



RSL
Victoria

RSL VICTORIA

TRANSFORMATION PROJECT BULLETIN

EDITION 02
DECEMBER 25

INTRODUCTION AND BACKGROUND

We are pleased to provide an update on progress towards RSL Victoria's Transformation Project (RTP).

Key highlights include:



RSL Victoria Transformation Project: Detailed planning remains on track for completion by end of December 2025



Strategic Initiatives: Progress continues on the Statewide Service Model and evaluation of the current Salesforce CRM platform



Financial Performance: Funding of \$1.5M secured for 2026.



A MESSAGE FROM THE EXECUTIVE PROJECT DIRECTOR SUE CATTERMOLE

At the RSL Victoria Annual State Conference, held 12 July 2025, Thoughtpost Governance's Independent Review into the governance and operations of RSL Victoria was released.

Thoughtpost was commissioned by the RSL to provide objective and truly independent research into our organisation. Thoughtpost provided clear feedback and guidance on what changes we need to implement to remain a strong and focussed charity that truly delivers on its mission for Victorian veterans and their families.

Thoughtpost's recommendations to us covered four distinct areas:

- **Modernise governance**
- **Support a sustainable Sub-Branch network**
- **Enhance financial stewardship**
- **Reposition RSL Victoria as a modern veteran charity.**

Throughout the remainder of 2025, RSL Victoria has set about implementing these changes as part of what we call the RSL Victoria Transformation Project – something of a catch-all term for all aspects of this large reform, including the structure and governance, of this organisation.

It's been a busy time preparing to implement these overdue structural changes to the RSL in Victoria. We are approaching the RTP with excitement and real energy and are putting the structure of this huge project together, not just in terms of its phased rollout, but also the personnel with the varied knowledge and experience needed to set us up for success.

To provide as much structure and oversight as possible, I have taken temporary leave from my duties as RSL Victoria CEO (leaving the day-to-day operations of the organisation in the very capable hands of CFO Jack Crawford and COO Clint Brewster) and assumed the role of RSL Victoria Executive Project Director.

This is not just a name change in my duties. We have a lot of work to do, and need to move as surely but quickly as possible. I am focussed on the RTP, and a number of subordinate projects,

and will lead the Project Management Team being put in place to deliver on them.

As 2025 draws to a close, I want to take this opportunity to thank all stakeholders, those in Sub-Branches and those working hard at ANZAC House, for their commitment and support of the project. We want these changes to be not just a transparent process, but an inclusive one – where you are not just kept informed, but you have a voice through the Advisory Groups to influence the future of the RSL.

RSL Victoria State Executive recently approved the 2026 budget for RSL Victoria and approved the initial \$1.5 million Project Spend for 2026. This funding will secure the engagement of the necessary skills during Qtr. 1 2026.

When 2026 arrives and our work on the Transformation Project gathers steam, we will be looking to you to for not just support, but advice and feedback on the various steps taken along this journey and how we can ensure your voices and experiences are heard.

For now, this December *Transformation Project Bulletin* outlines some further information on the key performance indicators (KPIs) and progress on building blocks for Phase One. It also includes updates on various strategic initiatives underway, financial performance and a look at certain risks we face and ways we intend to mitigate them.

On behalf of all of us involved in RSL Victoria's Transformation Project at State Branch, I wish you a merry and safe Christmas and New Year period. We look forward to updating you further in the New Year.

Warm regards,

Sue Cattermole
Executive Project Director
RSL Victoria

KEY PERFORMANCE INDICATORS (KPIs) & PROGRESS

RSL Victoria is committed to delivering the important steps detailed in the table below to ensure that Phase 1 of the RTP commences 1 January 2026. These building blocks are fundamental to securing both support and financial commitment necessary for 2026 start.

KPI	TIMELINE	PROGRESS	STATUS	TREND
Secure internal support and advocacy from State Executive and Sub-Branches	Aug – Oct 2025	Initial engagement and consultation completed	On Track	Positive feedback
Secure RTP funding for Phase 1 (\$1.5M)	Aug – Dec 2025	Funding secured for 2026	On Track	Positive
Establish and resource PMO	Jan 2026	Space identified; staff secondment planned	On Track	Positive
Develop detailed Phase 1 project plan	Aug – Dec 2025	Plans in progress using Cascade & Monday.com	On Track	Completion by 24 Dec 2025

STRATEGIC INITIATIVES



As we prepare for the commencement of Phase 1, the RTP Project Management Office (PMO) is also working on additional ongoing projects that will ultimately impact on the RSL's ability to deliver a statewide service model.

INITIATIVE	STATUS	PROGRESS	KEY ACHIEVEMENTS	NEXT STEPS
Statewide Service Model - Geelong, Surf Coast	Delayed; completion now Apr/ May 2027	Capital Milestone 1 completed	Lease secured; concept drawings agreed	Detailed planning of site works
Statewide Service Model - Frankston & Mornington Peninsula	Grant	95%	Evaluation report due Mar 2026	Address stakeholder concerns
CRM software evaluation	Ongoing	50%	Third-party report completed; current system requires major investment	Decision on CRM in Q1 2026

FINANCIAL PERFORMANCE



Funding of \$1.5M has been secured for 2026 through a combination of 10A League Support Fee contributions along with an allocation from the General Appeals Patriotic Fund.

This funding provides the financial support necessary to deliver on Phase 1 through the engagement of staffing and the added capacity to bring in external legal advice for governance matters.

Funding allocation progress will be reported on a quarterly basis.



STRATEGIC RISKS & MITIGATIONS

Risk management will be a key component of the delivery of RTP Phase 1.

As part of the overarching structure of RTP deliverables, RSL Victoria has identified the risks inherent to our transformation work, the likelihood of these risks occurring and the impact they potentially have.

We don't view the below risks as 'problems' — they are part of RTP planning. What matters is how we manage these risks through mitigations.

RISK	IMPACT	LIKELIHOOD	MITIGATION
Stakeholder engagement	High	Possible	Advisory Groups in the co-design process will limit concerns of stakeholders.
Financial risks	High	Possible	Regular financial reporting will ensure the budget is spent in accordance with the initial plan and overruns managed.
Lack of communication	High	Possible	Monthly bulletins will provide transparency on the progress and inform all stakeholders of project developments, successes and setbacks.
Resistance to change	High	Possible	Commitment to transparency, achievement of goals through regular updates. Engagement of stakeholders in co-design of new governance and structures.
Timeframe slippage	High	Possible	Detailed program reviews and regular reporting will highlight when intended timeframes are not achieved.
Insufficient resources	High	Possible	Program of reporting will highlight when intended project timelines are not achieved due to insufficient resourcing.

ACTION ITEMS

NEXT QUARTER (Q1 2026)

RSL Victoria's Transformation Project Working Group has identified the following actions to be taken as the next step of the project.

- Investigate steps and processes needed to transition RSL (Victorian Branch) Inc. to Company Limited by Guarantee (Q1 2026)
- Appointment of external legal team to support implementation of governance changes. (Q1 2026)
- Review current governing board structures and Committee Membership models (Q1 2026)
- Develop skills matrices for board and Sub-Committees (Q1 2026)
- Establish Sub-Committee nominations to lead the process of recruitment and assessment of capabilities (Q1 2026)



- Establish criteria to assess Sub-Branch viability to inform future structures (Q1 2026)
 - Establish Program Control Board & Advisory Panels to oversee and advice project teams (Q1 2026)
 - Prepare digital strategy to drive innovation, improve efficiency, and enable technology to support the delivery of business goals (Q2 2026)
 - Decision on current veteran record software as a guiding platform for a statewide service model (Q1 2026)
 - Establish central data repository as a single, unified storage location for all organisational data (Q2 2026)
 - Develop pooled investment model to offer maximised returns of funds held across the network (Q2 2026).
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The next President's Forum will be held on Thursday 29 January 2026. As part of the forum, Sub-Branches will hear more about the RTP and be provided the opportunity to ask any questions they may have. More information on this will be forthcoming in the New Year.

A Frequently Asked Questions (FAQ) webpage is being developed to cover broader RTP questions. This page will be updated periodically with new questions and Sub-Branches will be welcome to submit their own questions as of the January 2026 *RSL Victoria Transformation Project Bulletin*.



RSL VICTORIA TRANSFORMATION PROJECT (RTP) ROADMAP PHASE 1 2026

