The Public Trustee of Queensland **Strategic Plan 2012–16**

Our vision

To be Queensland's best provider of trustee and administration services.

Our purpose

To provide professional and accessable services in:

- The administration of deceased estates
- Trusts • Will making • Facilitating philanthropy
- Financial management for those with impaired capacity for decision-making

Our values

- Clients first • Ideas into action • Unleash potential
- Be courageous • Empower people

Strategic challenges and risks

1. Improving efficiency and effectiveness of frontline service delivery to meet increasing client expectations.
2. Increasing demand for services that attract a Community Service Obligation.
3. Growing reliance on our services to meet demand resulting from the changing socio- economic demographics.
4. Refining our business model to meet increasing complexity associated with client needs.
5. Maintaining community confidence in the services we provide.

The Public Trustee contributes to the Queensland Government objectives for the community through the following initiatives:

1. Delivering quality frontline services by providing our clients with professional and effective services in a responsive manner.
2. Building safe, caring and connected communities by ensuring that the future capacity of the organisation is able to meet the needs of all Queenslanders.

Strategies to support our commitments

Our clients

Meet the needs of our clients in an ethical, professional and responsive way

Government objective: Delivering quality frontline services

- Continue to maintain our focus on frontline service delivery for our core purpose.
- Integrate demographic analysis into future service delivery planning and implementation.
- Provide professional and accessible services.
- Plan our business model to meet growing demand for frontline services.
- Establish more effective and efficient delivery of resources to meet increasing stakeholder demand.

Performance indicators

1. Maintain or improve client satisfaction as measured by client satisfaction index.
2. The length of time to administer deceased estates.

Our services

Develop innovative services in a client responsive manner

Government objective: Delivering quality frontline services

- Continue to meet the growing demand for the delivery of services that assist the community.
- Drive efficiencies to reduce the costs associated with special purpose functions and Unclaimed Money.
- Ensure investment strategies are prudent, competitive and ethical.

Performance indicators

1. Meet new business targets.
2. Meet revenue targets.
3. Expenditure amounts are within budget.
4. Meet Will making targets appointing the Public Trustee as Executor.

Our people

Develop and maintain an engaged workforce.

Government objective: Delivering quality frontline services

- Attract and retain key personnel in a competitive labour market.
- Enhance the skill of our people to promote higher levels of customer service and productivity.
- Create opportunities for professional development within the organisation.
- Develop knowledge pathways to support future advancement of staff within the organisation.
- Promote a healthy workforce and maintain a safe work environment.

Performance indicators

1. Improved employee engagement.
2. Absenteeism rates minimised.
3. Staff development plans aligned with the organisation's objectives.

Our business

Maintain a viable business model and develop our internal operations to fund a broad range of services at no cost to government

Government objective: Building safe, caring and connected communities

- Review the future capacity of organisation resources to assist all Queenslanders.
- Develop opportunities to grow our business in areas that complement our core services.
- Manage the business model through an efficient use of resources.
- Investigate opportunities within existing business practices to support the continued viability of the organisation.
- Raise the public image and profile of the organisation through sustained community engagement.
- Promote openness and transparency in our decision-making.

Performance indicators

1. Operating budget remains in surplus.
2. Meet revenue targets.
3. Expenditure amounts are within budget.

Reviewed/Updated 2015