Legacy Brisbane Strategic Plan

2025 – 2029



Foreword

For nearly a century, the Legacy Club of Brisbane has supported families of veterans who have given their life or health in service to our nation. Our history reflects continuous adaptation to evolving needs, responding to changing societal, economic, and demographic circumstances while maintaining unwavering dedication.

This Strategic Plan reaffirms our commitment to Legacy's Charter, Vision, Mission, and Values, outlining key objectives to guide our operations in the coming years. As the needs of veterans' families have changed, so have we. While there has been a reduction in the number of Australian armed services personnel who give their lives in service, we must still support the families of veterans who give their health. These families have complex, multi-disciplinary needs. The chronic and acute mental health crisis among armed forces personnel and veterans is also having a profound impact on their families – and Legacy is an essential part of the care response.

During the life of this strategic plan we will move to new, purpose-built accommodation at Greenslopes. This site will deliver services through a collaborative model of care, offering a comprehensive range of support services in one location. It is located in the Health and Medical Research precinct and represents a truly family-focused solution.

Our service delivery programs must remain innovative, responsive, and well-resourced. We must continue to operate with effective leadership, strong governance, and sound financial management. Recognising the importance of financial sustainability, we're emphasising strategic philanthropy and fundraising to diversify funding sources and ensure long-term stability.

Legacy Brisbane remains committed to building a quality team of Legatees, Staff, and Volunteers, fostering a culture of service and compassion. While operating independently, we continue to collaborate with other Legacy Clubs and like-minded organisations in the ex-services sector.

As we look to the future, we acknowledge the enduring needs of our families. Through our enhanced focus on service delivery and strategic philanthropy, we are well-positioned to meet these challenges and continue our vital work supporting those who have sacrificed so much for our nation.

Dr Annabel McGuire
President, Legacy Brisbane

Legacy Charter, Mission and Values

Charter

THE SPIRIT OF LEGACY IS SERVICE.

The care of dependants of those who served their country; namely, veterans who died on operational service or subsequently, and Australian Defence Force members who died as a result of their service, affords a field for service. Safeguarding the interests of dependants, especially children, is a service worth rendering.

Personal effort is the main essential.

Inasmuch as these are the activities of Legacy, it is our privilege to accept the legacy of the fallen.

Mission

Supporting the families of deceased and incapacitated veterans.

Vision

Preventing social or financial disadvantage for the families in our care.

Values

COMMITMENT

We are committed to the best outcomes for our beneficiaries. We realise this imposes obligations upon us however, we will never forget our Legacy pledge. We are committed to all Legacy family members.

UNDERSTANDING

We commit to listening to the needs of our beneficiaries in order to understand how best we can meet their needs. Only through truly understanding the needs of the people that we serve can we deliver solutions that can empower those in our care.

TRUST

We realise trust is hard earned and easily lost. Trust must underpin our engagement with our beneficiaries and protect their interests and information. Trust must be maintained amongst the whole Legacy Brisbane family of Legacy House staff, Legatees and volunteers. United in trust we are a powerful team.

EMPATHY

We understand that empathy is a strength not a weakness. It requires us to truly understand another person's perspective or circumstance whether we agree with it or not. Through an empathetic approach collaborative solutions can rise from chaos.

Key Stakeholders

Key Stakeholders are those groups which have an impact on, or an interest in, the activities of Legacy Brisbane.

Legacy Brisbane's key **internal stakeholders** are:

- Beneficiaries/Clients
- Legatees
- Staff
- Board of Directors
- Volunteers

Legacy Brisbane's key **external stakeholders** are:

- The Australian Defence Force (ADF)
- The Department of Defence
- The Department of Veterans' Affairs (DVA)
- Legacy Australia Incorporated
- Legacy Club Services
- Queensland and other Legacy clubs
- Corporate, community and financial supporters
- Ex-service organisations (ESO) and other service delivery partners
- Industry Regulatory Peak Bodies
- Federal and State Health and Social Care Bodies

Legacy Brisbane's **stakeholders of Influence** are:

- Brisbane North and South Primary Health Networks (PHNs)
- Central Queensland and Sunshine Coast PHNs
- Queensland Mental Health Commission
- Department of Social Services
- Department of Health and Ageing
- Office for Veterans

Legacy Brisbane recognises that it should strengthen and further develop these relationships by:

- effective engagement demonstrating the value of our work in the community
- changing behaviour and perceptions where necessary
- enlisting the support of our stakeholders in meeting our objectives
- having transparent and accountable processes and outcomes
- informing stakeholders of progress under this strategic plan



Our Desired Future –
Legacy Brisbane in 2029

Service model

Programs delivered by a knowledgeable and supported workforce

Governance

Structured to deliver the mission and strategic priorities



Effective workforce

Well-trained and supported Legatee, paid and volunteer workforce.

Partnerships and alliances

Symbiotic and meaningful relationships for research, services and evaluation



Quality and accountability

Clear policies, procedures and practices within a quality system

Brand health

Recognised as the foremost provider of family support to the Defence and Veteran community.

Communication

Managed, purposeful and effective internal and external communication

Technology

Appropriate technology to secure effective knowledge management



Financial strength

Diverse revenue streams and a strong balance sheet to fund services into the future

National representation

Continuing involvement in Legacy Australia to add value to national policies and strategic direction

Planned and measurable impact

Planning, delivering and measuring impact from an evidence base



Strategic Pillars

Leadership and Governance

Goal: Ensure effective leadership, governance, planning and reporting to achieve organisational goals and regulatory requirements.

Service Delivery

Goal: To provide compassionate, timely, and flexible support that meets the unique needs of our community, empowering individuals and families to thrive and improve their quality of life despite their loss.

Financial Sustainability

Goal: Ensure current and future organisational capability and sustainability through sound financial management, diversified income and informative reporting.

People and Culture

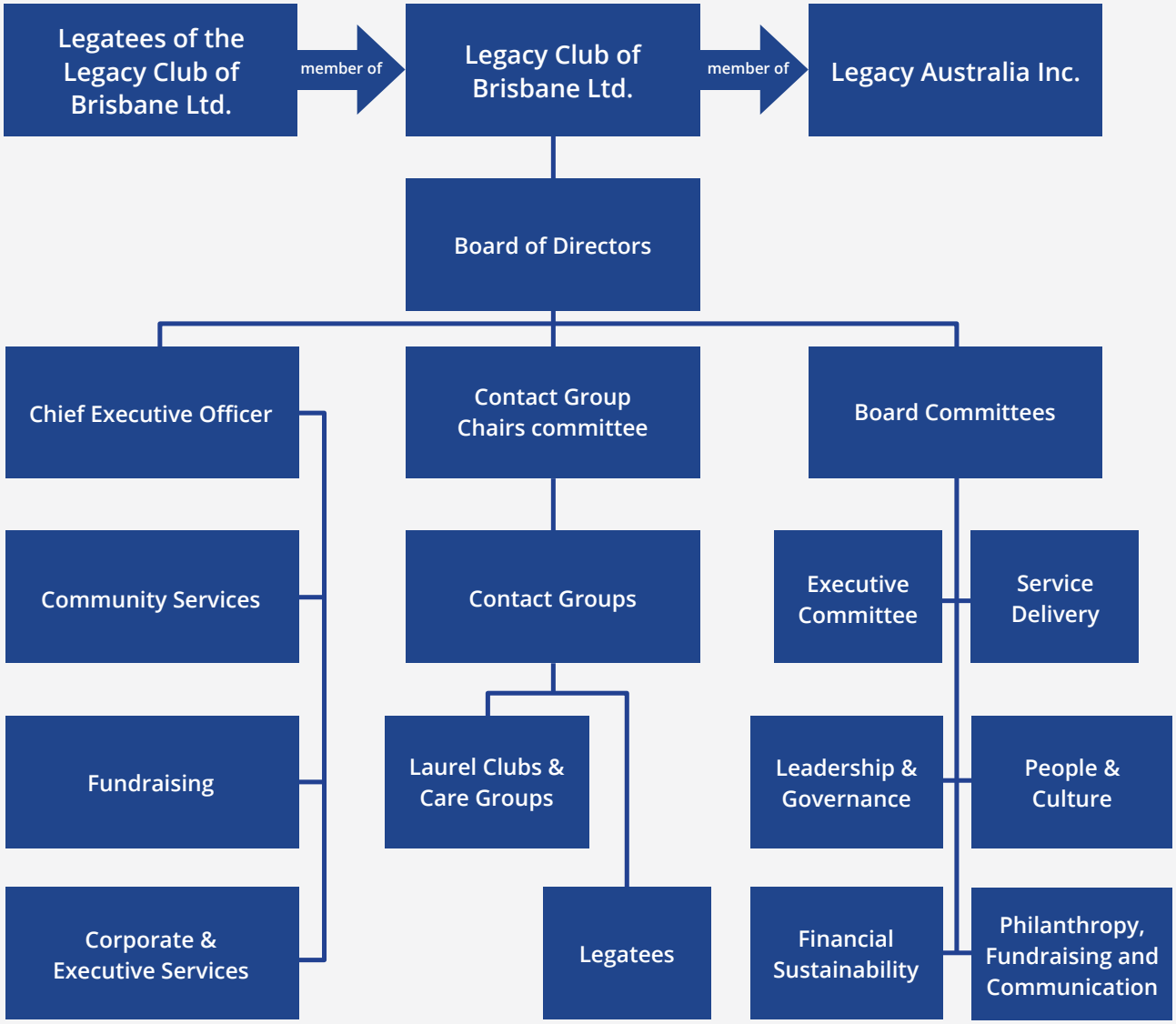
Goal: To provide the people and culture capability and capacity to deliver Legacy Brisbane's services.

Philanthropy, Fundraising and Communication

Goal: Increase philanthropic support to Legacy through the giving of time, talent and funding to ensure we have the volunteers, skills and funds needed to deliver our mission to the families of fallen and injured veterans.



Legacy Organisational Chart





Current Trends and Issues

Outlook	Implications for Legacy Brisbane 2024-2029
Increased regulatory and compliance requirements in the For Purpose environment	• All Legacy Clubs must only expend funds on intended purpose. • Risk Management and Governance must be resourced to sustain compliance across a dispersed and growing Club area. • Board must have skills and knowledge of emerging codes of conduct and practice across all Legacy domains (fundraising, communication, services etc).
Competition for funding is increasing amongst ESO and other For Purpose organisations	• Legacy must meaningfully engage our stakeholders regularly. • Legacy must diversify its revenue streams to sustain and attract corporate, individual and community donors. • Legacy must communicate effectively across multiple domains to promote its services and social impact. • Legacy must collaborate, where appropriate, with other service providers in the interests of our beneficiaries.
Royal Commission into Defence and Veteran Suicide Final Report	• Legacy must continue to advocate strongly for the families impacted by veteran suicide and poor mental health. • Legacy must investigate how we can identify and support vulnerable families before they leave Defence and transition into community. • Legacy must collaborate strongly with veteran service providers to provide wrap around care for transitioning families needing support. • Legacy must engage with State mental and physical health bodies to promote the needs of veterans and families in Queensland.
Volunteering support and Community Connectedness	• Legacy must engage at all levels of government including local community, state and national to promote Legacy as a charity of choice for volunteering. • Legacy must adapt its volunteer service offering to grow 'traditional Legatees' whilst providing the opportunities for short term/event-based volunteering as a 'try before you buy' experience. • Volunteers must see Legacy as a charity of choice. • Training and development of the workforce must grow our governance and service capabilities. • Ultimate goal is to recruit and convert volunteers to Legatees.
Legacy must be able to deliver services throughout its area of operations	• Legacy must recruit and retain the human resource to deliver services in the community. • Technical knowledge must be continuously developed to support local Legatees in the community. • If Legacy lacks the resources to support its mission it must seek alternate methods (collaboration/MoU etc) to support families in our care. • There is growing complexity in service needs across all Legacy program areas. The hybrid model of care involving staff supporting Legatees must constantly be reviewed and training conducted to ensure we remain responsive to family needs.
Continuous Improvement Focus	• Legacy programs must be continuously reviewed to ensure we are meeting beneficiaries needs. • Research must inform program delivery and measure outcomes. • Programs and outputs must be measured and contribute to the intended social impact identified in program frameworks. • The workforce and collaborative partners along with beneficiaries must be surveyed to gain user experience feedback.

Strategic Objective One
– Service Delivery

Goal: To provide compassionate, timely, and flexible support that meets the unique needs of our community, empowering individuals and families to thrive and improve their quality of life despite their loss. We are committed to delivering social impact by providing the right support at the right time in partnership with relevant organisations. Our efforts and articulated client outcomes align with the United National Sustainable Development Goals of good health and wellbeing, quality education, and reduced inequalities.

No.	Deliverables	Performance Measures	Responsible	Report	Report time
1	Clients' needs are understood and met by Legacy Brisbane	One program evaluated per year for planned, unplanned and unmet needs through interactions (survey, focus group or other) with clients or their representatives	Service Delivery Committee	Completed Program Report	Annual
		Program planning frameworks are reviewed to outline required resources (quality, quantity, availability and appropriateness)	Service Delivery Committee	KPI Report	Annual
2	Legacy Brisbane effectively uses available resources to delivery high quality services	Report by program on resources (quality, quantity, availability and appropriateness)	Service Delivery Committee	KPI Report	Annual
3	Clients' outcomes are supported through collaboration with community partners	Report and evaluate collaborative partners to ensure program outcomes are reached	Service Delivery Committee	KPI Report	Annual



Strategic Objective Two
– Leadership and Governance

Goal: Ensure effective leadership, governance, planning and reporting to achieve organisational goals and regulatory requirements.

No.	Deliverables	Performance Measures	Responsible	Report	Report time
1	Legacy Brisbane meets its regulatory compliance requirements	The Governance Committee annually reviews the Constitution, Board Handbook and the ACNC regulations to ensure alignment	Governance Committee	C'tee Minutes & Board Note	Annual
		Reporting and other compliance obligations to statutory bodies and LA Inc are met and minuted with Financial Sustainability Committee	Finance Manager	C'tee Minute	Each Board meeting
2	Legacy Brisbane board committees are effective in meeting the expectations of the Board	Board committees annually review their respective Terms of Reference to ensure they remain effective	Committee Chairs	C'tee Terms of Reference	Annual
		The Board annually assesses the effective of the board committees structure and outputs as aligned to the key strategic priorities based on qualitative reports by Committee Chairs	President	C'tee review	Annual
3	Board members' qualifications satisfy the minimum requirements set by the Australian Charities and Not-For-Profits Commission	Establish and annually review a skills matrix for the Legacy Brisbane Board and Committees to include qualifications and experience requisites	President	Skills Matrix	Annual
		Validation of members' qualifications for compliance with the Board Skills Matrix and peak body (ACNC, AICD) standards	President	KPI Report	Annual
4	Develop and maintain a risk management plan which identifies, mitigates and manages risk.	Qualitative report on the risk matrix to ensure risks are routinely and proactively identified, mitigated, managed and retired	CEO	Risk Matrix	Biannual

Strategic Objective Three
– *Financial Sustainability*

Goal: Ensure current and future organisational capability and sustainability through sound financial management, diversified income and informative reporting.

No.	Deliverables	Performance Measures	Responsible	Report	Report time
1	The operating budget is achieved or remains responsive to income fluctuations	Program/business area expenditure no greater than 5% of budget unless greater variance endorsed by Board in response to income fluctuations	Finance Manager	KPI Report	Triannual
2	The documented capital investment strategy achieves targeted returns on investment	Portfolio returns achieve or exceed targeted returns Comparative performance against asset class benchmarks to confirm reasonableness of return target	Financial Sustainability Committee	KPI Report	Biannual
3	Legacy Brisbane's budgeting process considers the enduring commitment of the Legacy Mission	The annual budget and five-year plan are consistent with long term financial sustainability	Finance Manager	Commentary demonstrating long term considerations	Annual



Strategic Objective Four
– People and Culture

Goal: To provide the people and culture capability and capacity to deliver Legacy Brisbane's services.

No.	Deliverables	Performance Measures	Responsible	Report	Report time
1	Recruit Legacy Brisbane's human resources to provide its defined services	Resourcing for Legacy Brisbane is at agreed levels	Group Chairs (with oversight by Community Operations Coordinator)	Capability Report	Quarterly
2	Provide the training and development to equip staff, Legatees and volunteers to perform their role	100% of new staff, Legatees and volunteers complete Orientation within 3 months	Legatees: Group Chairs (with oversight by Community Operations Coordinator) Staff: P & C Manager	Training report	Bi-monthly
3	Develop and implement retention strategies for Legatees, volunteers and staff	Retention rate – A rate of around 65% is the average	Group Chairs, P & C Manager	Staff and volunteer turnover report	Quarterly
4	Culture that supports the wellbeing of the Legacy Team and the creation of an inclusive and thriving work culture	+90% agree their Legatee experience has been personally fulfilling in the annual Legatee survey +80% of staff agree with the statement 'I feel like I belong at Legacy Brisbane' in the annual staff survey	Group Chairs, P & C Manager	Staff and Legatee survey	Annual

P & C Committee - People & Culture Committee
P & C Manager - People & Culture Manager



Strategic Objective Five
– Philanthropy, Fundraising and Communication

Goal: Increase philanthropic support to Legacy through the giving of time, talent and funding to ensure we have the volunteers, skills and funds needed to deliver our mission to the families of fallen and injured veterans.

No.	Deliverables	Performance Measures	Responsible	Report	Report time
1	Increase brand affinity and consideration in key target markets	Increase in Legacy brand awareness with propensity to give in target audiences	PFC Committee/ FRMC Manager	National brand survey	Biennial
		Development and implementation of Legacy Communication plan	PFC Committee/ FRMC Manager	Review against plan	Annual
		Development and implementation of government advocacy plan for Legacy Brisbane (in alignment with the national advocacy plan).	PFC Committee/ CEO/FRMC Manager	Review against plan	Annual
2	Grow sustainable revenue through a balanced portfolio of fundraising programs	Develop and implement a 4-year growth and diversification strategy for Legacy Brisbane	PFC Committee/ CEO/FRMC Manager	2025 – Launch plan. Ongoing Review progress against plan	Annual
		Legacy Brisbane has sustainable, reliable and diverse revenue streams from effective and ethical fundraising and philanthropy programs	Board/CEO/PFC Committee/FRMC Manager	Program performance report	Biannual
3	Grow Legacy's advocates and supporter base	Establish a major gifts taskforce to diversify Legacy's philanthropic revenue	PFC Committee/ FRMC Manager	Opportunities pipeline report, Major gift Task Force membership and referrals	Biannual
		Increase in total no. and lifetime value of active supporters (donors, fundraisers and volunteers)	PFC and PC Committee/CEO/ FRMC Manager	Supporter health check report	Annual
4	Build a philanthropic culture at Legacy	Board, staff and Legatees understand/value the role of fundraising and philanthropy and can articulate Legacy's case for support. Board and advocates are champions of Legacy's work and annually convert contacts to donors	PFC Committee/ Chair/Board/CEO/	No. of Board and advocate referrals, board engagement in FR activities	Biannual
		Legacy cultivates loyalty and advocacy through best-practice donor stewardship, acknowledgement and ethical fundraising practice	FRMC Manager	Donor survey results, lifetime value report, FIA Code compliance	Annual

PFC Committee - Philanthropy, Fundraising and Communication Committee
FRMC Manager - Fundraising, Marketing and Communication Manager

Honouring the past.... responding to the future

The Legacy Ode

Fear not that you have died for naught
The torch you threw to us we caught.
And now our hands will hold it high
Its glorious light shall never die,
We'll not break faith with you who lie
On many a field.
Lest we forget



Artist impression of our new Legacy House being built at Greenslopes.

LEGACY®



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