



# STRATEGIC PLAN 2021-2026

October 2020



# THE PLAN EXPLAINED

## Layout

This strategic plan is more detailed than others, and a 'Plan on a Page' version is attached as Annexure C, for easy reference. The plan is detailed so members can see what is intended to be delivered by when, and what the expected outcome is. It describes the organisation's purpose, derived from its charitable deed and sets a vision. There are then other key elements, namely:

### What is an Initiative?

This is a series of objectives or tasks that have to be completed to achieve the stated Goal. The Vision is realised if all the plan's Goals are achieved.

### What is a Success Measure?

Each initiative has an outcome to be achieved and success is to be gauged by a measurable outcome, or associated detailed 'Key Performance Indicator (KPI)'. Whilst the Strategic Plan may have broad success measures, more detailed measures are to be incorporated in individual project plans that will underpin initiatives grouped as projects, or tasks.

## How will the Plan be funded?

The Board will have the responsibility, on the advice of the CEO, for funding the plan. The extensive consultation period that preceded the release of this plan assured the Board that the majority of members want to realise the plan's vision, and make changes so the League is as strong and as relevant for future generations as it was in the past. This plan is phased so the Board can decide to fund in tranches as funding becomes available. The Board will also seek grant assistance from the Government as the RSL is an iconic part of every community in NSW and is in the community's custodian of the ANZAC 'spirit' and all commemorations.

What is RSL NSW? Aligned to a common Charter and Constitution, RSL NSW is defined as State Branch and all NSW sub-Branched bound by the Constitution and their respective Charters.

## The Case for Change

This is attached at Annexure D. Whilst some members disagreed with the assessment during consultation, the vast majority did, and importantly given the long term objectives of the plan, so did current serving personnel and younger veterans. There are compelling reasons to respect and learn from the past, but adopt this plan for the future.

### What does Success Look Like?

This is also attached as Annexure D. It is a brief narrative of how the RSL in NSW will be placed in 2027 if the Strategic Plan's goals are fully implemented. The citizens of NSW will know what the RSL stands for and what it does. For veterans and current serving personnel, they will also know what the RSL stands for and does, particularly in support of transition from the ADF, but they will also be attracted to join to help each other, our 'senior' members, and the wider veteran community.



## OUR PURPOSE

Support veterans and their families by connecting them to services to improve their wellbeing and assist former Australian and allied veterans and families by connecting to them to their local community, through camaraderie, mateship, recreation, and commemorating service.

## OUR VISION

By 2026 every veteran\* in NSW knows what the RSL stands for, what it does, and wants to be involved as a member.

## OUR MOTTO

One RSL—working together, delivering locally.

\*A 'veteran' is any person who is serving in the ADF, or has served in Australia's or allied armed forces.

# STRATEGIC GOALS

The Vision and charitable Purpose to support veterans and their families will be delivered in a phased approach by implementing initiatives under the following strategic goals.

## WHAT WE STAND FOR



Goal 1  
Stand for veterans and their families.



Goal 2  
Tell our story so everyone knows what we do and why we do it.

## WHAT WE DO



Goal 3  
Grow membership to support each other and have fun, and help all veterans and their families in need.



Goal 4  
Through collaboration and support, connect veterans to services.

## HOW WE DO IT



Goal 5  
Implement an optimised and sustainable operating and business model.



Goal 6  
Commemorate and pay respect.

# IMPLEMENTATION

The Plan will be implemented, under the direction and coordination of a Program Management Office (PMO) in three phases. Each phase will be budgeted for separately, but they will overlap. These colour codes are used to indicate the Phase in which an initiative will be implemented.



## Governance


Using contemporary practice and recognising the unique capabilities of the RSL's volunteer membership, constrained budget and need for transparency; the Strategic Plan will be implemented under the strategic direction and accountability of the RSL NSW Board.

The Board will appoint the CEO as the 'Program\* Sponsor' and the CEO will in turn appoint a Program Steering Committee (PSC) based upon RSL NSW's executive and member representatives to oversee the Plan's implementation and report to the Board against agreed milestones, budget, scope and risk. The Board will publish the reports after each Board meeting for all members to see.

A Program Management Office (PMO) will be established with a program manager to oversight the delivery, prepare reports, manage the budget, supervise project managers and liaise with project and task sponsors and owners.

## Budget

The Program's budget will be approved by the Board on the recommendation of the CEO. It will be in three tranches, aligned to the three Strategic Plan phases. A detailed budget estimate is at Annexure B2. The summary is as follows:

	Estimate: \$10,075,000 Commence FY 2021/2022
	Estimate: \$5,560,000 Commence FY 2023/2024
	Estimate: \$997,500 Commence FY 2025/2026

\*A 'Program' is a group of projects and tasks. The Strategic Plan initiatives will be grouped into projects, or if a project structure is not warranted, the initiative will be delivered simply as a 'task.' Each initiative/project will have a sponsoring (accountable) executive who will be required to get Program approval for funding and commencement based upon a detailed project plan which must include benefits realisation.

# OUR SHARED VALUES & SUPPORT PILLARS

Our values promote positive behaviours and create a caring team culture. They guide how we support veterans, other members, the wider community, and how we make decisions. The Values will underpin how we realise the Vision and Purpose. Also, the RSL foundations, based upon the long history of the organisation, further support our values and describe our purpose.



## Respect

Treat others as you want to be treated.

Appreciate the value individuals bring.

Show kindness, courtesy and encouragement.

Foster an environment where everyone is comfortable to express their opinions and ideas.



## Teamwork

Build a culture of collaboration.

Work together as one RSL, to be more effective, efficient and fulfilled.

Empower each other's individual strengths, celebrate successes and learn from our mistakes.



## Courage

Do what is right

Make tough decisions

Concerned about the needs and wishes of others over own

Understand the contribution of those we are here to support, putting them at the centre of everything we do.



## Trust

Display honesty, keep promises, follow through.

Stand behind whatever you are asking someone else to do.

Recognise when personal aspirations or relationships inhibit integrity and decision making.

Do the right thing even when there is pressure not to.

## FOUNDATIONS – WHAT THE RSL IS BUILT UPON.

Commemoration Welfare Mateship Advocacy

## CODE OF CONDUCT

The values and pillars underpin RSL NSW's Code of Conduct which sets the tone and expectations of members. Members are renowned for community leadership and the community recognises the brand and what it stands for.



# GOAL 1

Stand for veterans and their families.

## Our Priority Initiatives

1.1	Supporting the Joint Transition Authority (JTA), connect transitioning veterans to the wider local community through sub-Branches, and utilising current research, know the most in-demand transition and support services and make sure they are accessible through the RSL NSW network, <sup>1</sup> state-wide for veterans and families.
1.2	Position the RSL (NSW and nationwide) as the leading and coordinating Ex Service Organisation (ESO).
1.3	Enshrine and market the role of RSL NSW as a connector and companion for transitioning veterans to ensure they access consistent quality services across the entire state.
1.4	In conjunction with other States, provide free RSL NSW membership to all discharging or retiring ADF members, and in NSW, for all members from 2022. <sup>2</sup>
1.5	Through effective District coordination, establish links to current serving personnel to make them aware of the RSL; what it stands for, what it does, and what it means to be a member.
1.6	In establishing the 'Services Catalogue' (Item 4.1) provide guidance for sub-Branches to connect transitioning or new arrival veterans to the local community, and all the local services and amenities.

## How we measure success

- 1a. By 2022, there is a seamless referral pathway to service providers meeting determined transition needs in place (community based support services, ESOs and private sector products and services).
- 1b. By 2022, RSL NSW has an established process and method of engagement for service providers that offer products and services meeting veteran family transition needs.<sup>1</sup>
- 1c. By December 2021, with other States and RSL National, establish an RSL MOU with the JTA to enable a national approach to supporting transitioning veterans and their families.
- 1d. By 2022, every discharging or retiring ADF member settling in NSW knows how to connect with an RSL NSW sub-Branch, and is assigned a volunteer Wellbeing Support Officer (RSL NSW Member) from across the sub-Branch network.
- 1e. By 2022, Wellbeing Support Officers (WSO) (see 1.7) are in every sub-Branch to provide connection to camaraderie, support services, and the wider community and its services to ease transition and provide assurance.
- 1f. By 2023, an effective network is established, coordinated by respective Districts to establish an ongoing presence in each ADF base in NSW.

<sup>1</sup> See Annexure A – RSL NSW Network (Concept) where the sub-Branch is at the centre of how we support veterans and their families.

<sup>2</sup> Dependent on Board decision and position regarding future funding model so National or State capitation fees are not required.



# GOAL 1 (CONTINUED)

Stand for veterans and their families.

## Our Priority Initiatives

1.7	Establish, train and maintain the capability for RSL NSW volunteers (members) to act as Wellbeing Support Officers (WSO), who connect veterans to services and maintain relationships to ensure desired outcomes.
1.8	Leverage Australian Forces Overseas Fund (AFOF), and RSL related entities such as RSL DefenceCare and RSL LifeCare to facilitate strong RSL presence at all ADF activities, and related veterans' events, to create awareness of RSL NSW and its role.
1.9	Position volunteer Wellbeing Support Officers (WSO) on or near ADF bases, working in conjunction with the JTA to support current serving and transitioning ADF personnel.
1.10	Per 5.9 Establish a full-time cadre staff (e.g. secretary) with each District to train sub-Branch volunteers to ensure continuity, consistency and quality of support. E.g. the Cadre train WSO volunteers on the access and use of the Catalogue of Services.
1.11	Support current ATDP pension advocate volunteers and link them to RSLDefenceCare as RSL's leading pension advocacy service to provide training and support and transition the function to accessible RSL DefenceCare paid advocates by 2027.

## How we measure success

- 1g. By 2023, RSL sub-Branch members trained under ADTP as Wellbeing Support Officers (WSO) are able to connect veterans and their families online, on phone or in person) to services such as:
  - i) training and employment pathways
  - ii) housing providers
  - iii) full range of counselling and health services
  - iv) claims and pension advocacy, etc. (see Catalogue of Services at 4.1).
- 1h. By 2023, RSL NSW will provide 24/7 access to services that support veterans, by phone or online.<sup>1</sup>
- 1i. By 2023 each RSL NSW District has a full time cadre staff or 'secretary'.
- 1j. By 2022, tracking service delivery customer satisfaction and outcomes measurement scores to validate that veteran needs are being met, using a Net Promoter score or a social outcome (wellbeing measure).
- 1k. By 2027, pension advocates will be full time paid officers, located with RSL DefenceCare and accessible by all sub-Branches. Veterans in need will be connected to pension advocates and supported throughout by sub-Branch Wellbeing Support Officer volunteers who are trained under ATDP framework.

<sup>1</sup> This will be done by rostering sub-Branches over a 12 month period for 'out of hours' contacts.





# GOAL 2

Tell our story so everyone knows what we do and why we do it.

## Our Priority Initiatives

2.1	Review and establish a common approach for advocacy (lobbying) activities, undertaken by RSL NSW, to ensure rapid escalation of issues as required.
2.2	Engage veterans in the identification of issues affecting them and their families and deliver representation and advocacy for them.
2.3	Actively engage veteran research and government policy, to identify supporting arguments to advocate for veterans health and wellbeing.
2.4	Advocate for NSW veterans utilising the most effective (not necessarily most publicly visible) method, including building and leveraging relationships of influence.
2.5	Deliver an effective strategic and tactical communications and coordination capability. This is to include a prominent RSL presence at Defence and community activities such as transition seminars and Defence Community Organisation (DCO) events to enshrine the relevance of RSL NSW to serving ADF personnel and the wider community. Current serving personnel to be proactively engaged.

## How we measure success

- 2a. By 2022, a streamlined process is in place to capture and enable RSL NSW to provide timely responses to issues raised by RSL members in NSW, visible to all.
- 2b. By 2022, clearly defined advocacy priority areas and objectives are determined and reviewed on an annual basis. These are published annually and conveyed to RSL National where appropriate to be considered for national advocacy.
- 2c. By 2022, working effectively with RSL National, and other states, to achieve positive advocacy outcomes for the whole RSL membership.
- 2d. By 2022, all issues concerning veterans' welfare requiring Commonwealth government policy change, including performance of Defence and DVA at the operational level, are effectively advocated by RSL National and reported effectively to members.
- 2e. By 2022, the public are aware of what RSL NSW does to meet veteran needs. There is a clear narrative to support fundraising and public volunteer engagement which explains what the RSL does (in conjunction with initiatives 3.6 and 6.4).
- 2f. By 2026, increased public, member and general veteran community awareness of RSL NSW activities measured by an external survey and qualitative feedback. Baseline to be established in 2021 with pulse surveys every year before 2026.



# GOAL 2 (CONTINUED)

Tell our story so everyone knows what we do and why we do it.

## Our Priority Initiatives

2.6	Reposition the RSL brand, in collaboration with other jurisdictions, and address the brand confusion between clubs and sub-Branches in NSW. Position the brand as relevant and aligned to RSL's core purpose of supporting veterans and their families. <sup>1,2</sup>
2.7	Build appropriate messaging and language to ensure consistent understanding of RSL NSW's purpose of helping others and each other including camaraderie, especially its social media and online presence.
2.8	Identify and develop appropriate communication channels for members, veterans and the general public.
2.9	Maintain public position statements and implement an annual communications and marketing plan with regular validation and, if necessary, update the plan.

## How we measure success

- 2g. Led by the District President's Council and supported by ANZAC House, by December 2021 there is a single coordinated RSL NSW presence at every ADF transition activity, careers show or other major community event, to create public awareness of what the RSL does and what it means to be a member.
- 2h. By 2023, with an agreed measure and in conjunction with RSL National, there is a regular survey conducted to test brand awareness.
- 2i. By 2021, RSL NSW has a Communications and Marketing Plan and there is proactive local messaging support available for nominated spokespeople state-wide.
- 2j. By 2022 RSL NSW has over 20,000 followers across all social platforms.

1 To be achieved through collaboration (by an MOU or similar) with the Service Clubs Association, Clubs NSW and other RSL jurisdictions. Associated clubs play a significant historic and supportive role for all sub -Branches, as well as funding. Clubs can provide access for sub-Branch members to gyms for instance.

2 If RSL National undertakes this brand management initiative, RSL NSW would support it as substitute or complementary to 2.6.



## GOAL 3

Grow membership to support each other and have fun, and help all veterans and their families in need.

### Our Priority Initiatives

3.1	Research undertaken (or use completed research) to fully understand what veterans and their families want from RSL NSW, and ensure our membership offering is contemporary.
3.2	Develop and implement a new 'volunteer' or Wellbeing Support Officer membership offering, while maintaining the traditional veteran (service) member.
3.3	By 2022, a member recruitment strategy is board approved, including a definition of what RSL NSW requires from membership (volunteers, supporters, donors) and what RSL NSW offers in return.
3.4	By 2022, selected Districts (adjacent to ADF bases) implement a system that identifies a lead 'RSL NSW Liaison Officer' to ensure a strong coordinated RSL presence (see 1.8) and engagement at every appropriate unit or area event, and a means to connect serving people to sub-Branches.
3.5	Establish an ongoing validation process for the veteran services offerings, from veterans and their families who are connected to services in the Catalogue by RSL NSW.
3.6	Invite all Vietnam veterans associations and related organisations, and services associations to become part of RSL NSW.

### How we measure success

- 3a. By 2022, publish research findings on what veterans and families want from RSL, and details of membership offerings.
- 3b. By 2022 the Wellbeing Support Officer category of membership is formally adopted and recognises ADTP-trained members and competent users of the RSL NSW catalogue of services.
- 3c. RSL NSW engagement with Gen Z, Y, X age groups increases by 2022, and membership growth of these generations increases by 20% per year from 2023 onwards, from 2020 baseline.
- 3d. By 2023, new members can instantly join online, with service records validated electronically.



## GOAL 3 (CONTINUED)

Grow membership to support each other and have fun, and help all veterans and their families in need.

### Our Priority Initiatives

3.7	Deliver a new common membership management system, and Customer Relationship Management (CRM) system to all sub-Branches that can enable reporting on membership matters and charitable purpose performance.
3.8	After piloting, implement an inter sub-Branch sport, recreation or other fun and engaging activities program, promoting activities that attract new members of all ages and ability.
3.9	Working with RSL and services clubs, identify all club members with service experience and promote joining the associated sub-Branch to support and deliver the charitable purpose.
3.10	Implement programs for younger members to be carers for older members to ensure older members can attend camaraderie and other sub-Branch activities including commemorations and inter-sub-Branch sport and recreation, even as spectators.

### How we measure success

- 3e. By 2024, there are no membership fees, no membership cards, just badges and electronic membership records that can be accessed from a smartphone.
- 3f. By 2023, RSL NSW is offered the opportunity to participate in and has a presence at 80% of NSW ADF events to promote RSL purpose and relevance after discharge/retirement.
- 3g. By 2023, there is a reporting system regarding performance against objectives for all RSL NSW presence and recruiting activities on ADF bases in NSW
- 3h. By 2023 all Vietnam veteran organisations and service associations in NSW are integrated into RSL NSW and recognised.



# GOAL 4

Through collaboration and support, connect veterans to services.

## Our Priority Initiatives

4.1	Identify the best practice approaches, services and products available to support veterans and their families, and produce an electronic RSL NSW Services and Product Catalogue (see 5.10); maintaining knowledge and currency through an ongoing review and maintenance process.
4.2	Participate in dialogue across RSL organisations at state/territory and national level to work collaboratively and move towards a national network of RSL accessed or provided services for veterans and their families.
4.3	Develop an operational framework: <ul style="list-style-type: none"><li>i) For the development and sharing of standardised services across boundaries (to ensure seamless transfer when veterans relocate).</li><li>ii) To establish Veteran Centres<sup>1</sup> in collaboration with RSL NSW related entities to provide veteran services and connect to sub-Branches.</li><li>iii) To enable transferable membership across RSL State Branches and sub-Branches, nationally.</li></ul>

## How we measure success

- 4a. Inaugural Catalogue released for use across all sub-Branches by Dec 2021.
- 4b. By 2026 RSL becomes an inter-connected national organisation where veterans and families in need can easily access services delivered by RSL or related organisations' services.
- 4c. By 2023, there is sharing of information to improve products and services for veterans.
- 4d. By 2024, membership will be portable within Australia.
- 4e. By 2027, Veteran (Wellbeing) Centres will be located adjacent to or on major ADF bases in NSW.

<sup>1</sup> Veterans' Centres are strategically located around the State where veterans can receive face-to-face support and provide an access point for all services. RSL related entities provide centre leadership and the Centres coordinate and collaborate with local sub-Branches and the wider RSL NSW network.



## GOAL 4 (CONTINUED)

Through collaboration and support, connect veterans to services.

### Our Priority Initiatives

4.4	Establish a national covenant between RSL organisations, including licensed RSL or services clubs, to ensure highest priority for financial and non-financial support to veterans and their families. <sup>1</sup>
4.5	Collaborate with other States and RSL National to deliver a National Strategic Plan that 'dove-tails' with RSL NSW's plan.
4.6	With the ongoing support of DVA, maintain and develop RSL Day Clubs at all sub-Branches that wish to participate in the activity.

### How we measure success

- 4f. System and covenant in place that enables resources to be channeled to sub-Branches to support charitable purpose. Increase from 2020 baseline (total community grants to veteran related activity) by 200% by 2026.
- 4g. RSL NSW strategic plan aligned with National RSL strategic plan with no duplicated effort.
- 4h. By 2023 all Day Clubs under the leadership of RSL NSW sub-Branches follow renewed and consistent guidelines for successful programs that engage veterans and their families across all communities.

<sup>1</sup> RSL NSW to work with the RSL and Services Clubs Association and Clubs NSW to form a strong alliance of collaboration and respect, and enter into a new and constantly reviewed MOU(s). Linked to 2.6.



# GOAL 5

Implement an optimised and sustainable operating and business model.

## Our Priority Initiatives

5.1	Sub-Branches support and work with ANZAC House (State Branch) to ensure the implementation of the RSL NSW strategic plan. State Branch seeks volunteer support from the membership for reference and/or steering groups for all projects. See 5.15.
5.2	Determine, and implement, the 'One RSL' operating model to deliver the vision and purpose for veterans and their families placing sub-Branches at the centre of activities, working collaboratively together.
5.3	Determine the current League administration cost (state-wide) as a baseline, by June 2021 with a view to achieving a 25% efficiency gain by 2026.
5.4	By 2022, provide consistent systems and the required training support, for accounting, to all sub-Branches.
5.5	Investigate and implement, with support of a member reference group, commercial enterprises such as a lottery to provide new reliable funding streams (surplus) to support the entire League in NSW; that complements local public fundraising.

## How we measure success

- 5a. By April 2021, RSL NSW has committed resources to commence a five-year implementation of the strategic plan in stages and adopted a funding model so all available resources can be mobilised to enable the RSL in NSW to be the leading ESO.
- 5b. By 2026, RSL NSW is financially sustainable without significant reliance on public fundraising from the community.
- 5c. By 2023, the adopted operating model will enable the identification of operational efficiencies to be achieved by 2026. The One RSL operating model must improve administration efficiency from the baseline by 25% (to be measured by benefits realisation from the business case).
- 5d. By 2023, RSL NSW can accurately report expenditure on common categories, by sub-Branch and all sub-Branches operate with provided cloud-based accounting software and trained volunteers.
- 5e. 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 of members by Wellbeing Support Officers.
- 5f. By 2023, RSL NSW is totally transparent, by location and cost centre, on financial spending.



# GOAL 5 (CONTINUED)

Implement an optimised and sustainable operating and business model.

## Our Priority Initiatives

5.6	Implement a KPI and reporting framework against the charitable purpose for all sub-Branches to ensure available resources are being used to support veterans and their families.
5.7	Implement a state-wide governance and regulatory compliance training program to support sub-Branches.
5.8	Establish a full-time grants application and advisory function to support sub-Branches.
5.9	Establish a cadre of full-time staff to support and train volunteers in sub-Branches to build the capability of RSL NSW including fulfilling full-time secretarial function to support each district. <sup>1</sup>
5.10	Establish a team to produce and continually review an online, 'RSL NSW Catalogue of Services' in conjunction with initiative 4.1.
5.11	With Board approved Terms of Reference, supported by an independent person, rationalise the number of Districts on a sustainability and efficacy basis, and ensure sustainable RSL presence in all centres by consolidating unsustainable sub-Branches as Chapters or amalgamating as larger sub-Branches. <sup>2</sup>

## How we measure success

- 5g. In conjunction with 5b, by 2025, RSL NSW has established commercial funding streams to support revenue growth, so it can operate without reliance on fundraising from the community, including a minimum funding support to RSL DefenceCare of \$1.5m/year increasing annually as services increase.
- 5h. KPIs determined and implemented by June 2021 and RSL NSW has a fundraising authority and DGR charity status by 30 June 2021.
- 5i. Compliance support and reporting mechanism in place by December 2023.
- 5j. Grants support and advisory function established by June 2023.
- 5k. Full-time cadre staff (District Secretary) in place by Jul 2023. Positive feedback from sub-Branch executives from survey conducted in June 2024.
- 5l. Catalogue writing and maintenance team in place by July 2021, Catalogue released in December 21 (see 4.1).
- 5m. District numbers reduced – target 10 or fewer Districts by 2022.

<sup>1</sup> The 'cadre' staff could be the full-time paid secretary. One per District, total cost approx. \$1 m/year if 10 Districts.

<sup>2</sup> The number of Districts is to be determined by the Board, but ideally no more than 10. Future meetings should be conducted via technology and ANZAC House would support this with equipment and training where necessary.





# GOAL 5 (CONTINUED)

Implement an optimised and sustainable operating and business model.

## Our Priority Initiatives

5.12	Establish a training partner, such as TAFE NSW, to provide training for those members holding office bearer positions.
5.13	RSL NSW (State Branch) has identified an affordable and appropriate headquarters location providing the appropriate accommodation and includes an option to accommodate other ESOs or partners, that will enable synergy and collaboration.
5.14	Establish a Board fundraising committee to raise funds for RSL NSW, state-wide but coordinated with RSL National.
5.15	Sub-Branches solely responsible for local fundraising, and retaining all funds raised locally. ANZAC House to coordinate campaigns, seek best options for discounted tokens and aligned with RSL National to support sub-Branches.
5.16	The strategic plan implementation is fully funded through the establishment of a collaborative 'pooled' type funding mechanism and is to include a Program Management Office (PMO) and is to incorporate an annual review process. <sup>1,2</sup>

## How we measure success

- 5n. Training partner in place by July 2023.
- 5o. Current rented premises to be vacated by September 2021, a new permanent ANZAC House is identified and occupied by Dec 2024.
- 5p. Board fundraising committee established by March 2021.
- 5q. All major fundraising and commemoration activities are supported by nationally coordinated campaigns, using traditional and social media channels.
- 5r. Fundraising outcomes are to be a critical KPI to be determined by the Board.

1 Most initiatives will be grouped into projects. Projects will have a dedicated paid project manager. Each project will have a Steering Committee comprising volunteer members, and an ANZAC House senior staff member as an accountable project sponsor. With more than one project, they will be managed as a 'Program.' The CEO will sponsor the Program (accountable executive) and it will be steered (overseen) by the ANZAC House leadership team. The Program will report bi-monthly to the Board and then members. Initiatives that can be implemented without cost/complexity of project will be delivered as an initiative by an accountable staff member. The Board will formally review the Program annually.

2 See Attachment B1 for 'Collaborative' funding approach.



# GOAL 6

Commemorate and pay respect.

## Our Priority Initiatives

6.1	Maintain and grow RSL NSW's position as the leader in commemoration and custodian of the ANZAC spirit.
6.2	Produce a common suite of support products and guidance material for commemorative activities undertaken and supported by RSL NSW. All products and guidance material is to be readily accessible by all sub-Branches or Chapters.
6.3	Engage with and regularly inform communities (through public and private institutions) of the commemorative activities undertaken and supported by RSL NSW.
6.4	Educate the NSW community, supported by common learning material, particularly through the school system, of the reasons for commemoration, the significance to veterans and the Australian nation and the role RSL NSW plays. Maintain position as custodian of the ANZAC spirit.

## How we measure success

- 6a. By 2026, the format and funding to support commemoration activity delivery is consistent across NSW, adjusted to local conditions and population.
- 6b. The commemoration activities undertaken by the RSL in NSW are clearly attributed to the RSL brand and public awareness of commemoration is increased by 60% by 2025, from the baseline in 2021.
- 6c. By 2022, commemoration activities are relevant to contemporary Australian society, and well attended by the general public and younger Australians, measured by crowd attendance.
- 6d. By 2026, RSL in NSW is engaged with 100% of NSW's 129 councils, to promote commemoration services, and build brand associations for RSL (which are distinct from current RSL/Service Club association with the brand).
- 6e. By 2026, achieve increased engagement (local RSL relationship) with NSW schools to 50% (2019 total schools in NSW = 3,186).



# ANNEXURE A

## RSL NSW Network Concept



**Modernised approach to connect**

**Ex-Service Clubs**  
as a connector & financial supporter

**RSL NSW sub-Branch at the centre**

- Camaraderie, sport, recreation, and meetings.
- Complete 'concealer' service to access veteran services through Wellbeing Support Officers.
- Local commemoration, community events.
- Local fundraising and financial support to local veteran service initiatives.



Clubs proactively provide the means to connect veteran enquiries to the corresponding sub-Branch. sub-Branch 'pension' welfare officers' remain supported during transition to full-time paid pension advocates by 2027 (see below)



## Veteran and Veteran Family Support Services

<p><b>RSL DefenceCare</b> <i>Always there</i></p> <ul style="list-style-type: none"> <li>• Claims advocacy</li> <li>• Welfare and community support</li> <li>• Homeless accommodation pathway</li> <li>• Employment program</li> <li>• Transition of current sub-Branch "Pension Officers" over five years.</li> <li>• RSL and Ex-Service Clubs</li> <li>• Co-membership</li> <li>• Gymsnasiums / access to services</li> <li>• Activities</li> <li>• Financial support</li> </ul> <p><b>(Nowra) Veterans' Wellbeing Centre (a)</b> Connection to a full array of services All Defence Care services</p>	<p><b>RSL LifeCare</b></p> <p><b>Homes for Heroes</b> <i>Help for heroes in need</i></p> <ul style="list-style-type: none"> <li>• Aged care</li> <li>• Home care</li> <li>• Retirement villages</li> </ul> <p><b>RSL NSW Veteran Respite Accommodation</b> Subsidised accommodation by category of veteran need, including sub-Branch members</p> <ul style="list-style-type: none"> <li>• All sub-Branch owned holiday accommodation in the "managed pool"</li> <li>• Net returns to owning sub-Branches</li> </ul>	<p><b>Veteran Sport Australia</b> Connects to sport and recreation and competitive events, camps and games</p> <p><b>LEGACY</b> Department of Veterans' Affairs</p> <ul style="list-style-type: none"> <li>• Benefits and payments</li> <li>• Health and wellbeing</li> <li>• Consultation and grants</li> <li>• Links to national providers</li> <li>• Commemoration, memorials, war graves</li> </ul>	<p><b>NSW Government</b></p> <ul style="list-style-type: none"> <li>• Office for Veterans Affairs (OVA)</li> <li>• Veteran employment program</li> <li>• Veteran education program</li> </ul> <p><b>NSW Health</b></p> <ul style="list-style-type: none"> <li>• National Centre for Veterans' Healthcare</li> <li>• DVA funded healthcare</li> </ul> <p><b>NATIONAL CENTRE FOR VETERANS' HEALTHCARE</b></p> <ul style="list-style-type: none"> <li>• Rehabilitation and aged care</li> <li>• Cancer centre</li> <li>• Health and wellbeing</li> <li>• Clinical research</li> </ul>	<p><b>WITH YOU WITH ME</b> Veteran training and employment</p> <p><b>TAFE NSW</b></p> <ul style="list-style-type: none"> <li>• Ranks to Recognition (RPL)</li> <li>• Funding for courses</li> <li>• Training for sub-Branch office holders</li> <li>• Video conferencing and meeting locations</li> </ul> <p><b>BRAVERY TRUST</b> Emergency financial relief for essential - food, rent, bills, education, clothing and transport</p> <p><b>SWISS8</b></p>
<p><b>Other Services Associations invited to join the Group</b></p>	<p><b>Plus 450 NSW Ex/Veteran Service Organisations</b></p>	<p><b>SOLDIER ON</b></p> <ul style="list-style-type: none"> <li>• Health and wellbeing - psychology social sporting activities</li> <li>• Participation - social activities, programs to create connections</li> </ul>	<p><b>OPEN ARMS</b></p> <ul style="list-style-type: none"> <li>• Veterans and families counselling</li> <li>• Group programs</li> <li>• Lived experience peers, war graves</li> </ul> <p><b>AUSTRALIAN WAR WIDOWS NSW LTD</b></p> <ul style="list-style-type: none"> <li>• Advocacy, Support and Advice, Guild and Social Clubs, Friendship Line, Transport, Guild Digest, Paid Training, Events</li> </ul>	<p><b>SWISS8</b></p>

Note: This is a concept diagram, for discussion purposes only. Version 2.3

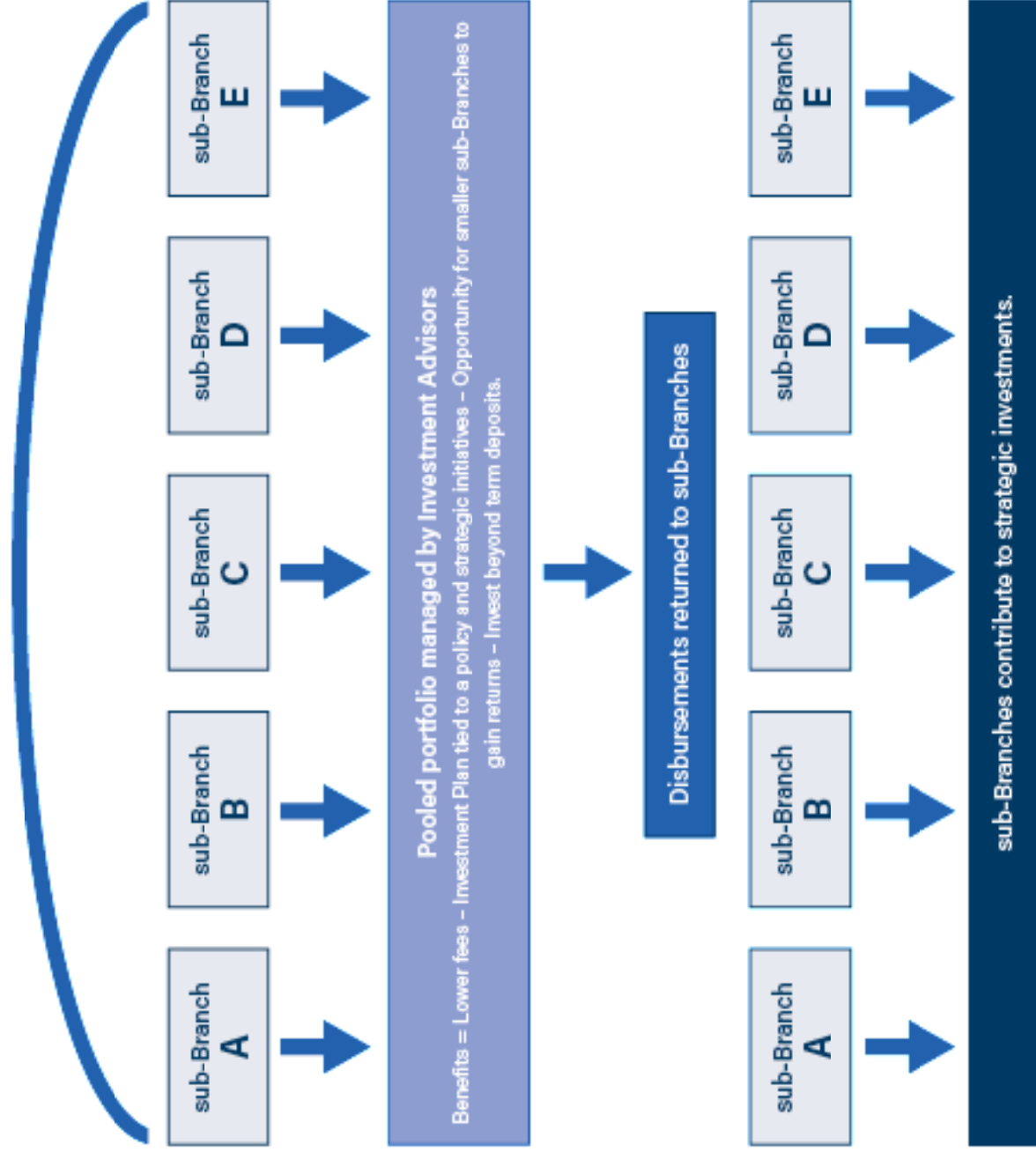


# ANNEXURE B1

## Financial Resource Management Concept

# FINANCIAL RESOURCE MANAGEMENT CONCEPT

## INVESTMENT POLICY/ASSET ALLOCATION



### Executive Summary

- Currently there is approximately \$250m managed across the League by financial advisors/brokers
- Based on a sample of the five larger sub-Branches, the average fee is 1.0% pa; applied to the \$250m this equates to \$2.5m
- ANZAC House currently manages a small diversified portfolio and pays 0.32% in fees pa; applied to the \$250m this equates to \$800K – a potential opportunity to save \$1.8m per year
- ANZAC House is looking at opportunities for a collective investment fund, to take advantage of lower fees – allowing smaller sub-Branches to participate in greater returns and to facilitate the funding of activities across the state
- The long-term investment objectives of the fund will be to deliver capital appreciation as well as annual disbursements
- Annual disbursements can include for example, funding for Strategic Plan, Tribunal, Staff to support Districts and sub-Branches, scholarships

### Pooled portfolio managed by Investment Advisors

Benefits = Lower fees – Investment Plan tied to a policy and strategic initiatives – Opportunity for smaller sub-Branches to gain returns – Invest beyond term deposits.

### Disbursements returned to sub-Branches

sub-Branches contribute to strategic investments.



# ANNEXURE B2

## Budget

As at November 2020

## 2021-2026 RSL NSW STRATEGIC PLAN BUDGET VERSION 2.3 (FINAL DRAFT)

Goal	Initiative	Link	Phase	21/22	22/23	23/24	24/25	25/26	Total
Goal 1 Stand for Veterans and their Families	1.1	4.1	1						-
	1.2		3						-
	1.3		2						-
	1.4		1						-
	1.5		1						-
	1.6	4.1	1						-
	1.7	1.10	1						-
	1.8		2						-
	1.9		2						-
	1.10		1	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000
	1.11		1	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$500,000
Goal 2 Tell our story so everyone knows what we do and why we do it	2.1		2						-
	2.2		2						-
	2.3		2						-
	2.4		2						-
	2.5		1	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$500,000
	2.6	2.5	1						-
	2.7		1						-
	2.8		1						-
	2.9		1						-
	3.1		2		\$50,000				\$50,000
Goal 3 Grow membership to support each other and have fun, and help all veterans and their families in need	3.2		1						-
	3.3		2	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$100,000
	3.4		2						-
	3.5	4.1	3		\$150,000	\$62,500	\$62,500	\$62,500	\$187,500
	3.6		2		\$150,000				\$150,000
	3.7		1	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000	\$300,000
	3.8		1	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
	3.9		2						-
	3.10		2		\$20,000	\$20,000	\$20,000	\$20,000	\$80,000



Goal	Initiative	Link	Phase	21/22	22/23	23/24	24/25	25/26	Total
Goal 4 Through collaboration and support, connect veterans to services	4.1		1	\$690,000	\$690,000	\$690,000	\$690,000	\$690,000	\$3,450,000
	4.2		2						-
	4.3i		3			\$50,000			\$50,000
	4.3ii		2		\$50,000	\$50,000	\$50,000		\$150,000
	4.3iii		3						-
	4.4		3						-
	4.5		1						-
	4.6		1						-
Goal 5 Implement an optimised and sustainable operating and business model	5.1	5.15	1	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$125,000
	5.2		2						
	5.3		2		\$160,000	\$160,000			\$320,000
	5.4		2		\$450,000	\$450,000	\$450,000		\$1,350,000
	5.5		3			\$200,000	\$200,000		\$400,000
	5.6	3.7	1						-
	5.7		3						-
	5.8		2						-
	5.9	1.10	2						-
	5.10	4.1	1						-
	5.11		2						-
	5.12		2						-
	5.13		1						-
5.14		1						-	
5.15		2						-	
5.16		2		\$600,000	\$600,000	\$600,000	\$600,000	\$600,000	\$3,000,000
Goal 6 Commemorate and pay respect	6.1		1						-
	6.2		2		\$180,000	\$180,000			\$360,000
	6.3		3						-
	6.4		3			\$180,000	\$180,000		\$360,000
				\$2,515,000	\$3,825,000	\$4,117,500	\$3,527,500	\$2,647,500	\$16,632,500



# ANNEXURE C

## Plan on a Page



# STRATEGIC PLAN 2021-2026

## OUR VISION

By 2026 every veteran\* in NSW knows what the RSL stands for, what it does, and wants to be involved as a member.

## RSL NSW FOUNDATIONS

What is the RSL built upon?

Commemoration | Welfare  
Mateship | Advocacy

## OUR MOTTO

One RSL—  
working together,  
delivering locally.

## RSL VALUES

The values and pillars underpin the RSL NSW Code of Conduct which sets the tone and expectations of members. Members are renowned for community leadership and the community recognises the brand and what it stands for.



Respect



Teamwork



Courage



Trust



Goal 1

Stand for veterans and their families.



Goal 2

Tell our story so everyone knows what we do and why we do it.



Goal 3

Grow membership to support each other and have fun and help all veterans and their families in need.



Goal 4

Through collaboration and support, connect veterans to services.



Goal 5

Implement an optimised and sustainable operating business model.



Goal 6

Commemorate and pay respect.

Number of initiatives

11

9

10

6

16

4

Key Outcomes

RSL NSW will effectively advocate for veterans and facilitate training for members to seamlessly connect veterans and their families to services and products.

Everyone in the community knows what the RSL is and does for veterans, and promote the RSL as the leading advocacy service for Australian veterans.

New members join RSL NSW as they want to help veterans, enjoy camaraderie, participate in interactive sub-Branch events, competitions, and programs.

RSL NSW is the leading veterans' charity and its catalogue of services shows the benefits of collaboration by veterans in need rapidly accessing services regardless of where they are located.

RSL NSW sub-Branches and ANZAC House working collaboratively to implement the goals of the Plan to ensure a sustainable future for the organisation.

RSL NSW sub-Branches are provided with a suite of resources to remain the leader of commemorative and educational activities.

Phase 1  
2021-22

Phase 2  
2023-24

Phase 3  
2025-26

\*A 'veteran' is any person who is serving in the ADF, or has served in Australia's or allied armed forces.



# ANNEXURE D

## The Case For Change and What Success Will Look Like

## THE CASE FOR CHANGE

As we move into 2021, less than 10% of RSL NSW's 30,000 service members are under the age of 55, and less than 1,000 are under 39 years of age. With 89% of current RSL NSW members 55 years or older (in the Boomer or Builder generations), including 32% who are over the Australian male average life expectancy age, it is clear that without intervention, RSL NSW will no longer be a viable organisation 10 to 18 years from now.

Alongside an ageing membership lies a lack of clarity of what we stand for, or a common understanding of the League's purpose – who we really are, and the way we can really make a difference. With no clear foundational pieces, it also means there is no strategic vision of what we want the organisation to be in the future. There are no common values across RSL NSW. Agreed values are needed to underpin a plan for the future.

According to research conducted by SVA, the RSL brand nationally is associated with social clubs, pokies, old people, cheap food and cheap drinks. This perception is contributing to a lack of understanding of what the RSL is or does to support veterans, as well as 'muddying the waters' when it comes to fundraising. It is a national issue that also impacts significantly on our lack of relevance, especially to the younger veteran who belongs to a generation that doesn't so easily relate to social clubs, or who rarely joins a membership organisation. Hence, we have seen a decline across the board in Lions, Rotary and other similar organisations. Younger generations use social media to generate influence, and increasingly they seem to prefer to interact with other people online rather than face to face.

A long period of introspection and isolation in sub-Branches, a lack of trust in strategic leadership after a very public inquiry, combined with the void in relevance to the younger generations, has probably helped create the proliferation of alternative smaller Ex Service Organisations (ESOs) and charities. The data indicates these organisations are providing the support and 'online' camaraderie younger veterans are searching for. These new ESOs are also influencing government policy makers given a clearer link directly to the 'modern day veteran'.

Increasingly, these new organisations are not asking for membership, but rather just focusing on the delivery of key services. Data indicates that very few exiting or retiring ADF personnel are joining an ESO, as they either only want to access certain services or have

the opportunity to support fellow veterans. There is an argument, however, that they are missing what the RSL can provide, which is the opportunity for genuine face-to-face camaraderie and enrichment through volunteering – something the RSL in NSW needs to consider.

There is a clear place for a lead ESO. This is noted in the 2019 Productivity Commission report. While specialist ESOs can play a part in the transition of veterans to civilian life, surely the RSL nationally needs to consider what differentiates it from the myriad of ESOs and other charities helping veterans. It is the opportunity that continuous and welcoming connections provide, as opposed to a momentary relationship with a specialist service.

The scale, reach and esteemed record of the RSL in Australia provides the basis for showing leadership. The RSL in NSW must seize the initiative, modernise and earn its position as the leading veteran's organisation. Rather than persist with local self-interest and introspection, it must work as one to be recognised as a leader and the organisation veterans wish to join and become involved with.

Internally, we have seen the emergence of wealthy sub-Branches by virtue of their location and benefits realised from increases in property values. Over 80% of the League's wealth rests with less than 20% of its members. This has created an equality challenge and additional pressure on other not so fortunate sub-Branches, predominantly in regional and rural areas, who are increasingly relying on the wealthier metropolitan sub-Branches for financial support. Poorer sub-Branches are having to fundraise, while others feel they do not need to.

Declining RSL membership in NSW, especially in population stressed rural areas, make many sub-Branches unsustainable. It's critical to maintain a presence in all these areas because the League's charter includes remembering and commemoration. As such there is no area in NSW that should not be serviced by the RSL. A new way of delivering an RSL presence in NSW, particularly in areas of low membership, must be found.

Similarly, other states, Queensland through its lottery for instance, have developed strong income streams to fund services and reduce reliance on increasingly competitive public fundraising. There is evidence that RSL NSW has not been able to replicate this because of a lack of

collaboration, insufficient trust in strategic leadership, and arguably too much self-interest in various quarters.

RSL NSW has a proud history and is an iconic and respected organisation. But a new modern way needs to be decided to address the declining membership. Delegates at the 2019 state congress unanimously agreed that the RSL in NSW must remain a membership organisation, and a charity. Other issues such as financial sustainability and greater collaboration must also be addressed.

Perhaps above all, the organisation must confidently reassert itself as the leader for the veteran community. The symbol of the RSL in NSW (and in Australia) must be recognisable as clearly and proudly standing for veterans

and their families. It must be as relevant into the future as it was immediately after the Great War.

This will require a new direction, and a renewed commitment to collaboration and trust. The League will have to think strategically as one, while passionately and fearlessly acting locally. If we want the RSL in NSW to be here for the next 100 years we need to work as one and act now to respond to the threats to our future.

## WHAT SUCCESS WILL LOOK LIKE IMPLEMENTING THE STRATEGIC PLAN

In 2027, communities across NSW know what the RSL stands for, what it does and why it is a valued and leading veteran organisation within our community. At its heart, it is here to provide camaraderie, commemoration and connection to services for all veterans and their families.

Declining membership is reversed, net numbers are increasing by about 10% a year, and the participation of new younger veterans lowers the average membership age from 78 to 60.

Existing veterans, and those who leave the Australian armed forces, know that by becoming part of RSL NSW they can have a Wellbeing Support Officer (WSO), regardless of where they choose to settle in NSW. This sponsor will guide them through the challenging journey of returning to civilian life and how to deal with the ups and downs of life after service in the armed forces. Veterans and their families will be connected to their new communities through their local sub-Branch, just like the Defence Community Organisation did while they were serving.

Our volunteer sub-Branch Wellbeing Support Officers, aided by a comprehensive catalogue, know how to guide all veterans towards where they can access the professional services they need, acting like a platinum 'concierge' service. They will retain contact with the veteran throughout his or her transition from Defence, or as needs arise, long after discharge from their

uniformed service to the nation. Our volunteer 'buddies' are also renowned for their warm hearts and welcoming character, encouraging every veteran who touches the RSL in NSW to become a member to enjoy the camaraderie, sport and recreation and events associated with sub-Branch life. These actions can address the isolation felt when exiting the armed forces, or as a delayed consequence of earlier service.

The professional services accessed through the RSL in NSW may be delivered by RSL NSW itself, the government, other RSL NSW partners or other ESOs. The RSL in NSW will strive for services to be local, but regardless, they will always be accessible. Our primary charity partner for services is RSL DefenceCare and other services provided by RSL LifeCare. As well as supporting local sub-Branch initiatives, RSL NSW's major fundraising efforts go to supporting all the state-wide services delivered by RSL DefenceCare and RSL LifeCare.

Our Wellbeing Support Officers and other volunteers are trained and supported by a professional full-time cadre staff, positioned with RSL Districts around the state. These staff are funded generously through the RSL NSW network. The professional team respond quickly where required to support all our volunteers, especially our sub-Branch office holders.

Sub-Branches, in addition to meetings, are running regular locally focused and often combined sport and

recreation activities, reaching out to all veterans and their families. Our members are distinguished by their badge and are proud to be part of the RSL in NSW, and able to say why RSL NSW exists and what it does for all veterans and our communities.

Local clubs and sub-Branches have a renewed, shared purpose as members of our community, mutually supporting each other's activities in upholding our traditions and values of supporting our veteran community.

State-wide there are commemorations and further community activities that uphold the dignity, respect and memory of those who have made the ultimate sacrifice, served, or are still serving our nation in the armed forces. No memory of sacrifice or service to our nation is missing.

Quality communications and other materials including the comprehensive catalogue of veterans' support services are available to our volunteer Wellbeing Support Officers across the state. Collaboration and support abound as the RSL in NSW proudly maintains its place as the most recognisable and respected community organisation in the nation.

By improved cooperation and collaboration of RSLs across all jurisdictions, access and influence in Canberra and around the country is strong. Veterans' issues are dealt with quickly and efficiently, supported by evidence obtained from superior research funded collectively by the states, in a planned and considered way.

Through collaboration, RSL NSW has invested wisely in income producing assets and/or enterprises and has reduced its reliance on public fundraising. RSL NSW can

strategically fund services where required and invest collectively to ensure a sustainable and strong future. All proceeds from sub-Branch community fundraising remains with the sub-Branch.

As well as continuing active local and corporate fundraising and sponsorships, the presence of RSL NSW at ADF related displays and events increases awareness of the League's role and shines a light on commemorative and remembrance events.

RSL NSW has relocated to ANZAC House, funded by the ANZAC House Trust. It is a state headquarters everyone is proud of, housing committed and valued staff. The new HQ provides opportunities for other charity ESOs and service partners to be co-located, creating an environment that is strategically focused on superior outcomes for veterans and their families.

There is a lot to do, and here is the plan to make it happen. It must be funded, and the membership has to hold its board accountable for its implementation as much as be open to the significant change required of themselves.