

LIFEBOAT GEELONG FOUNDATION

STRATEGIC REVIEW

FINAL REPORT

January 2025

# LIFEBOAT GEELONG REVIEW REPORT

## FULL REPORT

January 2025

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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 10<sup>th</sup> 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. **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 and 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://suscain.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.
  - 32b. 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).

## 4. Historical context and development of Lifeboat

- 4.1 The Review Committee considers it important to record the history and background to the establishment of Lifeboat to record the memory of how we got to where we are today. As part of this process it was important to identify, then clearly and coherently articulate the fundamental purpose and values of Lifeboat so that these would inform the building of the organisation into the future.

- 4.2 The genesis of Lifeboat was in the early 1990's when Fr Kevin Dillon was Parish Priest of Mitcham.

Fr Kevin had become increasingly concerned about the Catholic Church's inadequate response to the issue of sexual abuse by priests and others. He felt that the Church was avoiding its responsibilities to those who had been and were being abused by its priests. In 1996 in his weekly *Parish Bulletin* he wrote of his concerns about the media reports of child abuse by priests, "this week's grubby and tragic reports on child abuse within the Church cannot be ignored". He went on to say, "what happens from now on must be done with impeccable integrity and unstinting pastoral care. Certainly, there are risks if the Church lets down its defense and concentrates more on pastoral care. But, if the whole grotty issue is not met head on, the risks to the total mission of the Church are far, far greater. Justice must be done and must be seen to be done."

- 4.3 Fr Kevin became frustrated and appropriately angry that something which could have been so painfully obvious to the Church was being ignored and rejected by the Church. He was particularly concerned at what he called "the unfeeling, unjust and totally irresponsible attitude of the Church and its leaders to abandon those who have been betrayed and for whom it has and still has an ongoing responsibility for their suffering." At this time Fr Kevin was contacted by two women who had been abused, one by a family member, the other by a priest. He acted then in his role as a pastoral carer. However, his inclination following the media reports was 'something has to be done'.

- 4.4 In 2001 Fr Kevin was transferred to Geelong, and his concern continued grow as the media continued to expose cases of clerical sexual abuse. The tipping point was hearing Neil Mitchell deal with the topic on his morning *Drive* session on 3AW. Mitchell was railing about comments made by one of the Bishops referring to the family of victims of abuse by a priest who wanted to meet with the Pope who happened to be in Sydney for the World Youth Day in 2008. The Bishop, responding to questions from the media about the parents wanting to raise their concerns with the Pope, dismissed them as "dwelling crankily on old wounds".

- 4.5 Hearing this morning *Drive* affected Fr Kevin prompting him to ring into Mitchell's program to state his disgust at the comments, and his embarrassment as a Church official. More importantly, Fr Kevin expressed his deep compassion for those who had been abused and for their loved ones.

- 4.6 Many people heard the broadcast. Fr Kevin was contacted by over 300 people who expressed their support for his stand. The contact from supportive people continued. Fr Kevin developed a data base of people who had expressed support.

- 4.7 In 2012, in response to a large number of media reports of clerical sexual abuse, the Victorian Government established a Parliamentary Inquiry (*Inquiry into the Handling of Child Abuse by Religious and Other Organisations*). Despite advice from the Archdiocese that priests were

not to make individual submissions, Fr Kevin appeared before the Inquiry and made a submission.

- 4.8 Both the current and former Archbishops of Melbourne (Archbishops Hart and Pell) appeared before the Inquiry. Their response was that it was not their responsibility, and they had put in place measures (*The Melbourne Response*) to deal with the situation. Fr Kevin, and many others, saw this as inadequate as it failed to recognise the damage to victims which was deep and lifelong. He felt that what was described as ‘a legalistic and penny-pinching attitude of the church’ conflicted with its espoused Gospel values<sup>1</sup>.
- 4.9 Following submissions of the Archbishops to the Parliamentary Inquiry and the 2013 Report of that Inquiry, *Betrayal of Trust*, Fr Kevin concluded that the Church would not change its response. Therefore, he determined to take action at a grass roots level, together with support from the 300 people who endorsed his views of compassion towards victims of sexual abuse.
- Fr Kevin selected a dozen names from his data base, eight from Geelong and four from Melbourne whom he believed could give practical life to his idea. As he was based in Geelong at the time, it made sense to establish a new organisation there, but it was by no means Geelong exclusive. Thus, the organisation, *Lifeboat*, was founded.
- 4.10 One of the people invited to help was Helen Last, who had spent many years fighting for justice and compassion for victims of sexual abuse, both in society generally and in the Catholic Church in particular. Helen had developed Gospel based principles for the Archdiocese of Melbourne to apply to cases of clerical sexual abuse. However, she had been dismissed by Archbishop Pell, and the Gospel based principles rejected in favour of the legalistic *Melbourne Response*.
- 4.11 Helen Last’s experience at providing practical, Gospel based, restorative justice to victims and their families provided a framework within which Lifeboat could work. Initially everything was done on a voluntary basis, working hand to mouth. Word of Fr Kevin’s work in Lifeboat spread throughout the victim community. The number of people approaching Fr Kevin and Lifeboat increased from a handful of victims in Geelong to many scores of victims from all over Victoria and interstate. As the number of ‘clients’ grew, so did donations, and after five years Lifeboat was able to employ a part time Office Manager and from 2020, two part time Client Support Officers (CSO).
- 4.12 Once established, Lifeboat consisted of Fr Kevin and a small number of volunteers, including Frank Costa and lawyer, Paul Holloway. To manage the operations of Lifeboat and be informed by victim/survivors, a committee of supporters and victim/survivors was established under the chairmanship of Fr Kevin. Although not formally constituted, “The Committee,” as it came to be known, combined the role of the Lifeboat management committee and a client consultative forum. This model of combining the operations/management of the organisation with the active involvement of the client base became a defining characteristic of Lifeboat.
- 4.13 As the number of cases increased, correspondingly the need for funds increased. Thus, it was decided to formally incorporate the organisation and seek the status of a charity. This allowed Lifeboat to obtain tax deductibility status for donations.
- 4.14 A corporate constitution, based on a precedent document, was drafted after consulting several constitutions of similar organisations. At the time minimal thought was given to how closely

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<sup>1</sup> Eight Gospel values are: humility, kindness, compassion, and justice, forgiveness, and integrity, peace, courage.

this draft reflected the current or future role and needs of Lifeboat. The main objective was to have a formal constitution that would enable Lifeboat to achieve charitable status. It was not to draft a working document fully reflecting the nature, purpose and needs of Lifeboat.

- 4.15 In the process of seeking incorporation it was discovered that the name Lifeboat had already been used by another organisation, so the title “Lifeboat Geelong Foundation” was adopted to distinguish it from that organisation.

In sum, Lifeboat began in Geelong and owes much of its success and support to people in Geelong, nonetheless it has always been an organisation which seeks to help victims of church related sexual abuse wherever they are in Australia.

- 4.16 Following the incorporation of Lifeboat and establishment of its Board of Directors, “The Committee” continued to operate in parallel with the Board. As noted below in this report, in recent years this has led to confusion around roles and responsibilities.
- 4.17 Strategic Review – In 2017, the Lifeboat Board sought input from the client base through the Client Support Officers to assess how Lifeboat was meeting the expectations of clients to determine whether there was benefit to add or delete particular activities. (See Appendix A: Results of strategic review of Lifeboat Geelong Foundation 2017.)
- 4.18 The feedback received overwhelmingly indicated clients wanted to be listened to, heard and believed. The Board determined that this attitude and approach ought to be the cornerstone of Lifeboat’s policies and operations. Trust was a major matter of concern for clients. Lifeboat aspires to be trustworthy in the eyes of its clients. Personal 1:1 contact provided by the Client Support Officers and Fr Dillon was appreciated as significantly important. The need for ongoing practical support was also highlighted. Some clients wanted assistance to ‘tell their story,’ others sought support when meeting with church authorities and in legal proceedings.
- 4.19 The Board concluded that Lifeboat continue to provide pastoral care for victim/survivors, with the care built on trust primarily based on these 1:1 encounters and wherever possible. There was also commitment to continue ensuring a victim/survivor presence at every general meeting allowing for connections to be made.
- 4.20 This information was used to develop a strategic plan for the following two years (see Appendix A: Results of strategic review of Lifeboat Geelong Foundation 2017), which included a Vision, Mission, and Values Statement for Lifeboat Geelong that envisioned that victims/survivors would experience justice, compassion, acceptance and kindness through a set of recommended strategies.

## 5. Essence and nature of Lifeboat and its work

- 5.1 As is clear from the history outlined above, Lifeboat was started by a Catholic priest in response to his concern that the Catholic Church, his Church, was treating victims of church related sexual abuse in a manner inconsistent with the Gospel values on which the Church was based. Instead of providing the pastoral care of a Good Shepherd, the compassion of Good Samaritan, and open arms to the marginalized, the Church adopted a legalistic and adversarial response to victims and sought to deny, deflect, and discourage any sense of responsibility.
- 5.2 Gospel values captured in stories of the Good Shepherd and the Good Samaritan, along with the pastoral care which these stories exemplified, are at the very core of why Lifeboat was established and inform how it has operated since its establishment in 2013.
- 5.3 Lifeboat has from its inception sought to offer pastoral care to victims of abuse at the hands of churches of all denominations. From the outset it has also regarded the families of victims as “secondary victims” and aspired to provide pastoral care for them.
- 5.4 Lifeboat has not offered support for victims of sexual abuse which has occurred in other settings. This reflects the view that sexual abuse by church personnel is in a distinct category where not only the victim’s person, but also their faith is abused. It also reflects the practical reality that it is not possible for a small voluntary based organisation to support the very large numbers of victims of sexual abuse found in other settings, for example, in government orphanages or in foster care.
- 5.5 Restating, Lifeboat is an organisation born from faith, providing pastoral care (both practical and emotional assistance) to people who have been abused in faith-based settings. It is inspired by religious principles. Lifeboat supports victims regardless of whether they are still church members or believers. Indeed, given their experience with their abuser and with the church hierarchy, many are currently not.
- 5.6 Another defining feature of Lifeboat is *trust*. Victims have had their trust shattered, first by the abuser and then by organised church officials who refuse to believe them or to offer them compassion and justice.

Fr Kevin is a priest, a priest who has publicly spoken out against the policy and practice of his church toward victims and their families. Therefore, both he and his organisation, Lifeboat, have had to earn the trust of victims. Trust has been achieved through personal 1:1 contact, and through involvement and consultation with victim/survivors. Trust is one of the greatest legacies Fr Kevin has gifted Lifeboat. Without trust, it would not be possible to effectively support victims of abuse. For trust to be maintained beyond Fr Kevin’s tireless role in Lifeboat, the organisation must aspire to continue reflecting Gospel values and the courage that underlies them.

- 5.7 As Fr Kevin withdraws from full-time engagement with Lifeboat how this mode of operation continues in a similar fashion is a significant challenge. Over the last ten years the organisation has been built by him, and revolved around him, depended upon him, and many aspects of Lifeboat have been drawn from his experience as a priest working in a parish setting.

Much of the flexibility and informality which flows from that has been to the benefit of Lifeboat and its clients. But, while a style of “parish administration” was appropriate and very effective in the early informal days, it is no longer effective given the current scale and nature



of the client base. Furthermore, the external legal requirements which come with incorporation and charitable status require attention.

- 5.8 This is the same matter which has been faced by other faith-based organisations, such as, the Society of St Vincent de Paul, and the Sacred Heart Mission, which have needed to find ways of expressing their faith-based mission through revised management structures and systems. The Review Committee concludes that Lifeboat is facing the same need to adapt to this changed situation. As with organisations that function well governance and management functions need to be well defined and clearly distinguished.
- 5.9 The Review Committee had a number of discussions about how the term *pastoral care* is understood. It is seen by some to have formal religious connotations, and is not commonly used to describe the work of other organisations providing support to victims of sexual abuse.
- 5.10 Thus, for clarity, *pastoral care* in a Lifeboat context means simply *whole of person care*, that is, practical, physical, emotional and spiritual care. Lifeboat was founded on the principle that victims need pastoral care, the sort of care that would be provided by a Good Shepherd or a Good Samaritan. Pastoral care is part of the DNA of Lifeboat.
- 5.11 Pastoral care practiced by Lifeboat is not to be confused with its usage in various formal church documents which are very technical and theologically based. For lifeboat it includes *simple, practical, everyday care*. A reason to use this term is to emphasise that the motivation for our care, our action, is based on Gospel principles, irrespective of the organizational structure and system that is adopted.

## 6. Guiding statements of purpose and direction

- 6.1 Appendix A outlines the Vision and Mission Statements which were adopted by the Board in 2017. This was an important clarifying step in the process of identifying and documenting the purpose of Lifeboat. The accompanying objectives aspired to give practical and measurable outcomes to that purpose, while the values and spirit underpin actions arising from fulfilling those objectives.
- 6.2 The Review Committee conducted a survey of Board Members, Staff and Volunteers to ascertain whether respondents were satisfied with the current vision / mission statements and what they thought was the essence of Lifeboat. In sum, one third of respondents considered these statements needed revision, while two thirds were generally satisfied. Comments suggested that the present vision and mission statements could be elaborated to make them more specific to Lifeboat and to assist the Board determine how well the organisation was fulfilling its stated purpose and objectives. (See Appendix F: Lifeboat's current guiding statements.)

### Findings

- 6.3 The 2017 Vision and Mission Statements served their purpose for those intimately connected with Lifeboat, its history and operations. Following a review of survey responses and follow-up conversations, the Review Committee felt that there was value in further developing these foundational statements. The vision and mission need to be aspirational and relevant for the next ten years, as well as clear and coherent to people both inside and outside of Lifeboat, particularly to those who are coming new to Lifeboat and consequently do not have the background of those who have been involved over recent years.
- 6.4 In a similar vein, it was considered that the Objectives need to succinctly guide the practical actions Lifeboat will take to achieve its purpose, and as far as possible be measurable. In this way the Guiding Statements of Purpose enable clearer working oversight and become an organisational tool for the Board, management and staff as well as a clear guide to current and potential clients and supporters.
- 6.5 The Review Committee notes that findings and recommendations in section six, and in subsequent sections of this report, are generally consistent with the current drafting of the objectives of Lifeboat as expressed in both its corporate constitution and trust deed.

### Recommendations

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 and emotional support
- 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.*

## 7. Governance and management

- 7.1 This section concerns governance of Lifeboat Geelong Foundation. Governance encompasses legal and practical arrangements for the organization, management, operations and delivery of services by the entity. In other words, governance concerns the basic machinery and structure of the organization.

### **Corporate and charitable arrangements**

- 7.2 Lifeboat actually comprises two connected legal entities.<sup>2</sup> The first is Lifeboat Geelong Ltd. Lifeboat Geelong Ltd is a company limited by guarantee, established for charitable purposes, specifically to provide practical and pastoral support to persons who have been victims of church sexual abuse. This and related objectives are set out in Schedule 1 to the Company's Constitution. Although not specified, 'Church' is taken to mean the Catholic Church.
- 7.3 The company was established in late 2015. It was registered with the Australian Securities and Investments Commission (ASIC) in mid-2016.
- 7.4 Lifeboat Geelong Ltd is corporate trustee for the Lifeboat Foundation (the second entity), the latter being a charitable trust established under a deed of trust. The trust deed is undated although a deed of variation to the trust was executed in early 2017. Presumably the trust deed was executed in or around late 2015 or in 2016. The purposes of the Foundation align with those of Lifeboat Geelong Ltd. The Foundation is registered as a charity under Australian charities law, having been registered with the ACNC on 16 January 2017.
- 7.5 The company functions through its directors (namely, Board). Lifeboat Geelong Ltd may establish advisory bodies (under its constitution or trust deed or both) and undertake functions incidental to performance of its functions and purposes.
- 7.6 The above arrangements are commonplace for the general governance and operation of charities in Australia. The trust (Lifeboat Foundation) is used as a financial vehicle for receipt, management and distribution of funds in order to achieve the purposes and objectives of the charity (the company and trust as interconnected entities). By both the company constitution and the Foundation's trust deed, legal arrangements for the charity's governance are in relatively standard form. Certain aspects of corporate governance set out in the Lifeboat Geelong Ltd's constitution were considered in an earlier memorandum<sup>3</sup> (such as confusion over membership and the seemingly convoluted drafting or inapt provisions contained in the company constitution). These are attended to further below.
- 7.7 Baring some tardiness in reporting, it appears Lifeboat Geelong is compliant with its obligations under Commonwealth corporations and charities law according to ACNC information available.
- 7.8 Lifeboat Geelong Ltd has deductible gift recipient status under the *Income Tax Assessment Act*.<sup>4</sup> It is not registered for GST.

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<sup>2</sup> For the purposes of this section, we distinguish the discrete entities where appropriate and otherwise identify the organisation as a whole as 'Lifeboat', consistently with use of terms otherwise throughout this report.

<sup>3</sup> Bruce Lindsay 'Memorandum: Lifeboat Geelong Ltd – corporate governance issues to be attended to in 2023', 13 March 2023.

<sup>4</sup> ATO 'Australian Business Register', [Current details for ABN 56 613 227 964 | ABN Lookup \(business.gov.au\)](https://business.gov.au/abn/56613227964).

- 7.9 Key, elementary and formal structures are in place for Lifeboat to function as a charity in accordance with its purposes and objects.
- 7.10 There is a degree of convoluted and confusing drafting in the Lifeboat Geelong Ltd constitution, as noted in the March 2023 Memorandum. That memorandum also noted the need for clearer policies and practices on membership of the corporation, a program of induction and ongoing training for directors (board) and other officials, and preparation of a manual(s) or guidance for directors in discharge of their positions.
- 7.11 Further to the points raised in that earlier memorandum it would be in the interests of Lifeboat Geelong Ltd and its directors and any senior staff:
- to be provided with a structured program of induction and training on key features of corporate, charitable and governance arrangements.
  - to be provided with a structured program of induction and training on principal legal obligations and responsibilities owed by directors and any other officeholders named in the corporate documents.
  - to be provided with appropriately designed and targeted manuals or other guidance materials tailored to their positions.
- 7.12 The above activities or materials could be prepared over time and with the assistance of external agencies or firms, such as *pro bono* programs of legal firms, the ACNC<sup>5</sup> or not for profit training providers.<sup>6</sup>

#### **The distinction of governance and operations**

- 7.13 Corporate governance generally distinguishes between the setting of policy and broad direction and control of corporate entities (including charities) with operational decision-making. Nongovernmental or community organizations do not necessarily or inherently make this formal distinction. For example, incorporated community groups or associations frequently confine management of the entity to one layer of decision-making, such as a committee or board, and delegate day-to-day tasks and operations to specific members. Similarly, formal distinction of ‘governance’ and ‘operations’ may not be apt for small for-profit enterprises, such as entities used by sole traders, where discrete tasks of setting longer-term direction or strategy as against operational tasks are borne by the same person or smaller group of individuals (for example a family enterprise).
- 7.14 The manner in which a small charitable corporation handles broad direction-setting (including policy and strategy) and day-to-day management may be a product of circumstances, but there is often value in making the distinction and establishing formal or structural arrangements to reflect the division of tasks.
- 7.15 The governing and operational arrangements of Lifeboat appear to have evolved in a rather ad hoc manner, reflecting a range of factors including:
- The purposes of the organization (including the need, generally unfulfilled by the established Church, to provide direct and pastoral care for abuse survivors. The

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<sup>5</sup> See eg ACNC ‘Online Learning’, [Online learning | ACNC](#)

<sup>6</sup> See eg Institute of Community Directors Australia, [Institute of Community Directors Australia \(ICDA\) | Training](#); Centre for Social Impact, [Governance for Social Impact: Not-For-Profit Board Directors Course | CSI](#)

organization's functions are within what might be termed a wider 'movement' of survivors).

- The small-scale but collective approach to establishing the mission and delivering the support provided by the organization (including to some degree involvement of survivors in administration, services or governance of the organization).
  - The need for paid employees to deliver certain services and conduct administration of the charity.
  - Significantly, the unique role played by Fr Dillon in founding, governance and day-to-day operational tasks (fundraising, pastoral care, administration and so on) and Fr Dillon's plainly important leadership function in Lifeboat in response to clerical abuse in general.
  - The lack of clear organizational structure or direction within foundational documents (such as the Corporation's constitution) distinguishing governance from operational matters, or otherwise providing links between these two levels of management. For example, the Lifeboat Geelong Ltd constitution provides for no 'executive' officer(s) or 'managing' director(s).
- 7.16 Further, as a consequence of this historical approach to Lifeboat's function or otherwise, there is a blurring of and ambiguity between governance and operational arrangements within Lifeboat Geelong.
- 7.17 Similarly, there appears to be ambiguity in the functions of certain bodies within the organization, such as the role and function of the Advisory Committee. The latter appears to be somewhat independent in character and open to broader membership than the Board (which is confined to directors). The existence of 'advisory' committees is anticipated by the Lifeboat Geelong Ltd constitution, but it is not clear that the present advisory committee is or was established under those powers or how it otherwise relates to the primary governance functions of the directors of Lifeboat Geelong Ltd.
- 7.18 It is arguably unhelpful that the current foundational documents, both the Lifeboat Geelong Ltd constitution and the Lifeboat Foundation trust deed, appear to be prepared from standard form precedent documents and thereby tend to reflect to a degree standard form charitable arrangements. That fact may well have been the product of contingency at the time Lifeboat Geelong was established and we draw no adverse conclusion from that fact. The point, rather, is that revision of those foundational documents may aid governance arrangements better reflecting the specific and current circumstances and purposes of Lifeboat.
- 7.19 One further point needs to be made on the governance/operations ambiguity in the case of Lifeboat, as it is fundamental to the character of the charity, namely, the *faith background and values* of the organisation. As indicated in section 5 above, this is not an unusual tension in faith-based organisations which operate in a secular world and there are numerous examples of where the potential ambiguity has been successfully managed by clear vision/mission statements supporting an organisation structure with clear roles and responsibilities.

### **Survey results**

- 7.20 The result of the survey of Board Members, Staff and Volunteers highlighted governance and management/operations, as a major issue for Lifeboat's future operations.

- 7.21 85% of respondents felt the roles and responsibilities of the Board and the Advisory Committee were not clearly defined and understood, 70 % felt Lifeboat's decision-making processes were not clear or effective and more than 90% considered changes were needed to the structure and management of Lifeboat, if it is to be sustainable.
- 7.22 Within this broad survey response (7.21), the following individual responses, particularly from the Board and staff, are highlighted as significant:
- The role of "the Advisory Committee" and its relationship to the Board and with Lifeboat staff was an area of ambiguity and concern.
  - 75% of respondents indicated that the roles and responsibilities of staff and volunteers (Board and Advisory Committee) were unclear.
  - While communication between constituent groups was seen by the majority of respondents as fairly effective, it was noted this reflected the informal nature of how the organisation functions, but which also confuses and makes operations difficult.
  - 75% of respondents said there was no clear documentation of roles and responsibilities.
  - 75% stated that operational policies and procedures were not well developed to assist them in their roles.
  - 50% stated that financial policies and procedures were operating well, however, the remaining 50% felt that such policies, procedures and practices were poor and/or needed improvement.

#### **Risks in current governance arrangements and practices**

- 7.23 In the context of governance and practice, the scope of activities Lifeboat provides, or aspires to provide, necessitates close attention to risk as a category of governance and management. For example, abuse survivors may be considered inherently vulnerable persons or bear sensitive or confidential information and risks of harm to persons or disclosure of information are heightened risks for Lifeboat, its staff, volunteers or personnel.

It is not clear from documents available to the Review Committee how or to what degree or against what standards or criteria questions of risk have been assessed and managed. Those categories of risk may include psychological harms, compliance with relevant laws intended to protect vulnerable persons, or diligence in providing practical services and/or assistance.

In addition, categories of risk include those concerning proper administration of the charity, as distinct from 'service provision' per se, such as clear administrative policies and procedures, reporting arrangements, and appropriate and adapted management structures.

- 7.24 In sum, Lifeboat pays insufficient regard and systematic attention to risk management, including to what might be termed the charity's 'risk profile' and how to manage and mitigate that 'profile' and attendant sources of risk.
- 7.25 The question of risk is arguably heightened for Lifeboat because of its client base. Additionally, it may be complicated by the unique and important attention to a 'pastoral' model or approach. Further, there may be a degree of inevitability in the blurring of the governance/operations distinction in small NGOs seeking to function in the manner of a 'community of practice', but that ambiguity may itself be a source of risk.
- 7.26 As a governance matter, Lifeboat must take active steps to address its risk profile and risk management needs. External support and advice can be sought as required.



## Findings

The Review Committee identified the following major governance and management / operational matters requiring resolution and enable Lifeboat to move forward:

- As the foundational document of the organization, the Lifeboat Constitution would benefit from redrafting and should be revised to better reflect the current purposes, needs, circumstances and operations of Lifeboat.
- There is an overlap and confusion between the governance of Lifeboat and its management and operations. Due to the goodwill of current staff and the charisma and leadership of its founder, Fr Kevin, the organisation performs relatively well despite this structural deficiency.
- Much of the policy and decision making of Lifeboat revolves around Fr Kevin and in his absence there are few policies and procedures to guide the operations of the organisation.
- There is confusion about the roles and responsibilities of those involved in managing and operating Lifeboat and the reporting lines between them.
- Lifeboat has few documented policies and procedures that effectively inform and guide practices.
- The role of the 'Advisory Committee' has evolved over time such that it is now confusing to most and at times, an irritant to effective operations. It has evolved away from its original sole function of providing open communication between clients and the organisation's decision makers.
- There are inherent risks in the type of work undertaken by Lifeboat and minimal or no attention is given to risk management.

## Recommendations

The Review Committee recommends the following actions be taken to place the governance and management of Lifeboat on a sustainable basis:

- 1. 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**
  - 1a. 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.
2. 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.
3. 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:
  - 3a. Clearly establishing the Board as the body responsible for governance, policy, higher level strategic planning, and fiduciary oversight.

- 3b. Create a position of Executive Director responsible for day-to-day management of Lifeboat and to whom all staff and volunteers report.
- 3c. The Executive Director shall be an ex-officio member of the Lifeboat Board.
- 4. **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**
  - 4a. To keep informed about developments relevant to sexual abuse victims/survivors in Australia and overseas.
  - 4b. Receive reports from Lifeboat on its activities.
  - 4c. Inform Lifeboat in matters that are affecting victims/survivors.
  - 4d. Meet bi-monthly alternating between locations in Geelong and Melbourne and available online where possible.
- 5. Lifeboat Board develop a clear, coherent, and transparent set of procedures for financial delegations.
- 6. **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**
- 7. Lifeboat Board supervise a comprehensive assessment and response to risk and formulate related policies and procedures on risk identification and management.

## 8. Current and potential caseload and implications

8.1 This section examines the number of clients (victim/Survivors and family members) supported by Lifeboat and the key demographics/metrics of this group. This has an implication for how services are provided into the future. The information is drawn from desk research and the results of surveys of clients and Client Support Officer's. It is significant that the desk research results confirmed the accuracy of the survey results.

8.2 As of 30 June 2024 Lifeboat has 110 people on its list of clients. That number has been relatively stable for five years. (When Fr Dillon moved to Rowville there was a significant increase in numbers of clients as people became aware of him and the work of Lifeboat.) For day-to-day service provision, those clients are divided amongst three people, two Client Support Officers (CSO) and the Chairman as follows:

|               |    |
|---------------|----|
| CSO Melbourne | 48 |
| CSO Geelong   | 45 |
| Chairman      | 17 |

In addition:

- Lifeboat Secretary provides invaluable back-up support, and occasional front line support.
- A Property Officer provides specific assistance with cases requiring accommodation.
- The Mary MacKillop Conference of St Vincent de Paul also provides occasional assistance when requested.

8.3 A survey of CSO's conducted in 2023 indicated that:

- 50% of clients were assessed as requiring a basic level of support, for example, occasional personal contact.
- 20% of clients required a medium level of complexity and support, for example, regular personal contact payment of invoices, need for accommodation.
- 30% of clients required a higher level of complexity and support, for example, serious mental health issues, consistent contact and requests for practical assistance.
- The majority of the 'complex cases' were allocated to the Chairman, with the CSO's distributing the balance.

8.4 The CSO survey also found that both the CSO's and the Lifeboat Secretary were regularly working at least five hours, sometimes longer, a week over their allocated twelve hours.

8.5 The imminent retirement of the Chairman will mean some or all of the clients he serves need to be allocated amongst existing staff, or supplementary resources must be found, either by existing staff working extra hours, or employing additional staff.

8.6 Age profile data does not exist on 27 clients, however, it is likely such data would mirror the age profile of those clients for whom data is available.

- Under 50 years 12
- 50 to 60 years 20
- 60 to 70 years 23
- 70 to 80 years 21

- +80 years 9

- 8.7 Client gender profile indicated 57% female and 43% male.
- 8.8 Four clients identify as Aboriginal or Torres Strait Islander.
- 8.9 Given average life expectancy statistics (83 years), it is reasonable to assume that within 10 years, on current projections, natural attrition will see the number of clients reduce by 20 to 30. That leaves approximately 80 to 90 clients to be supported, assuming no additional clients seek assistance. Ongoing support for families has formed part of assessment of workload for Lifeboat staff.
- 8.10 Geographic distribution shows 46 clients (about 45%) are located within the Greater Melbourne region, 24 clients (about 20 %) in Greater Geelong region, 21 clients (about 20%) throughout regional Victoria, and 16 clients (about 15%) are located interstate (primarily eastern states).
- 8.11 Studies by the Royal Commission, and recently by Australian Catholic University researchers, indicates there are many thousands of historical victim/survivors of church related sexual abuse<sup>7</sup>. While that might suggest the potential for more clients needing support in the future, that outcome is considered highly unlikely because:
  - The victim/survivor community has strong networks and information on available sources of assistance is widely available.
  - There are other agencies, government and non-government, offering similar, but not identical support as services provided by Lifeboat.
  - If victim/survivors were going to seek the support of Lifeboat, it is thought that they would have done so by now.
- 8.12 The safeguarding measures taken by churches makes it unlikely that few new cases of abuse will arise in the foreseeable future.

## Findings

- There is ongoing need for Lifeboat to continue supporting its clients well beyond the next ten years.
- Serving the existing caseload will stretch current resources, and be exacerbated upon the retirement of the Chairman.
- The number of new clients seeking support from Lifeboat is unlikely to be large, if at all.
- With current resources available to Lifeboat there is little or no scope to moderately increase the number of clients or the level of service, without an increase in the number of staff and corresponding funds to support any increase.

## Recommendations

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<sup>7</sup> Royal Commission into Institutional Responses to Child Sexual Abuse,

<https://www.childabuseroyalcommission.gov.au/religious-institutions>

“The prevalence of child sexual abuse perpetrated by leaders or other adults in religious organizations in Australia,” <https://www.sciencedirect.com/science/article/pii/S0145213424003363?via%3Dihub>

Articles on sexual abuse – <https://theconversation.com/au/topics/sexual-abuse-3352?page=7>

The Review Committee has included recommendations related to current and potential caseload and implications under sections 9, 10 and 11 of this report.

## 9. Scope of services provided and potential development

- 9.1 This section describes the activities and services provided by Lifeboat and considers whether any changes to services offered would benefit clients. The contents are informed by desk research and the results of a survey of clients and are advised to be read in conjunction with the respective sections on Caseload, Staffing, and Finances.
- 9.2 Current services offered by Lifeboat include, but are not necessarily limited to, the following:
- Providing personal, 1:1 and group, contact with clients.
  - Listening and affirming client stories and experiences.
  - Referral of clients to professional support services such as counselling, legal, medical, financial planning.
  - Financial assistance across a range of circumstances to enable clients to live a life of dignity. For example, payment of invoices for medical and pharmaceutical expenses, car repairs and registration, house repairs, accommodation, provision of professional services.
  - Provision of in kind assistance through the Mary Mackillop Conference of the Society of St Vincent de Paul.
  - In addition to the financial support noted above, provision of advice and technical support in finding accommodation for clients.
  - In kind provision of cars (second hand) to clients.
  - Arranging social activities.
  - Accompanying clients to formal meetings and appointments.
  - Remembering clients on their birthday and at Christmas.
  - Provision of complementary medical services when grants are available.
- 9.3 Lifeboat does not:
- Lifeboat does not offer counselling or other professional services as staff are not qualified to offer such services. (Lifeboat refers clients to professionals who are qualified to provide professional care and may assist in the payment of expenses for those services.)
  - Lifeboat does not act as a public advocate for victim/survivors of church related sexual abuse. Lifeboat staff can offer personal support to clients involved in litigation, but does not formally represent them as staff are not qualified to do so.
- 9.4 The survey of clients (Appendix B – Survey results: Clients) provides useful information on how clients see the range and quality of services provided.
- 9.5 The Survey clearly demonstrates that clients are satisfied with the support from Lifeboat, understand what is offered and would recommend the service to other abuse survivors, friends, or family in need of support.
- 9.6 The survey included numerous positive comments and suggestions to ‘keep up the good work’. There was concurrence and overlap in comments about what clients found helpful and where they would like to see Lifeboat active in the future.
- 9.7 The overarching message was that clients felt heard, understood, and supported in appropriate ways. Primarily, that was expressed through having personal contact with the staff (CSO) of Lifeboat either in person or via the telephone. Staff were enabled to provide

follow up support of a practical nature in a timely way. Importantly, some clients said that they felt that could reach out ('just a phone call away') and receive help.

- 9.8 Suggestions for change can be divided into the 'low hanging fruit' and the 'big-ticket items.' Some items received multiple votes of support; many are mentioned once but still worthy of noting for consideration.
- 9.9 Suggested low hanging fruit include:
- A regular newsletter (digital and in print).
  - Organising social gatherings.
  - Mindfulness or positive healing teaching or reference to Apps or websites or tips included in the newsletter.
  - Information/support for clients transitioning to aged care. This may include education/information for aged care providers where Lifeboat clients will live (drawing on resources such as Blue Knot).
- 9.10 Suggested big-ticket items on a wish list include;
- Provision of accommodation.
  - Healthcare, health insurance, agreement with Roman Catholic hospitals.
  - Support from the archdiocese.
  - Publicity to engender awareness of Lifeboat and encourage donations.
  - Proactively contact clients when triggering stories are in the public domain (for example, recent Pell stories).
  - Help with gaining employment (skills training and finding work).
  - Specific support for indigenous survivors needs.
- 9.11 The survey of Board Members, Staff and Volunteers also assessed the range and effectiveness of services. These groups generally considered services as satisfactory but noted some areas with potential for improvement and others where the relevance of the service had declined.
- 9.12 Overall, 90% percent of respondents felt Lifeboat provided effective 'practical, emotional and financial support to clients, and provided opportunities to succeed and develop self esteem, self worth and dignity'.
- 9.13 However, areas requiring attention were identified as facilitating referrals to appropriate professionals, access to education and employment and enabling clients to re-engage in their community.
- 9.14 Furthermore, survey respondents felt
- Referral services were ad hoc. Staff and clients would benefit from a list of professionals who could be approached at a concessional rate.
  - While originally there were a number of clients seeking employment and education, the age and health profile of most clients suggests fewer are now interested in this.
  - Lifeboat assists, rather than enables, clients to engage in their community and this scope of service can be reflected in Lifeboat objectives.
- 9.15 Lifeboat currently supports a number of families of victim/survivors and regards them as clients with similar approaches of care as for the individual who was abused. The Review Committee is aware of discussions at Board level about providing more outreach to families

and meaningful targeted support. This can be a very sensitive matter for both the individual victim and their family and needs to be addressed carefully.

## **Findings**

- Clients and Management are satisfied with the range and quality of support received from Lifeboat.
- Referral of clients to professional support services happens occasionally on an ad hoc basis. There has been work with Catholic Care to facilitate provision of counselling services, however, it is unsure where this has been utilised.
- There are achievable opportunities for improvement, particularly in terms of communication and social interaction.
- The Review Committee found no immediate need for major change in the range of services provided by Lifeboat, nor does it consider major change practical in view of financial and staffing constraints.
- The most valuable and key service provided by Lifeboat is 1:1 personal contact which involves listening and believing.
- If resource pressures continue to restrict Lifeboat's ability to provide financial assistance, the organisation can look to enhance its provision of 1:1 personal contact with clients.
- Assuming the current financial and staffing resources continue in the short and medium term there is scope to improve the quality of services in some areas, including support for families.

## **Recommendations**

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

1. Initiate and arrange frequent social activities for clients in Geelong and Melbourne, also made available online.
2. Publish a quarterly newsletter to the wider Lifeboat community.
3. Devise an updated list of available professional service providers willing to offer services to clients at minimal or no cost.
4. Include online access where possible for events when appropriate for clients unable to physically attend.
5. 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://susancain.net/how-to-tell-your-own-life-story/> )
6. Examine effective approaches and good practices in supporting families of victims/survivors of sexual abuse.
  - 6a. Assess the staffing and financial implications for the ongoing sustainability of such a project.



- 6b. Facilitate the meaningful involvement of clients and their families in the development of this service.
- 7. Lifeboat continues the current practice of responding to all requests for financial support from clients.
  - 7a. If further funding is not forthcoming, the Lifeboat Board review and consider feasibility of ongoing expenditure.

## 10. Finance

### Overview

- 10.1 Over the past four financial years (2020-2021 to 2023-2024) Lifeboat has concluded each year with a positive financial outcome. Lifeboat accrued an average annual surplus of \$43,502.

The table below illustrates that there has been considerable variability between individual annual results, primarily as a result of variations in income, with an underlying increase in expenditure.

|                   | 2020-2021 | 2021-2022 | 2022-2023 | 2023-2024 |
|-------------------|-----------|-----------|-----------|-----------|
| Income (\$k)      | 254.5     | 252.1     | 339.5     | 277.6     |
| Expenditure (\$k) | 212.2     | 240.5     | 230.0     | 267.1     |
| Surplus (\$k)     | 42.3      | 11.6      | 109.5     | 10.5      |

- 10.2 Resulting from the recent record of positive financial outcomes, at July 2024 Lifeboat has funds in the bank totaling \$K415.3.
- 10.3 If services and costs remained the same, and no more income was received, a worst case scenario, under current expenditure levels means Lifeboat could continue operations for another 18 months. If expenditure halved, Lifeboat could continue operations for three years.
- 10.4 In summary, subject to prudent financial management and no increase in expenditure beyond current trend, the short term (one to three years) financial situation is sound.
- 10.5 However, there are significant revenue issues in the medium to long term. This is matched by the expenditure side if the number of clients increases and/or the range of services is enhanced or expanded.

Significantly the survey of Board Members, Staff and Volunteers, indicated 90% of respondents indicated that financial security was the most important issue for the future development of Lifeboat.

### Income

- 10.6 Income is overwhelmingly from donations from Lifeboat supporters. On average, over the past four years, *donations accounted for 76% of income.*
- 10.7 Other sources of income are:
- Car Project, which has raised a total of \$52,000 over the past two years, an average of 8% of income;
  - Raffle, which has raised a total \$24,500 over the past two years, an average of 4% of income. Note the raffles previously raised between \$20,000 and \$45,000, but the number of Parishes participating has fallen considerably and the raffle is conducted on a voluntary basis and cannot be relied upon beyond the short term.

- Bank interest, which has raised a total of \$11,700 over the past two years, an average of 1.8% of income;
  - Grants, which have raised a total of \$16,400 over the past two years, an average of 2.5% of income. Note that in 2020-2021 a grant of \$80,000 was received. There may be more potential for growth in this area.
  - Rental repayments raised a total of \$81,200 in 2023-2024, which is 5% of income for that year.
- 10.8 Looking at the key area of donations, there is a small number of supporters who make donations of \$10,00 or more and who provide about 50-60%% of income. If these donors discontinue or reduce, it will significantly impact income.

| Year      | Number of donations<br>\$10,000+ | Total number of<br>donations | Total donations |
|-----------|----------------------------------|------------------------------|-----------------|
| 2021-2022 | 6                                | 219                          | 206,000         |
| 2022-2023 | 9                                | 211                          | 299,000         |
| 2023-2024 | 3                                | 296                          | 211,000         |

- 10.9 While Donations have been averaging \$216,000 per annum across the past four years, much of this is due to the personal appeal and contacts of Fr Dillon. If Fr Dillon becomes unable to give his unstinting energies to the role of chairmanship of Lifeboat there is a risk that the level of donations will fall, and perhaps fall significantly.
- 10.10 The same may be said of the donation of cars for sale under the car project, and the continued voluntary operation of the raffle.
- 10.11 A top strategic priority must be to introduce permanency and regularity to Lifeboat's sources of income.

### **Expenditure**

- 10.12 Operating expenditure in 2023-2024 was \$267,500, an increase of 25% compared to 2020-2021. This is reflected in the employment of two Client Support Officers in 2019 and the increased level of service which flowed from closer links with clients, rather than any increase in the number of clients or significant cost increases.
- 10.13 Fixed costs, the costs of operating Lifeboat even if we provided no services to clients other than personal contact, are approximately 30% of total operating costs, while the cost of services to clients accounts for 70% of costs.
- 10.14 Areas of major service costs are:
- Client Accommodation, which was net \$67,000 in 2023-2024, or 35% of service costs.
  - Client Medical/Dental Expenses and Medical Insurance, which was \$45,000 in 2023-2024, or 24% of service costs.
  - Client House Repairs, was \$12,300 in 2023-2024, or 6% of service costs; and
  - Client Car Expenses (repairs, insurance, registration), comprised 5% of service costs.

- 10.15 Not only are these the services with the greatest expenditure, they are also the services in which the largest numbers of request for help are received. The majority of requests for services are for amounts less than \$500, with fewer than 10% of payments being in excess of \$1000. The majority of requests for services involving expenditure are made from a relatively small number of clients.
- 10.16 Over the period June 2019 to July 2024, Lifeboat has spent a total of \$615,124 on services to 78 clients:
- |      |                               |
|------|-------------------------------|
| 35%  | less than \$1000              |
| 25%  | between \$1000 and \$5000     |
| 15 % | between \$5000 and \$10,000   |
| 8%   | between \$10,000 and \$15,000 |
| 5%   | between \$15,000 and \$20,000 |
| 12%  | more than \$20,000            |
- 10.17 Service costs are effectively demand driven by clients. To date the Lifeboat policy has been, if we have the money, we accede to the request and make the payment; the money has been donated for client's welfare and should be used for such purposes.
- 10.18 If income were to reduce, it is possible to manage costs down by, for example, placing a ceiling on amounts paid. The service most valued by clients, as evidenced by the client survey and reports from CSO's, is personal contact. This suggests that, if income falls significantly, it may be possible, as a last option to reduce expenditure on services so long as a high level of personal contact is maintained.
- 10.19 Another expenditure related issue is that of delegations, or authority to approve expenditure. Currently there are no formal delegations. This creates confusion with CSO's and delays response to client requests.

#### **Mary Mackillop Conference of the Society of St Vincent de Paul:**

- 10.20 The important practical aid provided by the Mary Mackillop Conference needs to be recognised as having a direct positive impact on the welfare of clients, and an important financial impact. This aid includes food and vouchers.
- 10.21 The food and Vinnies vouchers provided by the Conference are at no cost to Lifeboat and save Lifeboat funds for use on other services. Currently there is no effective recording of this effective source of practical in-kind support.

#### **Findings**

- In the short term (1-3 years) the financial position will allow Lifeboat to continue to operate on its current basis.
- In the medium to long term there are significant financial risks, particularly on the revenue side.
- Much of the income, particularly income from large donors, comes from the personal contacts and relationships of Fr Dillon.
- Expenditure can be managed, but revenue is unreliable and unpredictable.
- A top strategic priority is to introduce permanency and regularity to Lifeboat's income.

- There are no formal financial delegations for the approval of expenditure, a necessary step to be taken from a governance and cost management perspective.
- The Mary MacKillop Conference of the Society of St Vincent de Paul makes an important contribution by providing food vouchers and Vinnies Store vouchers to clients at no cost to Lifeboat. The “cost” of these services ought to be recorded so that the relationship with the Conference can be effectively monitored and managed.

## Recommendations

The Review Committee recommends prudent financial management by implementing the following:

1. **Lifeboat Board establish a Finance Sub-Committee to oversee the prudent management of Lifeboat funds and develop plans for ongoing financial stability. MAJOR**
2. 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.
3. Finance Sub-Committee examine options for cost reductions in key areas of accommodation, health, vehicle, and house repairs.
  - 3a. Explore possibilities to approach service providers for concessional rates.
4. 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.
5. Record, prudently manage, and acknowledge the monetary value of the aid provided by the Mary MacKillop Conference.
6. Attention be given to accessing grants (both government and private) by appointing a person with specific responsibility for this task.
7. Investigate the possibility of attracting bequests.

## 11. Human Resources

- 11.1 This section identifies the human resources currently deployed by Lifeboat and whether changes are needed in terms of number, qualifications/training, organisation and location. The data used is drawn from desk research and surveys of staff and volunteers.
- 11.2 The human resources currently accessed by Lifeboat are:
- Eight Board Members who serve in a voluntary capacity. The Board Chairman, Fr Dillon, holds not only a Board role, but is the Client Support Officer for 17 clients (mainly complex cases), and he is also effectively Chief Executive Officer of the organisation.
  - An Administration Officer, who is employed part time and paid for up to 10 hours a week.
  - Two Client Support Officers (CSO) who are engaged part time for up to 12 hours per week and have requested not to be paid. One wishes to see her time as a donation to Lifeboat, while the other is seeking to avoid income affecting her Centrelink entitlements.
  - A Housing Project Officer who is engaged part time for up to 10 hours a week and has requested not to be paid in cash but in kind to avoid income affecting his Centrelink entitlements.
  - A Car Project volunteer.
  - Members of the Mary MacKillop Conference of St Vincent de Paul who offer services on a voluntary basis as required.
- 11.3 Lifeboat commenced as an all volunteer organisation, but a steady increase in the number of clients led to the employment of staff.
- 11.4 The Administration Officer, CSO and Housing Project Officer all have contracts of employment, but salaries have not been reviewed since September 2022.
- 11.5 There are presently no Volunteer Agreements for ongoing volunteers or other ad hoc volunteers who may assist from time to time.
- 11.6 Because the respective Lifeboat officers work but are not paid, the legal status of their “employment” is unclear. Certain staff themselves have recently requested that they not be paid, and Lifeboat has acceded to these requests. However, employment law is complex and the correct status of those working for Lifeboat needs to be clear and accountable, whether it is paid employment, some form of independent contracting, or volunteer status.
- 11.7 Expert legal advice is required on these issues so that staff can continue to work and receive appropriate compensation (whether monetary, in kind, or otherwise) and Lifeboat is fulfilling its legal and ethical obligations.
- 11.8 A formal volunteer policy, including a Volunteer Agreement, is necessary not only to safeguard Lifeboat volunteers and the organisation, but also to guide volunteers when they make a rewarding and effective contribution. Lifeboat has Volunteer insurance to cover any accidents which may involve volunteers, but little else in the way of policy and procedures on the matter.

### **Roles and Responsibilities of Staff**

- 11.9 Feedback from the staff survey revealed the CSOs were not clear about their position description, even though contracts of employment exist which describe their duties. However, those staff felt they did not have a job description.
- 11.10 CSOs are also unclear as to whom they are responsible to and, to whom they formally reported. They are not sure what authority they have to make financial decisions and commitments to clients.
- 11.11 A secret of the success of Lifeboat has been its informal nature with a culture built on goodwill. However, as the organisation has grown in complexity and as staff move on and take history with them, there is a need for more formal documentation and written policies which captures the experience of current staff.
- 11.12 Fr Kevin has been the engine house and the inspiration which has allowed Lifeboat to operate informally. However, as he withdraws from day-to-day operations, the need for formal policies on matters such as human resources becomes a matter of priority.

### **Staff Numbers**

- 11.13 Section 8 identified that existing staff are fully occupied and are regularly working more than their allocated hours. Notwithstanding any natural decline in the number of clients, the potential for the clients currently handled by Fr Dillon to be allocated to the existing staff necessitates either an increase in hours for existing staff, or an increase in staff numbers. Furthermore, without careful handling of the handover of these clients the need may arise to curtail certain services. This has implications for finance.
- 11.14 This matter forms part of the planning for the gradual reduction in Fr Dillon's involvement with Lifeboat. The work he currently undertakes is not only ongoing relationships with individual clients, but also he effectively operates as executive or general manager of Lifeboat. When Fr Dillon is no longer available to perform these roles that considerable range of work will be allocated elsewhere, either by a new Chairman or by a position created to manage day-to-day operations. The Review Committee considers the latter option worthy of consideration.
- 11.15 The survey of Board Members, Staff and Volunteers found that 50% of respondents felt that current human resources were not adequate to fulfill Lifeboat's purpose. This is consistent with the desk research findings in section 8 on case load.

### **Staff Support**

- 11.16 Currently there is no formal process of debriefing and the lack of clarity in lines of reporting and authority magnifies this situation.
- 11.17 In practice, the Chairman has provided effective support when requested. However, CSOs advise that Fr Dillon is now so busy that he is not always readily available and indeed he himself also requires similar support for his health issues.
- 11.18 Staff would benefit from straightforward and consistent lines of management, including decision-making. In particular, clarity regarding to whom CSOs and other officers report and the expectations of such reporting. (See 11.22)

- 11.19 Furthermore, the Review committee notes that staff would also benefit from appropriate arrangements that allow them to de-brief. This may take the form of one person acting as a 'counselling supervisor' (a role currently fulfilled by Fr Dillon), or it may be a different arrangement.

### **Staff Qualifications/Training**

- 11.19 Lifeboat does not engage in professional advice or counselling, therefore, there is no requirement for staff to hold professional qualifications. However, as section 12 demonstrates, there are a number of other organisations which offer services to victims of sexual abuse and which conduct training for staff working in the area. The Review Committee suggests Lifeboat explore opportunities for staff to participate in such courses at Lifeboat expense.

### **Pay and Conditions**

- 11.20 Staff are employed under a formal contract of employment which states the hourly wage, the max number of hours per week for which they will be paid and that they are entitled to leave conditions in accord with national standards. Staff pay and conditions have not changed since 2022 and would benefit from annual review by the Board.

### **Organisational Issues**

- 11.21 The survey of staff clearly shows that the productivity and quality of staff work can be increased by making some fundamental organizational changes (see below and recommendations that follow).
- 11.22 Staff need to have a clear line of authority and decision-making; they need to know to whom they report and about what, and have ready access to their 'line manager'. This needs to be documented.
- 11.23 The role of 'the Advisory Committee' and staff obligations in relation to the committee are unclear and confusing. At present, CSO staff feel compromised reporting to a group of people, some of whom they do not know, and who have no obligation to keep the proceedings confidential.
- 11.24 There needs to be clear and documented financial delegations so that staff and the Board know who can approve what level of expenditure, and the process for obtaining approval.

### **Volunteers**

- 11.25 Lifeboat needs to clearly identify and acknowledge its volunteers.
- 11.26 Volunteering is defined by Volunteering Australia as "time willingly given for the common good and without financial gain".
- 11.27 There are no policies or procedures in place to manage Lifeboat volunteers and their relationship with Lifeboat. Volunteering Australia has a check list to help organisations identify what needs to be done.
- 11.28 This Volunteering Australia check list provides a starting point for a Board Member to review Lifeboat against this check list to ensure compliance recommend actions to be taken where necessary. Like other resources, volunteers need to be guided in how best to contribute their time and energies to Lifeboat.



## **Supporters**

11.29 Lifeboat supporters, people who share Lifeboat's values and often make financial or other practical donations, are a potential source of volunteers.

11.30 The supporter survey results indicated that Lifeboat has approximately 915 supporters (the number of annual reports and invitations distributed). The Annual Report was sent by email or mailed with a paper survey. A covering letter from Fr Kevin Dillon invited supporters to participate in the survey. There were 55 responses or 6% of the supporters. A common response rate for such surveys.

The survey responses included 91% donors. Note 305 (or 33%) of 915 supporters donated in 2023-2024, so the survey results represented significantly represented their views.

It appears new donors are recently decreasing but on average there has been about 15% new donors annually. 50% of donors give annually. The 75% indicated they intend to support Lifeboat financially over the next 10 years.

70% did not see tax deductibility as significant, however, 25% indicated that this is significant when considering donations to Lifeboat. 16% are likely to provide a bequest to Lifeboat. 31% undecided about future financial support for Lifeboat. 85% would recommend others to support Lifeboat financially. 80% would like communication via a newsletter or the annual report. A low number of supporters use social media.

11% likely to volunteer and 11% undecided about volunteering. 50% of the 22 comments in Q9 asking for comments or suggestions expressed a desire 'to do more'. Comments fell into two broad categories: a) those who were still working or too busy ('maybe later') and b) those who had health concerns that precluded more involvement.

11.31 A regular programme of contact and communication with supporters helps keep them involved and informed and offers them opportunities for volunteering.

## **Findings**

- There is a lack of clarity and consistency in the terms of employment of staff which impacts staff morale and Lifeboat's legal obligations and reputation.
- There is some confusion among staff about roles and responsibilities and reporting lines.
- There is a high level of concern among staff regarding their role and relationship with "the Advisory Committee".
- Having staff report on matters which by their nature are sensitive and confidential places them in a difficult position and undermines trust in them among clients.
- There are no policies, procedures and practices on behalf of, or management responsibility for volunteers.

- Burnout of staff is a risk when there are no formal arrangements for them to debrief.
- Staff costs are likely to rise once Fr Dillon's role is reduced.
- There is a need to increase communication with and involvement of Lifeboat supporters.

## Recommendations

The Review Committee makes a range of recommendations regarding human resources;

1. Lifeboat Board seek professional legal advice on the terms and categories of engagement of staff and volunteers to safeguard Lifeboat employment and engagement practices.
2. Provide staff, including CSOs and volunteers, with a clear statement of their roles and responsibilities, including lines of reporting.
3. Lifeboat Board appoint a Human Resources Sub-Committee to annually review pay and remuneration conditions.
  - 3a. 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.
4. Offer staff opportunities to attend training courses conducted by other organisations involved in dealing with sexual abuse and PTSD.
5. Clearly document the role of any advisory bodies and the corresponding role of staff in relation to such bodies.
6. Assess Lifeboat against the Volunteering Australia Check List.
  - 6a. Devise and adopt a set of policies and procedures to ensure Lifeboat complies with Australian volunteer standards.
7. Clearly and coherently identify responsibilities for relationships with Lifeboat supporters.
  - 7a. Plan and implement a programme of consistent and regular communication with Lifeboat supporters.
8. **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**
9. 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.
  - 9a. Actively collaborate with the Fr Dillon as he transfers clients to manage staff workloads, particularly involving the transfer of any more challenging cases.
10. CSOs undertake trauma informed care training provided by Blue Knot Foundation.
  - 10a. CSOs assess the effectiveness of this training and make suggestions for future training.
11. CSOs and selected clients attend family/supporter workshops conducted by reputable organisations.

- 11a. CSOs and selected clients to assess the suitability of such courses for wider availability to Lifeboat's client base.
- 12. 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.
  - 12a. Where appropriate contribute to knowledge development in this field.
  - 12b. Draw on this as a resource of possible speakers at meetings of the proposed 'Friends of Lifeboat' (see section 7 recommendation 4).

## 12. Lessons from similar organisations

12.1 There are numerous organisations which suggest they provide services and/or support to victim/survivors of sexual abuse.

12.2 Those organisations can be classified into the following broad groups:

- Those concerned with sexual abuse in the broadest sense, mainly focused on abuse of adults, and primarily females. For example, rape crisis centres, domestic violence organisations.
- Those concerned with child abuse in the broad sense, including but not restricted to sexual abuse. For example, Alannah and Madeline Foundation
- Those concerned with institutional sexual abuse, and operate in a setting heavily influenced by the Royal Commission into Institutional Child Sexual Abuse.

It is the third group of most relevance to Lifeboat.

12.3 Within the third group, there are also several categories:

- Victim/survivor advocacy groups such as Melbourne Survivors Collective, For the Innocents, Broken Rights. These are organisations of victim/survivors or their supporters, which provide a forum for like-minded people to meet and share experience on a one-to-one and group basis, to conduct research and undertake advocacy and provide advice on where other support, such as, legal, medical, economic might be found.
- Organisations such as Living Well (Queensland) and Western Australia Health Department which claim to provide support and services to victims of child sexual abuse but actually provide a list of contacts in other organisations which work in the area. Information can be helpful, but these organisations do not actually do anything in a practical one:one sense; they are effectively referral agencies.
- Organisations which do offer a range of practical services/support and which might be most closely compared to Lifeboat in terms of clients and services provided.

Details of those organisations which fall into the third category and may have possible lessons for Lifeboat are outlined in Appendix E – Similar organisations, services provided and scope for cooperation.

12.4 Lessons can also be learnt from other organisations which are faith based and, like Lifeboat, have reached a scale where informal, parish based, practices are no longer effective, and where a charismatic founder, and all the accumulated knowledge in his head, is no longer available.

12.5 The Sacred Heart Mission in St Kilda is a good example. Started by Fr Ernie Smith to meet the practical needs of the marginalized and homeless, it grew beyond the ability of Fr Ernie to manage the demand and complexity. It now has a Board of Management which concentrates on governance and strategy and an Executive team to manage the operations. Clearly, Sacred Heart Mission is a much larger organisation than Lifeboat, but the similar principles apply.

## Findings

- Organisations in this space are very reluctant to enter into working relationships, or information sharing, with other organisations in the same field. Following informal conversations with several senior representatives, the consistent message expressed is that no-one wants to share with others offering similar services the details of what they are doing. The perception is that doing so may cost them government grants. As one chief executive described, “it is a field of silos”.
- Organisational structures are similar. They all have a Board like Lifeboat, and In Good Faith Foundation (IGFF), Blue Knot Foundation (BKF), Survivors and Mates Support Network (SAMSN) and Brave Hearts have a paid full time executive manager who is responsible for implementing the policies of the Board, that is, via the day-to-day operations. Clergy Abused Network (CAN) and Beyond Abuse have a volunteer manager/co-ordinator who runs the operations.
- The organisations which have full time management charge fees for service and receive government payments.
- It appears no other organisation offers financial assistance or practical physical assistance; broadly they offer advice, counselling, referrals or enrichment activities.
- The only other organisation which offers a form of pastoral care (financial and physical assistance) to clients and closely resembles Lifeboat is Clergy Abused Network (CAN) in the Maitland Diocese. CAN is funded by the Marist Religious Order. Its management structure is similar to Lifeboat, with a volunteer Chairman who effectively manages things, and one part-time paid staff member to deal day-to-day with clients. Significantly, CAN has formally advised that it does not wish to have a relationship or share information with Lifeboat.

There are several things Lifeboat can learn from CAN:

- It holds regular social gatherings for its clients with guest speakers on topics of relevance for victims. This is a form of social interaction and information sharing. It also functions as a mechanism for consultation and feedback.
- CAN has close links with academics and assists them in research into clerical sexual abuse, its impact and measures to mitigate that impact.
- CAN seeks to work co-operatively with the Diocese of Maitland to build a better understanding in the Church of the impact of sexual abuse.
- Victim/survivor organisations in Victoria, such as For The Innocents and Melbourne Survivors Collective may offer insights and information to Lifeboat which can be useful and Lifeboat can consider closer links to them, whether organizationally or informally through personal connections. The same applies to academics working in the field.
- Some organisations, Blue Knot Foundation (BKF) and Survivors and Mates Support Network (SAMSN) offer training for other organisations which deal with complex trauma cases. It may be worth asking our CSOs to trial this training, and if it is judged effective, the Board might also be involved.

- Some organisations, BKF and SAMSN, offer workshops and resources to help families of victims. While Lifeboat supports families, there may be value in exploring this area further and possibly engaging one of these agencies to offer a workshop and/or resources to our clients.

**Recommendations** (these recommendations are incorporated under Human resources)

1. Employ an Executive Director on a part time basis to effectively manage the implementation of the review and the ongoing management of the organisation.
2. Arrange for Lifeboat CSOs to undertake training provided by Blue Knot Foundation and assess its effectiveness.
3. Arrange for representatives, including clients, to attend workshops conducted for families of victim/survivors and assess the suitability for wider application.
4. Establish regular links with victim/survivor organisations and academics in Victoria to keep abreast of developments in the field, contribute to wider knowledge, and as a source of speakers to regular meetings of Lifeboat clients.

## 13. Role of the Founder

- 13.1 The Review has been conducted at Fr Kevin Dillon's request. He has indicated that in the near future he plans to step back from his role as Chairman and take a reduced role. Subsequently the organisation will need to operate without him involved on a daily basis.
- 13.2 In the period between now and when Fr Kevin ceases to be actively involved in Lifeboat, it is important to achieve maximum benefit from his legacy.
- 13.3 The first and most fundamental way to do that is to build the concept of Gospel values into the Lifeboat vision and mission statements so that the organisation remains true to the founding intention.
- 13.4 The most pressing strategic issue facing Lifeboat is finance, and in particular new sources of revenue.
- 13.5 Much of the donations obtained to date are due to the personal contacts of Fr Kevin and the Review suggests that he be asked to give top priority to seeking large donations which can form an investment upon which Lifeboat can draw annually.
- 13.6 With Fr Kevin's intimate knowledge of Lifeboat he is invited to review, with one or two assistants, the Lifeboat filing cabinets and records, to identify and codify what is recorded there.
- 13.6 Fr Kevin should remain a Member of the Board until such time as he feels unable to fulfill that role effectively.

## 14. Future Strategic Planning

- 14.1 Lifeboat will annually evaluate its performance against these objectives, including a review of the objectives themselves to ensure they effectively give expression to the purpose and values of Lifeboat.
- 14.2 In conjunction with annual reviews, Lifeboat will devise annual implementation plans to ensure continuous provision of services based on the needs of clients and in fulfilment of guiding statements.
- 14.3 The Review Committee proposes that in five years the Lifeboat Board consider planning, conducting and implementing recommendations from another full review similar to this type conducted in 2024.



## APPENDIX A

### Results Strategic Review Lifeboat Geelong Foundation: 2017

**Vision:** A Just, Compassionate, Accepting and Kind Society.

**Mission:** To bring help and hope to survivors of Church or Institutional related sexual abuse.

**Values:** Dignity of each Person: Justice: Compassion: Mutual Trust

#### **Core Beliefs:**

- We believe that all people are created equal and are of equal value
- We believe people should have choice and control over their lives
- We value diversity and individualism
- We respect the rights of others
- We empathise with others

#### **Objectives :**

Lifeboat Geelong achieves its mission by:

- Providing Practical, Emotional and Financial support.
- Enabling survivors to re-engage into their community.
- Providing Information and Support for Survivors to access Education and Employment opportunities.
- Providing opportunities to succeed and develop self-esteem, self-worth, and dignity.
- When necessary, facilitating referrals to appropriate professionals advocating on behalf of Survivors.

*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.*

The following strategies were devised to express these statements over the subsequent twelve months:

1. Invite a survivor to join the Board.

Lifeboat is built on the principle of listening to the voices of the victims/survivors, believing these voices, and responding to the needs expressed. Therefore, the need to ensure that this voice informs all the decision making is paramount.

2. Additionally, over the next 12 months we should seek to identify and engage three or four more people who are motivated, influential and willing to join the Board of Lifeboat.
3. To sustain services, Lifeboat plan and develop specific strategic intentions for the next two years and beyond which includes, recruiting the right people (those who support the values and objectives noted above) to give expression to Lifeboat's raison d'être.
4. Provide opportunities for clients to interact socially. The Client Support Officers are best placed to develop the most appropriate response to this strategic direction.
5. Source a legal firm prepared to help survivors. (Proposed was Arnold, Thomas and Becker, a Melbourne firm.)
6. Promote *story telling* as is done in Palliative Care Services where clients stories are recorded for their benefit and, if agreed, shared to promote greater understanding at the community level (see for example, (<https://palliativecare.org.au/stories/carer/>)). The Board will need to source an appropriately qualified person to assist with this project.
7. Lifeboat fund staff to undertake a Mental Health First Aid course to assist in the undertaking of their work on behalf of Lifeboat.

## APPENDIX B

### Survey results: Clients (28 survey responses)

#### Overview

There are results from surveys from 28 clients or 25% of the client population of 110 (as estimated by the desktop research). Fr Kevin Dillon wrote to clients inviting them to participate and then they requested access to the survey in paper form or via a link.

This is quite a good survey response rate.

There were no compulsory questions.

The survey results are presented as numbers and percentages with the estimates from the desktop research expressed as percentages added to the tables where they are available for comparison.

The comparison of client's gender, age and where they live (Q 2-4) in the survey and desktop numbers show that the surveys represent the client population to a reasonable degree. This means that other information collected in Q 1, & 5-8, the length of connection, level and type of services provided, and relationship to Lifeboat can be taken as a reasonable representation of the current services provided to Lifeboat clients.

Comments in the later section of the survey reveal that respondents represented not only survivors of sexual abuse but also secondary victims: parents and wives.

#### 1. How long have you been in contact with Lifeboat? (28 responses)

| Time       | 1 Year | 2-3 Years | 4-5 Years | 6-7 Years | 8-10 Years |
|------------|--------|-----------|-----------|-----------|------------|
| Number     | 0      | 1         | 10        | 8         | 9          |
| Percentage | 0      | 3.6%      | 35.7%     | 28.6%     | 32.1%      |

#### 2. Gender (28 responses)

|                  | Female | Male  |
|------------------|--------|-------|
| Number           | 10     | 18    |
| Percentage       | 35.7%  | 64.3% |
| Desktop research | 42.7%  | 57.3% |

3. Client's Age: (26 responses)

|                  | <50   | 50-59 | 60-69 | 70-79 | 80+   | Undisclosed |
|------------------|-------|-------|-------|-------|-------|-------------|
| Number           | 2     | 5     | 6     | 8     | 4     | 1           |
| Percentage       | 7.7%  | 19.2% | 23.1% | 30.8% | 15.4% | 3.8%        |
| Desktop research | 10.7% | 17.9% | 20.5% | 18.8% | 8%    | 24%         |

4. Where do you live? (22 responses)

There was a problem with this question in the online survey where Western Victoria and other states were not available as options.

|                             | Geelong | Melbourne | Central Vic | Eastern Vic | Northern Vic | Western Vic | Not known & interstate |
|-----------------------------|---------|-----------|-------------|-------------|--------------|-------------|------------------------|
| Number                      | 4       | 11        | 3           | 4           | 0            |             |                        |
| Percentage                  | 18.2%   | 50%       | 13.6%       | 18.2%       | 0            |             | 14.3%                  |
| Results of desktop research | 22%     | 42.2%     | 6.4%        | 4.6%        | 2.8%         | 5.5%        | 16.5%                  |

5. How often do you have contact with Lifeboat? (27 responses)

|            | >Monthly | Monthly | 2-6 times / Year | Annually | Occasionally | Not Disclosed |
|------------|----------|---------|------------------|----------|--------------|---------------|
| Number     | 2        | 0       | 14               | 4        | 7            | 0             |
| Percentage | 7.4%     | 0       | 51.9%            | 14.8%    | 25.9%        | 0             |

6. The desktop research categorised clients by level/difficulty/complexity of need: (110 clients)

|            | High Need | Medium Need | Low Level Need |
|------------|-----------|-------------|----------------|
| Number     | 31        | 23          | 56             |
| Percentage | 28.2%     | 20.9%       | 50.9%          |

7. How are you in contact with Lifeboat? Choose all that are appropriate. (Responses from 27 clients)

|                            | Number | Percentage |
|----------------------------|--------|------------|
| Face to face               | 10     | 37%        |
| Phone call                 | 21     | 77.8%      |
| Help with finances or food | 9      | 33.3%      |
| Committee Meeting          | 1      | 3.7%       |
| Newsletter                 | 13     | 48.1%      |
| Events                     | 12     | 44.4%      |
| Other                      | 2      | 7.4%       |

8. How do you think of yourself in relationship to Lifeboat? (22 responses)

|            | Client | Member | Friend |
|------------|--------|--------|--------|
| Number     | 10     | 4      | 8      |
| Percentage | 45.5%  | 18.2%  | 36.4%  |

9. How do you think of yourself in relationship to your past experience/history? (26 responses)

|            | Survivor | Victim | Victim/Survivor |
|------------|----------|--------|-----------------|
| Number     | 6        | 2      | 18              |
| Percentage | 23.1%    | 7.7%   | 69.2%           |

## Conclusions from Part 1: Clients

- There have been few new clients in the last 3 years 3.6%. The remainder having joined between 4 and 10 years ago.
- One 1/3 are female and 2/3 male.
- Only 10% are less than 50 years old. The rest are fairly evenly spread between 60 and 79 with decrease in numbers over 80, as might be expected.

- 65-70% live in Melbourne or Geelong. The desktop research shows that the rest are spread evenly across other areas of Vic and interstate.
- Level of service: 40-50% of the caseload could be classified as low level (from the survey, estimated by frequency of contact; or as estimated by the staff in the desktop survey) contact.
- The newsletter and social gatherings might create a more efficient way to maintain this support for clients.
- I see two issues with this: it goes against the personal contact model of Lifeboat support, and it creates a situation where staff are having a consistently heavier more demanding workload.
- The most common support was 'social' (phone calls, 1:1 meetings, events); 1/3 mentioned practical or financial support and interestingly half mentioned the newsletter which was last published in 2021!

## Survey results: Service provision

1. Overall, I am satisfied with the support I have received from Lifeboat. (27 responses)

|            | Agree | Neutral | Disagree |
|------------|-------|---------|----------|
| Number     | 25    | 0       | 2        |
| Percentage | 92.6% | 0       | 7.4%     |

2. Please comment to illustrate reasons for your choice.

|                                                  | Number |
|--------------------------------------------------|--------|
| Christmas card and vouchers appreciated          | 2      |
| Felt understood and heard so discussion possible | 9      |
| Help and support was timely at a critical point  | 6      |
| Practical help appreciated                       | 1      |
| Financial help when needed                       | 2      |
| Initiated contact                                | 1      |
| Lifeboat is trustworthy                          | 1      |
| Liked social connection with peers               | 2      |
| I'm a hopeless case                              | 1      |

*Summary: emotional, and practical help is provided in an appropriate, compassionate, and timely manner. Of particular importance was the opportunity to speak with someone who truly understood and believed the client, mostly from staff but also at social gatherings.*

3. I understand the support available to me from Lifeboat. (26 responses)

|            | Agree | Neutral | Disagree |
|------------|-------|---------|----------|
| Number     | 23    | 3       | 0        |
| Percentage | 88.5% | 11.5%   |          |

4. Please comment to illustrate what has been most helpful to you.

|                                                                 |    |
|-----------------------------------------------------------------|----|
| Communication with Fr Kevin and CSOs (being heard and believed) | 11 |
| Financial help                                                  | 6  |
| Reliable and authentic support                                  | 4  |
| Connection with other survivors                                 | 2  |
| Christmas card and voucher                                      | 1  |
| Uncertain                                                       | 1  |

5. I would recommend that a friend or family member contact Lifeboat for support.

|            | Agree | Neutral | Disagree |
|------------|-------|---------|----------|
| Number     | 25    | 2       | 0        |
| Percentage | 92.6% | 7.4%    | 0        |

6. Please comment.

|                                     |   |
|-------------------------------------|---|
| Yes                                 | 3 |
| They will be listened to and heard  | 2 |
| I have referred family              | 2 |
| Depending on location and situation | 2 |
| No, would feel exposed as a victim  | 2 |

|                                                   |   |
|---------------------------------------------------|---|
| Support was practical                             | 1 |
| Support was supportive                            | 1 |
| Emotional support was provided                    | 1 |
| Support was pastoral                              | 1 |
| It is a unique model of support                   | 1 |
| Received NO support from the institutional church | 1 |
| Survivors still exist with no support             | 1 |

*Summary: Most would recommend Lifeboat to others. It was the unique nature of Lifeboat, providing appropriate and compassionate support which clients would, and have recommended to others. Two were reluctant to be revealed/exposed as a victim of abuse and another was highly critical of her experience of the institutional church's failure to respond to their pleas for help.*

7. What other ways would you suggest Lifeboat consider as it plans to continue providing help to survivors and their families? Please be realistic in any suggestions.

- No change: 5
- More social get togethers 3
- Mindfulness or positive healing (? Sessions) or reference to Apps on the website 2
- Health insurance/health care. Could the archdiocese or RC hospitals help? 2
- Help with accommodation
- Support/information for survivors transitioning to aged care
- Help with gaining employment (skills and finding work)
- Continued contact
- Contact when there are triggering news stories (like the Pell case)
- Help with social integration
- Encouraging clients to seek and accept professional help
- Increased publicity to generate support and funding
- Specific support for indigenous survivors

8. Do you have any further suggestions or comments to elaborate your responses above? (18 responses)

**Other suggestions:**

- All good, no need for change. 7 responses.



- Specific Indigenous support
- More social gatherings
- More publicity to generate support and funding
- Tough love for some clients

**Comments:**

- Lifeboat provided much needed support when the institutional church did not.
- The support provided has been varied and appropriate.
- A mother of 5 abused children gets support though she cannot hear or imagine her children's experiences.

## Conclusions from the Service Provision Questions

This section demonstrates that clients are very satisfied with the support from Lifeboat, understand what is offered and would recommend the service to other abuse survivors, friends, or family in need of support.

There were many positive comments and suggestions to 'keep up the good work'!

There is quite a lot of repetition and overlap in comments about what they found helpful and where they would like to see Lifeboat active in the future.

The overarching message is that clients felt heard, understood, and supported in appropriate ways.

Primarily, that was a matter of having personal contact with the staff of Lifeboat either in person or on the phone which enabled staff to provide follow up support of a practical or financial nature in a timely way.

Importantly, some clients said that they felt that could reach out ('just a phone call away') and receive help.

As you might expect, suggestions for change can be divided into the low hanging fruit and the big-ticket items. Some receive multiple votes of support; many are mentioned once but still worthy of consideration.

**Low hanging fruit:**

- A newsletter
- Social gatherings. This may also be a way to resolve the question of 'advisory committee's' future.
- Mindfulness or positive healing (? sessions) or reference to Apps on the website or in the newsletter
- Information/support for clients transitioning to aged care. This may include education/information for aged care providers where Lifeboat clients will live (? Using Blue Knot)

**Big-ticket items and the wish list:**

- Accommodation

- Healthcare: health insurance, agreement with Roman Catholic hospitals, support from the archdiocese.
- Publicity to engender awareness and donations
- I think this is tricky given the need for confidentiality and some comments from clients about not wanting to reveal their status as abuse survivors.
- Maybe there is a way to leverage other publicity. There have recently been some programs and books about sexual abuse survivors and there will be more as survivors are given compensation in the courts.
- Proactively contacting clients when triggering stories are in the public domain (like the Pell stories)
- Help with gaining employment (skills and finding work)
- Specific support for indigenous survivors

## Survey: Clients of Lifeboat Geelong, 28-08-2024

### About the clients – qualitative information

#### Overview

There are results from surveys provided from 28 clients or 25% of the client population of 110 (as estimated by the desktop research). Fr Kevin Dillon wrote to clients inviting them to participate and then they requested access to the survey in paper form or via a link.

This is quite a good survey response rate.

There were no compulsory questions.

In the appendix X the survey results are presented as numbers and percentages with the estimates from the desktop research expressed as percentages added to the tables where they are available for comparison.

The comparison of client's gender, age and where they live (Q 2-4) in the survey and desktop numbers show that the surveys represent the client population to a reasonable degree. This means that other information collected in Q 1, & 5-8, the length of connection, level and type of services provided, comments, and relationship to Lifeboat can be taken as a reasonable representation of the current services provided to Lifeboat clients.

Comments in the later section of the survey reveal that respondents represented not only survivors of sexual abuse but also secondary victims: parents and wives.

#### Conclusions from Part 1: Clients

There have been few new clients in the last 3 years 3.6%. The remainder having joined between 4 and 10 years ago.

One third are female and two thirds are male.

Only 10% are less than 50 years old. The rest are fairly evenly spread between 60 and 79 with decrease in numbers over 80, as might be expected.

65-70% live in Melbourne or Geelong. The desktop research shows that the rest are spread evenly across other areas of Vic and interstate.

Level of service: 40-50% of the caseload could be classified as low level support. In the survey, this is estimated by frequency of contact. In the desktop survey, it is estimated by the staff.

The newsletter and social gatherings might create an efficient way to maintain this support for clients. I see two issues with this: it goes against the personal contact model of Lifeboat support, and it creates a situation where staff are having a consistently heavier and more demanding workload.

The most common support was 'social' (phone calls, 1:1 meetings, events); 1/3 mentioned practical or financial support and interestingly half mentioned the newsletter which was last published in 2021!

## Conclusions from the Service Provision Questions

This section demonstrates that clients are very satisfied with the support from Lifeboat, understand what is offered, and would recommend the service to other abuse survivors, family, and friends in need of support.

There were many positive comments and suggestions to 'keep up the good work'!

There is quite a lot of repetition and overlap in comments about what they found helpful and where they would like to see Lifeboat expanded.

The overarching message is that clients felt heard, understood, and supported in appropriate ways.

Primarily, that was a matter of having personal contact with the staff of Lifeboat either in person or on the phone which enabled staff to provide follow up support of a practical or financial nature in a timely way.

Importantly, some clients said that they felt that they could reach out ('just a phone call away') and receive help.

As you might expect, suggestions for change were many and varied. They can be divided into the low hanging fruit and the big-ticket items. Some receive multiple votes of support; many are mentioned once but still worthy of consideration.

### **Low hanging fruit:**

- A newsletter
- Social gatherings. This may also be a way to resolve the 'advisory committee's' future question.
- Mindfulness or positive healing (sessions?) or references to Apps on the website or in the newsletter
- Information/support for clients transitioning to aged care. May also include education/information for aged care institutions where Lifeboat clients will live (? Via Blue Knot)

### **Big-ticket items and the wish list:**

- Accommodation
- Healthcare: health insurance, some kind of agreement with Roman Catholic hospitals, or support from the archdiocese.
- Publicity to engender awareness and donations
  - I think this is tricky given the need for client confidentiality and some comments from clients about not wanting to reveal their status as abuse survivors receiving support.
  - Maybe there is a way to leverage other publicity. There have recently been some programs and books about sexual abuse survivors and there will be more as survivors are given compensation in the courts.
- Proactively contacting clients when triggering stories are in the public domain (like the Pell stories)

- Help with gaining employment (skills and finding work)
- Specific support for indigenous survivors.

## APPENDIX C: Survey results: Supporters

### OVERVIEW

Lifeboat has approximately 915 supporters.

The Annual Report was sent by email where possible or mailed as a paper copy with a paper survey at the end of April 2024. A covering letter from Fr Kevin Dillon invited supporters to participate in the survey.

There were 55 responses or 6% of the supporters. A common response rate for surveys.

#### 1. Have you supported Lifeboat financially? (55 responses)

| Yes   | No   | Maybe |
|-------|------|-------|
| 50    | 3    | 2     |
| 90.9% | 5.5% | 3.6%  |

NOTE: This is a large proportion of donors so not necessarily representative of the total supporter population as 305 approx. (33%) of 915 supporters donated in 2023-2024.

#### 2. How long have you financially supported Lifeboat? (51 responses)

| 1 Year | 2-5 Years (3 years) | 6-10 Years (5years) |
|--------|---------------------|---------------------|
| 7      | 20                  | 24                  |
| 13.7%  | 39.2%               | 47.1%               |

COMMENT: Given the limitations mentioned in Q1. This result look like it is saying that new donors are decreasing but the results average out at about 15% of new donors each year.

#### 3. How frequently do you donate to Lifeboat? (53 responses)

| Monthly | Annually | Occasionally | Once |
|---------|----------|--------------|------|
| 0       | 30       | 18           | 5    |
| 0       | 56.6%    | 34%          | 9.4% |

COMMENT: Given the limitations mentioned in Q1. Around half of our donors give annually which is encouraging

#### 4. How likely are you to be able to donate to Lifeboat in the next 10 years? (55 responses)

| Very Likely | Likely | Undecided | Unlikely | Very Unlikely |
|-------------|--------|-----------|----------|---------------|
| 26          | 16     | 4         | 6        | 3             |
| 47.3%       | 29.1%  | 7.3%      | 10.9%    | 5.5%          |

COMMENT: Given the limitations mentioned in Q1 & 3. The 75% commitment to Lifeboat financially over the next 10 years is encouraging.

5. Donations to Lifeboat Geelong are tax deductible. How much does this influence your decision to support lifeboat Geelong financially and the amount you give? (54 responses)

| Most Significant | Significant | Undecided | Little Significance | No Significance |
|------------------|-------------|-----------|---------------------|-----------------|
| 5                | 9           | 1         | 14                  | 25              |
| 9.3%             | 16.7%       | 1.9%      | 25.9%               | 46.3%           |

COMMENT: The fact that 70% didn't see tax deductibility as significant may support the idea that they are donating small amounts, however the 25% who felt it was significant may mean that we have results from larger donors as well.

6. How likely would you be to provide financial support to Lifeboat Geelong in your will? (55 responses)

| Very Likely | Likely | Undecided | Unlikely | Very Unlikely |
|-------------|--------|-----------|----------|---------------|
| 5           | 4      | 17        | 15       | 14            |
| 9.1%        | 7.3%   | 30.9%     | 27.3%    | 25.5%         |

COMMENT: 16% likely to provide a bequest to Lifeboat is positive. The 31% undecided is a potential source of future income. This raises the question of how we can support and encourage ideas about leaving a bequest to Lifeboat. A review which is positive about Lifeboat's future and some information or stories in the proposed newsletter could be beneficial.

7. How likely would you be to recommend to others that Lifeboat Geelong is a worthy organisation to support financially? (55 responses)

| Very Likely | Likely | Undecided | Unlikely | Very Unlikely |
|-------------|--------|-----------|----------|---------------|
| 29          | 18     | 7         | 1        | 0             |
| 52.7%       | 32.7%  | 12.7%     | 1.8%     | 0             |

COMMENT: Given the limitations mentioned in Q1, 85% recommendation rate is very positive.

8. By what means would you like to know more about lifeboat, its work and events? (53 responses)

|                      |    |       |
|----------------------|----|-------|
| Bi-annual Newsletter | 23 | 43.4% |
| Annual Report        | 18 | 37%   |
| Personal email       | 7  | 13.2% |

|              |   |      |
|--------------|---|------|
| Website      | 4 | 7.5% |
| Social Media | 1 | 1.9% |

COMMENT: That 80% would like communication via a newsletter and the annual report may indicate an aging or tech averse group of supporters and confirms the suggestion to introduce the newsletter which was also a feature of the client surveys. The low number of supporters for social media should not be ignored and could be a way to reach younger supporters. A volunteer who could manage social media might also use this to collect material for the newsletter.

9. How likely would you be to volunteer for Lifeboat? Possible roles for Lifeboat volunteers might be providing transport, recording life stories, accompanying individuals or groups on social outings, administrative tasks, or technology support. (54 responses)

| Very Likely | Likely | Undecided | Unlikely | Very Unlikely |
|-------------|--------|-----------|----------|---------------|
| 4           | 2      | 6         | 25       | 17            |
| 7.4%        | 3.7%   | 11.1%     | 46.3%    | 31.5%         |

COMMENT: 11% likely to volunteer and 11% undecided is encouraging.

There were 50% of comments in Q9 expressing a desire 'to do more'. The comments fell into 2 categories: those who were still working or too busy ('maybe later') and those who had health concerns.

Having volunteering opportunities well defined and the supporting processes in place may be a way to increase the ability to service Lifeboat clients at a reasonable cost. Volunteers are not free but they can be a cost-effective way to expand services.

Given the nature of Lifeboat services, the impact of trauma on clients and the need for confidentiality a small group of trusted and well trained volunteers who are well supported would be preferable to a larger group.

Including opportunities and information in the newsletter may support a volunteering community.

#### **Other comments or suggestions. (22 responses)**

16 responses were 'Well done; Great work; Thank you' type comments.

10 responses related to wishing they could provide more support either financial or volunteering.

2 hoped for greater support from the institutional church

There was one suggestion about ways to raise funds: movie nights, a restaurant dinner or a church service with a special collection.

## **Conclusions from Supporter survey**

### **OVERVIEW**



Lifeboat has approximately 915 supporters (the number of annual reports and invitations distributed).

The Annual Report was sent by email where possible or mailed as a paper copy with a paper survey at the end of April 2024. A covering letter from Fr Kevin Dillon invited supporters to participate in the survey.

There were 55 responses or 6% of the supporters. A common response rate for surveys.

The survey responses included 91% donors. This is a large proportion so it is not necessarily representative of the total supporter population as 305 (33%) of 915 supporters donated in 2023-2024.

Given these limitations. The result showing how long people have donated look as though new donors are decreasing but if the results average out for the number of years in each category it becomes about 15% of new donors each year. This is not supported by the donor number from Xero in the table below.

Of those who answered the survey, half of the donors give annually which is encouraging.

Given the limitations mentioned above. The 75% intend to support Lifeboat financially over the next 10 years is encouraging.

The fact that 70% didn't see tax deductibility as significant may support the idea that they are donating small amounts, however the 25% who felt it was significant may mean that we have results from Lifeboat's larger donors as well.

16% likely to provide a bequest to Lifeboat is hopeful. The 31% undecided is a potential source of future income. This raises the question of how we can support and encourage ideas about leaving a bequest to Lifeboat. A review which is positive about Lifeboat's future and some information or stories in the proposed newsletter could be beneficial.

85% recommending to others to support Lifeboat financially is very positive.

That 80% would like communication via a newsletter or the annual report may indicate an aging or tech averse group of supporters and affirms the suggestion to introduce the newsletter which was also a feature of the client surveys. The low number of supporters for social media should not be ignored and could be a way to reach younger supporters. A volunteer who could manage both social media and the newsletter might use this material for the newsletter.

11% likely to volunteer and 11% undecided is encouraging.

There were 50% of the 22 comments in Q9 expressing a desire 'to do more'. The comments fell into 2 categories: those who were still working or too busy ('maybe later') and those who had health concerns that precluded more involvement.

Having volunteering opportunities well defined and the supporting processes in place may be a way to increase the ability to service Lifeboat clients and organisation at a lower cost, however, volunteers are not free. They must be recruited, trained, and supported in an effective way which may involve employing someone to do this.

Given the nature of Lifeboat services, the impact of trauma on clients and the need for confidentiality a small group of trusted and well-trained volunteers for client work who are well supported would be preferable to a larger group.

Including opportunities and information in the newsletter may be effective in recruiting a volunteering community.

## Q9. Other comments or suggestions. (22 responses)

16 responses were ‘Well done; Great work; Thank you’ type comments.

10 responses related to wishing they could provide more support either financial or volunteering.

2 hoped for greater support from the institutional church

There was one suggestion about ways to raise funds: movie nights, a restaurant dinner, or a church service with a special collection.

## In Addition:

Number of donations to Lifeboat from Xero by Cath.

| Financial Year      | \$0-100 | \$101-500 | \$501-1000 | \$1001-5000 | \$5001-10000 | \$10001-20000 | \$20001- |
|---------------------|---------|-----------|------------|-------------|--------------|---------------|----------|
| July 2020-June 2021 | 102     | 53        | 7          | 21          | 2            | 3             |          |
| July 2021-June 2022 | 103     | 74        | 10         | 20          | 2            | 5             | 1        |
| July 2022-June 2023 | 101     | 67        | 10         | 23          | 2            | 7             | 1        |
| July 2023-June 2024 | 166     | 96        | 14         | 25          | 2            | 0             | 2        |

This information shows that the number of donations over the last 4 years has increased steadily in all but the \$10K-20K group.

We have survey responses from 50 of the 305 donors

Number of donations aggregated to \$0-500 and \$500+

| Financial Year | \$0-500 | \$500+ | Income \$K |
|----------------|---------|--------|------------|
| 2020-2021      | 155     | 188    | 254.5      |
| 2021-2022      | 177     | 215    | 252.1      |
| 2022-2023      | 168     | 211    | 339.5      |
| 2023-2024      | 262     | 305    | 277.6      |

The value of income includes the raffle (of falling value), car project (a new source of good income), and grants (a new small income).

|                   | 2020-2021 | 2021-2022 | 2022-2023 | 2023-2024 |
|-------------------|-----------|-----------|-----------|-----------|
| Income (\$K)      | 254.0     | 252.1     | 339.5     | 277.6     |
| Expenditure (\$K) | 212.3     | 240.5     | 290.0     | 267.1     |
| Surplus (\$K)     | 42.4      | 11.6      | 109.5     | 10.5      |

These income and expenditure figures from David's chapter on finances show that in this same period it is the increase in expenditure that has created the deficit.

## APPENDIX D

### Survey results: Board, Staff, Volunteers, April 2024

A quote which seems to sum up the current views about Lifeboat:

*Lifeboat has done amazing things for victim/survivors, and should be very proud of its achievement. However, much of that has been achieved by the work and inspiration of one man, Fr Dillon. Fr Dillon IS Lifeboat. We need to plan to continue the existing work of lifeboat, and indeed expand/improve it where possible.*

#### CURRENT SERVICES:

Respondents feel that Lifeboat is improving clients' self-worth and dignity by affording contact and social connection, particularly as provided by Lifeboat the staff. Where clients are interested other support for community re-engagement, study, employment, and/or referral to other professional services can be enabled and supported. It was noted that some of these services could be provided more effectively. The current financial position is a concern. Increasing support to cover housing and health services are expensive and could potentially be achieved through partnerships with other organisations.

#### STRUCTURE AND MANAGEMENT: Q8-14

Here respondents reported confusion and requested clarification and change. For example,

- Defining roles, responsibilities, and reporting amongst the board/advisory committee, staff, and volunteers
- Policies, procedures, and documentation needed in most areas for ongoing development beyond personalities who have sustained Lifeboat over the past ten years.
- Improvement in decision making and communication
- Review of financial provisions and fund raising

#### THE FUTURE

10 of the 12 respondents agreed changes to many areas of the structure and management of Lifeboat are needed to ensure a sustainable future.

While financial resources were commonly identified as an issue needing attention, the survey demonstrates confusion and desire for clarification in areas of operations, structure and management.

Important concerns noted included:

- ✓ A succession plan for Fr Dillon
- ✓ Actions to deal with the issues mentioned in the structure and management
- ✓ Possibly finding someone to manage these changes 2-3 days/week for 1-2 years

12 responses to this survey were from:

- 5 of 8 board members

- 4 of 4 employees
- 3 of 3 volunteers

## SUMMARY OF RESPONSES TO EACH SURVEY QUESTION

Comments are summarised to avoid repetition, *Italics = direct quotes from comments*

### A: VISION, MISSION AND OBJECTIVES:

**Q1:** Lifeboat provides effective practical, emotional, and financial support to Survivors of Church or institutional related sexual abuse

91.6% agree (1 neutral; 4 agreed; 7 strongly agreed)

5 comments:

- Two noted the importance of emotional support
- Two were positive about all areas of support
- Two commented financial support is provided when requested
- One thought support across all three areas could be done more effectively

**Q2:** Lifeboat enables Survivors to re-engage into their community in meaningful and sustained ways.

41.7% agree, 58% neutral (7 neutral; 3 agreed; 2 strongly agreed)

8 comments:

- General consensus that Lifeboat supports, encourages, and “assists more than enables” community re-engagement, but cases vary, clients are different, and there needs to be a willingness from the client.
- One comment; *Improvements can be made to overcome the isolation experienced by survivors - e.g. additional social functions, and regular newsletters.*

**Q3:** Lifeboat provides information and support for Survivors to access education and employment opportunities.

58.3% agreed, 41.7% neutral (5 neutral; 4 agreed; 3 strongly agreed)

7 comments:

- Many clients are too old (most over 60 y/o) or unable to work and not seeking further education.
- Compare Q2 support and encouragement are provided where appropriate.

**Q4:** Lifeboat provides opportunities to succeed and develop self-esteem, self-worth and dignity.

91.6% agreed, 8.4% neutral (1 disagreed; 4 agreed; 7 strongly agreed)

7 comments

- All agree that hearing, and believing client stories create personal connections for clients, for example, through visits, phone calls, cards, Christmas shopping vouchers
- CSOs aspire to enable a sense of self-esteem, self-worth and dignity  
Central function and key role of Lifeboat.

**Q5:** Lifeboat, when necessary, facilitates referrals to appropriate professionals advocating on behalf of Survivors.

91.7% agree, 8.3% neutral (1 neutral; 6 agreed; 5 strongly agreed)

5 comments

- Provided if clients are willing to access such services.
- Access to psychologist welcomed.
- More effective if there was a database rather than “an ad hoc basis” of affordable (i.e. reduced rates), trusted providers e.g., lawyers, doctors, dentists, counsellors, financial planners. (Note preferably ones who understand trauma).

**Q6:** Overall, I am satisfied with the current vision and mission statements, and objectives of Lifeboat Geelong Foundation.

66.6% agreed, 25% disagreed, and 8.3% neutral (3 disagreed; 1 neutral; 4 agreed; 4 strongly agreed)

4 comments

- The mission and values are admirable but too general, not specific to Lifeboat.
- Vision/mission and objectives need focus to Lifeboat Geelong, be “practical and measurable”.
- Starting point to inform the policies and procedures (see below Q 8-12)
- One comment *confusion / misunderstanding about the role / purpose of Lifeboat because the organisation has been so centred on one person and has had little or no policy documents.*

## **B: STRUCTURE AND MANAGEMENT**

**Q7:** Lifeboat Geelong provides a satisfactory level and range of services that brings help and hope to survivors of Church or institutional related sexual abuse.

100% agreed (8 agreed; 4 strongly agreed)

5 comments

- Broad range of support/services to client’s needs – but *also a wish list*
- Perhaps more could be provided in areas of housing/accommodation and healthcare (financial constraints), pursue through partnerships.
- One comment endorsing Q1 on emotional support *key role is being a friend, believing clients, listening to clients and providing social interaction for them*

**Q8:** Roles and responsibilities of the Board and the Advisory Committee are clearly defined and known to respective groups within Lifeboat.

16.7% agreed, 33.4% disagreed, 50% neutral (2 strongly disagreed; 2 disagreed; 6 neutral; 2 strongly agreed)

Comments from 8 respondents covered a range of issues. In summary:

- Confusion and lack of clarity was mentioned in most of the comments
- For example, confusion about the composition and role of the Advisory Committee which is not mentioned in the constitution – *appears to act as an executive management committee, no document which explains the function/purpose of the Committee, if there is to be an*

*Advisory Committee it should meet only quarterly or at most every 2 months, Committee meetings are de facto Board meetings. ...*

- Confusion about the lines of reporting, lines of authority, and decision-making procedures. Particularly pertinent for CSOs – *reporting lines need to be clarified and documented, need procedures to assist CSO role.*
- *Everything seems to be in Fr Dillon's or Cath's head. To date management is centred on Fr Dillon.*
- Constitution *should be simplified and clarified* including defining 'members', clients, and supporters and the role of the board/committee.
- *Little long term financial planning*
- One suggestion – employ a part time (2-3 days/week for 1 or 2 years) executive manager to oversee the amendment of the constitution, position descriptions, policies and procedures etc. associated with the operations and services of Lifeboat Geelong.

**Q9:** Roles and responsibilities of the Staff and Volunteers are clearly defined and known to respective groups within Lifeboat.

25% agreed, 41.6% disagreed, 33.3% neutral (1 strongly disagreed; 4 disagreed; 4 neutral; 1 agreed; 2 strongly agreed)

9 comments:

- Roles not clearly understood, defined, or documented.
- Minimal orientation of new Board and unclear expectations of CSOs. Are extra hours CSOs and admin staff considered to be voluntary work?
- *Staff roles are clearly defined but there needs to be more definition of volunteer roles and limitations.*
- *They (i.e., CSO) received very little, if any, briefing/induction, and operate without any policies or guidelines other than verbal advise from the Chairman from time to time. What is their relationship to the Committee?*
- Position descriptions and procedures for Board, staff and volunteers needs *review and refinement.*

**Q10:** Communication between constituent groups is effective, enabling each group to fulfill their respective roles.

50% agree, 8.3% disagree, 41.7% neutral (1 disagreed; 5 neutral; 4 agreed; 2 strongly agreed)

6 comments

- Concerns as expressed in previous Q8 & 9
- *Communication is OK but made more difficult because roles and responsibilities are not clear*
- Two comments relate to Chairman who is *difficult to access, is becoming forgetful, yet most of the key decisions and knowledge held by him*
- Lack of clarity of the purpose/role of the Advisory Committee meetings

**Q11:** Clear documentation of roles and responsibilities are accessible to respective personnel and these documents help facilitate good working relationships.

66.7% disagree, 25% agree, 8.3% neutral (3 strongly disagreed; 5 disagreed; 1 neutral; 1 agreed; 2 strongly agreed)

5 comments:

- *Few, if any, policies and procedures are documented, and not aware of any documentation of roles and responsibilities, however, one person states documentation is available for staff*
- *Working relationships are sound and personal connection operates well*

**Q12:** Policies on and procedures for operational matters are well developed informing practices of Lifeboat.

25% agree, 58.4% disagree, 16.7% neutral. (3 strongly disagreed; 4 disagreed; 2 neutral; 2 agreed; 1 strongly agreed)

7 comments:

- Lack of awareness of any documentation.
- One thought that *a policy and procedures manual with actions required in different situations would be beneficial*

**Q13:** Policies on and procedures for financial matters are well developed informing practices of Lifeboat.

50% agree, 33.3% disagree, 16.7% neutral (1 strongly disagreed; 3 disagreed; 2 neutral; 5 agreed; 1 strongly agreed)

8 comments

- *Financial matters are managed carefully and appropriately, however, not aware of any policy and procedures for financial matters*
- *Treasurer function is very well maintained*
- Three suggestions: i) *guidelines on whether/how much financial aid to give, or what type of need is more deserving of aid than another.* ii) *setting thresholds to identify when to increase/decrease financial aid,* iii) *Specification of the amount and types of allocations workers are allowed to authorize,* and iv) *establish a process to submit anything out of the norm*

**Q14:** Lifeboat decision-making processes are clear, effective, and supportive of fulfilling Lifeboat's mission and objectives.

33.4% agree, 16.6% disagree, 50% neutral (1 strongly disagreed; 1 disagree; 6 neutral; 2 agreed; 2 strongly agreed)

6 comments

- *Lifeboat's ability to help clients comes from the ability to respond with flexibility and promptly, yet Lifeboat is centred on the Chairman and all knowledge is in his head or that of Office Manager*
- *Lifeboats decision-making (without documentation) has been effective ... Informed, thoughtful, trusting*
- *Everything is word of mouth. I have no written policies or procedures.*

## **THE FUTURE: PLANNING AND SUSTAINABILITY:**

**Q15:** Changes are needed to the structure and management of Lifeboat to ensure sustainability over the next ten years.



83.3% agree, 8.3% disagree, 9.3% neutral (1 strongly disagreed; 1 neutral; 6 agreed; 4 strongly agreed)

12 comments

- A broad range of matter raised (a number repeated), including:
- Staffing and the possibility of using more volunteers
- Finances – the current deficit and possible alternative sources of income
- Governance – constitution, trust deed and compliance (e.g. AGM)
- Clearly define roles and responsibilities, including the Advisory Committee
- Review of documentation to develop and communicate policies, and procedures, roles and responsibilities, decision-making and lines of communication
- What to do about the reliance on Fr Dillon's role/succession plan – suggestion from Q8 *FR Dillon become Emeritus Chairman and be given specific responsibility for fund raising while he still has contacts*
- Practical and measurable mission and vision statements which maintain Lifeboat's commitment to provide care, concern and goodwill towards clients
- Look for younger board members and supporters
- Consider employing someone to manage the change

**Q16:** Current human resources, namely, staff and volunteers, are adequate to fulfill Lifeboat's purpose.

50% agree, 25% disagree, 25% neutral (3 disagreed; 3 neutral; 5 agreed; 1 strongly agreed)

8 comments

- General agreement that the workload is being covered, but this is due to the dedication and generosity of all the staff.
- Commented that potentially at least 26 hours of unpaid work is done by staff and Fr Dillon. Concern expressed about caseloads (also see earlier comments on caseload)
- Use of volunteers requires recruiting, training, supervision, and policies.
- Need is in management – *a CEO for a fixed period* to manage the changes needed.

**Q17:** The following matters have been identified as important for the future sustainable development of Lifeboat Geelong. Please rank this list in order of importance to you and add further matters that you believe require attention. (1 = most important, 2 = next in importance, etc.)

In order of popularity:

- Financial resources, particularly ongoing sources of revenue 91.7% (11)
- Clarifying roles and responsibilities 66.7% (8)
- Expanding or reducing the purpose of the organisation, that is, reviewing and renewing the vision, mission and objectives 50% (6)
- Ensuring Lifeboat operates consistent with its constitution and related legislation 41.7% (5)
- Review of the level and range of services provided 33.3% (4)
- Enhancement/ improvement of operations, such as, case and file management 33.3% (4)
- Need for professional development / training for members of the Board and Staff 16.7% (2)
- Number of volunteers 16.7% (2)
- Number of staff 0% – full time / part-time (0)

9 comments

- Work of Lifeboat to date and contributions of Fr Dillon enthusiastically acknowledged
- Need to ensure a sustainable future by addressing matters identified above
- Begins with a clear mission statement – *a clear mission, because all the others feed off the mission. The mission, in turn informs the structure, the roles and responsibilities. If the structure and roles are developed independently of the mission, then they may or may not deliver the mission-it is a punt. Finances are critical and need planned and managed work, not simply good ideas.* This statement captures general sentiment expressed.
- Lifeboat is a system with interdependent parts, for example, finances impact ability to provide services, staffing and training. *Volunteers can be 'cost effective' but are not 'free'.*
- Succession planning for Fr Dillon.

**Q18:** Are there any further comments you would like to add?

5 responses

1. *Keep up the very good work.*
2. *Lifeboat has done amazing things for victim/survivors, and should be very proud of its achievement. However, much of that has been achieved by the work and inspiration of one man, Fr Dillon. Fr Dillon IS Lifeboat. But he is getting old and infirm and the organisation needs to be able to operate as though he did not exist; to continue his legacy but to do it without him. My suggested changes are all designed with this in mind. To continue the existing work of lifeboat, and indeed expand/improve it where possible, but to operate as though Fr Dillon was no longer available.*
3. *I am proud of and pleased with what I contribute to so many in need of pastoral care, most importantly listening and believing stories told (sometimes many times). I enjoy the flexibility that comes from not having a formal organisation structure, but am regularly frustrated by the lack of clarity about what has been decided, who I actually report to, and the role of the advisory committee and the identity of people who seem to just show up there. The work I do is important but I could do it more effectively and with less stress if roles and relationships were clearly defined.*
4. *Other areas to consider: risk management, more detailed financial reports*
5. *We have to assume the Chairman is no longer with us and imagine how a new person would handle the job if dropped into it- is our objective clear? Is our structure clear? do we have documented policies and procedures or is it all in the head of one or two people?*

## APPENDIX E

### Similar organisations, services provided and scope for cooperation

There are numerous organisations which suggest they provide services/support to victim/survivors of sexual abuse.

Those organisations can be classified into the following broad groups:

- Those that are concerned with sexual abuse in the broadest sense and are primarily focused on abuse of adults, and primarily females, for example, rape crisis centres, domestic violence organisations.
- Those that are concerned with child abuse in the broad sense, including but not restricted to sexual abuse, for example, Alannah and Madeline Foundation
- Those that are concerned with institutional sexual abuse, and operate in a setting heavily influenced by the Royal Commission into Institutional Child Sexual Abuse.

It is the third group of most relevance and interest to Lifeboat.

Within the third group, there are also a number of categories:

- Victim/survivor advocacy groups such as Melbourne Survivors Collective, for the Innocents, Broken Rights. These are organisations of victim/survivors or their supporters, which provide a forum for like minded people to meet and share experience on a one:one and group basis, to conduct research and undertake advocacy and provide advice on where other support, for example, legal, medical, economic might be found.
- Organisations such as Living Well (Qld) and WA Health Department which claim they provide support and services to victims of child sexual abuse but only provide a list of contacts in other organisations which work in the area. Information can be helpful, but these organisations do not actually do anything in a practical one:one sense; they are effectively post boxes.
- Organisations which do offer a range of practical services/support and which might be most closely compared to Lifeboat in terms of clients and services provided.

This paper will now list those organisations which fall into the third category and outline their activities and identify possible lessons for Lifeboat.

#### **1. Blue Knot Foundation**

Formerly Adults Surviving Child Abuse, established in 1995, and rebranded Blue Knot Foundation in 2016.

BKF says it is “the national centre of excellence for complex trauma, and that it advocates for and provides support to people who have experience of complex trauma, and those who support them, personally and professionally.”

BKF is about complex trauma generally, not just sexual abuse.

Its Vision: to reach 1 in 4 Australians impacted by complex trauma.

Its Mission: Empowering adults to recover and build resilience from complex trauma.

BKF is heavily involved in professional psychological study of complex trauma and providing advice to survivors and professionals as to the best way to handle the condition.

It conducted national publicity and fund raising, first as Forget Me Knot Day, and now Blue Knot Day. It has a high profile Board and its Patrons include Thomas Kennealy, Jane Caro and Chrissy Foster.

BKF has produced a series of highly regarded professional sets of guidelines for professionals and others like police, who regularly deal with complex trauma.

In terms of practical actions to assist survivors BKF provides:

- National Helpline, open 9am to 5pm, 7 days a week to provide short term counselling support, referrals for ongoing support, information about the National redress Scheme.
- National Redress Scheme Helpline, to provide advice on the scheme and to assist people with their applications for redress.
- Workshops for Survivors. These are free of charge and held once a year in each capital city. They also conduct the workshops as Webinars. The workshops are not support groups or group counselling. They provide info/education on complex trauma and strategies for dealing with it.
- Workshops for Supporters of Survivors, for example, family members. These are also free and conducted once a year in each capital or by Webinar. The workshops seek to inform participants about the impact of complex trauma on supporters and provide strategies for dealing with it.

When it started as ASCA, the organisation was voluntary and relied on peer-to-peer support for survivors. However, it has largely left that behind and now concentrates on standard setting, publicity/awareness and group sessions. The group sessions may be worth researching for Lifeboat clients, especially those for families of survivors.

BKF also offers training for other providers of service to survivors and supporters.

In 2021/22 BKF had revenue of \$8.5m, 71 % from government, 21% from sale of goods and services. Its expenses were \$ 7.8M, 66% to grants within Australia, 1% interest and 33% other expenses. (Staff costs ??)

A copy of the constitution can be found at this link:

<https://blueknot.org.au/about-us/our-documents/blue-knot-foundation-constitution/>

Other resources found at: <https://blueknot.org.au/resources/blue-knot-publications/guidelines/> and <https://blueknot.org.au/resources/>

## **2. Brave Hearts**

Brave hearts describes itself as “an Australian child protection organisation dedicated to protection and treatment of child sexual abuse”.

Established in Qld in 1996, Brave hearts purports to be a national organisation.

Its strategic plan is to:

- Educate- kids about personal safety, and train adults

- Empower-by providing counselling and support to children
- Protect-by promoting safety standards

Brave Hearts is funded largely by State and Federal governments. In 2022/23 it had income of \$8.5m, (62% governments, 21% donations and 16% sale of goods and services.)

Its expenditure of \$8.5m was 72% on employee costs 29% all other expenses.

Brave Hearts is essentially aimed at children, like, for example, Alannah and Madeline Foundation.

It offers little for adult survivors of historical sexual abuse. It will give advice about the national redress system and provides a list of useful contacts from whom survivors can seek help.

Interestingly, Brave Hearts lists as one of its donors, the Geelong Community Foundation.

Here is a link to the constitution of Brave Hearts:

<https://www.acnc.gov.au/charity/charities/ee3a7a14-39af-e811-a961-000d3ad24182/documents/>.

Simply click on heading “Governing Document” (Not a close comparison with Lifeboat.)

### **3. Beyond Abuse**

BA is based in, and focused on, Tasmania.

A volunteer organisation, formed in 2002 by Steve Fisher, its formal purpose is to:

- Protect the human rights of sexual abuse survivors
- Educate and raise awareness of sexual abuse
- Provide direct support to survivors of sexual abuse

In a practical sense, BA has been very active as a public advocate for sexual abuse survivors, seeking to raise public and government awareness and pressure for legislative changes which will assist survivors. More recently it has been extensively involved in the Tasmanian Royal Commission into sexual abuse and advised government in the establishment of that inquiry.

BA also operates a “Peer to Peer” support programme where survivors needing support are given a fellow survivor as a case manager, to support them through the maze of issues involved with gaining health assistance, redress scheme or civil litigation.

The Tasmanian Government provides financial support to enable the Peer-to-Peer system to operate.

BA is a registered charity, but has submitted no annual or financial reports to ACNC to date. Its constitution appears to be a standard government document for unincorporated associations. Here is a link to the Constitution:

<file:///C:/Users/david/Downloads/beyond%20abuse%20constitution.pdf>

Similar functions, but different to Lifeboat. Similar in that it offers “peer to peer” /case worker type support. But different in that BA is not restricted to church related abuse, is more publicly involved in awareness/advocacy and does not support survivors financially.

### **4. Clergy Abused Network (CAN)**

CAN describes itself as a “network of trauma informed and sensitive volunteers who share the experience of being impacted by abuse by clergy or abuse by lay workers in a religious context.”

CAN is based in the Hunter Valley, NSW, an area with a large number of cases of Church related sexual abuse. Most members are from a Catholic background, with several from an Anglican background.

CAN assists about 150 victim/survivors, which includes the families of victim/survivors. While most are still living in the Hunter Region, some have moved elsewhere in NSW or interstate, and CAN seeks to help these people where they seek help.

Monthly meetings are held in an RSL Club, followed by lunch. Each month there is a guest speaker on topics relevant to the audience. Between 30 to 60 attend, depending on the topic/speaker.

CAN offers “life enrichment experiences” for its members eg art classes, cooking classes, equine therapy. Its basic work is the monthly meetings where people can get together and socially interact.

It is funded by the Marist Order and the CAN Office is provided by the Order.

Organisationally, CAN has a Committee of Management (Board) and employs a Co-ordinator/office manager and a Healing and Support Officer for 20 hours a week, but who is available 24/7. CAN uses a standard NSW Government constitution for unincorporated organisations.

Here is a link to the ACNC page which contains the constitution:

<https://www.acnc.gov.au/charity/charities/f301a163-ef91-eb11-b1ac-000d3ad12d50/documents/>

CAN will support members who wish to take legal action in terms of attending meetings with them, but does not get directly involved. This is because one of CAN’s objectives is to engage with the Church representatives to generate a better understanding of the impact of sexual abuse.

Consistent with that objective, CAN has close links with academics in Qld University and the University of Newcastle.

CAN is the organisation which has most in common with Lifeboat. It is focused on clergy abuse, on providing a network and practical assistance to victim/survivors, and supports them without becoming directly involved in legal issues.

Things CAN does which Lifeboat might consider are links with academia to keep abreast of best practice, broader gatherings for social/information purposes, and efforts to engage with the Church to help it better understand the impact of sexual abuse.

However, while the Chairman/Convenor of CAN, Bob O’Toole was happy to share information with me, including a copy of the CAN Constitution, the Committee of Management decided to have no formal relations, or share information with Lifeboat. No reasons were given.

## **5. SAMSN**

Survivors and Mates Support Network (SAMSN) says it is “Australia’s leading organisation for male survivors of child sexual abuse and their supporters.”

Its services to survivors are free, and are offered to male survivors resident in NSW who were abused in NSW and those eligible for Redress Scheme who currently live in NSW. However, they also offer services in South Australia and the ACT.

The purpose is “to build a support network which gives voice and agency to male survivors and their supporters”. The vision is “a world in which male survivors can easily access support and find acceptance and support”.

SAMSN was founded in 2011 by a small group of survivors looking for a support group.

Services provided to survivors include:

- eight week (1 day/week) group programme. SAMSN has run more than 80 of such programmes in NSW and SA and ACT.
- Monthly drop-in meetings of survivors.
- Individual planned support for survivors. SAMSN employ case workers to help individual survivors navigate the complexity of Redress, legal system, NDIS, Centrelink, housing etc.
- Peer to peer support from other survivors.

SAMSN also provides services to supporters:

- Supporters and survivors one day workshop.
- Resources for supporters, for example, a podcast, books which seek to help supporters as they struggle to deal with the condition of a loved one.

SAMSN also provides training at a fee for other organisations who support survivors and supporters.

SAMSN has 11 staff and its patron is Robert Fitzgerald, formerly of the Royal Commission.

In 2021/22 SAMSN had revenue of \$2m (92% from govt, 3% donations and 5% sale of services), and expenditure of \$2.25M ( 68% on staff costs).

A copy of the constitution is found at this link:

chrome-

extension://efaidnbmnnnibpcajpcglclefindmkaj/https://acncpubfilesprodstorage.blob.core.windows.net/public/64411eec-39af-e811-a963-000d3ad24077-01884568-e444-4345-a9af-db112c622d9d-

Governing%20Document-c0c7e7da-4bb0-e811-a961-000d3ad24182-Signed\_final\_company\_constitution\_-\_SAMSN\_-\_26.2.13\_(2).PDF

## **6. In Good Faith Foundation**

IGFF is based in Melbourne and serves the Victorian community of survivors and supporters.

IGFF provides the following services:

- Case workers for survivors and their supporters. Case workers help individuals navigate the complex world of the police and justice system, and provide referrals to independent professionals in areas of mental health, law, welfare and pastoral support.
- Redress Scheme support and advice

IGFF also facilitates the operation of the Melbourne Survivors Collective (formerly the Melbourne Victims Collective). This provides a forum for survivors to meet and provide mutual support, to provide feedback to IGFF and professionals attending, and keep members informed on new developments in legal and social welfare issues.

IGFF has regular contact with Lifeboat, as we have a number of common clients. Usually, this contact involves IGFF asking Lifeboat to provide financial support to a client.

ACNC data shows that in 2021/22 IGFF had revenue of \$1.125M (81% govt funds, 15% donations, 4 % sale of goods and services) and expenses of \$970K (85% on staff) .

It has 13 staff (a mixture of full and part time).

IGFF is effectively run as a business. It has a full-time executive team to manage its operations.

The constitution of IGFF is found at the following link:

chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://acncpubfilesprodstorage.blob.core.windows.net/public/b1161d4a-3aaf-e811-a962-000d3ad24a0d-48c75b0e-2568-4ffe-b465-d9fc77245d0d-Governing%20Document-3dcc334b-4273-ec11-8942-000d3ad21de8-Constitution\_for\_In\_Good\_Faith\_Foundation\_-\_adopted\_at\_AGM\_26.11.21.pdf

### **What can we at Lifeboat learn?**

- Victim/survivor organisations such as For the Innocents, Melbourne Survivors Collective may offer insights and information to Lifeboat which can be useful and we can consider closer links to them, whether at organizational or personal levels.
- Some organisations, BKF and SAMSN offer training for other organisations which deal with complex trauma cases. It may be worth asking our CSO's to trial this training, and if it is judged effective, the Board might also be involved.
- Some organisations, BKF and SAMSN, have workshops and resources to help supporters. While Lifeboat supports “supporters”, there may be value in exploring this area further and possibly engaging one of these agencies to offer a workshop and/or resources to our clients.
- In terms of organisational structure, they all have a Board, like Lifeboat, and IGFF, BKF, SAMSN and Brave Hearts have a paid full time executive manager who is responsible for implementing the policies of the Board, that is, the day-to-day operations. CAN and Beyond Abuse have a volunteer manager/co-ordinator who runs the operations.
- None of the other organisations offer financial assistance or practical physical assistance; they offer advice, referrals or enrichment activities.



## APPENDIX F: Lifeboat's current guiding statements

### A PASTORAL SUPPORT SERVICE FOR VICTIMS/SURVIVORS OF CHURCH-RELATED SEXUAL ABUSE.

| Vision                                            | Mission                                                                              | Objectives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Objectives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Values                                                                             |
|---------------------------------------------------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| A Just, Compassionate, Accepting and Kind Society | To bring help and hope to survivors of Church or Institutional related sexual abuse. | <ul style="list-style-type: none"> <li>• Providing Practical, Emotional and Financial support.</li> <li>• Enabling survivors to re-engage into their community.</li> <li>• Providing Information and Support for Survivors to access Education and Employment opportunities.</li> <li>• Providing opportunities to succeed and develop Self-esteem, Self-worth and Dignity.</li> <li>• When necessary facilitating referrals to appropriate professionals advocating on behalf of Survivors.</li> </ul> <p>[47 words]</p> | <ul style="list-style-type: none"> <li>• to provide practical and pastoral support to victims of church related sexual abuse;</li> <li>• to provide support, information, counselling, therapies and care for the victims;</li> <li>• to provide qualified staff and trained volunteers who will combine their knowledge and experience to provide holistic person centred care outside a church environment;</li> <li>• to act as a charitable institution whose principal activity is to assist sexually abused persons;</li> <li>• to undertake and pursue all such other similar, related or compatible objects as may from time to time be considered appropriate by the Company.</li> </ul> <p>[87 words]</p> | <p>Dignity of each person</p> <p>Justice</p> <p>Compassion</p> <p>Mutual trust</p> |

|                    |                    |                    |                             |                                                     |
|--------------------|--------------------|--------------------|-----------------------------|-----------------------------------------------------|
| Located on website | Located on website | Located on website | Located in the Constitution | From a document, <i>Lifeboat Geelong Foundation</i> |
|--------------------|--------------------|--------------------|-----------------------------|-----------------------------------------------------|