

Non-financial performance

We contribute to the Queensland Government's objectives for the community of delivering quality frontline services and building safe, caring and connected communities. We provide life planning assistance and facilitate the orderly transfer of assets through our Wills and Enduring Powers of Attorney (EPA) making service, and support vulnerable Queenslanders through our work in financial administration.

For more information about our objectives, please see our Strategic Plan at: www.pt.qld.gov.au.

Queensland Government objectives for the community

The Public Trustee's strategic objectives are aligned with the Queensland Government's objectives for the community. We particularly contributed to two of those objectives as demonstrated below.

Delivering quality frontline services

In 2017–18, we:

- delivered \$35.6 M in CSOs at no cost to the Queensland Government including:
 - fees rebated for some clients with limited assets
 - providing a free Will making service
 - public education in areas such as Wills and EPAs with an emphasis on planning for life
- made 28,272 Wills and 3,477 EPAs
- provided financial administration services for 9,048 adults with impaired decision-making capacity and acted as financial attorney for 251 people
- undertook an ongoing review of service delivery models and locations to better meet growing and changing demographic needs of Queenslanders
- continued to support philanthropic endeavours through the management of philanthropic and charitable trusts (see page 17 for more information).

Building safe, caring and connected communities

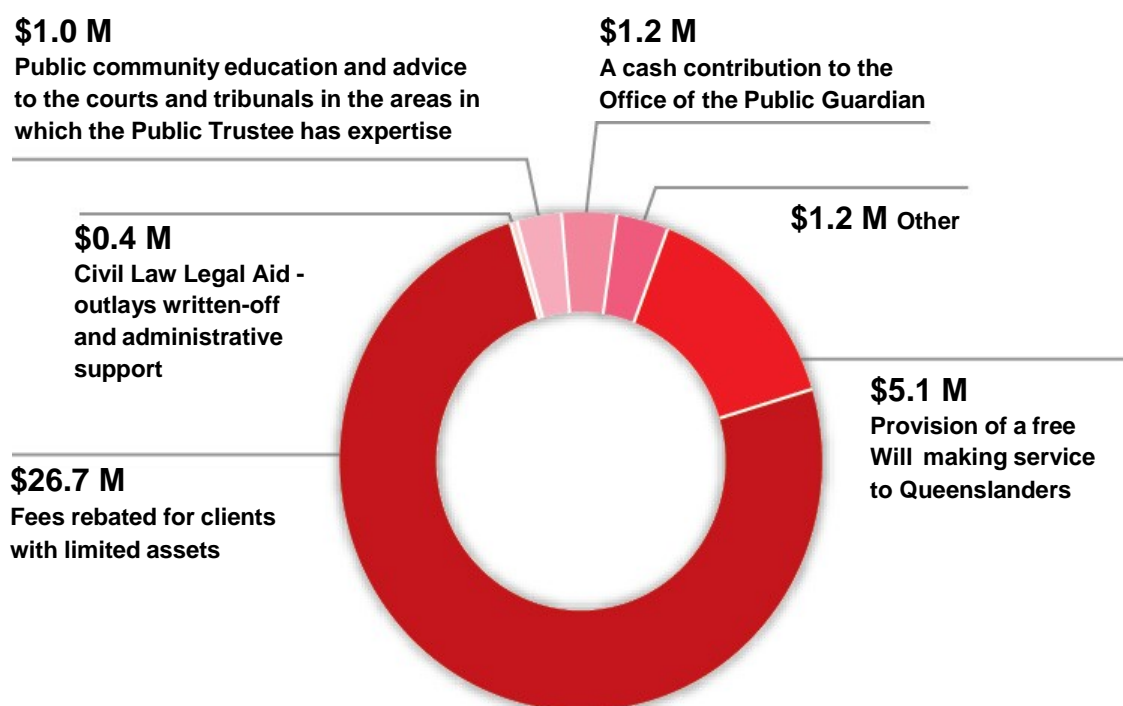
In 2017–18, we:

- supported a range of community services through the Office of the Public Guardian and funding the Civil Law Legal Aid Scheme administered by Legal Aid Queensland
- continued to contribute funding to the Department of Communities, Child Safety and Seniors' *No excuse for elder abuse* campaign
- maintained our Will making outreach services to ensure more Queenslanders can access our services
- provided extensive community education around the importance of having a valid Will and EPA.

Looking to the future, the Public Trustee will continue its focus on utilising advancing technology and digitisation of services to make it faster and more efficient for Queenslanders to access our information and services. In 2018–19, we will demonstrate our commitment to *Our Future State: Advancing Queensland's Priorities* and the Queensland Government's objective to be a responsive Government.

Community Service Obligations (CSOs)

A range of CSOs were provided in 2017–18 including:



The total cost of CSOs delivered for the 2017–18 financial year was \$35.6 M representing an increase of 5.5 per cent from the previous financial year (which was \$33.8 M). An amount of \$37.7 M is budgeted for 2018–19.

Category of CSOs	2017–18 Actual	2018–19 Budget
Fees rebated for clients with limited assets	\$26,693,526	\$28,441,448
Fees rebated for principal residence and other	\$1,159,983	\$736,455
Management of estates of prisoners	\$138,934	\$455,228
Public community education and advice to the courts and tribunals in the areas in which the Public Trustee has expertise	\$952,669	\$1,288,521
Providing a free Will making service to Queenslanders	\$5,088,960	\$5,264,175
Cash contribution to the Office of the Public Guardian	\$1,152,000	\$1,144,000
Civil Law Legal Aid - outlays written-off and administrative support	\$435,792	\$373,164
Total	\$35,621,864	\$37,702,991

CSOs are reported in our Financial Statements in two areas:

- deduction from fee revenue (\$34.0 M 2017–18) where there is a rebate of fees or services provided at no charge
- expenditure (\$1.6 M 2017–18) as contributions towards other sector operations.

Summary of our performance

Client Experience and Delivery is the frontline interface with our clients and the community, providing:

- deceased estate administration - the Public Trustee administers deceased estates pursuant to Wills or on intestacy, delivering quality services to beneficiaries
- financial management - the Public Trustee acts as administrator for financial matters for clients with impaired capacity for decision-making pursuant to the *Guardianship and Administration Act 2000* or as a financial attorney pursuant to the *Powers of Attorney Act 1998*
- a Will making service - the Public Trustee prepares Wills free of charge for all Queenslanders.

We measure our performance across the Client Experience and Delivery service area using three effectiveness measures and one efficiency measure.

The table below summarises our performance (quantifiable measures and qualitative achievements) against performance indicators in the Public Trustee's *Service Delivery Statement 2017–18* and those in our *Strategic Plan 2016–2020*. Our objective is to deliver a full range of professional, accessible and reliable personal trustee, financial and related services that meet client needs.

Service area: Client Experience and Delivery ¹	Notes	2017–18 Target/ Estimate	2017–18 Actual	2018–19 Target/ Estimate
Service standards				
<i>Effectiveness measure</i>				
Overall client satisfaction with the deceased estate administration service as measured by client satisfaction index	2	70%	66%	70%
Overall client satisfaction with financial management service as measured by client satisfaction index	3	70%	70%	70%
Overall client satisfaction with Will preparation services	4	90%	98%	90%
<i>Efficiency measure</i>				
Cost per Will	5	\$198	\$180	\$180

1. This service area was previously comprised of three material services: deceased estate administration, financial management, and Will making. Services have been consolidated to better reflect materiality.
2. The satisfaction index is calculated by an independent market research provider on an annual basis. The index is calculated by summing 50% of the overall satisfaction score and 50% of a score derived from service and process factors which have been weighted according to importance and combined to provide a single score.
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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 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.

Since 2013, the Public Trustee has conducted a client satisfaction survey specifically with beneficiaries of deceased estates at completion of administration, and with clients (and their carers) for whom the Public Trustee acts as a financial manager. The overall objective of the research is to gain understanding and insights into client experiences and the administration process.

The results of this research are highly valued and have been used to develop and implement a range of operational improvements including communication and supervision strategies, and enhanced financial management and deceased estate processes. The main aim of these changes is to improve the client experience and our service delivery.

Applying a service logic approach and reflecting better practice aligned with contemporary industry standards, in 2017–18 we redesigned our research. The changed methodology includes measuring satisfaction using an 11 point scale rather than the previous 7 point scale. As a result, our effectiveness and efficiency measures remain articulated in the same way but some of our estimated actual results vary slightly from those reported in our Performance Statement (published in the Service Delivery Statement as part of our 2018–19 Budget Papers). Direct comparisons between previous results and the 2017–18 results are not possible. However, the benefits we will derive from our changed methodology in future years far outweigh these minor points.

Looking to the future, we will use the insights and information obtained through this research when implementing targeted service delivery models that increase client satisfaction and improve efficiency.

Philanthropy

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 2017–18 and now has funds under management close to \$87.2 M. During the year, QCF paid distributions to a broad range of charities in excess of \$2.5 M.

For further information, visit 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 close to \$6.6 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 close to \$40.4 M.

Scholarships of more than \$1.6 M for 1,051 Indigenous students from 225 Queensland high schools were approved in 2017–18. In total, 7,305 students have been approved for scholarships since the foundation commenced in 2008.

For further information, visit 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 \$5.2 M with distributions totalling close to \$200,000 in 2017–18.

For further information, visit 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 \$4.1 M with distributions totalling close to \$140,000 in 2017–18.

For further information, visit 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 \$7.4 M as at 30 June 2018, with distributions totalling \$1.2 M paid in 2017–18.

For further information visit www.gladstonefoundation.org.au.