

FY2026-FY2028
Strategic Plan

LEGACY
SOUTH AUSTRALIA & BROKEN HILL



Our Plan



Core Purpose

To care for the dependents of deceased and incapacitated veterans in South Australia & Broken Hill.



Our Values

Personal Service.
Empathy.
Understanding.
Commitment.
Caring.



Our Vision

That no dependant of those who gave their lives or health as a result of serving their country suffers financial or social disadvantage.

Support & Care

Build and provide a diverse range of relevant services and support for all beneficiary families.

Our Community Engagement

Build strong and valued relationships for our internal and external stakeholder ecosystem.

Brand & Marketing

Build and live what we stand for as a brand through owned, earned and paid assets.

Governance

Build effective governance through strong leadership and accountability.

Our Future

Build a sustainable future across financial, organisational and cultural objectives.

Board chair's Introduction



Meredith Wyles

The year 2028 will mark the centenary of the formation of the Legacy Club of Adelaide (now the Legacy Club of South Australia and Broken Hill) - a time to reflect on our history and take a deep and strategic look into the future.

Legacy is dedicated to the families of those who have given their lives or health in the service of our country. Our motivation is to ensure these families have peace of mind and the opportunities they need to succeed, despite the difficulties they may face.

Our Club vision and mission statements are aligned with those of Legacy Australia and reflect our role within the Legacy 'family' across the nation.
Our strategic priorities for the next three years recognise the challenges and opportunities for us all in the years ahead.

The world is a very different place from 1928.
We will contemporise the services we offer to all those within our care through tailored solutions that best suit their current and changing needs.

Over the next three years we will strengthen our organisational structure to attract younger Members who willcontinue our important work.
We will align our suite of supports and services to contemporary needs, ensure ongoing financial viability by broadening our partnerships and supporter base, and encourage more community participation in Legacy's cause.

Legatee Meredith Wyles
Chair

Support & Care

Goal 1: Develop and deliver high quality tailored services by our frontline Community Services team

Actions	KPIs
From the 11 needs of Post-1991 Families identified by Intuito Research, ascertain which services can be delivered in-house and attract, retain and train internal Community Services staff.	• 100% retention rate of Community Services staff. • "Achieved" or higher annual performance review rating. • 75% or higher satisfaction rating from annual Beneficiary Family surveys.
Continue delivery of in-house services for Pre-1991 Families, identify what services can be delivered in-house and attract, retain and train internal Community Services staff.	• 100% retention rate of Community Services staff. • "Achieved" or higher annual performance review rating. • 75% or higher satisfaction rating from annual Beneficiary Family surveys.

Goal 2: Build a network of trusted external service partners and deliver specialised services

Actions	KPIs
From the 11 needs of Post-1991 Families identified by Intuito Research, source and develop trusted partnerships with external service providers where required and deliver specialised services.	• Trusted partners found for all need areas not able to be serviced by internal Community Services team. • Pre-agreed Service Level Agreements (SLA's) met by external partners.
For the needs of Pre-1991 Families source and develop trusted partnerships with external service providers where required and deliver specialised services.	• Trusted partners found for all need areas not able to be serviced by internal Community Services team. • Pre-agreed Service Level Agreements (SLA's) met by external partners.

Goal 3: Attract, retain and train a skilled base of Legatees and Volunteers to support service delivery

Actions	KPIs
Arrest current decline of Active Legatees then grow.	• Arrest decline so end FY26 number is the same as end FY25 number; then grow 5% to end FY27 and by required demographics (ie. age, gender, lived experience matches Beneficiary Families.
Provide & ensure compliance of necessary training for all Active Legatees.	• 100% compliance of required training completed in first 12 months.
Maintain Legatee interactions with allocated Beneficiaries.	• Minimum 2 recorded contacts per year with both allocated and unallocated (phone out) Beneficiaries with actions recorded and sent to Community Services.
Grow and develop Volunteers.	• Develop Volunteer framework to attract greater participation.
Provide & ensure compliance of necessary induction for all Volunteers.	• 100% compliance and agreement to Volunteer checklist prior events.

Our Community Engagment

Goal 1: Increase the level of engagement and quality of outcome with corporate partners

Actions	KPIs
Attract and retain Corporate Partners.	• Min. 3 touchpoints per year (eg. meetings, lunch invites, events, etc). • $200,000 of corporate partnership funds raised by end FY26 and growing 10% by end FY27, FY28 and FY29.
Attract and retain corporate association partnerships at a positive Return-On-Investment (ROI).	• AmCham (or similar industry partnership) delivered with a positive ROI measured by corporate partner value (cash or in-kind) sourced back to lunch invitations and auction income.

Goal 2: Drive advocacy at a state level

Actions	KPIs
Drive organisational advocacy via a continuous contact program with State Government (Minister and Opposition), State Departments (eg. Veterans SA), State Offices of Federal Departments, Governor, ADF State Contacts, TPI, RSL SA/NT and other ESO state offices.	• Minimum 3 touchpoints per year (eg. meetings, lunch invites, events, etc).
Drive Beneficiary advocacy via a continuous contact program with DVA and similar: • Policy influence: participation at forums and similar resulting in policy change. • Partnership Development: with other ESO's to enhance support services. • Community Building: community networks or support groups facilitated by Legacy SA&BH.	• Minimum 3 x interactions (2-way) per year for all areas.
Continuous contact program with state-based media.	• Minimum 10 positive media stories per year (state and regional media).

Goal 3: Support LA Inc. to drive advocacy at a national level

Actions	KPIs
Provide information as requested (eg. club numbers).	• Provide information as required to deadlines.
Provide financial and other support as required (eg. assist with Code of Legacy).	• Financial levies paid on time; timely response to requests for support.

Brand & Marketing

Goal 1: Elevate our brand awareness and relevance

Actions	KPIs
Establish a Brand Health Monitor and measure annually.	• Positive uplift annually in Brand Health Monitor.
Establish a ranking on annual Australia RepTrack.	• Top 40 NFP brands or higher by end FY26; Top 30 by end FY27 (dependant on LA Inc and other clubs also working for the same goal).
Elevate & celebrate the Legacy SA&BH brand leading into its 2028 Centenary.	• Develop & execute Centenary Project Plan.

Goal 2: Drive external and internal communications using owned, earned and paid channels

Actions	KPIs
Owned (Members' Bulletin, Beneficiaries Newsletter, Social Media Platforms, Website).	• Members' Bulletin & Beneficiaries Newsletter delivered by 1st of each month with increasing balance of information over social content. • At least one positive social media post per week. • Legacy SA&BH website updated and accurate.
Earned (PR, Ambassadors).	• Min. 10 positive media stories per year. • Min. 4 x active Legacy SA&BH ambassadors in-market per year.
Paid (External Media including Paid Traditional, Digital and Social Media).	• Achieve audience reach & frequency objectives for each media burst.

Goal 3: Develop and deliver a program of fundraising (including donations and bequests and events based on a positive ROI

Actions	KPIs
Grow Appeals/Donations.	• Achieve appeals/donations financial amount as per annual budget.
Grow Bequests.	• Achieve bequests financial amount as per annual budget.
Plan and execute Events efficiently and safely.	• All events to have positive Retune-On-Investment (ROI), be delivered to agreed timeframes and have event risk registers completed. • ROI to include short-term cash fundraising (within 12 mths) and longer-term "friendraising" to ultimately result in long-term fundraising (more than 12 mths).

Governance

Goal 1: Ensure good governance practices and compliance with obligations

Actions	KPIs
Undertake a compliance review of current Governance obligations.	• Complete annual ACNC self-audit. • Complete annual LA Inc viability report.
Undertake required Governance Training (Board and CEO).	• Complete requirements as per Clause 32 of the Board Charter and Director's Handbook.
Ensure all Legatees compliant for SA/NSW NPC/WWCC/ VPRC legislation.	• 100% of Active Legatees compliant by end FY26.

Goal 2: Ensure management of financial and risk factors

Actions	KPIs
Maintain and monitor financial position through implementation of a good financial strategy to develop the annual budget.	• Meet annual budget within a tolerance of 10%.
Maintain and monitor scrutiny over organisational risk and opportunities.	• Risk Watchlist reviewed quarterly by the Board with actions taken to reduce major and severe risks to acceptable levels.

Goal 3: Maintain a strong and effective Board and Management Structure

Actions	KPIs
Conduct an assessment of the Health of the Club and identify relevant prospects for Board and Committee Succession.	• Achieve board succession plan guided by a skills matrix.
Establish and build a cohesive team in support of Strategy and Operations.	• Annual Board Self-Evaluation Check. • Annual review of CEO Performance.

Our Future

Goal 1: Build a long-term plan for financial sustainability

Actions	KPIs
Develop 10 year forward projection of financial position based on recent historical trend of investment performance and annual budget delivery.	• Deliver by end May 2025.
Develop Investment Policy and work closely with Investment Partner (eg. Morgan Stanley) to maximise growth and income while minimising volatility risk.	• Achieve Investment Policy objective.
Develop annual Legacy SA&BH financial budget to achieve breakeven annually by end FY27.	• Reduce annual budget deficit to $200k by end FY26; breakeven by end FY27.

Goal 2: Grow the number of Active Legatees, Volunteers and Legacy-supported Beneficiary Families

Actions	KPIs
Grow number of Active Legatees.	• Arrest decline so end FY26 number is the same as end FY25 number; then grow 5% to end FY27.
Grow number of Volunteers.	• Arrest decline so end FY26 number is the same as end FY25 number; then grown 10% to end FY27.
Grow number of Legacy-supported Beneficiary Families.	• Arrest decline so end FY26 number is the same as end FY25 number; then grow 10% to end FY27.

Our Future

Goal 3: Build and live a positive and resilient culture aligned to our brand and values

Actions	KPIs
Attract and retain high-quality staff / ensure Legacy SA&BH becomes an employer of choice.	• Turnover less than 1FTE per year.
Annual Performance Reviews and Mid-Year Check-ins with all staff. Weekly Staff Team Meetings, Monthly Staff Bring Your Lunch and Quarterly Bonding Sessions.	• 100% compliance all staff with 100% “Achieved” status or higher. • 100% compliance.
Re-introduce an Employee Assistance Program (EAP). Measure and develop a positive and resilient Staff and Legatee culture.	• By start FY26. • Implement and act on annual Satisfaction Survey.


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