



NATIONAL ESO FORUM REPORT

*Tuesday, 30 May 2023 - A record of the conversation held at
the Shrine of Remembrance, Sydney*

Paper 1 of 2

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Introduction

Veterans and their families make a significant social and economic contribution to our nation. One in twenty Australian households include someone who is a current or former member of our Australian Defence Force¹.

The Ex-Service Organisations (ESOs) that provide support and services to veterans and their families make-up a diverse sector that has grown organically to meet their different needs. Many ESOs have been founded by veterans themselves, and they understand that there is a need to work closer together to simplify understanding and access for veteran and their families and to better leverage the collective strengths of the sector.

The first National Forum for Ex-Service Organisations (ESOs) held in Canberra in November 2022 brought together ESOs from across Australia. The Royal Commissioners into Defence and Veteran Suicide addressed the forum and updated participants on their inquiry. Participants discussed and ranked in order of importance the top five priority issues that they wanted to work on together as a sector that supports veterans and their families, and to ready the sector to respond to the recommendations of the Royal Commission:

1. Establish a peak body for the ESO sector to represent and advocate for the needs of ESOs, Australian veterans and their families
2. Map and categorise the services that ESOs deliver, and provide measurements of service quality to assist veterans navigating service needs and providers
3. Explore standardised reporting and measurement frameworks for ESOs that use quantitative and qualitative data to measure the success of services and programs
4. Prioritise the establishment of ESO-led-in-service transition coaching, support, and resources from ESOs and veterans
5. Advocate for enhanced defence family engagement by calling on government to expand DVA's transition seminars to next of kin to ensure family members are aware of support services available to veterans²

The second National ESO Forum held in Sydney on 30 May 2023 addressed the first two priority issues. It brought together over 80 representatives from 40 ESOs from across the country to consider a Peak Body for the sector. Facilitated by the Returned and Services League of Australia and its' State Branches, the Forum provided a framework to enable discussion and develop thinking around a Peak Body.

Key outcomes of the forum included broad acceptance for the introduction of an ESO Classification system and the priority functions of a higher authority, or Peak Body, for the ESO sector.

This paper provides a high-level overview of information shared at the forum, including participant feedback provided verbally and in writing, and copies of information shared by presenters and speakers. It is not an exhaustive record.

A second paper is being developed using the findings and feedback of the second forum to create an updated ESO Classification list and options for Peak Body structures that consider the priority functions agreed at the forum. RSL will continue to consult with participants and

¹ [Service with the Australian Defence Force: Census, 2021 | Australian Bureau of Statistics \(abs.gov.au\)](https://www.abs.gov.au) accessed 1 June 2023

² National ESO Forum Report, RSL Australia, 15 November 2022, p.13

experts in the development of that paper and it will be shared in advance of the next (third) ESO National Forum later in the year for public comment and further review.

This report will also be shared with other stakeholders, including the Royal Commission into Defence and Veteran Suicide and the Australian Government.

Forum Structure

Participants were provided with pre-forum information papers (Appendix 1) to inform their thinking and preparations ahead of the day.

The agenda included presentations from:

- The Hon Matthew Keogh MP, Minister for Veterans' Affairs (*pre-recorded video*)
- Marc Purcell, CEO, Australian Council for International Development (ACFID)
- Lt Gen Sir Nick Pope KCB CBE, Executive Chair, UK Confederation of Service Charities (Cobseo)
- Nick Kaldas APM, Peggy Brown AO, Hon James Douglas KC, Commissioners, Royal Commission into Defence and Veteran Suicide

The Forum was organised into three working sessions:

1. ESO classification
2. Functions of a Peak Body - all potential functions
3. Scope of a Peak Body - priority functions for a Peak Body

Session One: Classification of ESOs

Presentation 1: Katie Maloney, General Manager Partnerships & Engagement, RSL Queensland

- Purpose and benefits of a classification system for ESOs
- Explanation of the example classification list provided in the pre-forum papers and on the day

Participant Activity 1

Participants addressed two questions during a table group exercise:

1. Review and edit (refine or add) the example classification list developed primarily from recommendations of the Productivity Commission inquiry into the system of compensation and rehabilitation for veterans.
2. If time allows, to consider the appropriate classification for their ESO (core purpose – with understanding that some ESOs will undertake activities across more than one classification)

Outcome 1: There was agreement that an ESO classification system was required, and refinement offered of the examples provided (next page). High-level comments are captured in the table below. Furthermore, there was alignment that in addition to the classification system, principles supporting the system was also required.

ACTION 1:

- RSL to revise the classification list based on feedback and provide an updated copy to participants for review and comment.
- RSL to add principles of the classification system, in addition to the amended categories

Classification	Core purpose	Forum decision
Claims Advocacy	Assisting veterans and their families prepare and lodge claims to DVA, as well as arguing the veterans' case to DVA, the Veterans' Review Board (VRB and the Administrative Appeals Tribunal (AAT).	Category agreed
Referral Service	Assisting veterans and their families to access different types of services, including services provided organisations outside of the defence and ESO sectors.	Category agreed
Wellbeing Support	<p>Providing services based on the Australia Institute of Health and Welfare's Domains of Wellbeing Veteran Centred model*. Classified into sub-groups for those providing services related to:</p> <ul style="list-style-type: none"> • Health <ul style="list-style-type: none"> ○ physical ○ mental • Social Support: <ul style="list-style-type: none"> ○ connecting veterans with other veterans ○ connecting partners of veterans with other partners of veterans ○ connecting children of defence or veteran families with other children of defence or veteran families ○ connecting veterans and their families with civilians • Justice and Safety • Housing • Transport • Education and Skills • Employment • Income & Finance <p>*We note the DVA adapted model highlights Recognition and Respect and we reflect this in a dedicated classification of Commemoration and/or Camaraderie</p>	Category agreed in principle with significant feedback to be incorporated, including but not limited to housing as a separate category and aged cared to be included.
Veteran Policy Promotion	Informing government about the practical experience of accessing the veteran support system and recognising veterans' interests in government policy	Category agreed in principle with renaming to Veteran Policy
Commemoration and/or Camaraderie	Providing opportunities for mateship, connection, commemoration, and remembrance of significant military events. i.e. Unit Associations	Agreement to separate this category into two classifications
Awareness	Raising awareness and/or raise funds for veteran welfare, but not involved in service provision	Category agreed with the inclusion of additional explanation: includes one-off events, but are not regular activities and as such are distinct from camaraderie functions.

Table 1: Example Classification Table with summary of feedback provided from Forum participants

Session One – Participant discussion

Participants provided the following verbal feedback:

- Learnings from the work of ESOs who have or are collaborating to align their voices in work to advocate to government, such as The Voice of the Alliance of Defence Service Organisations (ADSO)
- A perceived or real lack of governance across the ESO sector
- Consideration of service standards and about quality assurance of ESO operations
- The absence of a Code of Conduct for the sector
- A suggested change in how the sector describes itself - from ESO to VSO (Veteran Service Organisation) or VFSO (Veteran and Family Service Organisation)
- The possibility of a classification system to not only address service outputs but also the ESO size or geographic location(s)
- The possibility of classification based on differentiating between in-service, transition and post-service
- Concerns as to how a Peak Body will ensure the voices of smaller ESOs are heard*
- Recognition of fee-for-service providers entering what has traditionally been a not-for-profit sector
- A need to future-proof classifications to ensure the system can address emerging and future issues
- A need for all ESOs to accept they are not the only solution; true collaboration includes referring veterans and their families to organisations that can better meeting their needs – including to non-veteran specific organisations
- Acknowledgement that the ESO sector includes people working in paid or unpaid roles without appropriate training or qualifications
- The importance of data, evidence, and research to inform the sector and the Peak Body*
- A desire to change the “broken veteran” narrative, including by ordering classifications from a strengths-based perspective
- Acknowledgment that many veterans and their families live outside of Australia’s major metropolitan areas
- Acknowledgement that the federated model of governments means different legislative treatment of some veteran issues across the states and territories
- Acknowledgement of the differences in participant’s understanding (and acceptance) of who is a veteran.
- Consideration of the definition used by the Royal Commission as being applicable to one day’s service:

According to the Royal Commission’s Letters Patent, a veteran means a person who has served, or is serving, as a member of the Permanent Forces (within the meaning of the Defence Act 1903) or as a member of the Reserves (within the meaning of the Defence Act 1903).³

³ [Commonwealth Letters Patent | Royal Commission into Defence and Veteran Suicide](#) accessed 1 June 2023

Session Two: Functions of a Peak Body

Presentation 2: Marc Purcell, CEO, Australian Council for International Development (ACFID)

- Work and structure of ACFID
- Importance of purpose and mission
- Functions of different peak bodies

Participant Activity 2

Participants considered and identified possible functions of an ESO Peak Body during a table group exercise.

Outcome 2: Participants agreed a preliminary list of possible functions of an ESO Peak Body.

1. Policy advocacy – collective voice to lobby for the interest of veterans and their families
2. Performance reporting
3. Best practice guidance, administrative and technical support for ESOs
4. ESO Code of Conduct and setting Service Standards
5. Corporate Governance
6. Co-ordination and networking for members
7. Promotion and recognition of the sector
8. Accreditation and Quality Assurance
9. Communication, engagement and representation on behalf of veterans and their families
10. Independence
11. Intelligence gathering
12. Vision and mission
13. Research, data collection, reports and submissions
14. Campaigning to Government and the public
15. Community of Practice for claims advocacy and training

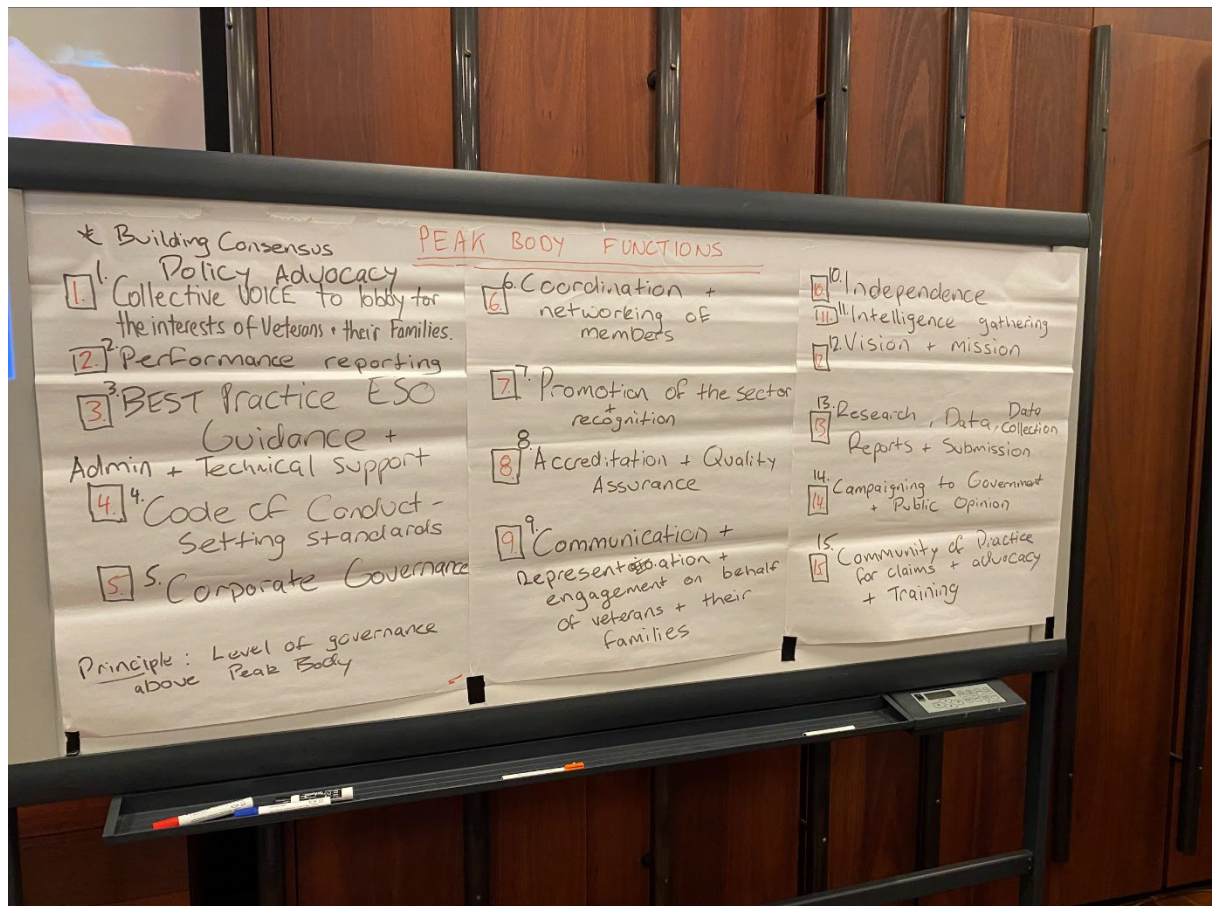


Image 1: Participant informed list of potential functions of an ESO Peak Body

Session Two - Participant discussion

Participants provided the following verbal feedback:

- While many ESOs would benefit from support and guidance about income generation, including grant funding, there was broad agreement it was not likely a Peak Body function
- A Peak Body must be focused on supporting ESOs to respond to the recommendations of the Royal Commission into Defence and Veteran Suicide
- Support and advice on governance is a key need for the sector
- A Peak Body should not undertake regulatory or regulatory-like functions, such as auditing ESOs against service standards, however the Peak Body to provide input and expertise about best practice and relevant service standards
- The Peak Body must be independent, build and maintain trust with members
- A requirement to have a clear methodology as to how a Peak Body would build consensus
- A Peak Body would not be a barrier for ESOs speaking individually
- Work to be done to determine how a Peak Body would be funded and financially sustainable
- A need to improve the Advocacy Training and Development Process (ATDP)
- A growing need for more and better-quality advocates, ESOs are struggling to retain and train advocates
- The Peak Body could facilitate an ATDP/advocate community of practice but not take

- responsibility for delivery of the training or quality control of advocates
- Intelligence gathering is of critical importance to a Peak Body – familiarity with government, stakeholder relationships or trust to influence policy and decision making
- Note the difference between principles and functions. Principles – independence, collaboration, inclusion, cooperation.

Presentation 3: The Royal Commission into Defence and Veteran Suicide

- Update on process and progress of the Royal Commission
- Call for participants not to underestimate the influence of the ESO sector and its capacity to change lives
- Role of the ESO sector implementation of the Commission's recommendations
- Strong support for an ESO Peak Body
- Call to continue inclusive, accountable and respectful collaboration
- Importance of putting veterans and their families at the heart of this work

Session Two – Participant Q&A with the Royal Commissioners

A summary of the conversation:

- The role of the ESO sector in determining the best option for its own Peak Body and communicating this to all stakeholders
- The role of a Peak Body as a facilitator, not regulator, assisting and encouraging the sector to understand best practice and standards, provide guidance on key matters to support ESOs and the welfare of the veteran community
- The importance of independence for a Peak Body - independent from members and separate to any ESO
- The concept of lifetime wellbeing (before, during and after ADF service)
- The reform work being undertaken by the ADF
- The importance of building and maintaining relationships of trust
- The nature and risk of ADF service and the cultural difference between service and civilian settings
- The value of best practice, data and research in addition to lived experience
- People must be central to the process
- The value of looking forward when determining the structure of a Peak Body (future proofing)
- The span of ambition – the value in starting small and developing and growing the functions and scope over time
- Different points of transition – entry to service, service to civilian life, ageing and aged care
- The Royal Commission will not be able to cover all issues in depth, there are important issues that will require advocacy beyond the life of the Commission

Presentation 4: Sir Nick Pope, Chair, The Confederation of Services Charities (Cobseo)

- History, structure and work of Cobseo
- Working with Government
- Managing membership
- Adding value
- Stakeholder engagement – individuals and organisations

Session Two – Participant Q&A with Cobseo

A summary of the conversation:

- Reaching consensus across the membership, how to progress issues when consensus or time is lacking (ie to respond to urgent media requests or fastmoving events)
- The importance of relationships of trust
- Trust is an identified risk in the organisational risk register
- The difference between the hard skills required in service (direct authority) and the soft skills (influence and inform) required to act as the voice of a sector
- Caution about the span of ambition – identify what is and isn't adding value
- Stakeholder engagement is critical
- Cobseo doesn't deliver services

Session Three: Scope of a Peak Body

Presentation 4: Andrew Condon, Industry Professor, Australian Catholic University (ACU)

- History and learnings from ESO mapping and research projects
- Position of the ESO sector within the wider eco-system
- The Peak Body needs to consider all the stakeholders in the Veteran Support System and deliver outcomes that support veterans and families being central to thinking and outcomes.

Participant Activity 3

Participants agreed if each of the previously identified 15 possible functions of an ESO Peak were a must have, should or could have, or shouldn't have function during a group table exercise.

Outcome 3: Participants responses identified four distinct must have functions.

- Policy advocacy (collective voice to lobby for the interest of veterans and their families)
- Independence
- ESO Code of Conduct and setting Service Standards
- Communication, engagement and representation on behalf of veterans and their families

Function	Must	Should/Could	Shouldn't
Policy advocacy	xxxxxxx		
Performance reporting		xx	x
Best practice guidance		xxx	x
Code of Conduct	xxxx	x	
Corporate Governance	x		
Co-ordination and networking		x	x
Promotion and recognition		x	x
Accreditation and Quality Assurance	x		xxxx
Communication and representation	xxxx		
Independence	xxxx	xx	
Intelligence gathering	x	xx	
Vision and mission		x	
Research and data		xxx	x
Campaigning	xxx		x
Community of practice		xx	x

Table 2: Summary of participant responses

Session Three - Participant discussion

A summary of the exchange:

- Independence is an operational must-have setting/principle, not a function
- A Peak Body must be independent of government, independent of individual ESOs and independent of service provision to veterans and their families
- A Peak Body must not have any regulatory functions, however the sector identifies the need for Service Standards and a process for reviewing and checking alignment to these standards

Participant Activity 4

Participants worked in table groups to prioritise the functions they had previously highlighted as important and rate from 1-3. This process was done for clarity from the ESOs present on their priority order of functions that will assist shape the consideration of the

Outcome 4: Participants responses identified three priority functions:

1. Policy advocacy, a collective voice to lobby for the interest of veterans and their families
2. ESO Code of Conduct and setting Service Standards
3. Communication, engagement and representation on behalf of veterans and their families

ACTION 2: The collective participants undertook to explore framework options, for an ESO Peak Body to deliver the agree priority functions.

Function	First priority	Second priority	Third priority
Policy advocacy	xxx	xxx	xx
Performance reporting			
Best practice guidance			xx
Code of Conduct	x	x	xx
Corporate Governance			
Co-ordination and networking	x	x	
Promotion and recognition	x	x	
Accreditation and Quality Assurance			
Communication and representation	x		xx
Independence	x	x	
Intelligence gathering			
Vision and mission			
Research and data			x
Campaigning			
Community of practice			

Table 3: Summary of participant responses

Wrap Up and Next Steps

Dialogue and discussions across the day identified strong support for the forum process and further work to reach agreement on ESO classification and a preferred option for an ESO Peak Body. Conversations also highlighted the ongoing challenge of considering engagement in this process from smaller, regionally located ESOs.

Additional conversations and comments identified a difference in thinking and sentiment of younger and older veterans regarding their engagement in traditional ESOs, such as RSL. This was noted as a separate issue to the discussions about classification and peak body.

Moving forward, participants agreed to the following actions facilitated by RSL:

- Provide a report of Forum 2 to participants (Actioned under this paper, Paper 1)
- Facilitate a third National Forum in September/October 2023
- Ahead of Forum 3 to develop pre-forum information papers in consultation with participants to inform discussion at that next forum. Pre-papers to include:
 - Updated ESO Classification system shaped by participant feedback from Forum 2
 - Different options for an ESO Peak Body frameworks able to deliver the top three priority functions identified at Forum 2 (p.12) as the initial remit of the Peak Body
- Forum participants to share Forum 2 reports and Forum 3 pre-papers with their members, fellow ESOs and other stakeholders to ensure there is deep engagement across the ESO sector, including with smaller ESOs, to inform this process.

Finally, a collective intent was also discussed, that the outcome of the third Forum will be an agreed ESO classification system and a preferred option for an ESO Peak Body. And that the ESO Sector will collectively work to agree how to operationalise the Peak Body and introduce the classification system.

It was agreed that this report will be shared with the Royal Commission and other stakeholders including the Australian Government and associated departments, and the Australian Defence Force, to inform their work and ensure they understand the collective intent of the ESO Sector.

Requests for Further Comment/ Feedback in Drafting

In the spirit of collaboration, RSL kindly requests any organisations that are interested in adding further feedback to this ESO Classification system or peak body functions, or to be involved in the preparation of the subsequent pre-forum papers to please contact rsvp@rsl.org.au before **Friday 14 July 2023**.

List of Appendices

- I. Participant organisations
- II. Pre-forum papers
- III. ESO Classification slides
- IV. ACFID slides
- V. Cobseo slides
- VI. ACU slides