ANNUAL STATE CONGRESS



RSL NSW

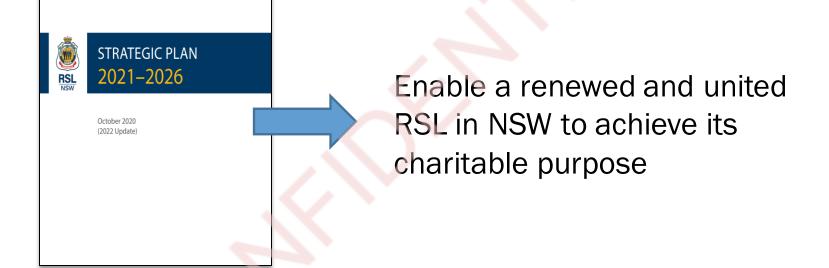
Monday 23 October 2023

Strategic Plan Update

ANZAC House Leadership Team



WHY WE'RE IMPLEMENTING THE STRATEGIC PLAN...



Veterans and their families are at the centre of everything we do... our charitable purpose.

OUTLINE OF TODAY'S SESSION

Key topics covered include:

- Operating Model ('One RSL') and Brand
- Performance how we are going with the implementation of the Strategic Plan

We hope this presentation will answer a lot of your questions. If not, there will be an opportunity to answer your questions at the conclusion of this session, or tomorrow at the ask ANZAC House session.

However, this session will be interactive.....

INTRODUCTION TO MENTI-METER

- We don't want to just talk at you but hear your perspectives and feedback.
- Throughout the presentation, we'll be posing a series of questions.
- We'll be using Menti-meter an interactive feedback tool – to hear your views in real time.
- You can join on your smart phone and responses are anonymous. Let's give it a test.

Introduction to Mentimeter



You have a QR code on your table, otherwise:

Go to www.menti.com Enter the code 7187 4793





Mentimeter

Ray James should be the next Wallabies coach?

(Strongly agree to strongly disagree)



Mentimeter

The Navy navigates by the stars, Army sleeps under the stars, and Air Force use the stars to choose hotel rooms. (Strongly agree to strongly disagree)

Introduction to the Team and **Organisation for** delivering the **Strategic Plan**



Delivered as a 'Program' - oversighted by a Program Steering Committee, chaired by the Program Sponsor

- Program Sponsor CEO RSLNSW accountable to the Board to deliver the Strategic Plan.
- Program Management Heads of Program Delivery Plan, manage and report on delivery. Lead and manage Project Managers. Responsible for Program budget and delivery.
- Project Sponsors ANZAC House Leadership Team members Responsible for delivery of assigned projects.
- **Project Managers** Deliver assigned Strategic Plan initiatives.
- Subject Matter Experts and Reference Groups

Program Steering Committee – Decision-making - CEO, Head of Program Delivery, Project Sponsors and Nominated Representatives from sub-Branches (3)

Program Design (Six Goals in Strategic Plan delivered in five Projects)

- Project A Services Project (Sponsor: Jeff O'Brien, State Secretary): Provide veterans and their families 24/7 seamless access to support based in NSW and nationally.
- Project B Advocacy Project (Sponsor: Jeff O'Brien, State Secretary): To provide effective advocacy ('voice') for veterans.
- Project C Engagement Project (Sponsor: Trina Constable, HCMM): To comprehensively engage members, veterans, other ESOs, and the community to highlight the contributions and enhance the reputation of RSL NSW.
- Project D Membership Project (Sponsor: Trina Constable, HCMM): To grow membership and expand into younger age cohorts.
- Project E Business Model Project (Sponsor: Nicole Hasrouni, CFO): To operate as a unified and financially sustainable organisation satisfying the needs of veterans and their families now and into the future.

Program Steering Committee

How is the Strategic Plan implementation going?



Strategic Plan Re-Cap



Transition to Phase 2





18 Initiatives Closed



Projects moving to BAU

Governance and Reporting

- Reports are provided to the Board, through the Program Steering Committee, against agreed milestones, budget, scope, and risk
- Two progress reports for each meeting
 - Program dashboard (overarching view of the program)
 - Task by task update (granular view)
- The reports are made available on <u>website</u> for all members, consistent with the Strategic Plan.

PROGRESS REPORT – STRATEGIC PLAN IMPLEMENTATION PROGRAM





Mentimeter

Does your sub-Branch review the progress of the implementation of the Strategic Plan at its meetings?

(Yes or No)

Update on Key Initiatives

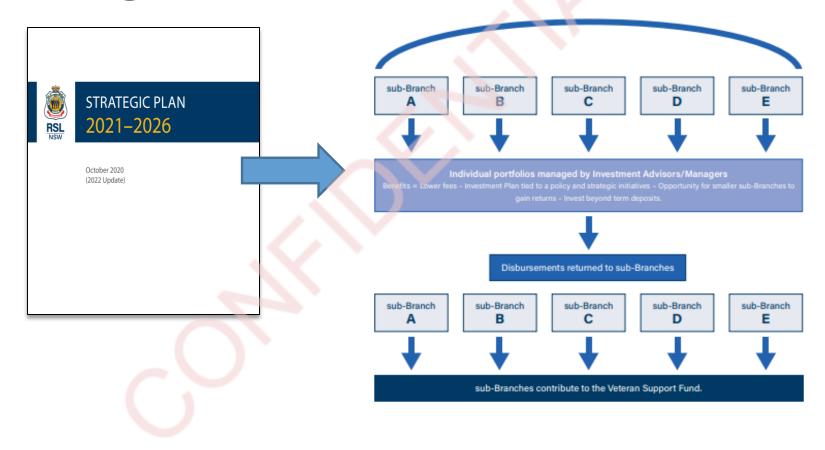


'Pooled' Funding Mechanism

Project E Goal 5 and Initiatives 5.1 and 5.14



Strategic Plan – Annexure B1



Part 1

Aggregated Investment Management Service Provider



Update on Morgan Stanley Wealth Management

- 18 accounts open
- 2 more to be opened this month
- Morgan Stanley have held 6 information sessions
- Available to all SBs in person and online
 - Save the date 2 February 2024
- Meet the team!

Investment Portfolios

- Things to think about when considering an Investment Manager
 - Returns net of fees
 - Risk approach and strategic asset allocation
 - Brokerage
 - Kickbacks
 - Independence
 - Diversification
 - actively managed



Mentimeter

Investment Management Has your sub-Branch reviewed its **Investment Management services in** the last 24 months? (Yes or No)



Mentimeter

Has your sub-Branch invited Morgan Stanley to present to members attached to your sub-Branch?

(Yes or No)

Part 2

Veteran Support Fund



Updated Charitable Purpose – Policy and SOP

- POL01: Funding the Charitable Purpose
- SOP01: Funding the Charitable Purpose
 - Supporting local initiatives
 - Collaborative funding mechanism
 - Sub-Branch nominated initiatives
 - Funding agreements / recognition



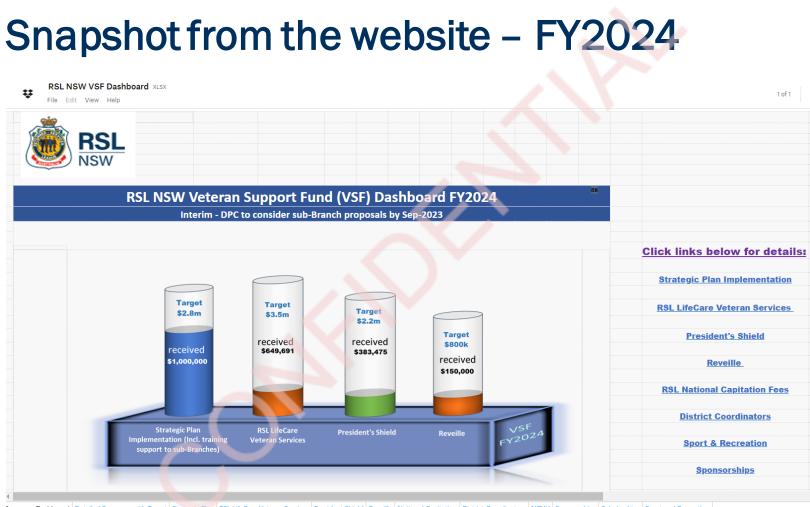
Policy POL01 Funding the Charitable Purpose



Standard Operating Procedure SOP01 Funding the Charitable Purpose

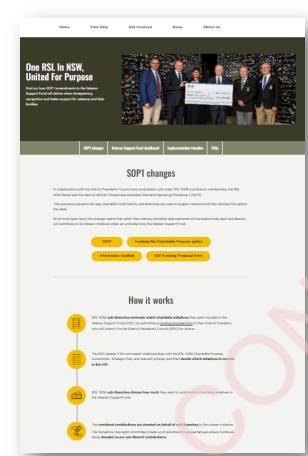
Version:	2.0	
WDF Index code:	SOP01	
Document status:	Approved	
Approved by:	District Presidents Council	
Approval date:	16 March 2023	
Approved by:	RSL N5W Board	
Effective dete:	1 June 2023	
Review date:	March 2025	

NSW SOP (SOP01 Funding the Charlebie Purpose a printed, this document is to longer controlled.

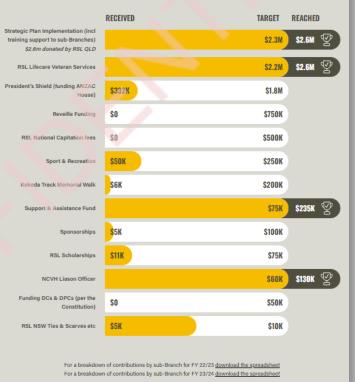


Summary Dashboard Detailed Summary with Target Strategic Plan RSL LifeCare Veteran Services President Shield Reveille National Capitation District Coordinators NCVH Sponsorships Scholarships Sport and Recreation

SOP1 webpage - https://rslnsw.org.au/sop1/



Veteran Support Fund Dashboard FY2022/23



2024 initiatives announced 1 November 2023

Veteran Support Fund Information Booklet

ONE RSL IN NSW, UNITED FOR PURPOSE The RSL NSW Sub-Branch donations to **Veteran Support Fund BANG FOR YOUR BUCKS** non-RSL charities in 2021 In addition to the important and generous donations to RSL LifeCare Veteral Services, according to SBA returns, RSL sub-Branches in NSW individually donated \$150,000 more than \$1.2 million dollars to organisations other than the RSL. \$100,000 m ome organisations receiving these IS ETERNAL VIGILANCE donations, while doing good THE PRICE OF LIBERTY writable work are not alloped to the \$18,000 RSL's charitable purpose and should We commend sub-Branches for their support f veteran services. We also want to enable \$5,000 the veteran community and the public to see the impact RSL sub-Branches have on veteran support, so that's why we need to carefully consider the intentions of the new SCP1. The policy is in the first instance to do all \$4,000 things possible locally to achieve the charitable purpose, and then direct surplus to the VSE. These donations are also in addition to all the allowable expenditure on delivering our Even the smallest amount

contributes to this \$1.2 million total.

Each circle represents a single donation of an RSL sub-Branch to a

ize from the largest contribu

0000 to the smallest, \$10

07

06

charitable purpose. For example, paying for

a cadet unit to support a local ANZAC Day

service, or running a sport and recreation activity for veterans and their families in the

community, are allowable expenses

not donations

Veteran Support Fund Resources



VSF proposal, approval and contribution process

For 2024 funding year (first period:
implementation)

30 September 2023 Sub-Branches submit proposals for initiatives and targets to their District Presidents.

24 October 2023

DPC submits approved VSF initiatives and targets based on sub-Branch submissions to Board, through CEO

1 November 2023

VSF initiatives and targets published to assist sub-Branches to prepare their budgets.

30 November 2023

Sub-Branches submit their 2024 budgets to ANZAC House, listing which VSF initiatives they will be supporting with charitable funds.

For 2025 funding year and beyond (starts March '24)

31 March

Sub-Branches submit proposals for initiatives and targets to their District Presidents.

RSL NSW Board

meeting in July DPC submits approved VSF initiatives and targets based on sub-Branch submissions, for approval by RSL NSW Board, through CEO

1 August

VSF initiatives and targets published to assist sub-Branches to prepare their budgets.

30 November

Sub-Branches submit their 2025 (or beyond) budgets to ANZAC House, listing which VSF initiatives they will be supporting with charitable funds.

VSF in Action

Tuesday morning presentation and opportunity for questions



Operating Model

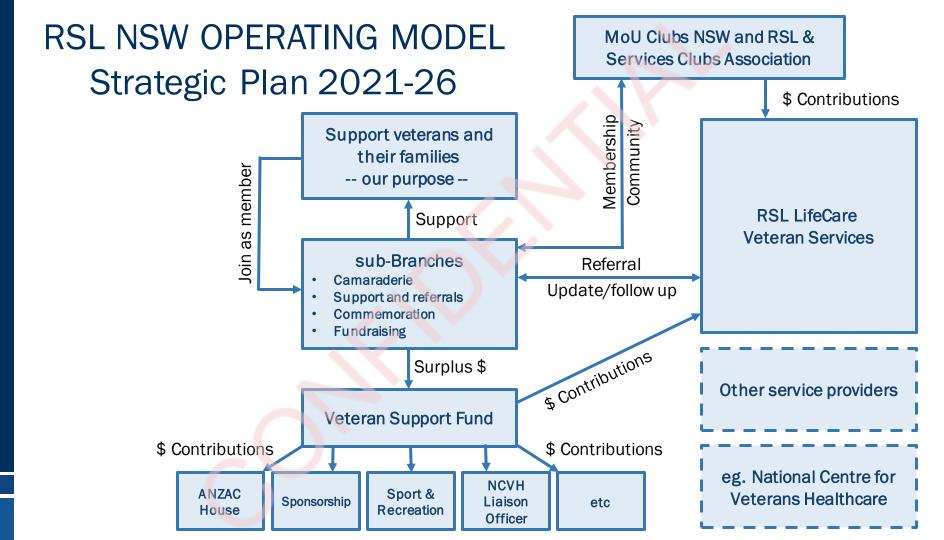
Goal 5, initiative 5.2 The sub-Branch at the centre of everything



ANNEXURE A OF STRATEGIC PLAN (P20)



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



REFERRALS TO RSL LIFECARE VETERANS SERVICES

- RSL LifeCare provides a range of services on our behalf, generously funded through donations from sub-Branches (\$3.3m in FY22/23).
- All delegates have received a pack of RSL LifeCare Veteran Services referral tools for their sub-branch
- All members will receive a 'Veteran Services wallet card' in the December issue of Reveille
- And <u>new</u> members will now receive a new membership card printed with RSL LifeCare contact details
- Wellbeing Support Officer initiative







DVA claims advocacy and appeals

- Homelessness support and accommodation
- Financial assistance
- Housing assistance and transport support
- RSL Veterans' Employment Program
- SPUR Equine Program
- Home care and retirement living
 Veteran Wellbeing Centres
- Call 8088 0388 or email info@rsllifecare.org.au

Or Scan for services and support Australia's first comprehensive care centre offering specialist physical and mental healthcare services for veteran

centre offering specialist physical and mental healthcare services for veterans in one location at Concord Hospital RSLNSW Liaison Officer: NCVH-Liaison@rsInsw.org.au

Immediate Crisis Support

Open Arms	1800 011 046
ADF Mental Health All-Hours Support Line	1800 628 036
Suicide Call Back Service	1300 659 467
Defence Member and Family Helpline	1800 624 608
Safe Zone Support	1800 142 072

Engagement Goal 1, 2, 3 + 6



COMMUNICATIONS & MARKETING PLAN

- Position RSL NSW as a relevant exservice organisation by publishing useful information to veterans on key issues
- Build content for website and social media channels
- Continue to build engaged database of readers of the Reveille newsletter
- Identify PR and media opportunities
- Identify new partnership opportunities with organisations such as the ADF, sporting codes etc



Community. Mateship. Commemoration.

RECRUITMENT PLAN

RSL

How to start a conversation with a veteran or current serving member in your community

starting up a conventation with a potential new eau wave member can be challenging, they might not be tain brieff, what the sub-stanch does or what sour wave membership can courtheat. in your re-unaute how to approach to mean term, here are some handy convertation starters.



RSL

How to onboard a new member A checklist for sub-Branches

some velocing a solitamily meetibets eligited tot local what to expect when joining ress will be when bringing a new member onboard, its official to do so in a mixed y way. Here's a checklist or critical steps to get onboarding right and welcome a new member to the way, waw community.





voure invited to join our RSL sub-Branch

Life also Debugs and its standing. Prove fielding over models are along a set provide to moting a local granication of balls. The production grade of the debug. deffit. 1929, analysis in advanta, Wein ham to help regard of reference.



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Cores along to say and marking an 82H and descentiles bandles of 78, 1924 membership.

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Join Teday



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BSLN

RSL



And REQ ARTIN.

REACH How to pass the baton to new members

THE PRICE OF LIBERTY



IS ETERNAL VIGILANCE

Event Presence Plan

- The purpose of this plan is to coordinate RSL presence at all significant ADF transition activities and events at bases in NSW
- ADF Transition Seminars
- Presence at ADF Bases
- Long term goal of RSL NSW participating in 80% of NSW ADF events
- Note: it's an interim Plan while we complete District Rationalisation



RSL NSW ADF EVENT PRESCENCE PLAN

Delivering on the RSL NSW Strategic Plan 2021-2026



Reveille: National Awards

Mumbrella Publish Awards

 Association or Member Organisation Publication of the Year

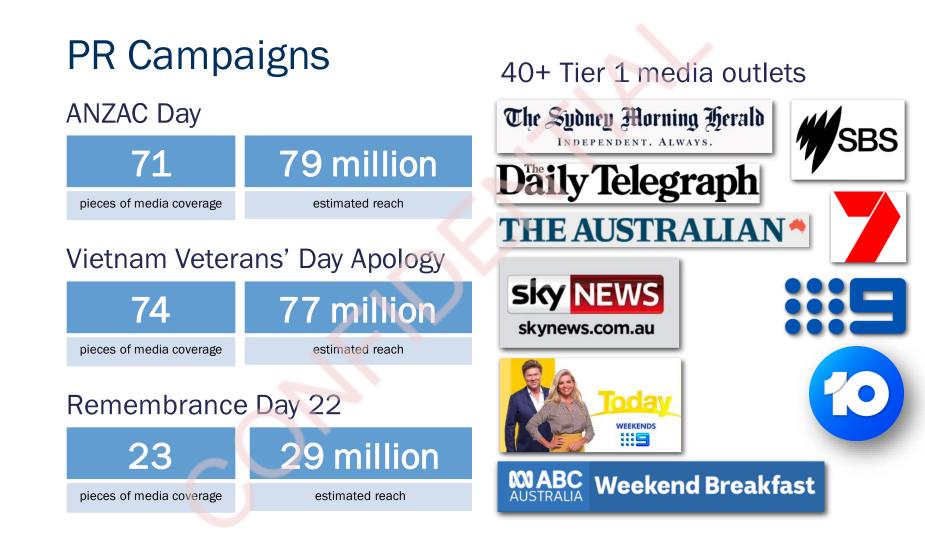
Public Relations Institute of Australia

- Platinum Excellence in Measurement and Evaluation
- Gold Integrated Marketing and Communication Campaign
- Silver Media Relations Campaign









Coverage impact:

- Clear uplift in new membership
- Positioning RSL NSW as the leading organisation for veterans and their families
- Driving conversation around the importance of commemoration and advocacy

'We honour you, we thank you': Albanese

Vietnam veterans say they have received closure with the marking of a major anniversary, while one of Australia's war heroes has urged the government to continue the fight to improve mental health support.

Commemorative services were held around the country yesterday to remember the 50th anniversary of Australia ending its involvement in the conflict.

Veteran Russell Kennedy travelled from Melbourne to mark the occasion at the Australian Vietnam Forces National Memorial in Canberra.

"Today is closure," he said. "We weren't accepted when we came home." Douglas Witt, who also fought, said the acknowledgment "means everything in the world".

Victoria Cross recipient Keith Payne called the war a "sad memory".

After a lifetime without recognition, he praised the government for acknowledging the impact of post traumatic stress disorder on his colleagues:

"It's a shame on the nation, and the people of Australia should say to the government, 'let's fix the problem'."

In a message to all Australians, Payne said: "Don't forget the causes of war."

At the end of the wreath-laying ceremony, Payne, 89, stood using his walker and laid poppies in honour of his mates. About 3000 veterans and their families braved the wind and rain in the Veterans' Affairs Minister Matt Keogh told the Canberra event the experience of the conflict reflected Australia's character: "It's about knowing no matter how dire the circumstances, your mates will always have your back." Governor-General David Hurley at-

tended the service, as did Vietnamese ambassador to Australia Nguyen Tat Thanh.

In Sydney, Veterans Minister David Harris was at the Cenotaph in the CBD alongside RSL NSW president and Vietnam veteran Ray James. "For those of us still here today, I say we must continue to honour the dead but fight like hell for the living as we support our fellow veterans of all conflicts and connect them with the mateship, camarderie and services they need," James said.

A



RSL NSW president Ray James apologises to Vietnam War veterans for post-war treatment

ABC Riverina / By Monty Jacka Posted Mon 14 Aug 2023 at 5:38pm



resident Ray James is apologising for the treatment of Vietnam veterans. (Supplied NSW RSL)



Ex-Commando's call to arms for RSLs

There was a time when Afghanistan veteran Peter Rudand couldn't see himself joining his local returned services league club. But now the former Special Forces operator is calling on his fellow defence force colleagues to reach out to their local RSL branches, as well as calling for more volunteers from the wider community to help out this Anzac Dav.

The former soldier is well placed to make the call, after first joining the army at 17. He rose up the ranks, passing Special Forces training for the

elite Special Air Services, before transferring to fellow top-tier defence force faction the Commandos. He was serving with the Commandos in 2010 when the incident that triggered his departure from the military occurred. Travelling on a Black Hawk helicopter in Afghanistan as part of a mission seeking out Taliban insurgents, Mr Rudland was severely injured when his chopper plunged to the ground, killing four others. He had to contend with a shopping list worth of injuries, including a broken lower leg, his

rifle embedding into his thigh-"It looks like a shark bite" multiple breaks in his face. It hastened his sait from the ADF - something he had never planned on - but said he managed to find support as he re-skilled to become a qualified counsellor.

Joining the RSL was another step in his post-military life. "I didn't think it was the type of thing for me," Mr Rudland said. "Evertually (gave in, I realised there was a whole bunch of dudes there like me pienty of young fellas."

It's a call he hopes others take up, with the signs positive in NSW with membership increasing for the first time in 40 years over the last year. But Mr Rudland said people outside the military also had a role to play particularly on days like Anzac Day. "The government doesn't pay anyone to do this – it's the RSL who put these (services) on," he

who put these (services) on," he said. "It takes volunteers to step forward... If it wasn't for members of the community and veterans, they wouldn't happen, If they don't happen, people would forget the sacrifices."



Peter Rudland.

ent doesn't pay -- It's the RSL ervices) on," he unteers to step

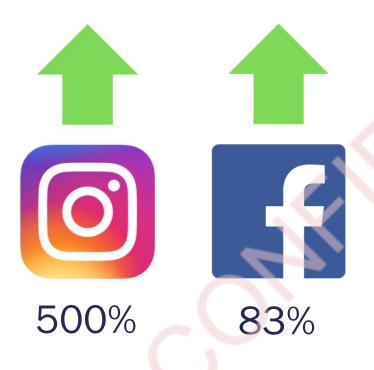
Draw to Remember Pilot

Thank you to the 34 sub-Branches participating!





Digital Engagement Insights



2023 website traffic:
Unique Pageviews: 380,817
180,875 Unique Pageviews in April

 Average Time on Page has increased by 5%

Top-performing posts

RSL NSW Sponsored · 🚱

...

RSL NSW

Sponsored · 🚱

Read RSL NSW President Ray James' address at a Vietnam Veterans' Day commemoration service in Sydney.

RSL NSW apologises to Vietnam War veterans

"

Many of those we are commemorating today didn't have a community around them to provide ballast



RSI NSW ORG AU Learn more Speech to Vietnam War veterans 13 2.6K 815 🗨 294 🍌

Link clicks: 8,467 Reach: 164.975 Impressions: 505,159

"The ADF ... has programs in place for people who are transitioning... I just don't believe they're marketed the right way." - Luke Doi RSLNSW.ORG.AU Reshaping veterans' support Peter Rudland, June Young and 640 others Link clicks: 3.754 Reach: 128.895

Impressions: 305,910

RSL NSW members mark ars since Australian forces left the Vietnam War RSI NSW ORG ALL Learn more Marking 50 years since Vietnam 149 28 🕒 🙀 June Young, Di King and 1.2K others

RSL NSW

Sponsored · 🚱

since Australian forces left Vietnam.

Here are commemorative events in 2023 commemorating 50 years

Link clicks: 3.062 Reach: 85.535 Impressions: 188,930

RSL NSW Sponsored · 🚱

...

Learn more

208 🗨 103 🍌

Army medic and Army Rugby National Manager Bronsen Mitchell shares the ups and downs of transitioning out of Defence.

...



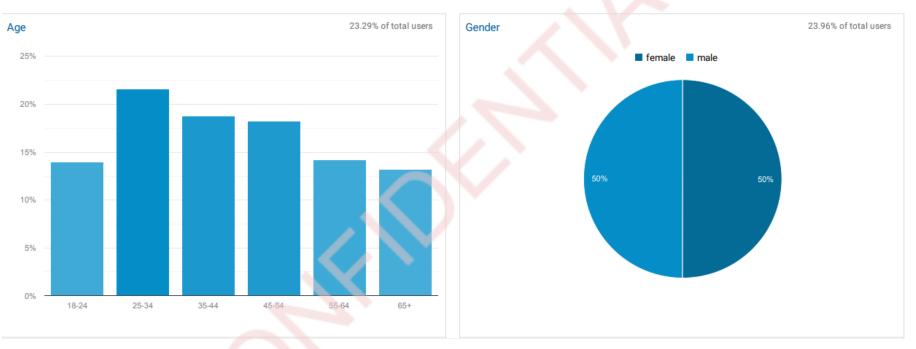
Transitioning out of Defence	Learn more		
€ Bill Fortier, Steve Hinwood and 454 others	13 🌒 13 🍌		

Link clicks: 2,214 Reach: 80.385 Impressions: 163,339

Ken Fayle shares how the experiences of Vietnam veterans have reshaped support for younger veterans such as Luke Douglass.



Social Media: Age Demographics



- Less than 9% audience difference between any age group
- Even 50/50 split between male and female audience

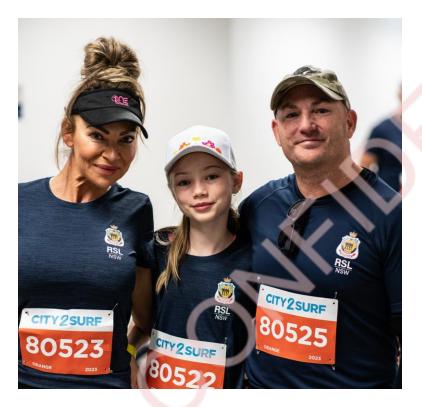
Sport & Recreation Program

Goal 3, initiative 3.8 – now BAU

Facilitate inter sub-Branch sport, recreation or other fun activities that attract new members of all ages and ability

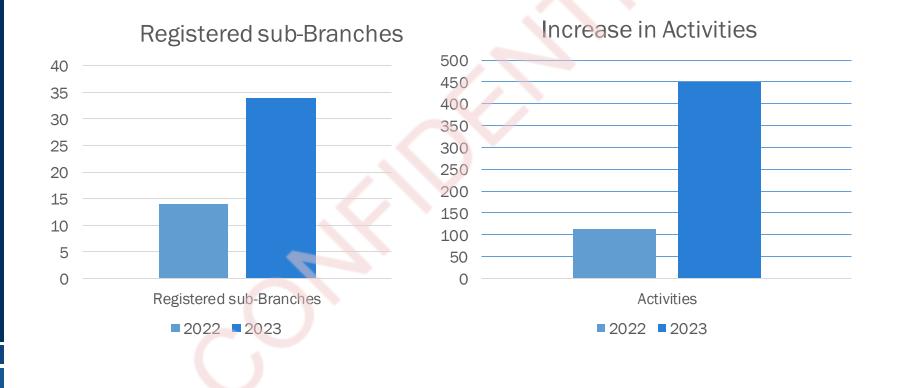


Purpose of Sport and Recreation



- 1. Support veteran wellbeing through social connection and camaraderie
- 2. Create an inclusive and supportive environment for veteran's families
- 3. Growing community connection
- 4. Increase membership and engagement

Sport & Recreation Program Growth



Support Resources

- 1. Planning Tools
- 2. Safety & Risk
- 3. Podcasts Interviews
- 4. Funding & Financial Support
- 5. Activity Promotion & Storytelling Tools
- 6. Training Videos
- 7. Flier & Social Media Templates

Activity Diversity



















Trivia night



SPORT & RECREATION PROGRAM

All veterans and their families welcome

SPORT & RECREATION

Old Bar Beach RSL sub-Branch



City of Wollongong RSL sub-Branch

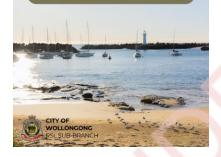
Monthly Walk!

We are off for a morning walk! We'll meet at the Southern end of Diggles at Bam, and take off at about 810am. This is a nice casual stroll along the Blue Mile, with a coffee break at half way! The walk is a great opportunity to get the legs going and have a conversation with some of the other Comrades and Community members!



CYCLING EXPRESSION OF INTEREST

Coastal Cycling Adventure - Join Our Expanded Sport Recreation Program!



Family BBQ this Saturday

We invite you to join us at the Mess located at 4/3 Bravo Company, within the Cipps Road Wollongong Army Complex. The event will lick off at 100 AM and will feature a BRQ spread along with refreshing beverages available throughout the



Cedar Creek Orchard Family Day Saturday 28th October Come on a bus frip to the orchard, tour the farm, have a feed, a couple of drinks and a great day out!



SUB-BRANCH MORNING WALK

THIS SATURDAY We are off for a morning walk We'll meet at the Southern end of Diggies Barn, and take off of about 810 am. This is a nice casual stroll along the Blue Mile, with a coffee break at hall



Fishing Charter

We invite you to join us at for our Monthly Fishing Competition and Charter - Sat 2nd and Sun 3rd September, Fishing Charter available Sunday 3rd ieptember from Gam to Jom/Walan in at Figtree Sports Club Sun 2nd at 300m. Earning swelcome



EXERCISE PHYSIOLOGY urrently available for ILLAWARRA RSL SUB-NCH Members through our Sport & Recreation program



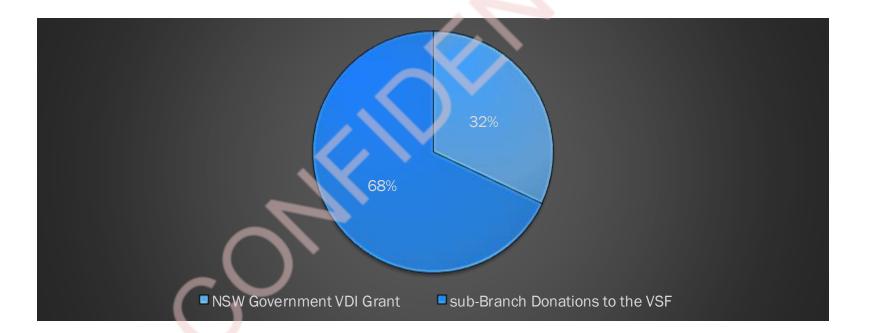
SOCIAL GOLF DAY

Get in quick - only 20 spots available! 24th of September starting at 9.20 - Wollongong Golf Club. Only 1 cart available so please advise if you require one!



2022 Program Funding

- sub-Branch donations to the Veteran Support Fund
- NSW Government: Volunteering Diversity & Inclusion Grant



Sport & Recreation Programs Comparison

	ESO A	ESO B	RSLNSW
Australian Government Funding (2021-2024)	Around \$7 million over 5 years	\$9 million over 3 years	\$109,000 (FY21/22)
Activity Inclusion & Visibility for veterans and their families	Email Distribution List	Facebook	Website, social media, email, Reveille, 320 sub-Branches/27k members
Staff in NSW	Regional social connection delivery teams	Тwo	One
Total activities YTD	Unclear, not reported or publicly available	Unclear, not reported or publicly available	450+ YTD in website calendar



Join us tonight!

- Bar Beach Bowling Club
- Bowls, Trivia, Pool
- Camaraderie & Social Connection
- 5pm-7:30pm
- Buses start @4:45pm from NEX
- Last Bus @ 7:30pm



Member Recruitment Toolkit

Helping to build your community

Club Toolkit + MOU Strategic Plan Goal 2 Initiative 2.6

- Explain difference between role of club and sub-Branch
- Membership and community
- Improved governance
- Funding support to veteran services
- Strategic communications
- Joint working groups

RSL NSW, RSL SCA, AND ClubsNSW MEMORANDUM OF UNDERSTANDING





RSI

RSL NSW MERCHANDISE STORE

RSL NSW					Search	٩
ome Browse Products	Favourites Order Hist	tory Accour	nt Info			
Categories ISL NSW						
ACCESSORIES ADD SUB BRANCH NAME	POLOS AN	D SHIRTS	5	Sort by Se	elect Option 👻	
<u>SAGS</u> CORPORATE UNIFORM - ADIES	*					
<u>ORPORATE UNIFORM -</u> IENS IEADWEAR						
ACKETS & FLEECE						
ANTS & SHORTS	RSL NSW BOTANY	MENS TEE	RSL NSW SUNSE	T POLO	RSL NSW LADIES	SUNSET
POLOS AND SHIRTS	NAVY (PKT25) 8000000-7		NAVY 8000008-8		POLO NAVY 8000016-21	
Quick Links	Stock: Wholesale:	0	Stock: Wholesale:	0 🕄	Stock: Wholesale:	0 🚯
Peak Marketing I [®] Rsl Nsw	Select Items	\$579.38	Wholesale: Select Items	\$37.14	Wholesale:	\$37.14
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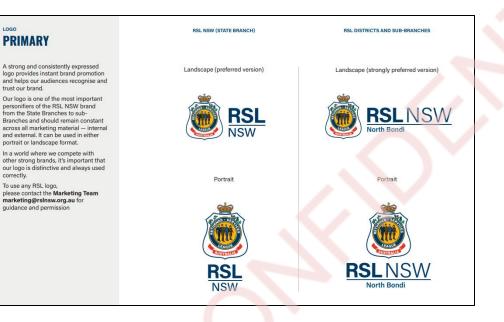


Sub-Branch Support & Assistance Fund





RSL NSW Brand Style Guidelines



- Applies to:Stationery
- Promotional material
- Websites
- Social media
- Clothing/uniform



Mentimeter

Should we continue engagement activities to promote what the RSL is and what it does, beyond the Strategic Plan? (Strong agree to Strongly disagree)

Membership

Goal 3, Initiative 3.3 Grow membership to support each other and have fun, and help all veterans and their families in need.



Decline in volunteerism/memberships in Australia

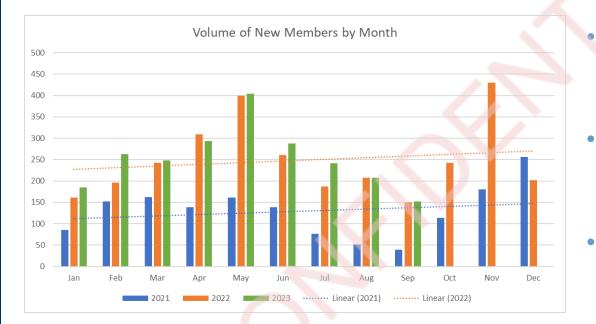
- The rate of volunteering through an organisation has declined over time, from one third of adults in 2010 to one quarter of adults in 2022.
- COVID-19 limited the communal activities of many Australians between 2020 and 2021, which resulted in an accelerated decline in volunteering and the trend hasn't reversed. The proportion of adults who volunteer declined from 36% in 2019 to 26.7% in April 2022.
- Additionally, data from the ABS shows that over the last decade, the proportion of people involved in social, community support and civic/political groups has decreased by almost 10%.

INCREASE IN MEMBERS



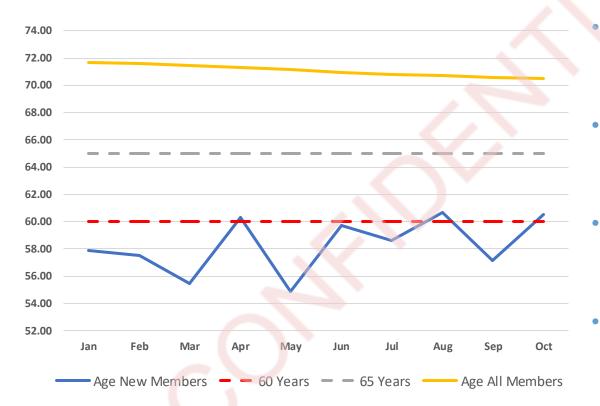
- **19,384** members at the beginning of 2019
- **28,637** members in October 2023
- Increase of over 9,000
- Almost **13%** growth in 2022
- Already over **9%** growth in 2023

INCREASE IN NEW MEMBERS



- Maintaining consistent member increases from last year.
- Over 100 more new members per month from 2021
- 2,380 new members and counting this year.

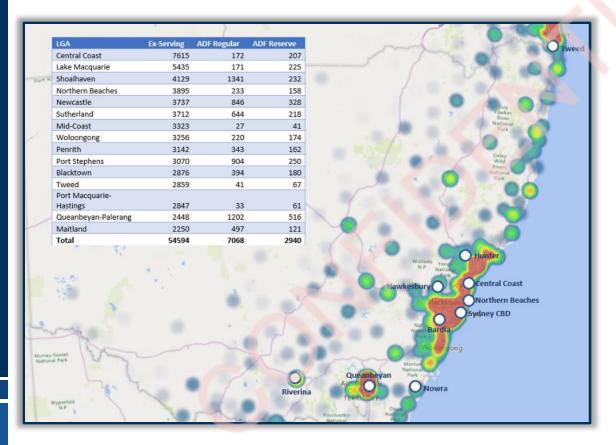
AVERAGE AGE OF NEW MEMBERS 2023



2023 average age of new members **58** years

- Total average age at **70.5** years in October
- Aiming to go below **70** years by end of 2023
- 12-year age difference
 between all members
 and new members

Veterans by District ABS Data



- Veterans in NSW: 152,000
- **30% of total:** 45,000
- Current RSL NSW Membership: +28,000

New Member Engagement Survey

152 Total Responses from 2,000 new members

Category	Age	Category	Count
Youngest respondent	28.9 years	Male respondents	126
Oldest respondent	86.85	Female respondents	58
Averageage	60.3 years	Male Average Age	59.98 years
Median age	62.76 years	Female Average Age	61.04 years

New Member Engagement Survey

- In 2021, 59% would be motivated to attend an event or activity that was <u>family-friendly</u>
- In 2023, 55% would be most attracted to attend an event or activity that was <u>family-friendly</u>
- In 2021, **35%** of younger veterans want to lead in their sub-Branch
- In 2023, 43% of new members want to regularly be involved, support or lead in their sub-Branch
- In 2023, 88% of new members would invite a mate to join!





RSL NSW sub-Branches applying the learnings

- Nabiac is prioritising family-friendly events, and has more than doubled their membership
- Tamworth has added social coffee catch ups to increase their membership by 35%
- Since 2021, Old Bar Beach have **tripled** their membership, saving the closure of the sub-Branch



sub-Branch Facebook Group



- Share your stories!
- Stay connected and collaborate!
- Share updates, events, and activities!





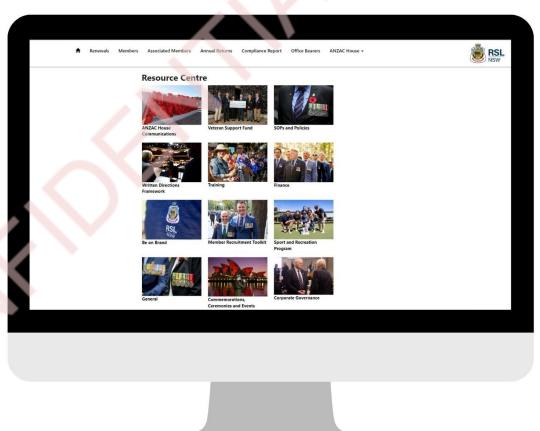






sub-Branch Portal





Member Portal





Mentimeter

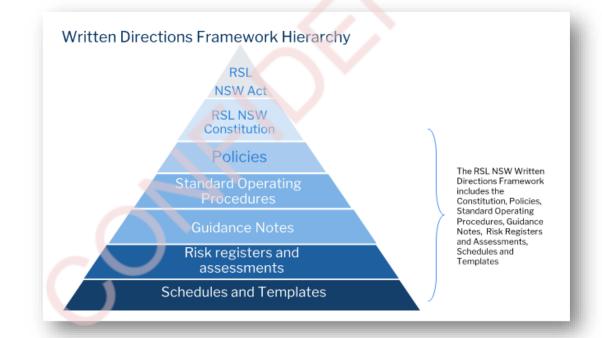
Do you see value in continuing to connect veterans and their families to their local sub-Branches? (Strong agree to Strongly disagree)

Written Directions Framework Goal 5, initiative 5.15



Written Directions Framework

- Project is ongoing
- Resources were made available ahead of sub-Branch elections this year e.g. handover guides and roles and responsibilities



Written Directions resources

Updated policies (POL) and standard operating procedures (SOP)

- New policy POLOO Written Directions Governance released March 2023
 - Developed supporting documents and templates
 - Office bearer roles and responsibilities
 - Handover guides for office bearers
 - Guidance notes
 - Registers and templates

[All available on the Sub-Branch Portal under Written Directions Framework section]

- POL01 and SOP01 Funding the Charitable Purpose released July 2023
- SOP07 Accounts, Financial Management and Expense Reimbursement released Sept 2023

Written Directions resources available in **Sub-Branch Portal**

Renewals Members Associated Members Annual Budget Annual Returns

A

Compliance Report

Office Bearers Training ANZAC House -



Resource Centre





SOPs and Policies



Framework





Finance







Member Recruitment Toolkit



Sport and Recreation Program









Commemorations. **Ceremonies and Events**

Search

Latest Communications

Latest Resources

User Guide

ANZAC House Communications

Veteran Support Fund

SOPs and Policies

Written Directions Framework

Office Bearer Roles and Responsibilities

Handover Guides

Guidance Notes

Registers and Templates

Written Directions Framework

ANZAC House has developed a Written Directions Framework (WDF) to support sub-Branch Office Bearers through the provision of clear guidance notes, handover guides and templates, to complement the SOPs and Policies, in line with initiative 5.15 of the Strategic Plan.

The documents are critical support resources for new office bearers elected at sub-Branch AGMs, covering areas of governance, operations, and delivering on the charitable purpose of RSL NSW.

As additional WDF supporting documents are developed they will be uploaded to the sub-Branch Portal.

Subcategories

Office Bearer Roles and Responsibilities Handover Guides Guidance Notes Registers and Templates

Code of Conduct

Strategic Plan – page 6 Values Underpin the Code



Code of Conduct

- Our values guide our behaviours and underpin a code of conduct.
- Approved by Board and DPC
- A Policy and SOP are still required to support the implementation



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.

Sub-Branch KPI Reporting Framework Goal 5, initiatives 5.3 & 5.6



E02 sub-Branch KPI reporting framework

Annual Budget online form – released 9 October 2023

Option to enter budget figures as either yearly

ategory					Total								
ncome													
Investments													
Interest received - bank & investment													
Dividends & distributions (inc franking credits)													
Rent received													
Realised gains/(loss) on sale of investments and/or property													
	-				L								
Category	January	February	March	April	May	June	July	August	September	October	November	December	Total
Category Income	January	February	March	April	May	June	July	August	September	October	November	December	Total
	January	February	March	April	May	June	July	August	September	October	November	December	Total
Income	January		March	April	May	June	July	August	September	October	November	December	Total
Income Investments	January		March	April	May	June	July	August	September	October	November	December	Total
Income Investments Interest received – bank & investment	January		March	April	May	June	July	August	September	October	November	December	Total

Governance and **Compliance Training** and Reporting for sub-Branches Goal 5, initiative 5.7



SBA data explaining how Charitable Purpose is being addressed

- Third year of online SBA submissions
 - Donations VSF
 - Charitable Purpose
- Compliance Annual Return sub-Branches to complete 31 May
 - Focus on charitable purpose
 - Outcomes focused

Compliance Annual Report (CAR)

- Initiative 5.7 of the RSL NSW Strategic Plan, a sub-Branch compliance framework has been developed and implemented to assist sub-Branches in meeting their obligations, responsibilities, and organisational requirements.
- Key features:
 - Online
 - Reporting aligned with SBAs
 - Risk assessment
 - Guidance for training and resources

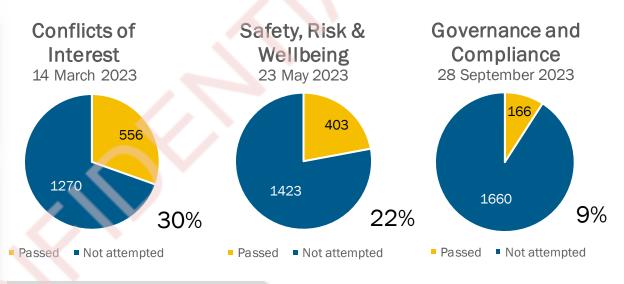
Compliance Annual Report (CAR)

Pilot released on 16 January 2023 to 313 sub-Branches, 192 voluntarily submitted their CAR (61.3%)

1 Finance Processes 🖌 2. Governance Processes 3. Charitable Purpose 4. Review
Sovernance Processes
29. Have the trustees attended at least 3 general meetings including the AGM in the last calendar year? \odot Yes \odot No
30. Does the current Trust Deed contain correct details for the current trustees? > Yes O No
31. Do trustees receive payment for their role as a Trustee? ○ Yes ○ No
32. Have the Trustees who made a declaration of trust relating to: (a) land or interest in land under the Torrens Title system, or (b) other land or interests in other land, Lodged the declaration with the Registrar-General in accordance with the provisions of section 82 of the Real Property Act?
33. Are the Responsible Persons listed with the ACNC for the sub-Branch accurate and current? $_{\rm O}$ Yes $_{\rm O}$ No
34. Does the sub-Branch have three Service members; RSL Custodian; or two Service Members and RSL Custodian as trustees? \odot Yes \odot No
35. Have the sub-Branch Trust Deeds been registered? ○ Yes ○ No

Governance and Regulatory Compliance Training



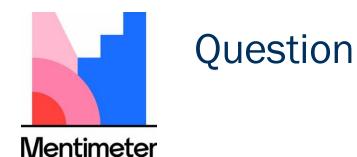


Access to all courses is at: https://rslnsw-elearn.com.au/

Login: [personal email] Password: as set by you, if forgotten password click on link for new temporary password to be sent to you 1,826 office bearers registered for the training

Governance and Regulatory Compliance Training View status of training in the sub-Branch Portal

Home > Training						
Training	Training Info					
Member ID	Member 🕇	Sub-Branch	Course	Training Type	Course Status	Completion Date
0116931	Alf Davey	Rooty Hill RSL sub-Branch	2023_05_22- Safety_Risk_and_Wellbeing	Office Bearer	Passed	21/05/2023
0116931	Alf Davey	Rooty Hill RSL sub-Branch	2023_01_30- Conflicts_of_Interest	Office Bearer	Not Attempted	
0116493	Allan Hills	Rooty Hill RSL sub-Branch	2023_01_30- Conflicts_of_Interest	Office Bearer	Passed	15/08/2023
0116493	Allan Hills	Rooty Hill RSL sub-Branch	2023_05_22- Safety_Risk_and_Wellbeing	Office Bearer	Not Attempted	
0247571	Allan Shearan	Rooty Hill RSL sub-Branch	2023_01_30- Conflicts_of_Interest	Office Bearer	Not Attempted	
0247571	Allan Shearan	Rooty Hill RSL sub-Branch	2023_05_22- Safety_Risk_and_Wellbeing	Office Bearer	Passed	03/09/2023



What topic would you like to see made available next in the suite of Training modules?

- Ceremonies and memorabilia
- Fundraising
- Conduct of sub-Branch meetings
- Cyber and Privacy
- Financial Management

Project A Services Project



Wellbeing **Support** Officers

Goal 1, initiatives 1.7 & 1.9



Wellbeing Support Officers (WSOs)



Wellbeing Support Officer Handbook

- Establishing a network of volunteer Wellbeing Support Officers (WSOs).
- Aim to have one in each sub-Branch.
- WSOs provide information to veterans and their families about accessing wellbeing services.
- RSL NSW is rolling out training to support building the network.

WSO Training Pilot



RSL

NSW

Basic Wellbeing Support Officer Training Package: Wellbeing Support Officer Opening

The Returned and Services League of Australia (New South Wales Branch)



What other training topics would you like to see offered by RSL NSW?



Mentimeter

Does your sub-Branch have a Welfare Support Officer / Welfare Officer? (Yes or No)



Mentimeter

Is your sub-Branch interested in having a volunteer train as a Wellbeing Support Officer? (Yes or No) Volunteer **Advocate** Network Goal 1, initiative 1.11



What is a Community of Practice (COP)



- CoPs are a form of social learning that create a learning community to share and develop practice and build knowledge
 - CoPs are groups of people who share a concern or a passion for something they do and learn how to do it better
 - Change to Strategic Plan to ensure support for volunteer advocates and CoP through RSL LifeCare

Volunteer Advocate Community of Practice (COP)



- Advocate Workshop held on 19 October
- More than 30 RSL NSW volunteer advocates attended
- Included presentations from RSL LifeCare, an ATDP CoP expert, and open forum for Advocates
- Planning for next steps for CoP

RSL LifeCare CRM Pilot

iii Dynamics 365	RSI, Defence Care	₽ Search		SANDE	3OX
=	← 🗄 🖬 Save	🚰 Save & Close 🛛 + New 🌘 Se	nd survey 🔥 Open org chart	Deactivate 🛛 🕄 Lists and segme	ents 🗸 🖻 🛃 Share 🗸
	A Duplicate Records Detected				Ignore And Save View Duplicates
③ Recent ∨ ⊀ Pinned ∨	Jake Muss - Une Contact	-		0	Conser
My Work	Phone Enquiry Active for 4 months	k identify Enquirer (4	Mo)	A Create Enquiry	Assign Enquiry
Dashboards Activities	Summary Community S	upport Claims & Advocacy Re	ierral Employment Wellb	peing Intake Revenue Generation	
D Queue Items					
Checklist Templates				+	New Claim Item O Refresh ;
Customers	Status Reason ~	Submitter	f ~ Determinati ~ Co	indition 1 ~ Case ~	SOP ~ MRCA ~
R Contacts	Accepted	13/04/203	3 13/04/2023 An	uiety 2022-10	anaiety dL. Ves
Accounts	Submitted	15/05/202	a Ce	rvical Spondylosis Appealt 2	cervical s Yes
Service	Rejected	13/04/202	3 13/04/2023 Ce	mical Spondylosis 2022-10	cenical s Yes
? Enquities	Rejected	15/06/202	3 15/06/2023 Fra	actured toe 2023-06	Yes
Ca Claims & Advocacy 🗘	1-4.0(25				H ← Pigr1 →





- Pilot ran January 2023 September 2023
- Provided training on RSL LifeCare's Customer Relationship Management (CRM) system
- Aim to integrate volunteer advocates to ease claims and wellbeing case management
- Six volunteer advocates across NSW with access to a training system
- 12 volunteer advocates to begin on live system in November

Veterans' and Families' Hubs

Goal 4, initiative 4.3



Vision and Strategy



Status

- Centres now operating in Nowra, Wagga Wagga, Hunter (temp) and Dee Why
- Awarded 'Request' for Business Cases for Hunter, Tweed, Queanbeyan, Hawkesbury and Bardia!
- Additional Hubs being considered in Sydney CBD, Central Coast, New England and Central West – per strategy
- Potential 13 hubs by 2026!

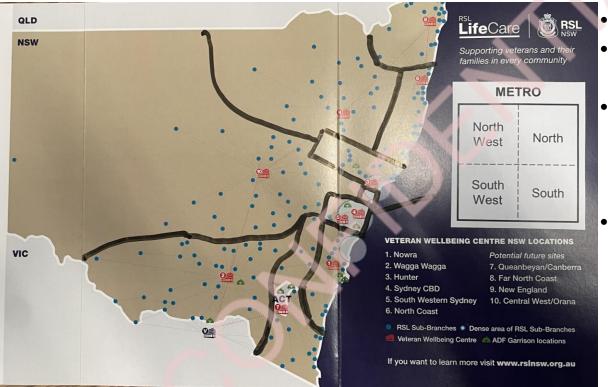


District Rationalisation

Goal 5, initiatives 5.10 & 5.16



Concept – Delegates' feedback



- One Hub per District
- Hub sub-Branch relationship
- Hub co-locate District support – training and assistance to all sub-Branches
- Advocate and Wellbeing Support Officer (WSO) coordination and support



Mentimeter

Do you support the concept of organising RSL NSW's District Council structure around the growing network of Veterans' and Families' Hubs? (Yes or No)

Project B Advocacy



Project B - Advocacy

- RSL Clubs, Service Associations & Clubs Australia MOU completed
- Veterans' Needs Research completed
- Advocacy management process and Advocacy Plan developed
- Ongoing progress towards JTA and RSL-related organisations agreements

Strategic Plan Program Challenges



Challenge – Ongoing Funding

- The Strategic Plan requires funding until 2026
- Will allow the Strategic Plan to address larger, more complicated Initiatives



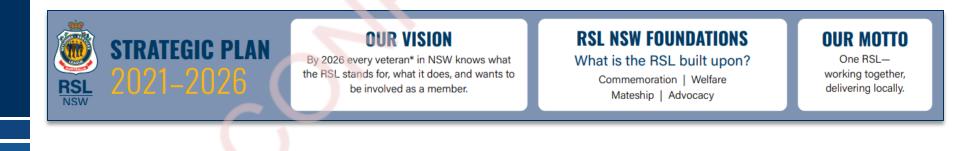
Challenge – Transitioning to BAU

- Staffing and other resources required to move Strategic
 Plan Initiatives to Business as Usual (BAU) activities
- Whole-of-organisation commitment to reform



Challenge – Awareness & Engagement

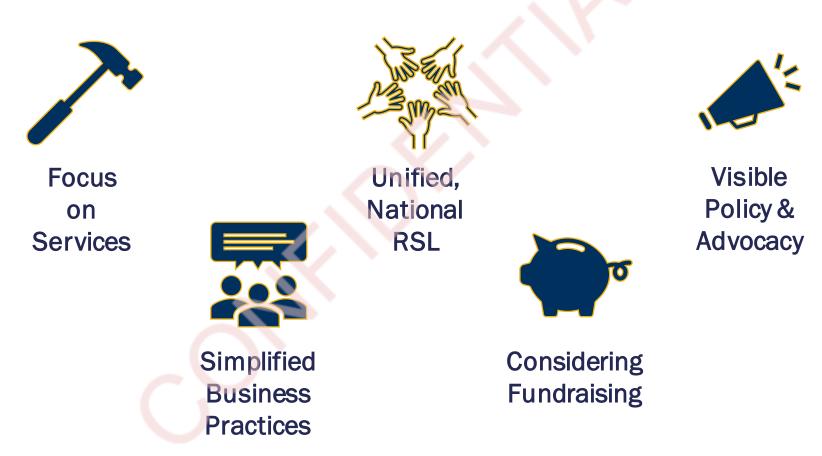
- Are you and your sub-Branch aware of the Strategic Plan?
- Are you engaged?
- What can we do to spread the word?
- How would you like this information delivered?



What's next?



Phase 2



Upcoming A – Services projects

- A04 Veterans Catalogue: offer a user-friendly guide for serving and exserving veterans and their families to locate services within their local area
- A06 WSO network: By Dec 2024, Wellbeing Support Officers (WSO) are in every sub-Branch
- A07 Support for volunteer advocate network: Support RSL volunteer wellbeing and compensation advocates through training, support, advice, and a common CRM
- AO9 District Support Officers: Design of support position for Districts and sub-Branches
- A10 District Rationalisation & A13 District Review : Continuing work of the District Administration Rationalisation Working Group (DARWG)

Upcoming C&D – Engagement & Membership projects

- CO7 Community and Schools Commemorative Learning Material Suite: Continuing to develop learning materials and rollout 'Draw to Remember' campaign.
- DO1 Establish baseline data for membership growth: Data validation required before completion
- D05 Process for other ESOs to join RSL NSW: Planned, with standardised process to be established
- D08 Collaboration Forum for sub-Branches: Potential pilot to run through Facebook.

Upcoming E – Business Model projects

- EO2 sub-Branch KPI reporting framework: develop a dashboard to pull together information from Annual Budgets, Annual Returns, Compliance Annual Reports, Training and Marketing information – to include District portal
- EO3 New head office identify an affordable and appropriate headquarters for ANZAC House, other ESOs and partners
- E04 Fundraising and alternate funding streams: establish a Fundraising Committee to the Board and develop a fundraising strategy
- E07 Accounting system: establish a standard chart of accounts for all sub-Branches
- EO8 Written Directions Framework: review of all policies and SOPs to prioritise for updates and revisions
- E09 Establish grants' advisory function: establish a full-time grants application and advisory function to support sub-Branches

What we need from you



Questions

Remember there is also an opportunity to ask questions tomorrow.



Thank you

See you all tomorrow.



Thank you to the following members for their invaluable contribution to the reference/working groups

Membership

- Greg Morris, North Gosford
- Mike Sterling, Coogee
- Peter McAskill, Forestville
- Allan Lotfizadeh, Epping

Claims Advocacy

William Forsbey, City of Sydney

Samantha Macabulos, Nelson Bay

Jo Beavis, Miranda

Cath Allen, RSL LifeCare Veteran Services

Rodney Smallwood, Toronto

Geoff Harrison, Wingham

Bronte Pollard, Kirribilli

District Rationalisation Reference Group
Sandra Lambkin, President New England
Berdene Oxley-Boyd, President Riverina
Brian Willey, President Lower North Coast
Derek Lesley, Chair DPC
David Ferr <mark>y, VP & Sec</mark> retary Central Coast
an <mark>Bubb, Treasurer,</mark> Intra Mural District Council
Alan Barnes, VP Far Southern Metro <mark>po</mark> litan
Rob Lunnon President Northern

Bob Lunnon, President Northern Beaches

District Administration Rationalisation Working Group Peter Watson, Harbord Brian Willey, Wingham Allan Lotizadeh, Epping David Hand, Castle Hill Rob Fry, Alstonville Richard Salcole, Wagga Wagga Peter Stephenson, Medowie David Ferry, Terrigal-Wamberal John Gordon, Alstonville Joe Kaplun, Panania Philip Gerber, Seven Hills

Mark Lee, Cumberland

Engagement

Greg Morris, North Gosford

Bronte Pollard, Kirribilli

Bob Lunnon, Forestville

Allan Lotfizadeh, Epping

David Ferry, Terrigal/Wamberal

CRM & sB Portal

Greg Morris, North Gosford Greg Hoving, Mullumbimby Brian Willey, Wingham Allan Lotfizadeh, Epping

Thank you to the following members for their invaluable contribution to the reference/working groups

Chris Willey, Wingham

VSF promotion	Compliance Annual Report	Governance training	Written Directions Framework	
Frank Brown, Maroubra	Buster Beatty, Laurieton	Mick Brownlow, Wauchope	Buster Beatty, Laurieton	Tad Samojlowicz, Forestville
Bill Harrigan, Bondi Junction / Waverly	Mick Brownlow, Wauchope	Lachlan Donald, Malabar	Mick Brownlow, Wauchope	Gary Samuels, Gulgong
	Les Mackie, The Entrance/Long Jetty	Chris Dunne, Mosman	Chris Cox, Lockhart	Karen Samuels, Gulgong
Peter Stephenson, Medowie	Bob Waller, Old Bar Beach	Leonie Gilford, Wingham	Pat Cleggett, City of Newcastle	Michael Tabone, Terrigal Wamberal
Brian Willey, Wingham	Glenn Wall, Gresford	Anne Powell, Mosman	Bob Dokter, Doyalson-Wyee	Todd Vercoe, Bowraville and District
Annual Budget	Ted Samoj Iowicz, Forestville	Deane Tietzel, Mosman	John Glasser, City of Lismore	Glenn Wall, Gresford
Greg Cavanagh, Wauchope	Lynn Webber, Sussex Inlet	Alan Toner, Mosman	Leonie Gilford, Wingham	Bob Waller, Old Bar Beach
Bob Dokter, Doyalson-Wyee	Russell French, Uralla	Margaret Wallis, Wauchope	Michael Hankey, Moree	Lynne Webber, Sussex Inlet
Ben Coutman, Cardiff	Brian Willey, Wingham	Peter Watson, Harbord	John Hopwood, Castle Hill and District	Brian Willey, Wingham
Brian Willey, Wingham	Chris Willey, Wingham	Brian Willey, Wingham	Les Mackie, The Entrance/Long Jetty	Chris Willey, Wingham

Francis Woodhams, Mosman



Questions?