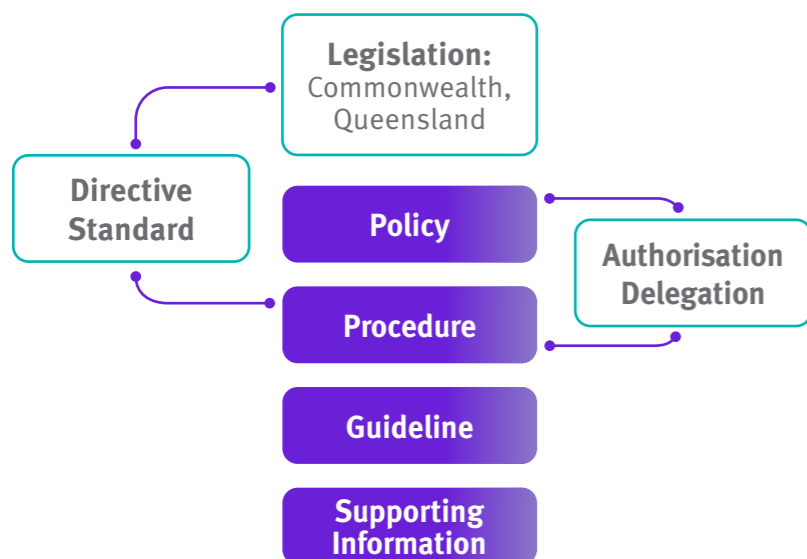


# Public Trustee Policy Management Framework

## Policy Instruments



## Principles

- Provides the central point of truth
- Aligns with Policy Instruments
- Supports achievement of strategic objectives
- Aligns with Corporate Governance and Risk Management Frameworks
- Considers information asset management principles
- Clearly defines roles and responsibilities

## Definitions

<b>What is a policy?</b> (Compliance with a policy is mandatory) <ul style="list-style-type: none"> <li>provides government direction and purpose</li> <li>establishes a clear and concise statement of the Public Trustee's intent, actions and position</li> <li>may be applicable to whole-of government or to the Public Trustee</li> </ul>	<b>What is a procedure?</b> (Compliance with a procedure is mandatory) <ul style="list-style-type: none"> <li>provides the 'how to' and sets out processes to implement the policy</li> <li>identifies responsibilities for individuals or business areas</li> <li>cannot override or conflict with policies</li> </ul>	<b>What is a guideline?</b> <ul style="list-style-type: none"> <li>is often a set of instructions to aid the implementation of a policy or procedure</li> <li>reflects the Public Trustee's standard of good practice</li> </ul>	<b>What is supporting information?</b> <ul style="list-style-type: none"> <li>may provide advice and tools to support staff to comply</li> </ul>
<b>Examples</b> Customer complaints management policy – provides the Public Trustee's policy statement, including its obligation and intent in implementing the customer complaints management system.	Customer complaints management procedure - sets out a consistent Public Trustee's approach, including process and responsibilities for managing customer complaints across the Public Trustee.	Best practice guides, manuals and work instructions.	Checklists, tip sheets, frequently asked questions, forms, notices, registers, sample legal agreements, sample letters.

## Roles and Responsibilities

- Policy owner** Ensures the intent of government policy. Accountable for approving policies or delegating approvals.
- Procedure owner** Ensures information, such as 'what', 'when', and 'how' is clearly communicated to support policy implementation. Accountable for approving procedures or delegating approvals.
- Delegated officer** Approves policies and procedures delegated by the owner. Ensures major review of policies and procedures.
- Author/contact officer** Develops and reviews policies or procedures. Complies with frameworks and guidelines. Consults with appropriate stakeholders. Quality assures content.
- Policy and procedure register team** Provides quality assurance, advice and support, and management information and data, including review schedules

## Key Features

