

Strategic Plan 2020 – 2024

Our Vision

Security and peace of mind for Queenslanders



Our Values

The Public Trustee aligns with the Queensland Public Sector values and contributes to the Queensland Government's objectives for the community — **Unite and Recover**.



Customers first



Ideas into action



Unleash potential



Be courageous



Empower people

Our Purpose

To enhance and protect the rights, dignity and interests of our customers and the community.

We will do this by:

- Supporting Queenslanders with life-planning assistance
- Providing reliable, independent, and ethical services that protect our customers' financial wellbeing
- Building a modern, professional, and customer-focused organisation
- Providing value and support to our customers and the community.

Because we value and respect:

- Our customers
- Our community
- Our people
- Our social responsibility

Our Social Responsibility Charter

The Public Trustee has a lead role in representing and assisting the community we serve.

We are mindful of our responsibilities, our customers, and Queenslanders, and will proactively contribute to the community by being a trusted, transparent, consultative, people-focused organisation.

Our focus for the future requires governance that is grounded in the continuity of our values and geared towards providing quality support for customers by:

- communication with and commitment to our customers and stakeholders
- respect for the law and ethical standards
- commitment to the principles of the *Public Sector Ethics Act 1994*.

Our services contribute to the Government's objectives for the community — *Unite and Recover* to Back our frontline services by:

- undertaking a key role in Queensland's guardianship system
- advocating for the rights and financial interests of people with impaired decision-making capacity and protecting them from neglect, exploitation, and abuse
- supporting Queenslanders to protect and manage their financial wellbeing at all stages of life
- delivering a customer experience that is tailored, relevant and accessible
- enhancing customer and community understanding of life planning.

Our Strategic Challenges

- Understanding and responding to the impact of changing economic factors on our services
- Meeting the increasing demand for services to customers with changing complex needs
- Maintaining confidence and trust in our ability to deliver fair and transparent services
- Building the capability of our workforce and systems to enable us to respond effectively to the needs of our customers
- Maintaining service delivery through effective planning and business continuity responses

Our Key Opportunities

- Embedding a culture of learning and continuous improvement to drive customer-centric service delivery
- Innovating through data and digital transformation
- Ensuring our fees and charges are transparent, fair and reflect value for the services provided
- Contributing to the community's understanding about the importance of planning for different life-stages
- Being recognised for our professionalism by customers, their support networks and sector partners

We will respect, protect and promote human rights in our decision-making and actions.

Objectives	Strategies	Performance Indicators
 1. Customers first Customer-centric, fair and equitable experiences	<ol style="list-style-type: none"> 1.1 Understand the changing needs of our customers and consult with their support networks to improve our services and delivery channels 1.2 Use data to understand our customers to improve services and enhance the customer experience 1.3 Continue to focus on accessible, timely and transparent communication to customers 1.4 Ensure our complaints management processes are responsive to the needs of our diverse customer groups 	<ul style="list-style-type: none"> • Customers and stakeholders have positive experiences with us, as measured by achievement of customer satisfaction targets • Improved accessibility to, and timeliness of, Public Trustee services as measured by outcomes of our initiatives and streamlined processes • Number of service improvements implemented as a result of complaints analysis
 2. Leadership Engaged, empowered and customer focused workforce	<ol style="list-style-type: none"> 2.1 Create a culture of integrity, diversity, and continuous improvement 2.2 Provide a safe and rewarding workplace, enhancing wellbeing and enabling the delivery of exceptional services to our customers 2.3 Invest in developing empowered and engaged leaders 2.4 Support an integrated and future-focused workforce that is responsive, and customer focused 	<ul style="list-style-type: none"> • A safe and healthy workplace as monitored and measured by our work health and safety reporting and incremental achievement of targets • Improved Working for Queensland survey results in agency engagement and job empowerment factors
 3. Integrity Socially responsible services that meet the needs of Queenslanders	<ol style="list-style-type: none"> 3.1 Enact our Social Responsibility Charter, applying our knowledge and understanding of the ethical and social responsibilities of our services 3.2 Drive future-focused policy development and reviews to support the delivery of our strategic objectives 3.3 To be respected for our integrity, empathy, and trust in our relationships with our customers, stakeholders and staff 3.4 Implement effective governance structures and systems to enhance our commitment to transparency and accountability 3.5 To provide open, honest and ethical service delivery 3.6 Working with Government to establish a new Public Trustee board 	<ul style="list-style-type: none"> • Customers and stakeholders value Public Trustee services as measured by achievement of customer satisfaction research results • Continued focus on ethics and integrity matters via dashboard reporting • Assess our policies against contemporary public sector governance standards
 4. Financially responsible Financially and ethically responsible leadership and governance	<ol style="list-style-type: none"> 4.1 Continue to be financially responsible and transparent in the management of our customers' funds 4.2 Review our fees and charges 4.3 Implement business improvements, and allocate resources to deliver streamlined services for our customers 4.4 Adopt a continuous improvement approach to our service delivery to ensure we remain relevant, sustainable, efficient, and cost effective for our customers 4.5 Continually review our investment strategies to maximise returns to enable financial sustainability 	<ul style="list-style-type: none"> • Evaluate fees and charges review findings • Effective project management practices support delivery of improvements • Investment strategies are supported by external independent advice • Improve operational efficiencies
 5. Engagement Engage meaningfully with the community to improve the quality of life of Queenslanders	<ol style="list-style-type: none"> 5.1 Enhance community education and empowerment in planning for different life-stages 5.2 Highlight the benefits of our services as a trusted provider of financial, estate and trust administration 5.3 Engage with our partner organisations to understand stakeholders' perspectives and support achievement of our shared strategic objectives 5.4 Display personal and professional respect for each other and our customers 	<ul style="list-style-type: none"> • Achieve customer experience targets as measured by our customer satisfaction research results • Increased capability and improved engagement levels as evidenced by community and stakeholder feedback and positive advocacy levels • Regular engagement with stakeholders through the Government and Customer Reference Groups • Evaluate community education outcomes
 6. Care for community Inclusive with our customers, their support networks and our stakeholders	<ol style="list-style-type: none"> 6.1 Play a key role in Queensland's guardianship system to protect the rights and interests of adults with impaired decision-making capacity 6.2 Focus on building community knowledge and improving community services 6.3 Continue to contribute to charitable foundations and philanthropic endeavours across Queensland 	<ul style="list-style-type: none"> • Regular engagement with stakeholders through the Government and Customer Reference Groups • Evaluate implementation of the Accessibility, Inclusion and Diversity Plan

Our acknowledgment

We acknowledge the Australian Aboriginal peoples and Torres Strait Islander peoples of this nation, the traditional custodians of these lands. We pay our respects to their ancestors, our First Nations peoples, their spirits and their legacy which give strength, inspiration and courage to current and future generations, both Indigenous and non-Indigenous, towards creating a better Queensland.