

## Service delivery

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The Public Trustee is required to plan service delivery to measure and monitor the efficiency and effectiveness of our services. Service delivery uses internal capabilities such as human resources, financial, information and communication technology and is measured using service standards and other measures. The Public Trustee sets service standards and other measures and publishes our expected results in our Service Delivery Statements (SDS) as part of our budget papers. Actual results for 2016-17 are published on page 13.

By measuring performance, the extent to which the Queensland Government's services are creating value can be determined.

### Our service areas and service standards

Client Experience & Delivery is the frontline interface with our clients and the community. The Public Trustee strives to make a positive difference in the lives of our clients while ensuring we fulfil our fiduciary responsibilities.

The SDS discloses service standards that relate to the efficiency and effectiveness of services.

### Service area objective

To deliver a full range of professional, accessible and reliable trustee, financial and related services that meet client needs.

### Services and service area description

The major services provided by Client Experience & Delivery are:



#### Deceased estate administration

The Public Trustee acts as executor and trustee or administrator in deceased estate matters pursuant to Wills or on intestacy.

In 2016–17, the Public Trustee accepted 2,142 new deceased estate matters for administration.



#### Financial management

The Public Trustee acts as an administrator for financial matters for clients with impaired decision-making capacity pursuant to the *Guardianship and Administration Act 2000* or as a financial attorney pursuant to the *Powers of Attorney Act 1998*.

In 2016–17, the Public Trustee provided financial management for 9,359 clients and acted as financial attorney for 233 people. Fees rebated for clients with limited assets under our CSO were \$25.3 M.



#### Will making service

Wills are prepared free of charge for all Queenslanders over 18.

In 2016–17, the Public Trustee prepared 25,136 Wills and 3,165 EPAs.

This table outlines our performance against service standards:

Service Standards	Notes	2016-17 Target/Est.	2016-17 Actuals
<b>Service: Deceased Estate Administration</b>			
<i>Effectiveness measure</i> Overall client satisfaction with deceased estate administration service as measured by client satisfaction index	1	70%	74%
<i>Efficiency measure</i> Percentage of deceased estates administered within target timeframe	2	70%	73%
<b>Service: Financial Management</b>			
<i>Effectiveness measure</i> Overall client satisfaction with financial management service as measured by client satisfaction index	3	70%	76%
<b>Service: Will Making Service</b>			
<i>Effectiveness measure</i> Overall client satisfaction with Will preparation services as measured by client satisfaction index	4	90%	97%
<i>Efficiency measure</i> Cost per Will	5	\$191	\$192

**Notes:**

1. The satisfaction index is calculated by an independent market research provider on an annual basis. The index is calculated by summing 50 per cent of the overall satisfaction score and 50 per cent of the single overall weighted satisfaction factors score to obtain a total index score.
2. Reflects current actual status of the administration of the estate within the Client Information Management System.
3. The satisfaction index is calculated by an independent market research provider on an annual basis. The index is calculated by summing 50 per cent of the overall satisfaction score and 50 per cent of the single overall weighted satisfaction factors score to obtain a total index score.
4. All clients preparing a Will with the Public Trustee receive a Wills Questionnaire. The Wills Questionnaire contains eight questions relating to the quality and the delivery of the Will making service provided. The overall satisfaction level is calculated as a percentage of positive responses to total number of responses received.
5. This measure is calculated using the total cost of making free Wills divided by the number of Wills drafted and completed in the financial year.

## Philanthropic charitable trusts

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The Public Trustee is trustee for the following leading philanthropic charitable trusts in Queensland.



### **Queensland Community Foundation**

The Queensland Community Foundation (QCF) was established in 1997 to provide a permanent source of philanthropic funding for charitable organisations to enable them to respond to the needs of the Queensland community.

The QCF continued to grow in 2016–17 and now has funds under management exceeding \$80 M. During the year, QCF paid distributions to a broad range of charities in excess of \$2.0 M.

For further information visit [www.qcf.org.au](http://www.qcf.org.au).

### **QCF Sub Fund: Gulf Area Community Social Development**

Established under the umbrella of the QCF in 2000, this sub fund has assets in excess of \$6 M.

The sub fund supports the Gulf Area Community by providing grants to projects and initiatives that encourage educational, health, cultural and social development.



### **Queensland Aboriginal and Torres Strait Islander Foundation**

The foundation was established in 2008 and provides a secure, independent and perpetual funding source to advance the education of Aboriginal and Torres Strait Islander children and young people in Queensland through provision and promotion of scholarships.

The trust has net assets of approximately \$39 M with distributions totalling \$1.8 M in 2016-17.

Scholarships of more than \$2.2 M for 1,390 Indigenous students from 244 Queensland high schools were approved in 2016–17. A total of 6,299 students have been approved for scholarships since the foundation commenced in 2008.

For further information visit [www.qatsif.org.au](http://www.qatsif.org.au).



### **Lady Bowen Trust**

Established in 2006, the trust aims to re-engage people experiencing chronic homelessness so they achieve genuine, positive and lasting outcomes. The trust supports Mission Australia which maintains Roma House, a facility to enhance clients' life skills, confidence and resilience while assisting them to find secure accommodation.

The trust has net assets of approximately \$5.0 M with distributions totalling \$0.2 M in 2016-17.

For further information visit [www.ladybowentrust.org.au](http://www.ladybowentrust.org.au).



### **Forde Foundation**

The Forde Foundation was established in August 2000 in response to the findings of the *Commission of Inquiry into Abuse of Children in Queensland Institutions*, better known as the Forde Inquiry. The foundation is designed to support former residents of Queensland institutions. Financial support is provided to individuals for specific purposes such as dental care, education, training and personal development opportunities.

The foundation has net assets of approximately \$4.0 M with distributions totalling \$0.2 M in 2016–17.

For further information visit [www.fordefoundation.org.au](http://www.fordefoundation.org.au).



### **Gladstone Foundation**

Established in early 2011, the foundation allows for industry funds to be channelled into this perpetual trust to provide social infrastructure and service needs in the Gladstone Region.

Specific purposes of the trust are relieving poverty, assisting the aged, relieving sickness or distress, advancing religion and education, providing child care services on a non-profit basis and other purposes which benefit the Gladstone Region.

Initial capital received by the trust was \$13.5 M. The foundation has net assets of approximately \$8.5 M as at 30 June 2017 with distributions totalling \$2.1 M paid in 2016-17. In 2016–17, the foundation awarded grants totalling \$3.2 M for four major projects in the Gladstone region with \$1.1 M remaining to be claimed. After taking into account the balance of outstanding grant commitments to be claimed, the balance of uncommitted funds at 30 June 2017 was approximately \$7.4 M.

For further information visit [www.gladstonefoundation.org.au](http://www.gladstonefoundation.org.au).