

LIFEBOAT GEELONG FOUNDATION

STRATEGIC REVIEW

EXECUTIVE SUMMARY

January 2025

LIFEBOAT GEELONG REVIEW REPORT

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1. Introduction

- 1.1 In August 2023 the Board of the Lifeboat Geelong Foundation (Lifeboat) commissioned a Sub-Committee ('Review Committee') to conduct a strategic review of the aspirations and operations of Lifeboat. The context of the review was the 10th anniversary of the establishment of Lifeboat and a recognition that its founder and influential driving force, Fr Kevin Dillon, was advancing in years and he recognised the need for a strategy to maintain the impetus of the organization. There was need to ensure Lifeboat would continue to fulfill its purpose and that the organization could operate successfully in an environment where Fr Dillon was no longer actively involved on a day-to-day basis.
- 1.2. The members of the Review Committee are Kevin Larkins, Dr Bruce Lindsay, David Maiden, and Susan Wilson. With Board approval, Craig Boyce, a consultant with extensive experience in organizational reviews, was engaged as an independent expert adviser to the Review Committee.
- 1.3. The Terms of Reference of the Review Committee were:

To examine and make recommendations on:

 - The purpose and mission of the organisation, including its values and spirit;
 - The current and potential caseload and its implications;
 - The scope of services provided and potential for development;
 - The views of clients and supporters on Lifeboat's performance and future;
 - The views of Board members, staff, and volunteers on Lifeboat's performance and future;
 - Lessons to be learned from other similar organisations and the potential for alliances and sharing;
 - Management and governance issues, including roles, responsibilities, communications and the structure of the Constitution;
 - Human resource implications for employees and volunteers, including numbers, skills and turnover;
 - Financial resources and future funding models;
 - The role of the founder and how to achieve maximum benefit from his knowledge and expertise;
 - Future strategic planning process.
- 1.4. The Review Committee collected information through desktop research, surveys of clients, Board members, staff, volunteers, and supporters, and through both formal and informal conversations with those directly connected to Lifeboat. Respondents to the Board member/staff/volunteer surveys were also offered the opportunity to hold confidential discussions with Craig Boyce. Cath O'Reilly (Administrative Officer) and Ian Kelly (Treasurer) were very helpful in providing data to inform the Review Committee's considerations.

2. Summary of Review Findings

A. Overview

- 2.1 2024 is a critical point in the life and future of Lifeboat. The organisation was developed by and around the person of Fr Kevin Dillon drawing on his status and experience as a Catholic priest. Over its first 10 years under Fr Dillon's leadership, Lifeboat underwent organic growth, people in need became known, needs were expressed and as situations developed these were addressed. Over time, what began as a local idea to help a small number of victim/survivors in Geelong has become an organisation serving people across the nation, currently supporting around 105 victim/survivors and their family members with an operating budget of more than \$200,000 annually.
- 2.2 Building on the legacy of Fr Dillon, as Lifeboat moves into its second decade, it needs to change and transition from an informal movement inspired by a charismatic individual. To sustain and develop its services Lifeboat has needed to become a structured organisation which intentionally reflects and maintains its original aspirations and spirit, operating into the future involving a team of caring people committed to the vision, purpose, mission, values and objectives of Lifeboat.
- 2.3 Lifeboat has successfully supported victim/survivors and their families who have sought its assistance, and notably no-one has been turned away when in need. The role and support activities of Lifeboat are still required, relevant, and much appreciated by the victim/survivor community. While there is room for refinement and improvement of services, Lifeboat is on the right track and should continue to provide emotional and practical support to its community.
- 2.4 In light of the above, and with the inevitability that Fr Dillon will reduce his active involvement, there is a compelling need for change in the approach to governance, management structures and processes to ensure meaningful and purposeful support continues to be provided. This includes how Lifeboat involves and is informed by the victim/survivor community central to its purpose. Importantly, having people on board to tell Lifeboat their experience of suffering and support and what has worked for them.
- 2.5 While Lifeboat can continue to operate effectively for the short term (1 to 3 years), priority needs to be given to strategies and plans, both financial and pastoral, sufficient for sustainability of financial and human resources to maintain Lifeboat's work in the near and long term.

B. Overall findings

1. There is a continuing need for Lifeboat to support its current clients well beyond 10 years and into the indefinite future as many are scarred for life.
2. Serving the existing caseload upon the retirement of the Chairman will be difficult with current financial and human resources.
3. The number of new clients seeking support is unlikely to be large.
4. Clients, the Board and staff of Lifeboat, are generally satisfied with the range and quality of support currently provided, however, there are opportunities for improvement, particularly in communication, social interaction where clients are provided an opportunity to meet in a social setting, and support for families.
5. Thus, there is no need for a major change in the range of services offered, nor would this be practical within existing resources.
6. The most valuable support currently provided is the personal 1:1 contact which involves active listening and believing of stories told.
7. If income is reduced, this would impact Lifeboat's capacity to provide financial support, however, the organisation could continue to support clients through 1:1 contact.
8. In the short term (1-3 years), Lifeboat's financial position will allow it to continue operating on its current basis.
9. In the medium term (3-5 years, then beyond) there are significant financial risks, particularly on the revenue side.
10. Currently most donations result from Fr Dillon's longstanding relationships and personal contacts.
11. Costs can be prudently managed, but future revenue is potentially unpredictable, inconsistent and unreliable.
12. There are no formal financial delegations for approval of expenditure.
13. The Mary MacKillop Conference makes an important positive contribution to Lifeboat client support. The provision of cars to clients is not accounted for financially. This contribution is not recorded and/or sufficiently acknowledged.
14. There is a lack of clarity and consistency in the terms of engagement of staff which effects staff morale and has implications for Lifeboat's legal and moral obligations.
15. Staff report confusion regarding roles and responsibilities, reporting lines and general communication lines.
16. This is particularly reflected in their role and relationship with the 'Advisory Committee' and the requirement for them to report to it while maintaining client confidentiality and trust.

17. The operation of the 'Advisory Committee' has evolved. It no longer effectively performs the role of communicating client needs/views to the Board nor adequately keep clients abreast of developments within Lifeboat.
18. There are no policies, procedures or management responsibilities relating to volunteers. This gives rise to attendant serious risks both to Lifeboat and to volunteers, for example, risks of harm to clients, to financial probity and volunteer exposure to legal liabilities.
19. Burnout (as a specific psychological injury) of staff is a risk which includes, but is not limited to, lack of formal arrangements for them to debrief.
20. Staff costs will rise once the Chairman's operational role is reduced and more is required from Lifeboat staff and volunteers.
21. Communication and involvement with Lifeboat supporters are limited and not sufficiently systematic and strategic.
22. The constitution inadequately reflects the stated purpose and objectives of Lifeboat, governance that is 'fit for purpose,' and lacks sufficient clarity of organizational roles and relationships.
23. There is a significant overlap and confusion between governance and management / operations within Lifeboat. This is not sustainable in the long run. Lifeboat currently manages to perform due to the charisma and extensive work of Fr Dillon and the goodwill of staff.
24. Much policy and operational decision-making revolves around Fr Dillon. There are few written policies or procedures to guide the organization, its staff, volunteers, and the Board. Preparation of written policies and procedures that do exist have been ad hoc and insufficient to adequately guide the administration of the organization through the next stage of development.
25. There is confusion about the roles and responsibilities of those involved in providing services, the way they are required to keep records and to whom they regularly report.
26. There are inherent risks, which can be significant, in the work undertaken by Lifeboat and minimal or no attention given to risk management.
27. Other organisations working in the field of support for victims of sexual abuse are reluctant to enter formal working relationships with Lifeboat or to engage in organisational information sharing.
28. Most of these 'like' organisations clearly separate governance and management and have a paid executive manager. In addition, many charge fees for services and receive government grants.
29. Only CAN (Clergy Abused Network) in Newcastle offers pastoral care to its clients. CAN is funded from the Marist Brothers and has declined a request to engage with Lifeboat.
30. Other organisations (such as, Blue Knot Foundation) provide information sheets, courses and training for clients and/or staff. Currently these are not used by Lifeboat. However, Lifeboat is unique in recognising the spiritual damage to its clients. An important distinction is that Lifeboat provides support not advocacy like other organisations. Furthermore, Fr

Dillon believes it is important to acknowledge the loss of spiritual life and beliefs that provide comfort in difficult times.

3. Summary of Recommendations

The Review Committee has identified six recommendations as MAJOR, that is, particular recommendations where action (or lack of action) can have significant impact on Lifeboat's ability to intentionally realise its guiding statements of purpose and direction.

A. Guiding statements of purpose and direction

- 1. The Review Committee recommends that the Lifeboat Board review, amend, then ratify and adopt revised Guiding Statements, which include measurable objectives that guide decision-making and future actions. (See sections 5 and 6 for the rationale supporting this recommendation.) MAJOR**

The Review Committee commends to the Lifeboat Board the following revised guiding statements for their consideration.

Vision

A society where victims/survivors of church and church institution related sexual abuse, their families and supporters, are heard, believed, and experience justice, compassion, kindness and care.

Purpose

To provide personal and practical support to victims/survivors of church and church institution related sexual abuse throughout Australia, and to assist their families and supporters.

Mission

To bring help and hope to victims/survivors of church and church institution related sexual abuse, and extend help and hope to their families and supporters.

Values

The values governing Lifeboat's relationships and actions are inspired by the New Testament Gospels, in particular:

- The dignity of each person
- Justice
- Compassion
- Mutual Trust

Core Beliefs

We believe:

- All people are created equal and are of equal value
- All people have the right to exercise choice and control over their lives
- Society is enriched by diversity and uniqueness of individuals
- The rights of others ought to be respected
- Empathy with others is important for healing

Objectives

Lifeboat achieves its purpose and mission by:

- Hearing and acknowledging victim's/survivor's experiences
- Providing financial, practical, emotional support, and spiritual care where desired and requested
- Enabling victims/survivors to re-engage with their communities
- Providing information and support to access education and employment
- Enabling opportunities to succeed, develop self esteem, self worth, and dignity
- Making referrals, where appropriate, to relevant professional services.

Lifeboat will annually evaluate its performance against these objectives, including a review of the objectives themselves to ensure they continue to effectively give expression to the vision, mission and purpose of Lifeboat.

Note:

Self-esteem is the internal assessment of one's qualities and attributes.

Self-worth is the belief that one is loveable and valuable regardless of self-esteem.

Dignity is how one conducts oneself in different situations as reflected in attitude and behaviour.

B. Governance and management

2. **Lifeboat Board oversee the review and amendment of the Constitution to ensure it is fit for purpose and reflects the Guiding Statement of Purpose and Objectives. MAJOR**
 - 2a. Lifeboat Board seek assistance on a *pro bono* basis to conduct a full review and revision of the Constitution (and Trust Deed as required) to ensure it complies with all legal and ethical requirements, with best practices for a charity of this type and size, and with the current needs and directions of Lifeboat.
3. Lifeboat Board review its composition and terms of reference with the view to add another victim/survivor to its membership to have client input at governance levels.
4. Lifeboat Board clearly separate the roles of governance and management within the organization to facilitate more efficient and effective day-to-day operations. This entails two primary tasks:
 - 4a. Clearly establishing the Board as the body responsible for governance, policy, higher level strategic planning, and fiduciary oversight.
 - 4b. Create a position of Executive Director responsible for day-to-day management of Lifeboat and to whom all staff and volunteers report.
 - 4c. The Executive Director shall be an ex-officio member of the Lifeboat Board.
5. **Lifeboat Board discontinue “the Advisory Committee” and replace it with a forum (suggested “Friends of Lifeboat”) to provide a place for victim/survivors, families, friends, and Lifeboat supporters to meet in an informal setting to share information. MAJOR**
 - 5a. To keep informed about developments relevant to sexual abuse victims/survivors in Australia and overseas.
 - 5b. Receive reports from Lifeboat on its activities.
 - 5c. Inform Lifeboat in matters that are affecting victims/survivors.
 - 5d. Meet bi-monthly alternating between locations in Geelong and Melbourne and available online where possible.
6. Lifeboat Board develop a clear, coherent, and transparent set of procedures for financial delegations.
7. **Lifeboat Board oversee the development of a set of standard operating procedures contained within one or more operations manuals including, but not limited to, financial delegations, human resources, reporting lines, communication, office procedures, decision-making, evaluation and measurement procedures. MAJOR**
8. Lifeboat Board supervise a comprehensive assessment and response to risk and formulate related policies and procedures on risk identification and management.

C. Scope of services

The Review Committee recommends that the quality and range of Lifeboat services to clients can be improved by implementing the following:

9. Initiate and arrange frequent social activities for clients in Geelong and Melbourne, also made available online.
10. Publish a quarterly newsletter to the wider Lifeboat community.
11. Devise an updated list of available professional service providers willing to offer services to clients at minimal or no cost.
12. Include online access where possible for events when appropriate for clients unable to physically attend.
13. Offer life story telling services to clients as a means for sharing and understanding experiences, thus enabling Lifeboat staff to listen and believe (for example, <https://susancairn.net/how-to-tell-your-own-life-story/>)
14. Examine effective approaches and good practices in supporting families of victims/survivors of sexual abuse.
 - 14a. Assess the staffing and financial implications for the ongoing sustainability of such a project.
 - 14b. Facilitate the meaningful involvement of clients and their families in the development of this service.
15. Lifeboat continues the current practice of responding to all requests for financial support from clients.
 - 15a. If further funding is not forthcoming, the Lifeboat Board review and consider feasibility of ongoing expenditure.

D. Finances

- 16. Lifeboat Board establish a Finance Sub-Committee to oversee the prudent management of Lifeboat funds and develop plans for ongoing financial stability. MAJOR**
17. Finance Sub-Committee seek guidance from the incumbent Chairman on effective means to prioritise fundraising with the objective of building up a strategic fund for the long-term stability and sustainability of Lifeboat.
18. Finance Sub-Committee examine options for cost reductions in key areas of accommodation, health, vehicle, and house repairs.
 - 18a. Explore possibilities to approach service providers for concessional rates.
19. Introduce formal financial delegations which clearly outline levels of financial authority, procedures for obtaining approval and acquitting of expenditure, that is, include clear lines of accountability for expenditure of Lifeboat funds.
20. Record, prudently manage, and acknowledge the monetary value of the aid provided by the Mary Mackillop Conference.
21. Attention be given to accessing grants (both government and private) by appointing a person with specific responsibility for this task.
22. Investigate the possibility of attracting bequests.

E. Human Resources

23. Lifeboat Board seek professional legal advice on the terms and categories of engagement of staff and volunteers to safeguard Lifeboat employment and engagement practices.
24. Provide staff, including CSOs and volunteers, with a clear statement of their roles and responsibilities, including lines of reporting.
25. Lifeboat Board appoint a Human Resources Sub-Committee to annually review pay and remuneration conditions.
 - 25a. Human Resources Sub-Committee provide staff, significantly CSOs, with a suitably qualified person with whom they can debrief to facilitate the ongoing wellbeing of staff.
26. Offer staff opportunities to attend training courses conducted by other organisations involved in dealing with sexual abuse and PTSD.
27. Clearly document the role of any advisory bodies and the corresponding role of staff in relation to such bodies.
28. Assess Lifeboat against the Volunteering Australia Check List.
 - 28a. Devise and adopt a set of policies and procedures to ensure Lifeboat complies with Australian volunteer standards.
29. Clearly and coherently identify responsibilities for relationships with Lifeboat supporters.
 - 29a. Plan and implement a programme of consistent and regular communication with Lifeboat supporters.
- 30. Engage an Executive Director to assist with the implementation of the recommendations arising from this Review Reports and support Lifeboat's ongoing operations. (See recommendation 4b). MAJOR**
31. Lifeboat Board assess the need for the appointment of an additional Client Support Officer (CSO), fine tune existing caseloads, and prepare for the transfer of cases from the Fr Dillon to ensure ongoing optimal care of clients.
 - 31a. Actively collaborate with the Fr Dillon as he transfers clients to manage staff workloads, particularly involving the transfer of any more challenging cases.
32. CSOs undertake trauma informed care training provided by Blue Knot Foundation.
 - 32a. CSOs assess the effectiveness of this training and make suggestions for future training.
33. CSOs and selected clients attend family/supporter workshops conducted by reputable organisations.
 - 33a. CSOs and selected clients to assess the suitability of such courses for wider availability to Lifeboat's client base.
34. Lifeboat Board and staff establish regular links with victim/survivor organisations and academics in this field to keep abreast of developments in Australia and overseas.
 - 34a. Where appropriate contribute to knowledge development in this field.

- 34b. Draw on this as a resource of possible speakers at meetings of the proposed 'Friends of Lifeboat' (see Section B recommendation 5).