

# Non-financial performance

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The Public Trustee contributes to the Queensland Government objective of being a responsive government through our work in guardianship supporting vulnerable Queenslanders, by facilitating the orderly transfer of assets, and by providing life-planning assistance through Wills and EPA services.

## Queensland Government objectives for the community

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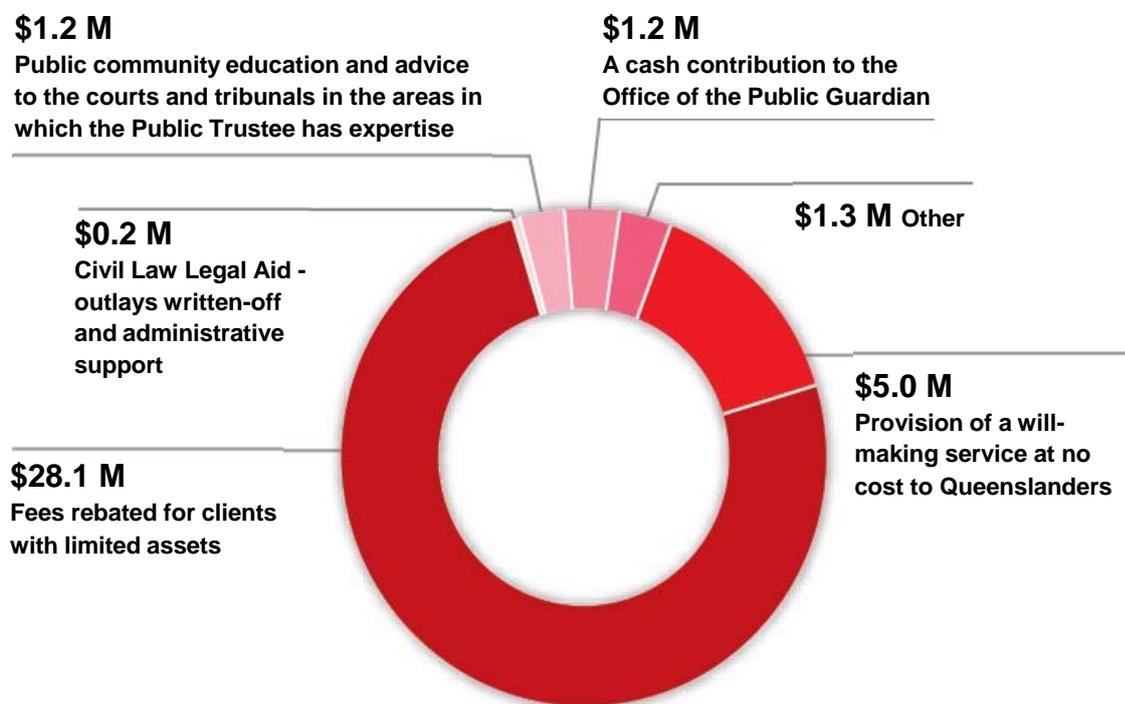
The Public Trustee's strategic objectives are aligned with the Queensland Government's objectives for the community. In 2018–19, we invested significantly in being a responsive government by:

- partnering with a design research agency to undertake individual face-to-face customer interviews in Brisbane, Toowoomba and Cairns seeking our customers' views on how we can improve our services and focus on the issues that will be most meaningful for them
- collaborating across business teams on a project to improve the value of the information we publish on our website about Wills, executor services and Enduring Power of Attorney documents. We started by testing the accessibility of our webpages and analysing digital insights and user needs. Through this process, we were able to identify gaps, which led to the development of new digital content. The information available is aligned to the Government's *Web Content Accessibility Guidelines* to increase access for people with disabilities. It is also now aligned with common customer queries, and offers greater value to the community in general. This is a great example of our teams working together to make it easier for Queenslanders to access and use our services
- recruiting a Community Education Officer to enhance our relationships with our stakeholders and deliver a high quality program of education and information activities designed to improve the Queensland community's access to our information, and its understanding of our products and services
- introducing an online survey tool for Wills customers, linked to Google reviews, to make it quicker and easier for customers to provide feedback on our will-making service
- listening to our customers' requests for correspondence to be sent to them by email, and initiating work to develop a secure online portal
- increasing the searchability of real estate on our website, making it easier for Queenslanders to do business with us
- playing a strong role in preventing instances of elder abuse by contributing to the Queensland Government's elder abuse awareness campaign which supports elder abuse prevention programs, and encouraging Queenslanders to plan for their later years and protect their interests by making an EPA.

Looking to the future, the Public Trustee will continue its focus on utilising advanced technology and digitisation of services to make it faster and more efficient for Queenslanders to access our information and services. In 2019–20, we will continue to demonstrate our commitment to *Advancing Queensland's Priorities* and, particularly, the Queensland Government's objective to be a responsive Government.

## Community Service Obligations

A range of Community Service Obligations were provided in 2018–19 including:



The total cost of Community Service Obligations delivered for the 2018–19 financial year was \$37.1 million representing an increase of 4.2 per cent from the previous financial year (which was \$35.6 million). An amount of \$39.4 million is budgeted for 2019–20.

Category of Community Service Obligations	2018–19 Actual	2019–20 Budget
Fees rebated for clients with limited assets	\$28,147,900	\$29,731,521
Fees rebated for principal residence and other	\$783,355	\$775,970
Management of estates of prisoners	\$564,719	\$681,188
Public community education and advice to the courts and tribunals in the areas in which the Public Trustee has expertise	\$1,246,632	\$1,533,230
Providing a free will-making service to Queenslanders	\$4,974,550	\$5,091,625
Cash contribution to the Office of the Public Guardian	\$1,172,000	\$1,180,880
Civil Law Legal Aid - outlays written-off and administrative support	\$233,706	\$381,291
<b>Total</b>	<b>\$37,122,862</b>	<b>\$39,375,705</b>

Community Service Obligations are reported in our Financial Statements in two areas:

- deduction from fee revenue (\$35.7 million 2018–19) where there is a rebate of fees or services provided at no charge
- expenditure (\$1.4 million 2018–19) as grants and contributions towards other sector operations.

They are also reported in Budget Paper 2, Concessions Statement.

## 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 2018–19* 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.

Client Experience and Delivery	2018-19 Target/Est	2018-19 Actual	2019-20 Target/Est
<b>Service standards</b>			
<i>Effectiveness measures</i>			
Overall client satisfaction with the deceased estate administration service as measured by client satisfaction index <sup>1</sup>	New measure	New measure	70%
Overall client satisfaction with the financial management service as measured by client satisfaction index <sup>1</sup>	New measure	New measure	70%
Overall client satisfaction with Will preparation services <sup>2</sup>	90%	93%	90%
<i>Efficiency measure</i>			
Cost per Will <sup>3</sup>	\$180	\$180	\$175

Notes:

1. 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.
2. 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.
3. This service standard is calculated using the total cost of making free Wills divided by the number of Wills drafted and completed in the financial year. The total cost is comprised of direct and indirect costs specifically attributable to the will-making service including employee expenses, supplies and services, and apportioned overheads. The 2019-20 Target/Estimate has been adjusted due to continued refinement of the Public Trustee's cost allocation model.

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. In 2018–19, we extended the survey to include trust administration clients. 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 are used to develop and implement a range of operational improvements including communication and supervision strategies, and enhanced financial management, deceased estate and trust administration processes. The main aim of these changes is to improve the client experience and our service delivery.

Looking to the future, we will use the insights and information obtained through this research when embracing business transformation to enhance capacity to provide service excellence.

## Philanthropy

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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 2018–19 and now has net assets of \$94.7 million under management. During the year, QCF paid distributions to a broad range of charities close to \$2.9 million.

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 net assets close to \$6.7 million.

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



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

The Queensland Aboriginal and Torres Strait Islander 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 \$42.9 million.

Senior education scholarships of more than \$2.6 million for young Queensland Aboriginal and Torres Strait Islander students were approved in 2018–19. In total, 10,184 students have been approved for scholarships since the foundation was established in 2008.

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



### **Lady Bowen Trust**

Established in 2006, the Lady Bowen 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 \$5.3 million with distributions paid totalling \$90,000 in 2018–19.

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



### **The 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 million with distributions paid totalling \$147,000 in 2018–19.

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



### **Gladstone Foundation**

Established in early 2011, the Gladstone 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 million. The foundation has net assets close to \$6.7 million as at 30 June 2019, with distributions paid totalling \$0.86 million in 2018–19.

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