

FAQs for Standard Operating Procedure 1 (SOP1)

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COULD REDIRECTING SURPLUS FUNDS TO OTHER INITIATIVES RISK NON-COMPLIANCE WITH REGULATIONS GOVERNING CHARITABLE DONATIONS – ALONG THE LINES OF WHAT WE SAW HAPPEN IN 2020 WHEN CELESTE BARBER RAISED FUNDS FOR THE NSW RFS?

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Why is this change happening?

Charitable funds held by sub-Branches must be used in accordance with our charitable purpose. The only way we can balance sub-Branch autonomy, alignment to charitable purpose and transparency is via the Veteran Support Fund (VSF).

This will also increase the visibility and acknowledgement of the contributions RSL makes in NSW to veteran support services. We want all veterans in the state to understand who we are, what we do and what we stand for – and to want to be part of our community.

The visibility afforded by the new SOP1 will increase the perception of the value of our organisation to within the veteran community, including potential members.

When does SOP1 and the Veteran Support Fund officially become effective?

The new SOP1 was approved by the RSL NSW Board in March 2023 and effective immediately.

The Veteran Support Fund will officially start on 1 January 2024. From this date, all sub-Branch charitable donations should be pooled through the VSF, and the DOC will be in place to report on disbursements. In the meantime, the VSF is open and is receiving donations.

Is SOP1 and contributing to the Veteran Support Fund mandatory?

Yes, SOP1 is a mandatory procedure for sub-Branches to follow.

Any sub-Branch that chooses to make a charitable donation must do so via Veteran Support Fund (VSF), and sub-Branches choose how much and which initiatives they contribute to.

SOP1 is important for the future health and relevance of the RSL in NSW. The procedure has been carefully designed in collaboration with sub-Branches and members, via the District Presidents' Council.

Contributing to the VSF is voluntary.

Under SOP1, sub-Branches can still fund local initiatives (not donations), and sub-Branches can choose not to make any charitable donations at all, and therefore not contribute to the VSF.

What are charitable funds?

As per clause 5.1 of the Constitution, funds held by a sub-Branch must only be used to pursue the Charitable Purpose (outlined in clause 3 of the Constitution), and therefore all funds held by a sub-Branch are charitable funds, including returns on investment.

Australian Charities and Not-for-Profit Commission (ACNC) compliance requires all charitable funds to be disbursed in alignment with the not-for-profit's (in this case, RSL NSW's) stated charitable purpose.

Our charitable purpose is to support veterans and their immediate families.

Who decides whether an initiative is included in the Veteran Support Fund?

The District Presidents' Council.

For calendar year 2024 which is year one, sub-Branches nominate initiatives for inclusion by submitting them to their respective District President by 30 September 2023.

For subsequent years, initiatives will be required to be submitted by 31 March.

e.g. sub-Branch nominations for initiatives to District Presidents for calendar year 2025 will be required by 31 March 2024.

We're starting to plan our 2024 budgets including donations now. When do we need to submit initiatives by for consideration by the DPC?

For possible inclusion in 2024, sub-Branches can submit initiatives to their District Presidents up until 30 September 2023.

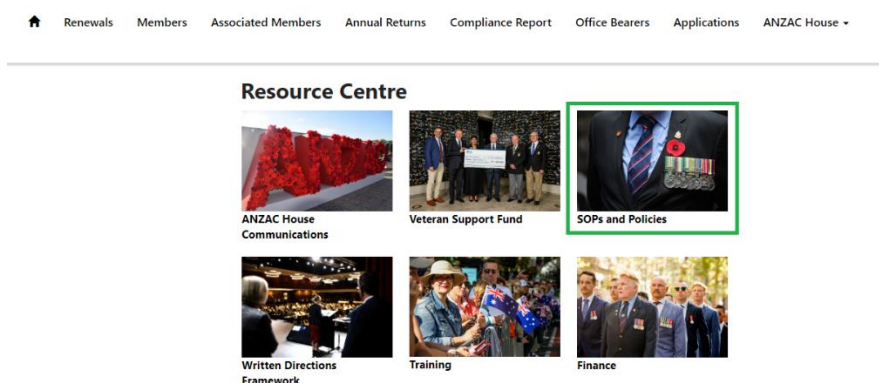
On an ongoing basis, sub-Branches can submit proposals to their District Presidents at any time during the year, and submissions made after 31 March will be considered for inclusion by the DPC in the following year's VSF targets.

e.g., Submissions made after 31 March 2024, will be considered for inclusion in 2025.

What form do sub-Branches need to use to submit Veteran Support Fund initiatives for consideration by the DPC?

Sub-Branches can submit initiatives to their District Presidents, by completing the **Funding Proposal Form** located in the sub-Branch portal:

1. [Log in to the sub-Branch portal.](#)
2. Click the **SOP and Policies** tile on the sub-Portal homepage.



3. Click on **Forms**, and the [Funding Proposal Form](#) will be the top form.

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Forms

Resource Name	Description	Resource URL
Funding Proposal Form	RSL NSW Funding Proposal Form for sub-Branches	Link: Funding Proposal Form

When will the 2024 VSF initiatives and targets be finalised so we can plan our giving?

1 November 2023 for the 2024 implementation year. In subsequent years, VSF inclusions and targets will be published 1 August.

e.g., VSF initiatives and targets for 2025, will be published on 1 August 2024.

What happens to the remainder of our planned donations for the rest of 2023?

All donations for the remainder of 2023 must be made in line with SOP1.

My sub-Branch provides funding, educational materials and financial support for local schools as well as to Cadets. Can we still do this?

Yes, but that is not a donation. Donations are made to registered charities.

The examples of local school activities or financial support for Cadets may be allowable expenses under SOP1, 4.2.1 Allowable Administration Costs, but not donations.

Your sub-Branch will need to be invoiced for these expenses.

Those sub-Branches that value education are encouraged to consider contributing to the VSF's scholarships pool to support higher education opportunities for veterans.

How can we pay for school bands to play at our commemoration services?

School bands at commemoration events are an expense that aligns with our charitable purpose, not a donation.

Expenses can be invoiced to and paid by sub-Branches.

My sub-Branch uses charitable funds to support ANZAC Day commemorations in a small town nearby. Can we continue to do this?

Yes, this is allowed under SOP1, 4.2 Charitable Activities undertaken within the sub-Branch, as long as the commemoration is taking place in your Local Community.

As per the 'Funding the Charitable Purpose' policy, Local Community is defined as:

"Local Government Area (LGA) including LGAs within the District in which a sub-Branch operates."

My sub-Branch donates to other ex-service organisations (ESOs) such as the Vietnam Veterans' Association/Vietnam Veterans' Federation. Why can't we continue supporting other ESOs?

This is incorrect – sub-Branches can continue to support other ESOs that are registered charities through the VSF.

The example above, the Vietnam Veterans' Association and Vietnam Veterans' Federation, received tens of thousands of dollars in donations from RSL sub-Branches over the past two years.

This change is not designed to reduce that charitable support, but to ensure it is visible, transparent and acknowledged with appropriate RSL brand recognition, and that members can understand the outcomes any charity achieves with RSL funding.

Donations to other ESOs could potentially increase as sub-Branches across the state start to make contributions to nominated initiatives.

What happens if an initiative is over-funded?

In the event that an initiative is funded beyond the target set for it, the DOC, on the CEO's advice, may propose redistribution of excess funds to underfunded initiatives.

The DOC, under its charter, is obligated to consult with donating sub-Branches before any redistribution to another initiative is agreed – and as funds will only ever be redistributed to initiatives that are part of the VSF, we can be sure that we are abiding by the regulations that govern the use of charitable funds. This process is explained in the DOC Charter.

Could redirecting surplus funds to other initiatives risk non-compliance with regulations governing charitable donations – along the lines of what we saw happen in 2020 when Celeste Barber raised funds for the NSW RFS?

The case with Celeste Barber's 2020 fundraising was examined very carefully and considered when establishing the VSF. In that instance, Ms Barber nominated a NSW Government agency, the Rural Fire Service, and the Brigades' Donation Fund Trust, as the beneficiary of donations.

The deed governing that Trust did not permit charitable donations to be spent on what Ms Barber told her followers the money would be spent on i.e., providing 'bushfire relief'. So funding relief via the Trust, as she had proposed, was never possible.

In the case of RSL NSW, the CEO and the District Presidents' Council are responsible for ensuring that all initiatives proposed by sub-Branches and approved for inclusion in the VSF align with our charitable purpose (Clause 3 of the Constitution), and will recommend that sub-Branches support the initiatives accordingly.

As all initiatives within the VSF are and will be aligned with our charitable purpose, even if funds are moved between overfunded and underfunded initiatives, any redistribution will meet our regulatory obligations.

We also have a rigorous process for decision-making around redistributions. In the event that an initiative is funded beyond the target set for it, the Donation Oversight Committee, on the CEO's advice, may propose the redistribution of excess funds to underfunded VSF initiatives. The DOC, under its Charter, is obligated to consult with donating sub-Branches before any redistribution to another initiative of the VSF is agreed.

What is the difference between the Pooled Funding Model and The Veteran Support Fund?

The funding model is made up of two parts: the Aggregated Investment Management Service and the Veteran Support Fund. Under the first part, sub-Branches can establish an investment portfolio with Morgan Stanley. [Find out more about that here.](#)

The second part, the Veteran Support Fund, aligns donations to our charitable purpose and combines our resources to achieve greater impact, such as our donation to our partner charity, veteran services provider RSL LifeCare Veteran Services.

What's the difference between grants and donations?

There is no functional difference between a grant from charitable funds and a donation. Both must only be made to registered charities, and only via the VSF.

When will SOP1 be reviewed and adjustments made if necessary??

SOP1 will be reviewed in 2025. In the meantime, VSF dashboards are live on the RSL NSW website and are updated on a weekly basis to track contributions, and the DOC will publish performance reports on a quarterly basis.

Where can I find out more?

Log in to the [RSL NSW sub-Branch Portal](#) or visit [Member Resources](#) section of the RSL NSW website to find more resources.

Links to key documents:

- [Standard Operating Procedure 01](#)
- [Funding the Charitable Purpose policy](#)
- [RSL NSW Constitution](#)
- [Funding Proposal Form](#)

What support is available to help us manage this change and ensure we are compliant?

The support team at ANZAC House is on hand to assist members and sub-Branch leaders with any questions. [Contact us](#).

I have more questions – how can I talk to the ANZAC House team?

Each month, the RSL NSW leadership team including the CEO and CFO invite all members to attend an Ask ANZAC House Q&A session.

If you have questions or are just keen to listen in, join the next Ask ANZAC House – view dates and times for upcoming session [here](#).

You can also invite the team at ANZAC House to attend your next sub-Branch or District meeting or ask a question directly by contacting your Member Support Team at support@rslnsw.org.au or 1300 679 775.

End of FAQs