

Legacy Australia Incorporated

Annual Report

2022 - 2023



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Chairman's Report

Eric Easterbrook, Chairman

What an incredible year it has been as Legacy commemorates 100 years of service in 2023. There has been a wonderful number of activities including The Legacy Centenary Torch Relay, presented by Defence Health and other events and opportunities associated with our Centenary. It has been an exciting and busy year as Chairman, and I have been in awe of the community and corporate support of the work Legacy does as we commemorate 100 years.

Firstly, I would like to take this opportunity to extend our appreciation to our National Patron, The Governor-General of the Commonwealth of Australia, His Excellency General The Honorable David Hurley (Retd) AC, DSC and Her Excellency Mrs Linda Hurley for their personal support to Legacy. Their Excellencies have extended many invitations to Legatees and beneficiaries during their time in office. On all occasions attendees have experienced a warmth and welcoming that comes from being one family. We are particularly grateful for their hospitality in opening Government House to our Legacy beneficiaries in February 2023. It was an honour to have beneficiaries from all over Australia attend for a very special and exciting afternoon, which led to the heartfelt presentation that His Excellency gave about Legacy during his 2023 ANZAC Day speech; Thank you, Your Excellencies.

In 2022, the team at Legacy Australia was very busy planning for the Torch Relay and other centenary activities. There has been a large and busy team operating full time to ensure that this event would be successful. This includes the very much appreciated input of time and effort from all Legacy Clubs. I would like to extend my thanks to all involved with the planning and execution of this project.

Once again, the Australian War Memorial hosted the National Launch of Legacy Week held on 27 August 2022. His Excellency General The Honorable David Hurley (Retd) AC, DSC, officially opened Legacy Week in the presence of a large number of distinguished guests representing Federal and Local Government, the Australian Defence Force, corporate partners, supporters, Legatees and beneficiaries. The launch was followed by a Centenary Lunch at Parliament House. It was a magnificent and poignant occasion, and my personal thanks go to all involved in making the event an outstanding success.

The opening ceremony of the Legacy Centenary Torch Relay 2023 presented by Defence Health was held at Pozières on 23 April 2023 in the lead up to ANZAC day. I was fortunate to represent Legacy and, even in the cold drizzle, it was an incredibly moving ceremony. The ceremony was attended by many special guests including The Hon Matt Thistlethwaite MP, the Assistant Minister for Defence and Assistant Minister for Veterans' Affairs, Ms Gillian Bird, PSM, the Australian Ambassador to France, and Dominique Bierwald, Mayor of Pozières.

We would like to thank the Department of Veterans' Affairs for their support by providing funding and including Legacy in the ANZAC Day Commemorations in France.

After the official Launch, the torch participated in ANZAC Day events before heading to Ypres, Belgium where the torch was part of the daily Menin Gate Last Post Ceremony. On behalf of the Australian Government, the Assistant Minister accepted a Centenary Commemorative Torch which was gifted to the Sir John Monash Centre at

Villers-Bretonneux to commemorate Australians who served on the Somme.

The torch then made its way to London where Legacy was granted an audience with His Majesty, King Charles III. Legatees, beneficiaries and torch bearers from London met His Majesty at Buckingham Palace and he congratulated Legacy and all who have been involved, both past and present, for their dedicated service to the care and support of our veterans' families. We are grateful that His Majesty The King made a donation to Legacy Australia via his charitable foundation, The Prince of Wales's Charitable Fund. These funds will be allocated toward a bursary on the Young Endeavour.

The torch then arrived on Australian soil in Albany, where the first Torch Bearer was the former Governor of Western Australia, The Hon Kim Beazley, AC.

We are also grateful for the support provided by The Hon. Matt Keogh, Minister for Veterans' Affairs and Minister for Defence Personnel, the Office of Australian War Graves, and the Secretary of the Department of Veterans for their assistance to Legacy and the relay event.

In a direct connection to our Centenary activities, we have developed important relationships with several Defence contractors who have generously supported the relay event as well as providing funding for the Legacy Australia Education Grant. These funds have been accessed by many Legacy Clubs to support their beneficiaries.

I would like to take this opportunity to thank our major national sponsors for their financial sponsorship and in-kind support across many of the Legacy programs and special acknowledgement is extended to Defence Health, BAE Systems, Lockheed Martin, Boeing Australia, Northrup

Grumman, Defence Housing, Thales, Accenture, Australian Defence Apparel and Europcar. We look forward to continuing friendships and relationships with these organisations.

The concept of the Torch Relay had been discussed by the Board in 2019 and it was evident that Legacy Australia did not have the expertise or resources to plan and execute this event. Subsequently, the management of the event was outsourced, and I would like to take the opportunity to acknowledge the team at Perfect Events for their outstanding efforts in producing this major event. I would also like to thank your Board of Directors, both former and current, who had the vision and courage to propose and execute the challenge of staging such a significant event.

Another team which has supported The Legacy Centenary Torch Relay has been The Australian Defence Force. With very visual support from the Chief of Defence Force and the Chiefs of Navy, Army and Air Force, Legacy was strongly supported by The Joint Support Services Division (JSSD) under the leadership of Major General Doug Laidlaw, CSC. Each of the ADF members that supported the Legacy Centenary have performed their duties above and beyond requirements, and I thank them sincerely.

I would also like to thank the Royal Australian Mint and Australia Post for their partnership and support for our Centenary year. In March the Legacy Centenary \$1 Commemorative Coin was released and was sold out in a matter of days. Also in March, Australia Post issued a Legacy stamp to commemorate our Centenary. I would like to thank both organisations for their support.

A Board decision was to gift to each Legacy Club a bronze commemorative plaque as a record of achievement of the Legacy movement over the past 100 years. The

Board also agreed that it would be fitting for each Club to receive the Commemorative Torch that was proudly carried by the last torch bearer who lit the cauldron in its local Club relay.

Under the very professional leadership of Legatee Peter Keane, the Legacy2030 Steering Committee has continued its work which commenced in 2019, to strengthen the Legacy movement with an emphasis on building a consistency in service delivery, a high standard of governance, and a greater collaboration between clubs. At the 2023 National Conference, Legacy Clubs will be given the opportunity to discuss these important issues with a view to advancing the Legacy2030 strategic plan across Legacy.

As in past years the John & Anna Belfer Trust, managed by Mr Garry Browne, AM, a Legacy Australia Ambassador, has been a wonderful and very generous supporter of Legacy Australia. We extend a very sincere thank you to the Trustees for the continuing support and generosity.

I would also like to acknowledge the generous support provided by Sydney Legacy and Legacy Club Services in providing complimentary accommodation for Legacy Australia Inc, access to meeting space and other support when required, and the major Capital City Clubs for their assistance to all clubs with advocacy and marketing costs throughout the year.

Throughout this year, and many previous years, Legacy Australia has been supported with pro bono legal advice from DLA Piper, from Dr Gerry Bean; I would like to sincerely thank Dr Bean for giving generously of his time and professional services.

The Board has been professionally supported by a very dedicated and loyal staff who have worked tirelessly over the past twelve months. Our staff has committed

many hours of personal, unrecompensed time to ensure our Legacy Clubs are supported.

I extend a vote of appreciation to each of your directors for taking the step to represent you and to give very generously of their time and expertise to conduct Legacy business at a National level. They give their time freely and generously in their Board duties and the Committees on which they serve, as well as caring for their beneficiaries in their own Legacy Clubs.

This has been an exceptionally busy year and this AGM will be my last as Chair of the LA Inc Board. It has been an honour and a privilege to hold this position and support the work of the 45 Legacy Clubs to ensure that our beneficiaries are well supported. It has been a very rewarding experience which has enabled me to meet many Legatees and beneficiaries throughout Australia and the UK. Thank you for your support, but more importantly, thank you for the great work that you do in your own localities.

In finishing, I would like to say an exceptionally big thank you to my wife, Sally, who has been a stoic support while I have been performing Legacy duties away from home.

I commend this Annual Report to all Legacy Clubs.



Legatee Eric Easterbrook

Chairman, Legacy Australia Inc.

LEGACY 100

1923 - 2023



National Patron

Governor-General of the Commonwealth of Australia
His Excellency General the Honourable
David Hurley AC DSC (Retd)

Chairman

Eric Easterbrook OAM

Vice-Chairman

Wayne McNee

Immediate Past Chairman

Richard Cranna OAM

Treasurer

Peter Kalkman

Secretary

Sarnia Birch OAM

Chief Executive Officer

Graham Boyd

Commercial Bankers

Commonwealth Banking Corporation
Westpac Banking Corporation

Auditors

Fortunity Assurance

Solicitors

DLA Piper

Business Address

Level 3, 47 York Street, Sydney NSW 2000

Registered Address

293 Swanston Street, Melbourne VIC 3000

Postal Address

GPO Box 4020, Sydney NSW 2001



About Legacy

Our Mission

Legacy Australia strives to ensure that the partners and children of veterans who gave their lives or health in recognised military service can fully realise their potential.

Our Vision

Our vision is that no dependant of a veteran suffers financial or social disadvantage as a result of their loved one's death or injury from service.

Our Objectives

The primary purposes of Legacy Australia Incorporated are:

- the care of dependants of those who served their country, namely, veterans who gave their lives or health on operational service or subsequently, and Australian Defence Force members who die in service or as a result of their service; and
- to provide a caring service, not limited to financial support to the dependants, including by way of personal endeavour by Legatees.

Other purposes are:

- to protect the good name and reputation of Legacy; and
- to act as the national coordinating body for Legacy Clubs including representations and/or promotion of Legacy Purposes, Ideals and Interests at a national level.



Legacy Fundamentals

The first Legacy Club was started in Melbourne in 1923 by Captain (later Lieutenant-General, Sir) Stan Savige who espoused the fundamentals of Legacy as follows:

- Personal Service, which is the main essential
- Comradeship, which grows from the commitment to personal service.
- Co-operation, which is the companion of comradeship.
- Discipline, which derives from the pledge to do one's utmost.
- Service to Children, which is usually delivered through the parent.
- Local Autonomy, which is exercised within an agreed framework.



Care and Compassion

Legacy connects beneficiaries with the most appropriate health and well-being services, or providers when required.



Overcoming Social Isolation

Legacy conducts camps and outings; personal visitation programs, transport and mobility assistance; and social, recreational and educational activities.



Provision of Support

Legacy provides grief and hardship support; financial assistance short and long term; as well as informal advice and assistance with aged care placements and emergency accommodation.



Advocacy

Legacy lobbies to government bodies on behalf of widows and children, provides high quality advocacy services, and represents our beneficiaries in consultation with other ESO's.

Our Ambassadors



**THE HON DR BRENDAN
NELSON AO**



**MAJOR GENERAL
STUART SMITH AO DSC
(RETD)**



**MR CHRIS JENKINS,
CEO THALES AUS & NZ**



**MS CHRISTINE
SIMPSON STOKES AM**



**MR GARRY BROWNE
AM, TRUSTEE JOHN &
ANNA BELFER TRUST**



MS LESSA KWOK

Each Ambassador is personally active in promoting Legacy's work while at the same time supporting and promoting Legacy to those with whom they interact.

Australia has four living Victoria Cross recipients. They are:

- Ben Roberts-Smith VC MG
- Keith Payne VC AM
- Mark Donaldson VC
- Daniel Keighran VC

Our VCs are willing to support Legacy in any way they can, provided they are available. All have attended and championed Legacy activities in the past few years. Mark Donaldson, a former Junior beneficiary at Coffs Coast Legacy, is now the Club's Patron. Keith Payne's wife Flo is active in Mackay Legacy where Keith serves as Patron.

Our Board and Committees

as at 30 June 2023

Board Members

Eric Easterbrook - Chairman
Wayne McNee - Vice Chairman
Sarnia Birch - Secretary
Peter Kalkman - Treasurer
Mark Bouchier
Gavin Briggs
Peter Bysouth
David Grant
Peter Keane
Mark Lax
Malcom McCullough

National Marketing Committee Members

Mark Bouchier - Chair
Mark Lax
Peter Heeney
Michael Gibbons
Graham Boyd
Brendan Cox
Michael Ducie
Matthew Granger
Kerryn Smith

Finance, Audit & Risk Management Committee Members

Peter Kalkman - Chair
Eric Easterbrook
David Grant
Chris McGeoch
Wayne McNee
Malcom McCullough

Governance Committee Members

Sarnia Birch - Chair
Gavin Briggs
David Grant
David Grierson
Mark Lax

Legacy 2030 Steering Committee Members

Peter Keane - Chair

Sarnia Birch

Rick Cranna

Kenny Eagan

David Kelly

Malcom McCullough

Scott Perkins

Meredith Wyles

Observers:

Eric Easterbrook

Graham Boyd

Michael Ducie

Centenary of Legacy Committee Members

Peter Bysouth Co-Chair

Wayne McNee – Co-Chair

Mark Bouchier

Paul Crew

David Kelly

Peter Heeney

Paul Lane

Advocacy Committee Members

Gavin Briggs - Chair

Robert Connor

Wayne McNee

John McInerney

Shawn Bergquist

Disciplinary Committee Members

The Hon. Stanley G Jones AO - Chair

Don Stuart (South Australia & Broken Hill)

Duncan Warren (Western Australia)

Charles Wright (Gold Coast)

Corporate Governance

Board

The Board shall consist of:

- a Chairman; and
- a Vice Chairman; and
- a Secretary; and
- a Treasurer; and
- seven (7) other Directors; and
- one (1) Appointed Director if required.

The Board may appoint an eligible Director to fill a casual vacancy on the Board until the next Annual General Meeting. The Vice-Chairman fills a casual vacancy in the absence of the Chairman. The Board meets bi-monthly or as required. The Chief Executive Officer attends all Board and Committee meetings as required.

The membership and attendance at Legacy Australia. Board meetings during the whole of the financial year are as follows:

Legacy Australia Board Member	Dates	Eligible to Attend	Meetings Attended
Sarnia Birch		8	8
Mark Bourchier		8	4
Gavin Briggs	*Elected with effect 24 November 2022	5	4
Peter Bysouth	*Appointed 15 February 2023	3	3
Robert Connor	*Term expired 24 November 2022	3	3
Eric Easterbrook		8	8
David Grant		8	7
Kerry Gunson	*Resigned 29 November 2022	4	4
Peter Heeney	*Term expired 24 November 2022	3	3
Peter Kalkman		8	8
Peter Keane		8	6
Mark Lax	*Elected with effect 24 November 2022	5	5
Malcom McCullough	*Appointed 24 November 2022	5	3
Wayne McNee (Zone B1)	*Resigned 24 November 2022	3	2
Wayne McNee (Zone A1)	*Appointed 24 November 2022	5	4

During the reporting period, Legatees Robert Connor and Peter Heeney completed their terms, and Kerry Gunson resigned from the Board. The Directors extend their appreciation to these Legatees for their commitment and contribution to the Legacy cause during their tenure particularly in Advocacy and National Marketing.

During the reporting period, Board meetings were convened via Zoom videoconference and face-to-face meetings in Sydney and Townsville, to coincide with the Townsville Torch Relay and Community Day. Three (3) Special Meetings of the Board were convened, and, in total, there were eight (8) Board meetings held with the meeting arrangements as follows:

- 28 July 2022: Zoom videoconference
- 28 September 2022: Sydney
- 24 November 2022: Sydney
- 24 November 2022: (Special Board Meeting): Sydney
- 13 December 2022 (Special Board Meeting): Zoom videoconference
- 15 February 2023: Sydney
- 8 March 2023 (Special Board Meeting): Zoom videoconference
- 26 May 2023: Townsville

DLA Piper continues to support Legacy Australia and we thank the organisation for generously providing facilities for our Board Meetings.

Legacy Australia Office

The national office is the set of resources required to undertake the work of the Board on a day to day basis. The following summarises the program activities of the Board, CEO and staff in ensuring the objects of Legacy Australia are achieved.

Legacy Australia office aims to have:

- Effective Board members representing all views of the Legacy movement
- Qualified and efficient support staff
- Relevant information to make decisions
- Board committees with relevant Terms of Reference reporting to the Board promptly
- Well-organised and managed Board meetings
- Regular Board meetings
- Quality agenda and papers prepared ahead of the meetings
- Quality minutes

Brand Protection



Supporting our veterans' families

Legacy Australia is tasked with protecting the good name and reputation of Legacy. The Legacy Brand related activities undertaken as part of this responsibility through 2022 - 2023 have included:

- Review and maintenance of the LA Inc. Risk Register;
- A standing 'risk' agenda item for the Finance, Audit and Risk Management (FARM) Committee, to review and update all risks regularly;
- Ongoing development of policies and procedures to ensure legal compliance and reduce the risk for Legacy Clubs;
- Maintenance of an Issues Register reviewed by the Board;
- Monitoring of the compliance expectations of the Australian Charities and Not for Profit Commission (ACNC);
- Monitoring of the compliance expectations of the Privacy Commissioner; an
- Monitoring of the developments in compliance requirements of the fundraising industry.

On behalf of Clubs, Legacy Australia ensures the protection of Legacy's trademarks for posterity and against misuse by unauthorised parties or by like organisations.



Committee Reports

Governance

The role of the Governance Committee is to assist the Board of Directors to develop plans, policies and procedures which enable the Board to comply with legislative and regulatory requirements and provide for regular review of the Constitution and Bylaws of Legacy Australia for practicality and effectiveness. Furthermore, it is the role of the Governance Committee to ensure that the AGM of Legacy Australia is conducted in accordance with the LA Inc. Constitution.

During the reporting period, the Governance Committee held three (3) meetings and communicated regularly via email. The Committee focused primarily on the conversion process to becoming a company limited by guarantee. The motion was endorsed by clubs at the October 2022 Annual General Meeting and consequent changes to the Constitution of Legacy Australia Limited were approved at a Special General Meeting on 13 April.

National Marketing

The National Marketing Committee is responsible to the Board for the development of best practice marketing and fundraising proposals, which enhance Legacy's reputation and brand name while, where possible, cultivating long term revenue streams. This Committee held two (2) meetings during the reporting period and communicated via email. The National Marketing Committee has adopted a project management approach to the key fundraising campaigns held nationally each year with a lead Capital City Club appointed. The National Project Working Group reports to the NMC and undertakes the bulk of the project work. Activities included:

- Overseeing the ongoing management of the national website
- Development and oversight of National Campaigns
- Consultation on creative concepts and approval processes
- Oversight of National projects to ensure all Clubs benefit from a co-ordinated approach
- Maximised unpaid media during campaign times including TV appearances and special programs
- Ongoing digital media management (website, social media and other)

Advocacy

The Board's Advocacy Committee encompasses all matters relevant to compensation, wellbeing, and aged care. During the reporting period, the Advocacy Committee

- Facilitated a best practice National Advocacy Forum in Canberra that attracted keynote speakers including Ms Liz Cosson AM, CSC then Secretary, DVA, Ms Jane Anderson, Principal Member, Veterans' Review Board, Professor Terry Campbell AM, Chairperson, Repatriation Medical Authority and Ms Gwen Cherne, Veteran Family Advocate, DVA. Keynote speakers from the Royal Commission into Defence and Veteran Suicide, and Defence and Veterans Legal Service were very informative and provided valuable information. The new format of including an Open Forum, where participants were encouraged to raise and discuss issues affecting our beneficiaries, was successful and very well received.
- The membership of the National Advocacy Working Group (NAWG), comprising of Legatees and Staff continue to work efficiently in responding to advocacy policy enquiries and submissions in 2022-2023.

- Consultation on the broad themes for the Royal Commission into Defence and Veteran Suicide continued with L/Wayne McNee being appointed Legacy Australia's representative on the Royal Commission Stakeholder Reference Group, chaired by the Chair of the Commission, Mr. Nick Kaldas APM.
- The Legacy2030 Steering Committee is reviewing a draft Service Delivery Standards 2023 document that proposes standards of service that would assist clubs to develop consistency in, and quality of, service delivery across all clubs, whether large or small.
- The NAWG continues its work on developing a National Induction Program for Legatees, improvements in the support

Finance Audit and Risk Management

During the reporting year, the Finance, Audit and Risk Management Committee met by videoconference the week prior to each LA Inc. Board meeting and as required. Seven (7) meetings were held during the reporting period including two Special Committee Meetings to review LA Inc.'s Budget and audited accounts. At each meeting the accounts as at the end of the preceding month(s) were examined in detail, noting the end of month-to-date reserves and bank balances. The results of these considerations were provided in a report, together with the accounts to each subsequent Board meeting.

Additionally, in the internal audit function, the monthly summary of expenses including the detail of credit card usage, plus details of individual director's expenses were examined and endorsed. Details of educational scholarship grants approved by the Advocacy Committee were also noted as was the Treasurer's out-of-session approval for the commitment of such funds. Project income and expenses are monitored at each meeting.

The Board endorsed Strategic Risk Register was considered and reviewed on a regular basis and in a rolling program, where changes or new risks were addressed in detail

During the year, the external auditors, Fortunity Assurance, continued their audit on LA Inc. producing the statutory accounts for both Legacy Australia Incorporated and the Legacy Australia Inc. Welfare Patriotic Fund for the period ended 30 June 2023. This was reviewed by the committee and submitted to the Board for endorsement.

A detailed Treasurer's Report is available with the FY 2022/2023 Financial Reports.

Centenary of Legacy

The purpose of the Centenary of Legacy Committee is to assist the Board of Directors with the development of plans for Legacy's Centenary by acting as the initial focal point for ideas, activities, and events to promote our Centenary and by coordinating national events and publicity to achieve the Boards Objectives to:

- Capture and celebrate the essence of the Legacy movement and Legacy's role in Australian society, especially in advocating for Service Widows, Orphans and the families of Service Personnel who have given their health.
- Give due recognition to those who have perhaps suffered the most through military service and the agony of war in the defence of the nation.
- Maintain the Legacy movement's relevance to our modern society by connecting those affected by the results of war and military service with the youth of today.
- Prepare the Legacy Movement for our more e-enabled clients and world in what will be the Legacy movement's second century.

The Committee progressed the development and distribution of the 100-year plaque given to all Clubs; monitored the Legacy Flame grevillea program undertaken by Hobart Legacy; reviewed the development and distribution of educational material to schools through the Department of Education; developed Centenary merchandise and progressed other commemorative initiatives such as the commemorative coin and commemorative stamp.

The Committee met five (5) times during the reporting year primarily to progress and complete identified projects, the major project being the Legacy Centenary Torch Relay sponsored by Defence Health. The activity involves thousands of people and is supported by the Australian Defence Force. Perfect Events has been working alongside Legacy Australia Office to organise the flagship event with the focus of celebrating and capturing the essence of the Legacy movement, particularly Legacy's role in Australian society.

A detailed Committee report will be provided to the Board in early 2024 and the Committee will disband when it has fulfilled its reporting responsibilities.



Legacy2030

Since 2019, the Legacy2030 Steering Committee has been tasked with providing thought leadership on the planning and implementation of Legacy 2030 milestones, and communications back to all Clubs. During the 2022-2023 reporting period, an open forum to ensure maximum opportunity for consultation was held at the 2022 AGM and the Committee met three times.

The open forum attendees recognised that there was a generational change impacting Legacy with diminishing numbers of aged beneficiaries and a corresponding reduction in the number of Legatees. At the same time, it had become evident that Legacy was expected to articulate and demonstrate a response to the care of families where the veterans had given their health in service to their country

Legacy2030 strategic directions include the implementation of the following reinforcing initiatives.

- Restructure as a Company Limited by Guarantee and redraft of the Constitution (this initiative was actioned by the Governance Committee and will be addressed under that section of the Report)
- The Service beyond Service national recruiting program, specifically aimed at the thousands of Defence veterans in the 35-55 age bracket that have transitioned successfully or are planning their transition from the ADF. Unfortunately, progress had to be put on hold and a restart is proposed by the end of the year.
- The Legacy Australia National Investment Fund was progressed with the broad aim to professionalise investment management across Legacy Australia. The roll-out of the initiative to clubs will commence post the 2023 AGM.
- The development of Standards of Service for universal application across all Legacy Clubs. The aim is to develop consistency in the quality-of-service delivery regardless of whether the Clubs are large or small.

The upcoming National Conference will provide Legacy Clubs an opportunity to consider, openly discuss and progress the Legacy2030 initiatives.

National Representation

Legacy Australia's aim is: To act as the national coordinating body for Legacy Clubs including national representations and/or promotion of Legacy purposes, ideals and interest at a national level. To protect the good name and reputation of Legacy.

On behalf of the Legacy Clubs of Australia, to develop and maintain alliances and relationships at the national level, including making representations to, or negotiating with entities including:

- Department of Veterans' Affairs
- Department of Defence and the ADF
- Federal Government and Federal Departments and Agencies generally
- RSL and other Ex-Service Organisations
- Australian Charities and Not for Profit Commission (ACNC)

To represent Legacy Australia at the national level in areas of:

- Brand and Media Management
- Incident Response



Pictured: Legacy Families at Government House Canberra on 3 February 2023.
Photography by: Rohan Thomson

National Advocacy

Legacy Australia's aim is to provide a caring service, not limited to financial support to the dependants, including by way of personal endeavour by Legatees. The activities undertaken in terms of national advocacy through 2022 - 2023 have included:

- Chairman's participation in Ex-Service Organisation Round Table (ESORT) consultation with DVA;
- Participation in the Royal Commission into Defence and Veteran Suicide Stakeholder Reference Group
- Participation in Working Groups and Committees to improve support systems;
- Participation in joint committees for Advocacy development;
- Making submissions to Government for policy and budget considerations;
- Active lobbying to Government decision-makers concerning benefits for widows and children of veterans;
- Canvassing compensation and wellbeing officers for information on emerging issues;
- Convening of National Advocacy Forum to provide professional development for Legatees and paid staff, and an opportunity to engage with senior DVA, VRB and RMA officials;
- Liaise with the wider Ex-Service Organisation community to identify issues and opportunities;
- Responding to requests for input to government legislation and policy review and development;
- Develop and implement, following endorsement by Legacy Clubs, policy on matters including Compensation/ Pensions; Welfare/ Wellbeing; and Aged Care, and
- Dissemination of information across all Legacy.

Compensation/Pension Support

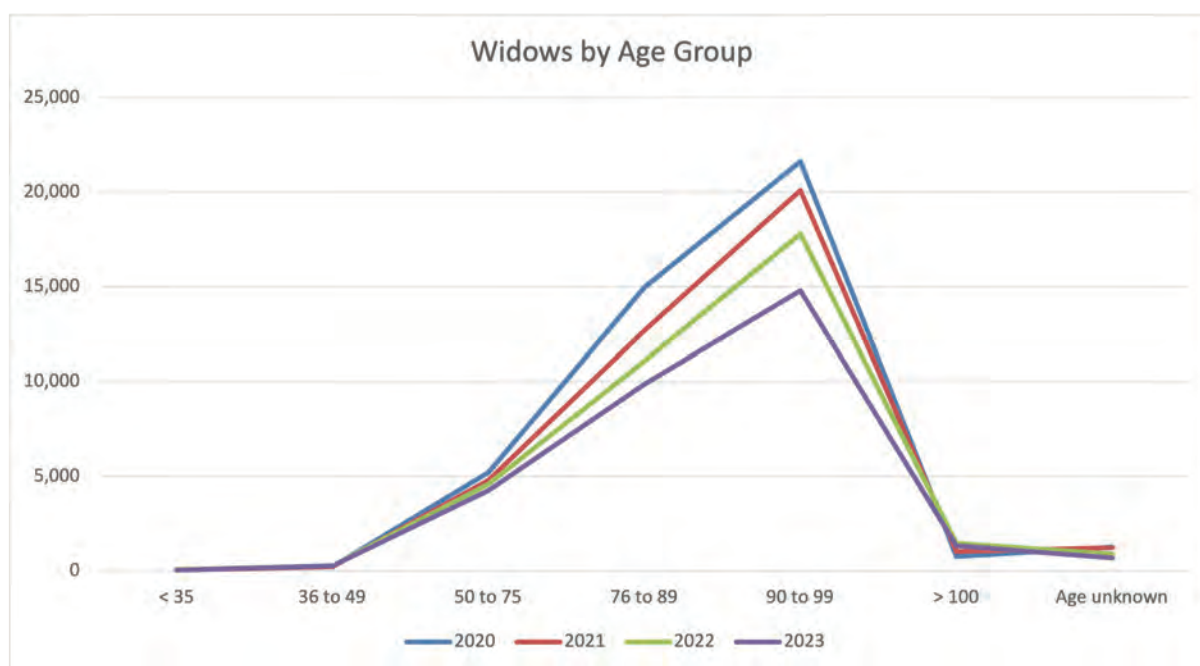
Our compensation support continues to primarily focus on ensuring that our beneficiaries receive all their entitlements, including both pensions and welfare entitlements.

Under clause 3.3.10 of Bylaws of Legacy Australia Incorporated, Clubs submitted the following pension's statistics for 2023:

- 402 primary claims lodged and 259 accepted
- 81 section 31 claims were made and 3 accepted
- 83 VRB claims were made and 25 accepted
- 11 AAT cases with 2 accepted

As at 31 March 2023 we have 16,574 widow(er)s enrolled with Legacy and who receive a War Widow's Pension under the VEA. Last year there were 15,044.

The downward trend of widows continues as our WWII widows pass on at a rate of around 13 per day. The graph below shows the numbers of widows by age group over the last four years. The significant decline in numbers has been in the 76 – 89 and 90 – 99 age groups. This has been somewhat mitigated by the hardier WWII veterans surviving into the 90s, and their widows being enrolled only more recently into Legacy. Sadly, the rapid decline of the numbers in these groups will most likely continue. The 76 – 89 age group is also being mitigated due to the passing of the Korean and Vietnam War veterans, with their widows being enrolled into Legacy.



National Programs

John & Anna Belfer Trust

During the FY 2022/2023, an amount of \$165,000 was donated by the Trustees of the John & Anna Belfer Trust. These monies were used to fund mutually agreed Legacy projects and programs, and in conjunction with the Australian War Memorial (AWM), to assist in the social and personal development of Legacy beneficiaries and especially Legacy Youth. A total of \$220,565 was distributed to Legacy Clubs from this fund. The main distributions were \$5,000 paid out to beneficiaries towards the Legacy Natural Disaster Relief Fund, \$171,000 towards the Legacy Junior Camps and \$16,000 towards various Legacy Youth Development assistance programs. This fund also supports the Legacy Social Support Programs such as Legacy Junior Public Speaking Award and Australian War Memorial Youth visits.

Annual ANZAC Day Visit

Canberra Legacy, in conjunction with the AWM, hosted the Annual ANZAC Day Visit (previously the Florance Foundation Visit) at the Outward Bound facility at Tharwa for 13 Junior Legatees (aged between 14 and 18 years) from all over the country visiting Canberra for six days, concluding on 27 April. A highlight was the wonderful immersion day provided by the AWM on 24 April, leading into formal ANZAC Day commemorations.

Legacy Youth Camps

The Legacy Youth Camps are an integral part of helping and supporting young Legacy beneficiaries. These camps provide an opportunity for Legacy Youth to interact with other children in similar situations in a relaxed and fun environment.

Youth Camps are held across Australia, including in Busselton, Brisbane, Ballarat, Sydney, and Melbourne.

The very generous donation from the John & Anna Belfer Trust helped ensure the continuing success of camps.

BAE Systems Australia

During the FY 2021/22, BAE Systems Australia (BAE) entered into an agreement with Legacy Australia to sponsor the Legacy Australia Grants program. BAE has committed a total funding of \$900,000 to be received by July 2024. A total of \$150,000 was received during the financial year bringing the total to date to \$600,000. This program will be used to expand BAE System's support to families of Veterans through educational and general support for Legacy families.

Legacy Australia Education & Development Fund

The Legacy Australia Education & Development Fund was once again supplemented with a payment of \$150,000 from BAE Systems Australia this financial year. This generous donation by BAE Systems have sustained the fund leaving a balance as at 30 June of \$127,868. The funds received from a Bequest to assist school aged beneficiaries in the last FY has now been exhausted.

During the financial year, 160 grants totalling \$525,037 were awarded to Legacy beneficiaries in 21 Legacy Clubs. Of these grants, \$199,927 was awarded for tertiary and vocational education and \$325,110 for school-aged education.

Due to the significant increase in applications for grants the Board reduced grant limits to \$5,000 for tertiary and vocational education and \$2,000 for school-aged education.

Currently, a total of 15 Australian Veterans' Children Assistance Trust (AVCAT) Scholarships, were supported by Legacy Australia. This fund was generously supplemented by a Northrop Grumman donation of \$75,000 and a Bequest of \$50,000. Due to the original donation from The Late Legatee John Gough which has now been exhausted, the fund has been renamed the Legacy Australia Education Fund.



Legacy Junior Public Speaking Award

There has been a continuation of providing funds for the final of the Legacy Junior Public Speaking Competition, assisting in raising the awareness in schools of Legacy and its ideals. The competition continues to be popular and well contested in those states that participate.

The 2022 National Final was held in Tasmania and hosted by Launceston Legacy. Gabrielle Elias a Year 9 student from St Ignatius College in Adelaide was the national winner.

Centenary of Legacy

In 2023, Legacy commemorates 100 years of supporting our veterans' families. There have been several activities and events Legacy Australia and our Clubs have organised to mark this important milestone.

The Legacy Centenary Torch Relay 2023 presented by Defence Health.

The Legacy Centenary Torch Relay 2023 presented by Defence Health is a six-month satellite relay event taking place to commemorate Legacy's 100 years of service and acknowledge veterans' families.

The torch will travel on a remarkable journey spanning over 50,000 kilometres through 100 locations, carried by approximately 1500 Torch Bearers who have a connection to Legacy or the Defence Community.

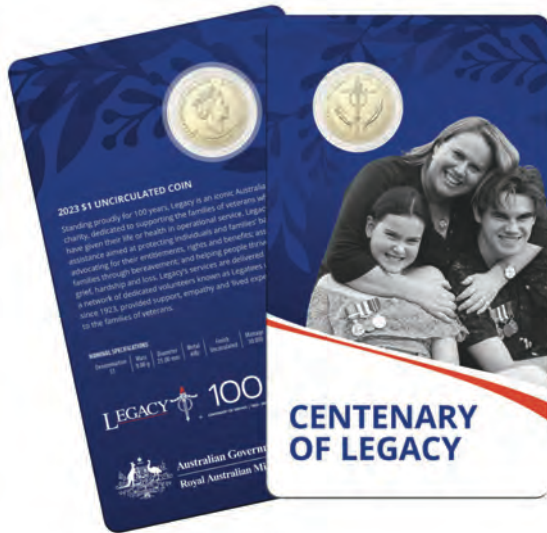
The Legacy Centenary Torch Relay began at a ceremony at Pozieres France on 23 April 2023. Whilst in France the Torch and Legacy representatives also participated in Anzac Day events before heading to Ypres, Belgium to be part of the daily Menin Gate Last Post Ceremony.

The torch then travelled to London, the location of the only Legacy Club outside of Australia, where the Legacy flame received a royal welcome from His Majesty The King at Buckingham Palace. Following this once in a lifetime meeting there was a relay through the streets of London.

The Legacy flame then made its journey to Albany Western Australia and has travelled through South Australia, the Northern Territory, Queensland and NSW. The relay will conclude in Melbourne in October where the first Legacy club was established by Lieutenant General Sir Stanley Savige in 1923.

The torch relay will continue throughout 2023 and has gained much community support as it travels across Australia.





\$1 Centenary Commemorative Coin

Legacy partnered with the Royal Australian Mint in the development of the Legacy Centenary \$1 coin.

The reverse of the coin featured a sculpted interpretation of the Legacy logo torch cupped by a pair of hands with the title text 'Centenary of Legacy • 100 Years of Service' circling the design around the edge of the coin.

The \$1 coin had a limited mintage of 30,000.

We extend appreciation to the Royal Australian Mint for their support

Centenary Plaques

Bronze Legacy Centenary Commemorative Plaques were provided to every Legacy Club as a record of achievement of the Legacy movement over the past 100 years. The bronze plaques were developed by DP Jones of Kyabram Victoria. Many Clubs have chosen prominent places in local communities to display this plaque.

Commemorative Stamp

Legacy partnered with Australia Post in the development of a commemorative stamp issue featuring the iconic Legacy Torch in honour of our centenary year.

The stamp and associated collectables were sold online and from Australia Post stores. The pack comprised of a first-day cover, 4 booklets of 10 x \$1.20 stamps, 4 x maxicards, sheetlet pack, Royal Australia Mail postal numismatic cover and magnetic badge prestige cover.



We would like to thank Australia Post for their support of Legacy.

LegacyFlame Grevillea

In honour of our centenary year, one of our wonderful volunteers from Hobart Legacy, Suzanne Curry, has coordinated this nation-wide project of the Legacy Flame Grevillea plant. This Grevillea plant has been specifically chosen as it resembles the iconic Legacy Torch with an abundance of long flowering red/orange spikes.

The LegacyFlame Grevillea was sold through Bunnings and some local nurseries. It is hoped the plant will increase awareness of the work of Legacy to the wider community but also a portion of the funds from the sale of the plants will be donated to Legacy.



Legacy Centenary Torch Relay



National Campaigns



Legacy Week Launch 2022

Legacy Week National Launch was held on Monday 29 August 2022 in the Reg Saunders Courtyard of the Australian War Memorial (AWM) Canberra.

The Launch was opened by a welcome delivered by Mr Matt Anderson PSM, Director of the Australian War Memorial. Mr Anderson acknowledged how Legacy represents a safe space for families impacted by service, a place where people can relate to challenges faced by service families and the support provided being tailored both appropriately and sensitively.

His Excellency General the Honourable David Hurley AC DSC (Retd) and Her Excellency Mrs Linda Hurley attended the Launch as Guests of Honour. His Excellency delivered a moving speech that recognised the good work carried out by Legatees in support of our beneficiaries

Mrs Pennie Looker delivered a truly remarkable address demonstrating her amazing courage and strength which had an incredible impact on all attendees at the Launch.



Kokoda - Our Challenge, Their Legacy 2023

Due to COVID-19 the 2022 Kokoda challenge did not occur. Planning for The Kokoda – Our Challenge, Their Legacy 2023 activity is well underway, with 20 Junior Legatees from across Australia programmed to walk the Kokoda Track 25 September – 5 October 2023. This life-changing opportunity is being conducted by No Roads Expeditions. The Junior Legatees will be mentored by five ADF members during the lead up to and conduct of the activity. Respective Legacy Clubs are supporting their Junior Legatees and funding domestic travel and essential kitting.



2023 ANZAC Day Campaign



Legacy Week 2022 Campaign



Remembrance Day 2022 Campaign

2022 - 2023 National Campaigns

Capital City Legacy Clubs worked collaboratively through the National Project Working Group to deliver three national campaigns in 2022-2023. These campaigns were Anzac Day (led by Melbourne Legacy), Legacy Week (led by Sydney Legacy) and Remembrance Day (led by Brisbane Legacy).

The Legacy Australia office continues to ensure that there is a single and consistent brand and corporate image and to realise the economies of scale in fundraising costs and overheads across the Legacy movement. Activities in this regard include:

- Provision of merchandise for fundraising;
- Receipt and disbursement of donations and third-party fundraising;
- Corporate partnership programs;
- Approval of 3rd party fundraisers;
- Provision of support to 3rd party fundraisers; and
- Corporate partner liaison.

Benefits and Financial Support for Legacy Clubs

The Legacy Australia office is the first point of contact for public enquiries and offers support to Legacy Clubs with branding, marketing and fundraising as requested.

The various activities of Legacy Australia provided benefits to Clubs in 2022-2023 the order of **\$1,202,346** (2021-2022 \$590,539) which is an increase of \$611,807 through:

\$220,565	J & A Belfer Trust funds supporting Legacy Junior Camps, Legacy Youth Assistance Programmes and Legacy Natural Disaster Relief
\$601,480	Legacy Australia Education & Development Grants Funding (including Grants administered by AVCAT)
\$188,078	Disbursement of donations and 3 rd party fundraising proceeds
\$60,880	Trademark protection, Insurance for Clubs, website licences, marketing support, telephone charges for 1800 number, website development & support and fundraising platform fees.
\$131,343	Kokoda Trek 2023 with 20 Junior Legatees participating
\$1,202,346	Total Benefits to Legacy Beneficiaries and Clubs for FY 2022/23

Support for Website Donations Management

Legacy Australia centrally managed Legacy's online donation portal and related disbursements to Clubs. This is done under the administration of Legacy Clubs Services on behalf of LA Inc. This enabled Clubs who participated in the automated system of disbursements to receive donations directly into their respective bank accounts promptly. 2022-2023, a total of \$908,403 was donated to Legacy through Legacy's National website donate portal.

Support for 3rd Party Fundraising & Donations

Legacy Australia centrally managed Legacy's support to 3rd party fundraisers and related disbursements to Clubs. The net 3rd party fundraising and donations income disbursed to clubs in FY 2022/2023 was \$188,078. Legacy Australia absorbs associated 3rd party platform licence costs on behalf of Legacy Clubs.

Merchandise

Legacy Australia supports Legacy Clubs with the fulfilment of their Legacy Week merchandise requirements, with merchandise supplier Premium Merchandise Group (PMG), as well as additional merchandise ordered by LA Inc. on behalf of Clubs. Legacy Club collateral orders were managed by Legacy Australia and included the sale of:

- Collection buckets and Legacy stickers
- Legacy tin hat collection tins
- Pull-up banners

Centenary merchandise was developed including vintage tri-service bears and a centenary commemorative badge. These items were made available to Clubs to use as a fundraising opportunity throughout 2023.



National Fundraising

The Mad Hueys

The Mad Hueys donated \$12,592 from the sale of special release t-shirts to Legacy Australia this financial year.

Brothers and books

The Brothers N Books held their annual '5 in 50' reading Challenge where participants read 5 books in 50 days. All funds raised were donated to Legacy.

Run Army

Run Army Australia brings together a community of people with the common goal of supporting soldiers of the Australian Army and the families of our fallen and injured veterans. Run Army 2023 was a huge success. The event raised over \$212,000 for Legacy clubs across Australia. Run Army 2024 will take place on 21 April 2024.

Centenary Fundraising

Limited edition Commemorative Torches have been presented to each Legacy Club on completion of their leg of the relay. Our supporters were also given the opportunity to purchase one of these unique and priceless items of memorabilia.

Torch Bearers have also been provided an opportunity to purchase their **Torch Bearer torch** as a memento of this historic occasion.

Legs for Legacy is the fundraising effort for those Torch Bearers who want to do more for the Legacy cause by inspiring their supporters to sponsor their leg of the relay. As at 30 June, over \$200,000 was raised.

National Supporters

Australian Defence Force

The ADF continues to support Legacy Australia and its Clubs through activities such as Legacy Week, Kodoka Treks and other fundraising initiatives throughout the year.

During the financial year, \$26,255 was raised by Defence Industry Studies Course (DISC) and \$14,000 was raised by ADF Jakarta at the Blackforce Auction Dinner 2022.

The ADF has provided immense support during our Centenary year and, in particular, for the Legacy Centenary Torch Relay.

Australian Military Bank

Australian Military Bank donated \$49,914 to Legacy Australia through its Military Rewards cents rounding program for this financial year.

Defence Health

We are proud that Defence Health is our presenting partner for the 2023 Legacy Centenary Torch Relay and value their support in ensuring the Torch Relay's resounding success. Defence Health's support for the relay has not only helped us to commemorate this significant milestone in our history, but also to raise awareness of Legacy's work both past and present.

Lockheed Martin

Lockheed Martin supported Legacy in our Centenary Year by sponsoring Community Days in Perth, Adelaide and Townsville. Three additional Committee Day events are planned before the completion of the relay. The Legacy Centenary Community days are a great addition to the torch relay event and brought together veterans and families as well as highlighting the important role of Legacy in the community.

Northrop Grumman

Northrop Grumman donated \$75,000 to support Legacy Youth assistance programs this financial year.

Foundations

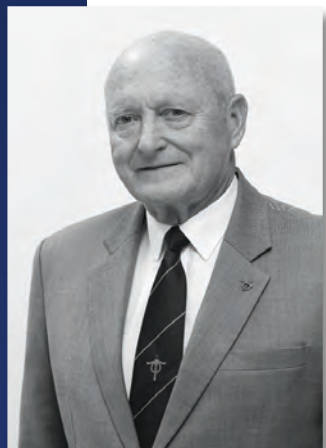
This financial year, Legacy Australia received \$72,305 from the various Australian Philanthropic Foundations.

Legacy Member Clubs



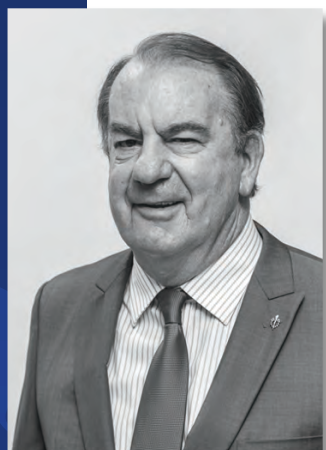
- ALBURY · ARARAT · ARMIDALE · BALLARAT · BENDIGO · BRISBANE ·
- BRISBANE WATER NSW · BUNDABERG · CANBERRA · COFFS COAST ·
- COLAC · FAR NORTH COAST · FAR NORTH QUEENSLAND · GEELONG ·
- GOLD COAST · GOULBURN · GRAFTON · HAMILTON & DISTRICT ·
- HOBART · HUNTER · INVERELL · IPSWICH · LACHLAN · LAUNCESTON ·
- LONDON · MACKAY · MELBOURNE · MILDURA · MORNINGTON PENINSULA ·
- NEWCASTLE · NORTHERN QUEENSLAND · NORTHERN TERRITORY ·
- ORANGE · PORT MACQUARIE HASTINGS · QUEANBEYAN-EDEN-MONARO ·
- SHEPPARTON · SOUTH AUSTRALIA & BROKEN HILL · SYDNEY ·
- TAMWORTH · TAREE · TOOWOOMBA · WAGGA WAGGA · WARRNAMBOOL ·
- WESTERN AUSTRALIA · WOLLONGONG & SOUTH COAST ·

Past Chairmen of Legacy Australia



Rick Cranna OAM

2018 - 2021



Tony Ralph OAM

2016 - 2017



David Gray AM

2015

Partners & Supporters



BAE SYSTEMS



THALES



Europcar



Partners & Supporters

John & Anna Belfer Trust



THE MAD HUEYS



QINETIQ



**NORTHROP
GRUMMAN**

**SCENTRE
GROUP**

Legacy Leading Lights

These corporates have committed support to get our Centenary project off the ground.

- ★ Capital Investment Group
- ★ Carlton United Breweries
- ★ Central Real Capital
- ★ Christine Simpson-Stokes AM
- ★ Kerry Stokes AC
- ★ Dr Andrew Forrest AO
- ★ Elbit Systems of Australia
- ★ Garry Browne AM
- ★ Harvey Norman
- ★ Judith Neilson AM
- ★ Northrop Grumman
- ★ The Snow Foundation
- ★ The Pratt Foundation
- ★ Walker Corporation
- ★ Wheelton Philanthropy



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**Supporting
our veterans'
families**

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