

DISTRICT PRESIDENT'S COUNCIL STRATEGIC PLAN 2020-2025 INPUT

1 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.

2 There needs to be measurable KPIs to enable the Program Managers to understand whether the Plan is achieving its goals. Moreover, each goal within the Strategic Plan needs to be managed as a project with a Project Manager, Project Plan and goals and KPIs that match the Strategic Plan goals.

3 The time frame of the Strategic Plan is 5 years, 2020 - 2025. However, this time line is thrown out due to an external fact, COVID-19.

In March 2020 the world as we know it changed. The current Pandemic will have a material effect on the ability to fund the Plan. When will it end, and how long will it take to return finance and property markets to normality? The volatility of these markets reflects the universal uncertainty across industry sectors such as finance, investments and commercial real estate. We must accept a reduction in interest rates and decreasing dividend payments from investments. Not forgetting the effect on the overall economy and government attempts to keep the economy afloat whilst facing high unemployment and diminishing sales across Australian businesses.

4 In terms of the Plan RSL NSW needs to be transparent in the costs associated with this draft, the staffing needed to support it and the qualifications of those who are to administer the project(s). Remembering that a large income slice has been reduced courtesy of COVID-19 and SOP 1.

RECOMMENDATION

The Draft Strategic Plan is commendable; but needs clarification and re-evaluation in the areas indicated. It is an extremely ambitious Plan with timeframes, doubtful financial and manpower resources as well as excessive workloads to put the Plan into operation. The ideas in it are to be lauded; but they are not at a practical level that will assist members to take ownership of them.

5 The Plan has an undertone of centralisation of everything including finance. The devil is always in the detail and there are insufficient details (specially to do with costings). The financial situation of the RSL NSW State Branch needs to be clear before a serious assessment of the Strategic Plan is possible.

6 RSL NSW was founded as a grass roots organisation with the basis being the network of sub-Branches supporting their local areas. There is strong resistance to the notion of 'thinking as one' organisation and an inclination to continue doing 'local stuff'. Local stuff is the core of the RSL NSW and should not be overlooked.

7 A full SWOT analysis is required to understand the strengths and weaknesses of RSL NSW against the plethora of ESOs essentially delivering the same services. In addition, complete Business Plans for each of the Goals are needed so all

participants understand their role in implementing the Plan. The business plans and cases will identify the funds needed and where the funds will come from.

8 There is no specific mention of the Advocacy Training and Development Program (ATDP) in the Strategic Plan. It does not show how the ATDP fits in with the Wellbeing or Compensation Advocates roles within sub-Branches, Districts and State Branch. The Strategic Plan should include the notion of collaboration from the bottom up; not just at the State/Territory and national levels. It should also be more specific about the link between the role of our Wellbeing or Compensation Advocates and the ATDP.

It has been expressed by many Financial Planners, Governments, Commonwealth and State, Banks Business, etc that recovery will not occur within a 3-year period; but safely within 5 years. The way the RSLNSW does its business has changed and will change dramatically into the future.

9 The activities of the RSL NSW will have changed or will be changing to meet an expected COVID future. All the Partnerships of the RSL have changed, and Change is being demanded by many others. The Financial outcomes of all Partnerships and sub-Branches have changed also and the current support (up to 3 years) will not be forth coming or will be diluted. In the long term this will have a dramatic outcome to all of the RSL NSW Administration down to sub-Branch survival.

10 Members are finding difficulty in rebuilding 'Trust' in ANZAC House. Too many instances have continued to occur to defer this rebuild. As a result, members remain sceptical about the intention of the significant changes called for in the Strategic Plan. The funding requirements for the Strategic Plan have not been transparent to members and are feeding some of the mistrust.

11 RSL NSW needs to be transparent in its finances to the membership. The membership needs to know the base line financial position of RSL NSW before and after the Strategic Plan is implemented. Based on our COVID-19 reality, the Strategic Plan needs a full review and re-consideration before any further debate and discussion occurs.

12 There is no review indication such as reviewed annually, amend and extend the SP for another year (e.g. to 2026). The Strategic Plan needs consistent reviews and a continuous improvement process implemented.

SUPPORTING ARGUMENTS

1. THE CASE FOR CHANGE

The 'Case for Change' is compelling, clearly recognising the shrinking demographic of the RSL, confusion about who the RSL is and its purpose, and referencing the pivotal Productivity Report of 2016. It leaves no doubt as to challenges 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.

While separating the RSL and RSL Clubs in the minds of prospective members and the donating public is desirable; it is unlikely to be successful as later in the plan there are a number of proposals to join with the RSL Clubs and associations including RSL associations. RSL Clubs are working to modernise their images and become more family oriented. The days of the large beer halls are gone mostly. Without the RSL Club in many communities there would be no public display of the RSL. If we can harness a strong relationship with RSL and Services Club, we should be able to gain through the Clubs Grant program.

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The proud history has been badly tarnished and RSL NSW will have to work hard internally and externally to regain some of the ground lost. The RSL will be around for some time into the future; but it has a lot to do before putting a timeframe on its future.

Within the Case for Change is the acknowledgment that due to the deeds of the past from within the management, regulation and inactivity of RSL NSW came a proliferation of ESOs that appear to better serve the target audience that RSL NSW wishes to attract. RSL NSW believes that there is a clear place for a lead ESO; however, to attract younger veterans, provide a greater depth of services, RSL NSW has to redefine itself.

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Young veterans primarily relate to their unit associations and see themselves different to other veterans, and they are not prepared to compromise. These veterans have growing families and work commitments and rarely have time to volunteer for sub-Branch activities.

However, there are more than just the younger generations or contemporary veterans. There are generations of ex-service personnel who parted from Defence in the 60s/70s and who did not meet the criteria to join the RSL or were not welcomed by the RSL. When this situation was changed in the 90s there was little PR to tell these people of it. Veterans from the 1980's/1990's were totally ignored by our organisation. In the early 2020s a change to veteran status was made and again little PR was provided. The ESO and VSOs filled the vacuum and many do a great job for their veterans. We need to include all veterans young and old in our target for recruitment.

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There is significant disagreement that sub-Branches isolation and introspection was a reason for the proliferation of ESOs. There may have been some sub-Branches where this accusation would be true; but many, if not most, sub-Branches have endeavoured to embrace generations of all age groups including the younger veterans.

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The idea of a lead ESO is commendable and should have been pursued at a National level in past years. It was not and as a result the RSL is no longer considered the lead veteran organisation. You only have to look at the work done by the ADSO which is an amalgamation representing some fourteen (14) veteran/war widows associations.

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The RSL as a part of its vision could look to join the ADSO and possibly become the lead ESO; but it would need to be approached through discussion, management and negotiation not by the tactics of the past.

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One of the issues that face Strategic Plans is achieving the vision set within the Plan. To achieve a vision without taking into account the plethora of ESOs and the services they render to the RSL NSW target audience is tantamount to failure. In any military appreciation both the ground and enemy are examined firstly. This ensures that the Aim is correct and that appropriate troops to task are allocated to meet the conditions imposed by both the enemy and the ground. We do not believe this has occurred as the influence of these plethora of ESOs are better serving of the younger veterans, than the draft Strategic Plan recognises.

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Larger sub-Branched are willing and able to support smaller sub-Branched. While, these larger sub-Branched are less likely to donate to a centralised fund, they normally will assist smaller sub-Branched with their budgets. Larger sub-Branched could support multiple smaller sub-branched in a coordinated manner without the overheads required through a centralised fund.

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2. EQUALITY

The fundamental issue of equity across RSL NSW is addressed only indirectly. The Plan raises the issue of equal benefits across the membership, and somewhat acknowledges the disparity between prosperous and struggling sub-Branched (primarily city and country respectively), however, the Plan does not propose any specific remedies. This issue is very complex and requires clear and transparent consideration to determine a consistent policy across RSL NSW and that is acceptable to the majority of the membership.

The principle of equity across the membership is important, however, currently unachievable because sub-Branched control their own assets and cannot be compelled to surrender them. RSL NSW is unable to re-distribute assets because it does not and should not control them, however, it could resort to increases in branch fees to force redistribution. Another option is a system of prosperous sub-Branched sponsoring struggling ones. Whichever model is adopted for the future, it will need to be co-operative between RSL NSW and sub-Branched.

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The so called wealthy sub-Branched have come about by the forethought of their forefathers who put their efforts and finances in to building for the future. Further, there are sub-Branched that:

- Are yet to sell their clubs; but get hefty income from leasing them,
- Are funded from rented properties,
- Are funded by clubs, councils, bequests, etc., and
- Strong investments.

If you take the veteran population across all ages and conflicts you will find different sets of values, needs and support. RSL NSW cannot hope to achieve all of these to satisfy the ages.

RSL NSW has tried every way which way (Payment of the consultant to rebrand the RSL as the League, donations at Congresses) to get money from sub-Branched without doing anything to resolve its own finances. A bit of leadership would have gained the support from sub-Branched. State Branch needs to be completely financially independent.

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3. MEMBER BENEFITS

There is considerable agreement that the RSL is a unique charitable organisation as our members (serving and ex-serving military members) are the target of our charity. It is acknowledged that members are not permitted to 'benefit' from their membership of RSL. However, our members receive benefits from our organisation in their role as a charitable beneficiary not as a member. While we also extend our charity to serving and ex-serving military members, we need to do more to extend our hands. However, the conundrum is, if we help a veteran in need and the veteran then joins the sub-Branch, can we no longer assist them?

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There is a notion that 'we' have done our service already, that 'we' join the RSL for what it can give us.

If the primary issue is using the term RSL member maybe it would be appropriate to change the title to RSL Veteran. This would be made easier by eliminating membership fees. Unfortunately, this would also question the benefits of Affiliate and Auxiliary members.

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4. PURPOSE (*Mission Statement*)

The purpose is succinct in the explanation for the reason of the organisation's 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.

5. VISION

This also is succinct in that it states where we want to be in 2025.

6. MOTTO

Why has our Motto changed or is this a motto for the Strategic Plan?

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7. VALUES

Independence should be added to our values.

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8. STRATEGIC GOALS

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

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 outcome 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 is 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.

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Goal 1: Support veterans transitioning to civilian life.

- Concern about the ability of small rural sub-Branches to effectively engage with transitioning veterans and the time/resources/training and communication required.
- Establishment of "Regional Hubs" based on District Council areas drawing resources from multiple SB's could be a solution to this issue.
- An audit of how and what sub-Branches do now would provide best practice by understanding current practices.

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Sub Goal 1.1 Work with transitioning ADF members, the ADF, DVA and access current research to identify the most in demand transition services, access the service gap and what can be made available through the RSL NSW network state-wide.

- Establishment of the recently announced 'Joint Transition Authority,' requires this goal to be reassessed.
- Address isolation for discharging Defence Force members.
- Are these services only available to those transitioning out of active service?

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Sub Goal 1.2 Identify the best practice approaches, services and products available to support veterans and their families, and produce an RSL NSW Services and Product Catalogue; maintaining knowledge through an annual review process

- Joint Transition Authority Transition Coaches replace need for "Veteran Sponsors" (buddies).
- Joint Transition Authority hopefully will produce this catalogue.

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Sub Goal 1.4 In conjunction with other states, provide free RSL NSW membership to all discharging and retiring members

- If free membership is made available to all members, this goal is redundant

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

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Sub Goal 1.5 Establish the capability for RSL NSW volunteers (members) to act as ‘Veteran Sponsors’ (buddies), who connect veterans to services

- Joint Transition Authority Transition Coaches replace need for “Veteran Sponsors” (buddies).
- Finding and training 5,000 Buddies challenging to say the least.

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Sub Goal 1.6 As per 7.8. a full-time cadre of staff support Veteran Sponsors ensuring continuity and consistency of support and training on the use of the catalogue

- Joint Transition Authority Transition Coaches replace need for “Veteran Sponsors” (buddies).
- 24/7 service requires high numbers of staff to be available and the effective return on investment may not justify the cost overhead.
- 1.6 – The cadre of ANZAC House staff needs to be quantified and financially sustainable.
- Timeframe overly optimistic and should be reviewed.

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

- Ambitious goal needing a lot of work.
- What resources and funding will it have?
- ADF will respond to government; but not the sub-Branches. Pipeline top to bottom needs to work properly.
- RSL National need to be more relevant and accountable. There are mechanisms in place which should function better.
- Infrastructure already in place should have minimal financial impact.

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

- “What Does Success Look Like” goal of 10% growth a year does not appear under strategic Goal 3 where it should belong. Is that an aspirational versus a realistic goal?
- 10% of 30,000 equates to 3000 in 2020 and larger numbers annually out to 2025.
- To achieve a 10% real growth RSL NSW will need to recruit greater than 10% to replace the loss of members from the 30,000 and this could be as many as 2000 or even more.
- On the basis of the figure 5,000 new members need to be recruited.
- Nationally, the Army discharges some 4,000 regulars a year of which maybe 750 or less discharge in NSW.
- From the two NSW Reserve Brigades there maybe 500 discharging (Brigade numbers are low in the Reserve). Combining both, that is 1,250. Add to this

figure about the 1,000 from Navy and Air Force; this comes to around 2250 personnel (The above figures need to be validated).

- RSL NSW would have to recruit all of them plus a lot more? A 10% increase is not possible.
- Additionally, whoever is recruited from the discharging personnel will represent all age groups up to 60 years or so. They will not be all young veterans. Refer to Goal 1.
- Narrative attempts to be all things to all veterans and lack clarity and focus.
- Different demands of different generations within the RSL require specific tailoring for outreach.
- RSL needs to connect to different demographics in the way that suits the target audience.
- Appears to concentrate on recent veterans and ignores the groups from the 80s/90s which would no longer be attracted by unit association and may require our assistance as they approach retirement.
- A single approach will not succeed and greater investment in the online presence is required to connect with young veterans.
- Encourage membership at point of enlistment rather than discharge. Provide membership form and representatives coordinate with ADF requires a national approach.
- Aged and unwell members are leaving when assistance is most needed. Don't want to pay fees where there are no services available.
- A partial strategy could be to wait for the more recent veterans to grow older and retire (at which time they will be ready to join the RSL).
- Recruitment planning appears to target serving members preparing to leave service ignoring those who have already left.

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Sub Goal 3.2 Develop a contemporary membership offering using a collaborative approach

- Consider this is a motherhood statement and suggest a rewrite.
- this should look at online and blended engagement options for RSL. The online presence is terrible at the moment

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Sub Goal 3b. RSL NSW engagement with Gen Z, Y, X age groups increases by 2022, and membership growth of these generations increases by 20%/yr from 2023 onwards, from 2019 baseline

- There are a great many other veterans excluded in this goal. Veterans from 1980 on needs to be included as well as allied forces veterans.
- They need to be included and added to every aspect of PR, veteran support and recruiting plans.

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Sub Goal 3.3 By 2021, A member acquisition strategy is set. Clear definition of what RSL NSW requires from membership (volunteers, supporters, donors) and what RSL NSW can offer in return, including inter sub-Branch sport or other activities

- The new definition of a veteran needs to be published widely.

Sub Goal 3.5 By 2022, the DPC implements a system that identifies a lead liaison officer for each ADF base in NSW, to ensure strong presence and engagement at every appropriate unit or area event

- Will stretch the abilities of the active RSL membership numbers.
- DVA have liaison officers in Defence Bases.
- An option may be to use serving members, and/or make barracks based sub branches
- Buddies, liaison officers, sporting, other activities including commemoration are going to stretch manpower resources and there may not be sufficient to carry out all tasks – members to tasks needs to be developed as part of the Strategic Plan.
- Why do members have to wait to 2024 before membership fees cease given all the financial options being proposed before this time? Veterans can join unit associations for about \$5. Why join the RSL for \$36.
- In order to pay any fees, we must provide a value-based proposition for all members
- Recruiting should be a goal to provide for proper recruitment and validation.
- Public recruiting needs to occur not just ADF.

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

- Commemorations serve a number of aspects of the RSL's purpose – honouring those who served and still serve, as well as their families and providing opportunities for the community to gather for memorials.
- Commemorations can also be complex to arrange and quite costly with no prospect of fee recovery.
- Consideration should be given to funding assistance for commemorations to enable improved management and delivery of these important community events.
- 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.
- We already do this well. Community participation in Anzac Day and Remembrance Day is evidence of this.
- Funding for this should be a lower priority than other goals because it is already happening.

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An additional Sub Goal should be added: By 2023 create a commemoration for "Recent Veterans" to include all military activity since 1975. The name of this commemoration and its date needs to be worked out. This should be an RSL led activity to control this commemoration.

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Sub Goal 4a By 2025, the format and funding to support commemoration activity delivery is consistent per population across NSW, adjusted to local conditions

- While format might be specified and funding available – consistency will be difficult to achieve.

Sub Goal 4b The commemoration activities undertaken by RSL in NSW are clearly attributed to the RSL brand and public awareness of commemoration is increased by 60% by 2025, from baseline in 2020

- Consider that the ceremonial activities by RSL are well recognised by the public and awareness is growing.
- Public might think that the local RSL Licenced club manager is responsible.
- How would this growth be measured?
- 2020 baseline must be adjusted as 2020 is COVID affected.

Sub Goal 4c. By 2022, commemoration activities are relevant to contemporary Australian society, and well attended by the general public and younger Australians

- Consider these are and remain relevant.
- How would this be measured?

Sub Goal 4d. By 2025, achieve increased engagement (local RSL relationship) with NSW schools to 50% (current total schools in NSW = 3,186)

- Desirable where local conditions prevail.
- Many sub-Branches have strong school programs.

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Sub Goal 4e By 2022, increased public and veteran community volunteer participation, providing for camaraderie and ensuring ongoing viability of commemorative events

- Volunteers are diminishing across the community.

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Sub Goal 4f By 2025, commemoration services participation increased by 25%, from 2020 baseline

- How would this growth be measured?
- 2020 baseline must be adjusted as 2020 is COVID affected.
- This is an aspirational goal with no plan to achieve

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

Sub Goal 5.3 Develop an operational framework:

- For the development of standardised services across boundaries (liaising with other jurisdictions to ensure seamless transfer when veterans relocate)***
- To draw upon Centres of Excellence in the support of veterans and their families***
- To implement transferable membership across RSL Branches and sub-Branches nationally***

- The initiatives for veteran’s centres and standardised services are fully supported as well as the points on branding and messaging.

Sub Goal 5e By 2025, RSL membership is fully portable. Removal of state boundaries (and internal divides). Membership is of one RSL

- Highly ambitious aims initially appear very attractive; a seamless membership between all RSL state branches and RSL sub-Branches.
- May introduce risks and obligations that sub-Branches may not be aware of and which have been negotiated centrally without adequate reference to the membership.
- Considered unachievable to deliver a single agreement between RSL NSW and the huge diversity of RSL sub-Branches, and for what purpose?
- Membership databases and their linkages will require enormous IT engineering to establish and maintain.
- Not supportive of broad covenants that attempt to bring all sub-Branches into strategic agreements with other organisations.

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Sub Goal 5f. By 2023, through an effective brand strategy and a nationally coordinated and resourced marketing plan, the Australian public know and understand what the RSL does for veterans, and it is effectively differentiated from, ‘clubs and pokies’ (see 6.2)

- Deep need to repair the RSL brand.

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

Sub-Goal 6.a By 2025, increased public, member and general veteran community awareness of RSL NSW activities

- Anzac and Remembrance Days already create an awareness of the RSL in the role of commemoration.
- The challenge will be to grow the awareness of what RSL Defence Care and RSL LifeCare actually do.
- We need to use 'social media' and 'cyberspace' to help us connect with future veterans, their families and the public.

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Sub-Goal 6.2 Reposition the RSL brand, in collaboration with other jurisdictions, and address the brand confusion between clubs and sub-Branches. Position the brand as relevant and aligned to RSL’s core purpose of supporting veterans and their families*

- Particularly critical in the branding of the RSL.
- How do we get people to know the difference between an 'RSL' or 'Services' clubs and the real RSL such as the sub-Branches and their services?
- On a personal note (from Brian Willey - President of the LNCDC): “I joined RSL NSW in order to find out what the RSL actually did! As a twenty-one-year Navy veteran and not having needed any welfare or other assistance, I worked a second career for twenty years and was busy with family and

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community life. I had no inkling of what the organisation did or how it did it. My feeling is that this is one of the main challenges for our organisation.”

Sub Goal 6.c. By 2025, up to five mobile “Cooee”- RSL NSW fully contained promotion and information ‘units’ are built and available for use by any RSL NSW element/ organisation across the state, coordinated by the DPC

- Performance and value achieved will be difficult to measure.

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Sub Goal 6.d. By 2021, the RSL NSW (state-wide) Vision, Purpose and Values drive organisational behaviour and the code of conduct is derived from the Values

- Our Code of Conduct should already be published as well as the Board’s Code of Conduct.

Sub Goal 6.e. By 2021, RSL NSW has a channel so talking points for major communications and proactive local engagement are available for nominated spokespeople state-wide

- Assumes appointments of a state based public affairs officer who can feed talking points to local spokesperson(s).

Sub Goal 6.4 Identify and develop appropriate communications channels – for members, veterans and the general public

- (older)Sub-Branch members will need training and guidance on how to achieve this.

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.

- Most challenging of all.
- Outcomes appear to be not achievable or realistic.
- Recommend a Panel be formed to work through these issues.
- Workable Panel to included network representatives to assist Anzac House having a broader understanding of sub-Branch operations which can vary greatly across the network. One size does not fit all.
- Primarily about internal administration.
- RSL NSW and sub-Branches are required to transition to an increasingly business-like model due to the growing complexity of governance and asset management, as well as the increasing diversity of services expected by members.
- Plan does not address the implied corporatisation and professionalisation of the RSL at all levels.
- Increased expectations from both the RSL management staff as well as an expanding membership base spanning three generations is already placing increasing strain on sub-Branch committees to keep pace with a myriad of governance requirements and member services.

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- Recommended that ANZAC House maintain a training team that travels to advise and assist sub-Branches and District Councils in the increasingly complex administration required, as well providing funding for office holders to receive professional education.
- Search for a consistent operating model across RSL NSW should not force sub-Branches into a single structure, instead, a selection of operating models can be developed that allow for tailoring to a sub-Branch's circumstances while achieving consistency across the state.
- Goal 7 is very ambitious, indicates centralisation and takes away flexibility to be a grass roots organisation and the control of finances.
- Goal 7 may have the most meaningful impact on gaining younger generations support and membership of the RSL

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Sub-Goal 7.1 – sub-Branches support and work with ANZAC House (State Branch) to ensure the implementation of the RSL NSW Strategic Plan. State Branch seeks support from the membership, especially reference groups for projects

- The challenge will be to help all levels of our organisation to realise that 'local activities & services' are actually a part of the 'whole organisation' and not just something 'we do locally'. Local activities meet our charitable purpose.

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Sub-Goal 7a – By July 2020, RSL NSW has committed resources to commence five-year implementation of the Strategic Plan

- Where will these resources come from and what can be expected in the business plan/case supporting this requirement.
- Financing for the Strategic Plan appears to be a major hurdle.
- Pooling all sub-Branch liquid assets is doubtful and will not provide enough finance to continue to run sub-Branches and provide funding for the Strategic Plan and Charitable Purposed donations.
- With current projections, funding the Strategic Plan would require using ~50% of all earnings from sub-Branch investments leaving only 50% for sub-Branches to continue their charitable activities.

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Sub-Goal 7.2 – Determine, and implement, an operating model that best delivers the vision and purpose. The model implementation must include an efficiency gain and address areas where there are insufficient volunteers to fill office bearer positions, including trustees in sub-Branches, by 2023

- This operating model needs to be determined much earlier than 3 years into the Plan.

Sub-Goal 7b – By 2025, RSL NSW is financially sustainable without significant reliance on public fundraising from the community

- Fundraising is an important activity for members and maintains contact with the community who are happy to contribute. Needs to be promoted and must continue to function.
- Reducing reliance on public funding is a must.

Sub-Goal 7.3 – Determine the current League administration cost (state-wide) as a baseline, by June 2020

- It is vital that the 'cost of doing business' and how that will be paid for, is known to all members. How else can they take ownership of the collaborative effort?

Sub-Goal 7c - By 2023, the adopted operating model will enable the identification of operational efficiencies to be achieved by 2025. The chosen operating model must improve administration efficiency from the baseline by 25% (to be measured by benefits realisation from the business case)

- Where is the business case to support this concept?
- Needs to be implemented now – not wait until 2023.
- What is the rationale behind the improvement target set at 25%?
- Is improving administration efficiency by 25% across RSL NSW in 2023 achievable.
- The components comprising administration costs across the network are varied in many respects; rent, wages, financial advisor fees, to name a few.
- The accounts that comprise administration expenses need to be defined so that a common measure can be applied across the network.
- Savings from a baseline of 25% - what effect will this cause on sub-Branches.

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Sub-Goal 7.4 By 2022, provide consistent systems such as Xero, and the required training support, for accounting, to all sub-Branches

- This was proposed three years ago. Why is it taking so long to implement?
- At the moment nothing is standard about sub-Branch financial record keeping and reporting formats.
- Should be rewritten to remove reference to a commercial organisation (Xero). Should read:
- 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.

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Sub-Goal 7.5 Investigate and implement by 2025, with support of a member reference group, commercial enterprises to provide a reliable funding stream (surplus) to support the entire League in NSW; that complements local public fundraising

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- Contradicts sub-Goal 7b.

Sub-Goal 7e By 2025, expenditure on administration is less than 15% of budget. Veterans' support includes identified expenditure on camaraderie that has a specific measure of effectiveness including membership retention and successful recruitment to RSL of veterans by Veteran Sponsors

- Joint Transition Authority Transition Coaches replaces the need for “Veteran Sponsors” (buddies).
- A similar result as in 7c, 15% by 2025 may not be achievable across the network.
- Why different to 7c on admin savings, 15% or 25% (2025 or 2023?).
- Should be split into two parts – expenditure target and reporting on camaraderie.
- It is unclear whether the 15% target applies to just head office or the whole League.
- it would be useful to place expenditure into common categories; but without targets or limits.
- it is impossible to measure the effect of expenditure on camaraderie and impact on retention.
- Commercial funding streams are needed now; but more information and definition are necessary.

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Sub-Goal 7.8 - Establish a cadre of full-time staff to support and train volunteers to build the capability of RSL NSW

- This cadre will require a large amount of manpower to provide subject matter, cover all subjects and locations; and will be costly.

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Sub-Goal 7.9 - By 2021, establish a small team to liaise with all service delivery organisations (see Annexure A) to provide advice and feedback on veteran needs. The team annually produces an online, and when required printed, ‘RSL NSW Catalogue of Services’ in conjunction with 1.2

- Joint Transition Authority would have this responsibility.
- Support creation (and maintenance) of a Catalogue of providers of services that a veteran may need to access in relation to their condition or general need.
- Model diagram must show the ‘local Veterans’ Support Centres’ as the first point of referral from the sub-Branch ‘Buddy’ to enable more efficient triage and onward referral to the next appropriate provider.
- While some sub-Branches will hold a qualified Welfare Officer who can effectively do this, the Support Centre will be better equipped for this task.

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Sub-Goal 7.10 - By 2021, the DPC, with board approved terms of reference, rationalise the number of districts on a sustainability and efficacy basis, and work with members to ensure sustainable RSL presence in all centres by consolidating unsustainable sub-Branches as Chapters

- Number of districts should be rationalised to meet sustainability and efficacy requirements.
- Looking to the future the greater use of technology most likely to be favoured by younger members has the potential to deliver more timely, consistent communication across the organisation and reduce the administrative costs involved with travel and physical gatherings.
- The reason and necessity for rationalisation are not clearly understood because the reasons for it have not been clearly enunciated.

- Does rationalisation necessarily mean a reduction in Districts? It could mean an increase if some of the larger Districts were broken up.
- Currently, Districts range from 7 to 31 sub-branches with between ~200 to ~4500 members.
- Rationale could attempt to balance numbers better; but would cause more widely dispersed Districts.
- Asking the DPC to review the number of District Councils is not a preferred option.

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Sub-Goal 7.11 - By 2023, simplify sub-Branch administration requirements. Through the DPC, rationalise roles (e.g. trustees and office bearers) and administrative tasks. Collaboratively establish sub-Branches with chapters to ensure long term presence – where there is an RSL presence now, there will be in the future

- Any process of rationalisation would also need to know how many members are in each sub-Branch and what the sustainability status is of that sub-Branch.
- Smaller to medium size sub-Branches would be reluctant to take on the additional responsibility of administering Chapters.
- In regard to ensuring RSL presence where they are now may not be possible as there are a number of sub-Branches that have already disbanded.
- Unsustainable sub-Branches should become Chapters if they have a membership of say 12 or more veterans. Less than 12 members may need other options. Affiliate membership will also be a factor in any re-organisation.
- Measurement of sustainability must be set and applied across the board.
- Communications will also be a large part in a review.
- Standardisation of financial record keeping is very desirable.
- Each sub-Branch uses a different 'platform' to record income and expenditure.
- The layout and style of some monthly and annual reports are in a foreign language compared to others.
- District councils should be empowered to conduct an audit of the administrative methods and systems used by sub-Branches.
- Collating and analysing the methods, systems and processes used by sub-Branches and Districts would enable an informed discussion on how best to go about the standardisation and simplification of administrative requirements.
- How will this be monitored?

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Sub-Goal 7m By 2024, the operating model facilitates improved collaboration and trust, resulting in a reduction in wasted resources and improved operational efficiencies (the expenditure on camaraderie is the same per member at every RSL sub-Branch location/s in NSW)

- Same expenditure is unrealistic as expenditure depends on a number of unknowns such as prices by locations, paid sub-Branch staff, etc.
- This requires reducing expenditure on camaraderie throughout the network based on the lowest common denominator theory. That will not be achievable.

Sub-Goal 7o. Collaborative ESO relationships established, enabling

- i) a joint voice and positioning RSL as a lead ESO in response to the call for this in the Productivity Commission's report**
- ii) opportunity for shared resourcing**
- iii) collaborative response to veteran issues**

- Close cooperation with Ex-Service Organisations in a 'flagship' arrangement is optimistic.
- ESOs have been established to cater to a demographic that sees the RSL as archaic and irrelevant and therefore gaining their trust will be a challenge.

Annexure A: RSL NSW Network Concept Part 1

- Difference of opinion exists as to the value of working with Clubs vs separating from them.

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Annexure A Part 2 – Executive Summary.

- Reference to investment management in the draft Strategic Plan is comparing apples with pears.
- Net return of 6.1% cannot be sustained in these perilous financial times.
- Rate of 2.75% net of fees is considered prudent.
- 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.
- if sub-Branches wish to manage their own investment portfolios any profits/losses will be localised.
- With the IDB Fund profits/losses will they be shared by all members of that fund.
- It is always a preferred policy to spread risk, not centralise risk.
- There should be a policy on sub-Branch investment strategy, a long-term strategy with income and growth achieved with a balanced portfolio would be acceptable to most.

- We are investors, not speculators.
- The argument to centralise investments is not agreed
- Representation on the IDB is based on the size of investments; but blocks of sub-Branches could control it.
- Major concerns regarding sub-Branch retaining control (through its Trustees) of any funds invested in the proposed IDB.
- Members need assurance that financial control will be fully retained by the sub-Branches (via the existing Trustees), who may move funds at sub-Branch Members' wishes, to be used by the sub-Branch within RSL NSW budgeting guidelines.
- 'Putting all eggs in one basket' is never a good strategy.

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CONCLUSION

The above report is submitted for consideration.