



***STRATEGIC PLAN
2014 - 2017***

***THE ROYAL UNITED SERVICES INSTITUTE
OF
WESTERN AUSTRALIAN***

July 2014

INTRODUCTION

The Royal United Services Institute in Western Australia (RUSI WA) is a non-profit, non-partisan organisation focussed on issues related to the defence and security of Australia. The Institute provides a platform for informed debate and discussion on topics such as defence strategy, contemporary and historic conflict, developments in military science and technology, and also wider concerns such as food and water security. It brings together members drawn from many backgrounds: including active and retired defence personnel, academics, students and the general public.

RUSI WA began in 1902 and is one chapter of the national RUSI federated body, which includes all states and the Australian Capital Territory (ACT). The first body began in New South Wales in 1888 and was modelled on the early RUSI of England which was founded by the Duke of Wellington in 1831.

To sustain RUSI WA's future and to meet the needs of its current and future membership, the Council believes that the organisation requires a contemporary operating model underpinned by strong governance principles. The RUSI WA Council is also of the view that a Strategic Plan is the appropriate document to articulate these operating and governance objectives.

This Strategic Plan covers the period 2014-17 and provides direction for the long term development and growth of RUSI WA.

As RUSI WA looks to the future, the Council is confident that the organisation has the capacity to build on national and local accomplishments that will ensure that RUSI WA continues to

... promote informed debate, and to improve public awareness and understanding, of defence and national security.

RUSI WA STRATEGIC PLAN: 2014-2017

- Purpose** The Strategic Plan 2014-17 will deliver an important component of good governance for RUSI WA and will also provide guidance for the long term development and growth of RUSI WA. It is intended that the Plan be reviewed, and where necessary, updated annually.
- Consultation** This Strategic Plan 2014-17 has been developed through consultation with RUSI WA Councillors and Members.

RUSI WA AIM

- The aims of the Institute are to ... promote informed debate, and to improve public awareness and understanding, of defence and national security.

RUSI WA STRATEGIC GOALS

- This Strategic Plan covers the following Strategic Goals ...

Goal 1	Membership
Goal 2	Guest Lecture Program
Goal 3	Finances
Goal 4	Marketing
Goal 5	Fund Raising/Sponsorship
Goal 6	Volunteer Program
Goal 7	Business Management
Goal 8	Managing Risk

STRATEGIC GOAL #1 MEMBERSHIP (RETENTION and GROWTH)

5. RUSI WA membership has traditionally been drawn from the ranks of the WA military and security community. RUSI WA recently embarked on a successful initiative to engage with a broader audience (University students, academics and the media) with an interest in defence and national security issues.

As per the current Register of Members (Table 1), as at 30 June 2014, total membership (including Patron and Vice-Patrons) sits at 102, which represents a 48% increase on FY 12/13.

Register of Members - Table 1

#	Membership Category	FY 11/12	FY 12/13	FY 13/14
1.	Country Members (financial)	3	2	5
2.	Ordinary Members (financial)	36	40	62 (53+9 Associate)
3.	Student Members (financial)	N/A	8	15
4.	Life Subscribing Members	18	11	11
5.	Life Members	3	3	4
	TOTAL (financial)	60	64	97
6.	Patron and Vice-Patrons	5	5	5
	TOTAL	65	69	102

Membership growth is vital to the sustainability of RUSI WA, however the on-going generational change in the membership demographic is very likely to impact on the profile of our membership.

To retain the current members (Goal 1.1) and attract new members (Goal 1.2), RUSI WA must reflect the needs, expectations and diversity of its membership to ensure all members, current and future, see on-going value and benefits.

Specific Action Items for Membership Retention and Membership Growth are summarised in Tables 2 and 3 below.

Table 2

Membership Retention ...			
Goal 1.1	Action Items	Responsibility	Comment
1.1.1	Continue to promote and raise awareness of RUSI WA	Council	Refer Goal 4 - Marketing
1.1.2	Develop and articulate a "Membership Value Proposition" that answers the question ... <i>What are the benefits of being a member of RUSI WA ?</i>	Council	
1.1.3	Underpinned by the "Membership Value Proposition", develop and implement a Membership Retention Plan.	Council	
1.1.4	Council to manage the development and implementation of the Membership Retention Plan.	Council	
1.1.5	Council to ensure an adequate level of risk management planning is undertaken in the development of the Membership Retention Plan.	Council	Refer Goal 8

Table 3

Membership Growth ...			
Goal 1.2	Action Items	Responsibility	Comment
1.2.1	Promote and raise awareness of RUSI WA.	Council	<i>Refer Goal 4 - Marketing</i>
1.2.2	Develop and articulate a “Membership Value Proposition” that answers the question ... <i>What are the benefits of joining RUSI WA ?</i>	Council	
1.2.3	Underpinned by the “Membership Value Proposition”, develop and implement a Membership Attraction Plan.	Council	
1.2.4	Council to manage the development and implementation of a Membership Attraction Plan.	Council	<i>A Student Rep currently sits on the Council</i>
1.2.5	Council to ensure an adequate level of risk management planning is undertaken in the development of the Membership Attraction Plan.	Council	<i>Refer Goal 8</i>

STRATEGIC GOAL #2 GUEST LECTURE PROGRAM

6. The Institute delivered a diverse and topical Lecture Program in CY 2013 and CY 2014. The program encompassed presentations by senior military officers and academics, and the highlights included ...

- a. The Blamey Oration on “*The Army’s Role in a National Maritime Strategy*” by Lieutenant General David Morrison, AO, Chief of Army
- b. “*Refining an Officer for Command - Linking Postings and Skills for the Ongoing Development of an Officer*” by Captain Angela Bond RAN, CO of HMAS Stirling and the Senior Naval Officer in WA
- c. “*The Australian Defence College: Leading Defence Training and Education in Order to Build Defence Capability*” by Major General Simone Wilkie AM
- d. “*Mercenaries, Private Military Companies, and Private Security Companies*” by Professor Sarah Percy, from UWA.

Specific Action Items to develop an engaging Guest Lecture Program are summarised in Table 4 below.

Table 4

Guest Lecture Program ...			
Goal 2	Action Items	Responsibility	Comment
2.1	Cater for the broad interests of all membership categories - civilian, military and student.	Council	<i>Refer Goals 1.1 and 1.2</i>
2.2	Provide a balance of topics encompassing; strategic, operational and academic defence matters as well as national/international security issues.	Council	
2.3	Develop a Guest Lecture Program over a 6-12 month timeframe.	Council	
2.4	Council to manage the development and implementation of the Guest Lecture Program.	Council	
2.5	Council to ensure an adequate level of risk management planning is undertaken in the development of the Guest Lecture Program.	Council	<i>Refer Goal 8</i>

STRATEGIC GOAL #3 FINANCES

7. The financial management of RUSI WA accounts is guided by the WA Incorporations Act 1987 and the RUSI WA Constitution. In accordance with these reference documents, RUSI WA will develop and implement the appropriate governance structure to provide prudent, efficient and transparent management of members' funds.

Specific Action Items to efficiently and effectively manage RUSI WA finances are summarised in Table 5 below.

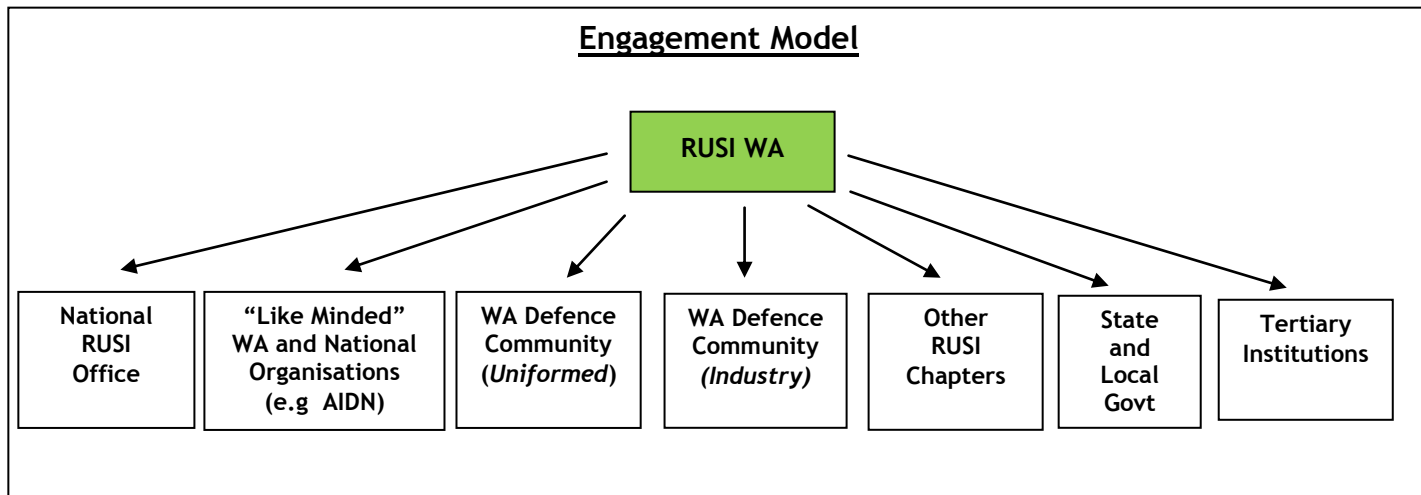
Table 5

Finances ...			
Goal 3	Action Items	Responsibility	Comment
3.1	Development of a Standard Operating Procedure (SOP).	Council	
3.2	Engage an external party to conduct an audit of RUSI WA Books of Account.	Council	
3.3	Develop and present an Operating Budget to Council for the forthcoming FY.	Council	
3.4	Mimimise the handling of cash by using a debit card or "Load and Go" card for low value purchases/transactions (under \$250).	Council	
3.5	Council to ensure an adequate level of risk management planning is undertaken in the development of the Budget.	Council	<i>Refer Goal 8</i>

STRATEGIC GOAL #4 MARKETING

8. RUSI WA is presented with an excellent opportunity to communicate its value to a broad range of constituents ... (members, affiliated organisations, the WA defence community, the WA defence industry, state and local government departments and tertiary institutions).

Establishing and maintaining partnerships with “like-minded institutions” will also help to promote the Aims of RUSI WA, provide opportunities for increased membership as well as branding and sponsorship opportunities.



Specific Action Items to develop a marketing strategy for RUSI WA are summarised in Table 6 below.

Table 6

Marketing ...			
Goal 4	Action Items	Responsibility	Comment
4.1	Build relationships with the local security and defence industries.	Council	Refer Goals 5.1 and 5.2
4.2	Enhance the Engagement Model and develop a Marketing Plan.	Council	Refer Goals 1 and 2
4.3	Council to manage the development and implementation of the Marketing Plan.	Council	
4.4	Council to ensure an adequate level of risk management planning is undertaken in the development of the Marketing Plan.	Council	Refer Goal 8

STRATEGIC GOAL #5 FUNDRAISING and SPONSORSHIP

9. Fundraising and Sponsorship activities will be closely aligned with RUSI WA Marketing activities (Goal 4). Key Considerations should include ...

Fundraising (Goal 5.1)

- ✓ Simple to implement with a low resource overhead and low cost
- ✓ Clear plan for the utilisation of the funds raised
- ✓ Activities that will complement RUSI WA's aim, profile and reputation
- ✓ Set Dollar Targets

Sponsorship (Goal 5.2)

- ✓ Build affiliations with local and national "like-minded institutions/organisations"
- ✓ Pursue co-sponsorship and support for the Guest Lecture Program
- ✓ Explore opportunities for shared venues for presentations

Specific Action Items to develop Fundraising and Sponsorship Plans are summarised in Tables 7 and 8 below.

Table 7

Fundraising ...			
Goal 5.1	Action Items	Responsibility	Comment
5.1.1	Develop a Fundraising Plan.	Council	<i>Refer Goals 2 and 4</i>
5.1.2	Council to manage the development and implementation of the Fundraising Plan.	Council	
5.1.3	Council to ensure an adequate level of risk management planning is undertaken in the development of the Fundraising Plan.	Council	<i>Refer Goal 8</i>

Table 8

Sponsorship ...			
Goal 5.2	Action Items	Responsibility	Comment
5.2.1	Develop a Sponsorship Plan.	Council	<i>Refer Goals 2 and 4</i>
5.2.2	Council to manage the development and implementation of the Sponsorship Plan.	Council	
5.2.3	Council to ensure an adequate level of risk management planning is undertaken in the development of the Sponsorship Plan.	Council	<i>Refer Goal 8</i>

STRATEGIC GOAL #6 VOLUNTEER PROGRAM

10. RUSI WA has a range of elected and volunteer positions i.e. RUSI WA Council, the RUSI WA Office and the RUSI WA Library. All volunteer positions on the Council are elected, whereas the other volunteer positions are appointed. Councillors may hold appointed positions (e.g. Newsletter Editor) in conjunction with their positions on the Council.

All volunteer positions, (Elected and Appointed) are listed below with an estimate of the monthly time commitment for each position.

Table 9

#	Position/Duties	Estimated Workload	Elected/Appointed	Comment
Council				
1.	President	4 days per month	Elected at AGM	
2.	Vice President	1day per month	Elected at AGM	
3.	Vice President	1day per month	Elected at AGM	
4.	Vice President	1day per month	Elected at AGM	
5.	Secretary	4 days per month	Elected at AGM	
6.	Treasurer	2 days per month	Elected at AGM (may be co-joined with Secretary)	
7.	Councillor	½ day per month	Elected at AGM	
8.	Councillor	½ day per month	Elected at AGM	
9.	Councillor	½ day per month	Elected at AGM	
10.	Councillor	½ day per month	Elected at AGM	
11.	Councillor	½ day per month	Elected at AGM	
12.	Councillor	½ day per month	Elected at AGM	
13.	Councillor	½ day per month	Elected at AGM	
14.	Councillor (Previous Past President)	½ day per month	Appointed (previous President)	
15.	Assistant Secretary (Memberships)	4 days per month	Appointed by Council	
16.	Assistant Secretary	4 days per month	Appointed by Council	
RUSI WA Library				
17.	Honorary Librarian	4 days per month	Appointed by Council	
18.	Assistant Librarian 1	4 days per month	Appointed by Council	Not yet appointed
19.	Assistant Librarian 2	4 days per month	Appointed by Council	Not yet appointed
RUSI WA Office				
20.	Assistant Secretary (Memberships)	4 days per month	Appointed by Council	Not yet appointed
21.	Assistant Secretary	4 days per month	Appointed by Council	Not yet appointed
22.	Assistant Treasurer	1 day per month	Appointed by Council	Not yet appointed
23.	Office Assistant 1	4 days per month	Appointed by Council	Not yet appointed
24.	Office Assistant 2	4 days per month	Appointed by Council	Not yet appointed
25.	Office Assistant 3	4 days per month	Appointed by Council	Not yet appointed
26.	Office Assistant 4	4 days per month	Appointed by Council	Not yet appointed
RUSI WA Newsletter				
27.	Newsletter Editor	1 days per month	Appointed by Council	
28.	Assistant Newsletter Editor	1 day per month	Appointed by Council	Not yet appointed
29.	Webmaster	1 day per month	Appointed by Council	
Property				
30.	Property Member	4 hours per month	Appointed by Council	
31.	Assistant Property Officer	4 hours per month	Appointed by Council	Not yet appointed

It is self-evident that RUSI WA is reliant on capable, enthusiastic and experienced volunteers to support its current and future activities.

Goal 6 acknowledges the important role of volunteers in RUSI WA and the legislative requirement for RUSI WA to provide volunteer staff (current and future) with the appropriate professional environment, induction and training.

Specific Action Items to develop a viable Volunteer Program are summarised in Table 10 below.

Table 10

Volunteer Program ...			
Goal 6	Action Items	Responsibility	Comment
6.1	Development of a Standard Operating Procedure (SOP) for the recruitment, induction and training of volunteers.	Council	
6.2	Council to manage the development and implementation of the SOP.	Council	
6.3	Council to ensure an adequate level of risk management planning is undertaken in the development of the SOP.	Council	<i>Refer Goal 8</i>

STRATEGIC GOAL #7 BUSINESS MANAGEMENT

11. This Goal is focused on the effective and efficient administration of RUSI WA and encompasses the following ...

- ✓ Business Cards
- ✓ Library
- ✓ Medals
- ✓ Office Bearers - Accountabilities and Responsibilities
- ✓ Property
- ✓ The Safe
- ✓ Security - Personnel and Physical
- ✓ Standard Operating Procedures (SOP)

Specific Action Items re business management are summarised in Table 11 below.

Table 11

Business Management ...			
Goal 7	Action Items	Responsibility	Comment
7.1	Develop a Business Operating Manual that encompasses Policies/SOPs for each of the items listed in para 12.	Council	
7.2	Council to manage the development and implementation of a Business Operating Manual.	Council	
7.3	Council to ensure an adequate level of risk management planning is undertaken in the development of the Business Operating Manual.	Council	<i>Refer Goal 8</i>

STRATEGIC GOAL #8 RISK MANAGEMENT

12. Risk management is a systematic process of making an informed and realistic evaluation of the level of risks to RUSI WA using these three simple questions ...

- ✓ What can go wrong at RUSI WA ?
- ✓ What can be done to prevent it ?
- ✓ What will RUSI WA do if it happens?

Sound risk management planning, coupled with appropriate risk management strategies, can minimise the cost and stress of “doing business” at RUSI WA.

Specific Action Items concerning Risk Management at RUSI WA are summarised in Table 12 below.

Table 12

Risk Management ...			
Goal 8	Action Items	Responsibility	Comment
8.1	Council to undertake the appropriate risk management methodology in the development and implementation of each of the Goals 1 to 7.	Council	Goals 1- 7
8.2	Utilise a Risk Management planning methodology.	Council	

FOCUS

13. Area of Focus #1

To provide a focus and to shape the development of a broad delivery timetable, it is suggested that Council assign a Priority to each Strategic Goal.

Note - As Risk Management has been embedded in the Action Items for each Strategic Goal, it has been removed from Table 13.

Table 13

#	Description	Priority
Goal 1	Membership	
Goal 2	Guest Lecture Program	
Goal 3	Finances	
Goal 4	Marketing	
Goal 5	Fund Raising/Sponsorship	
Goal 6	Volunteer Program	
Goal 7	Business Management	

14. Area of Focus #2

The growth in membership has, and will continue, to generate an increased workload for Councillors.

It is therefore suggested that the implementation of the Volunteer Program (Goal 6) be considered by Council as Priority 1.