurable; Achievable; Realistic and Timely (**SMART**) (refer Annexure A).

STRATEGIC GOALS

The intent of strategic goals is to implement initiatives in order to deliver the Purpose and Vision. Again objectives need to follow the SMART acronym as a guide in setting objectives.

Goal 1: Support veterans transitioning to civilian life.

The concept is supported subject to clarification of the following:

1.4 – How long is free membership to be provided? This needs to be shown or reference made to 3f.

1.6 – The cadre of ANZAC House staff needs to be quantified and financially sustainable.

Goal 2: Represent veterans and their families and advocate (lobby) for their needs.

We generally concur with the initiatives and outcomes outlined in the Strategic Plan.

Goal 3: Grow and maintain the engagement/membership of veterans and their families with RSL NSW.

We generally concur with the initiatives and outcomes outlined in the Strategic Plan.

3.2 – Would consider this a motherhood statement and suggest a rewrite.

Goal 4: Represent veterans and their families through commemoration to respect and value their service.

We generally concur with the initiatives and outcomes outlined in the Strategic Plan. The only comment to make is that some sub-Branches already have a very high exposure in local schools and the community. This needs to be considered in the measurement of outcomes.

Goal 5: Establish collaborative working relationships with RSL organisations in other jurisdictions to advance the support to veterans and their families in NSW.

We generally concur with the initiatives and outcomes outlined in the Strategic Plan.

Goal 6: Build awareness of RSL NSW and its purpose to current and future veterans, and their families and the public.

Remove the word "and" and insert a comma in the Goal.

We generally concur with the initiatives and outcomes outlined in the Strategic Plan.

Goal 7: Implement an optimised operating model that provides consistency of support to veterans and their families wherever they are in NSW and ensures the sustainability of RSL NSW.

This Goal will be the most challenging of all. It is our view that there are outcomes that are not achievable or realistic and suggest a Panel be formed to work through these issues. A workable Panel to include network representatives would assist Anzac House having a broader understanding of sub-Branch operations which can vary greatly across the network. One size does not fit all.

7.4 – Should be rewritten to remove reference to a commercial organisation (Xero). Should read: "By 2022, provide a consistent accounting system, and the required training support...etc."

There are also many sub-Branches who don't need to go to the expense of purchasing an accounting package. The use of an Excel spreadsheet to set up a Cash Book should be acceptable as would the Cash Book available at newsagents for those who do not have access to computers. The number of transactions within the smaller sub-Branches would be minimal.

7c – We question whether improving administration efficiency by 25% across RSL NSW in 2023 is achievable. The components comprising administration costs across the network are varied in many respects; rent, wages, financial advisor fees, to name a few. We very much doubt that RSL NSW could achieve that target based on their 2019 results. THE ACCOUNTS THAT COMPRISE ADMINISTRATION EXPENSES NEED TO BE DEFINED so that a common measure can be applied across the network.

7e – A similar result as in 7c, 15% by 2025 may not be achievable across the network.

7m - The only problem with this outcome is that you are reducing expenditure on camaraderie throughout the network based on the lowest common denominator theory. That will not be achievable.

Annexure A Part 2 – Executive Summary.

In our view reference to investment management the draft is comparing apples with pears. Long standing investment advisors have a proven track record, whereas, ANZAC House is an internal operation without a proven long term track record. The old adage is 'higher the rate higher the risk', In this case the 'lower the fees the higher the risk'. Who holds a "Proper Authority" at ANZAC House?

Does the stated 0.32% fee include any professional advice in addition to ANZAC House management costs (salaries etc)? Investment Management to the extent considered should be left to the experts. It is not the business that ANZAC House should be involved in.

The concept of an Investment and Disbursement Board (IDB) comprising representatives of sub-Branches who wish to participate is problematic. What investment experience will the representatives have? Recommendations made by the IDB on investment strategies are to be approved by the Board. Should the Board have this responsibility? If investments go pear shaped Directors could be respondents in any legal action taken by participants.

The current situation is that sub-Branches take responsibility to manage their own portfolios, with financial advisers being involved in many cases. Generally speaking this has been successful. We are of the opinion that if sub-Branches wish to manage their own investment portfolios any profits/losses will be localised. With the IDB Fund profits/losses will be shared by all members of that fund. It is always a preferred policy to spread risk, not centralise risk.

We agree that there should be a policy on sub-Branch investment strategy, especially those sub-Branches in a financial position to do so. A long term strategy with income and growth achieved with a balanced portfolio would be acceptable to most. We must remember that we are investors, not speculators.

Conclusion

The Draft Strategic Plan has merit subject to resolving the above concerns.

W Hardman OAM

President

1st January 2020 updated 2nd February 2020

Attachment:

- Annexure A
- Comments from a sub-Branch for consideration.

Annexure A

SMART Goal

S for Specific: There are several key factors which should be present in the objectives that are set in order for them to be effective. They should be specific. In other words, they should describe specifically the result that is desired.

M for Measurable: It is important that the objectives you set can be a measured. In order to use the objectives as a part of a review process it should be very clear whether the objective has been met or not.

A for Achievable: The next important factor to setting objectives is that they be achievable. For instance, an objective which states "100 percent customer satisfaction" isn't realistically achievable. It's not possible to expect that everyone must be 100 percent satisfied with their service. A goal must be realistic and achievable.

R for Realistic: Realistic objectives are objectives that recognize factors which cannot be controlled. Put another way, realistic goals are potentially challenging but not so challenging that the chance of success is small. They can be accomplished with the tools and skills available.

T for Time-based: The final factor for a good objective in that it is time-based. In other words, it's not simply, "improve customer service by 12 percent," it's "improve customer service by 12 percent within the next 12 months." This is the final anchor in making the objective real and tangible. The implied date is the date of the next review, when accountability for the commitment in meeting objectives is reviewed.