

Non-financial performance

Queensland Government objectives for the community

The Public Trustee's strategic objectives are aligned with the Queensland Government's objectives for the community.

Our services contribute to the Government's objectives for the community – to **Back our frontline services** by:

- undertaking a key role in Queensland's guardianship system
- advocating for the rights and financial interests of people with impaired decision-making capacity and protecting them from neglect, exploitation and abuse
- supporting Queenslanders to protect and manage their financial wellbeing at all stages of life
- delivering a customer experience that is tailored, relevant and accessible
- enhancing customer and community understanding of the Public Trustee.

Community Service Obligations

The total cost of Community Service Obligations delivered for the 2020-21 financial year was \$40.7M representing an increase of 6.0 % from the previous financial year (which was \$38.4M). An amount of \$41.7M is budgeted for 2021–22.

Category of Community Service Obligations	2020–21 Actual \$M	2021–22 Budget \$M
Fees rebated for clients with limited assets	\$32.0	\$32.8
Fees rebated for principal residence and other	\$0.9	\$0.9
Management of estates of prisoners	\$0.5	\$0.5
Public community education and advice to the courts and tribunals in the areas in which the Public Trustee has expertise	\$1.4	\$1.4
Providing a free Will-making service to Queenslanders	\$4.4	\$4.5
Contribution to the Office of the Public Guardian	\$1.2	\$1.2
Civil Law Legal Aid - outlays written-off and administrative support	\$0.3	\$0.4
Total	\$40.7	\$41.7

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

- deduction from fee revenue (\$35.0M 2020–21) where there is rebate of all or part of a fee to customers (Note 1 of the Public Trustee Financial Statements)
- expenditure (\$1.3M 2020–21) as Contributions towards other sector operations. (Note 6 of the Public Trustee Financial Statements).

The provision of free Will-making services is not included in Revenue in our Financial Statements.

Summary of our performance

Customer 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 service 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 Customer Experience and Delivery service area using three effectiveness measures and one efficiency measure.

The Public Trustee conducts a customer satisfaction survey specifically with beneficiaries of deceased estates being administered by the Public Trustee as executor under a grant of administration or under the Public Trustee's statutory powers, with customers (and their support network) who have used the Public Trustee to act as a financial administrator, and with customers of our Will-making service.

The table below summarises our performance (quantifiable measures and qualitative achievements) against performance indicators in the Public Trustee's *Service Delivery Statement 2020-21* and those in our *Strategic Plan 2020-24*. Our objective is to deliver a full range of professional, accessible and reliable personal trustee, financial and related services that meet customer needs.

Service standards	2020-21 Target/Est.	2020-21 Actual	2021-22 Target/Est.
Effectiveness measures			
Overall customer satisfaction with the deceased estate administration service as measured by the overall experience score ²	70%	76%	70%
Overall customer satisfaction with the financial management service as measured by the overall experience score ²	70%	74%	70%
Overall customer satisfaction with Will preparation services	90%	93%	90%
Efficiency measure			
Cost per Will ³	\$180	\$250	\$200

Notes:

1. The name of the service area has been amended from "Client Experience and Delivery" as presented in the 2020-21 *Service Delivery Statements*, to "Customer Experience and Delivery" as it better aligns the services delivered by the Public Trustee's Strategic Plan. In 2020, the Public Trustee replaced references to "client" to "customer", consistent with the public service value of Customers First and the launch of the Public Trustee Customers First Agenda.
2. There have been changes to the methodology from the 2020-21 Service Delivery Statements. Previously, the Public Trustee calculated overall experience as a combined index of customer satisfaction, service and process factors which were then weighted according to importance. The revised methodology is based on the customer's overall experience with the Public Trustee service on a scale of 0 to 10 and is a more direct indication of the customer's overall experience. Results are comparable with the previous methodology as the customer will consider those factors in providing an indication of their overall experience.
3. The 2020-21 Actual is higher than the 2020-21 Target/Estimate as a result of fewer Wills being completed during the period. In response to COVID-19, in-person Will appointments were temporarily suspended; however, customers were also offered telephone Will appointments. More Wills are estimated for 2021-22, resulting in the lower 2021-22 Target/Estimate Cost per Will.

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 has net assets of \$113.2M under management as at 30 June 2021. During the year, QCF paid \$1.5M in distributions to a broad range of charities.

For further information, visit <https://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 \$6.9M.

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 \$45.8M as at 30 June 2021.

Scholarships of more than \$3.66M were approved for payment over the 2021 and 2022 calendar years for young Queensland Aboriginal and Torres Strait Islander students. Scholarships have been awarded to more than 12,000 students from over 350 schools since the foundation was established in 2008.

For further information, visit 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 \$5.4M as at 30 June 2021 with distributions paid totalling \$0.4M in 2020–21.

For further information, visit 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 \$4.3M as at 30 June 2021 with distributions paid totalling \$0.1M in 2020–21.

For further information, visit www.fordefoundation.org.au.



g l a d s t o n e
f o u n d a t i o n

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 childcare services on a non-profit basis and other purposes which benefit the Gladstone Region.

Initial capital received by the trust was \$13.5M. The foundation has net assets of \$4.1M as at 30 June 2021, with distributions paid totalling \$2.0M in 2020–21.

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



Strategic Plan 2020 – 2024

Our Vision

Security and peace of mind for Queenslanders

Our Purpose

To enhance and protect the rights, dignity and interests of Queenslanders — our customers

We will do this by:

- Providing responsible, transparent, and ethical financial, estate, and trust administration and other essential fiduciary services, together with an enduring power of attorney and will making service
- Building a modern, professional and customer focused organisation
- Providing value and support to the community

Because we value:

- Our customers
- Our community
- Our people
- Our social responsibility



Our Social Responsibility Charter

The Public Trustee has a lead role in representing and assisting the community we serve.

We are mindful of our responsibilities, our customers and Queenslanders, and will proactively contribute to the community by being a trusted, transparent, consultative, customer and people focused organisation.

Our focus for the future requires exemplary governance that is grounded in the continuity of our values and geared towards providing quality support for customers by:

- respect for the law and ethical standards
- communication with and commitment to our customers and stakeholders
- commitment to the principles of the *Queensland Public Sector Ethics Act 1994*.

Our Role & Services

Enduring Powers of Attorney and Wills

Financial, estate, and trust administration and other essential fiduciary services

Our role and services to the community contribute to **Unite and Recover – Queensland’s Economic Recovery Plan** to Back our frontline services by:

- undertaking a key role in Queensland’s guardianship system
- advocating for the rights and financial interests of people with impaired decision-making capacity and protecting them from neglect, exploitation and abuse
- supporting Queenslanders to protect and manage their financial wellbeing at all stages of life
- delivering a customer experience that is tailored, relevant and accessible to Queenslanders
- enhancing customer and community understanding of the Public Trustee

Our Values

The Public Trustee aligns with the Queensland Public Sector values and contributes to the Queensland Government’s objectives for the community, outlined in **Unite and Recover – Queensland’s Economic Recovery Plan**.



Customers first



Ideas into action



Unleash potential



Be courageous



Empower people

Strategic Plan 2020–2024

Our Strategic Challenges

- Understanding and mitigating the impact of economic factors on our services
- Increasing demand for services that meet the changing complex needs of vulnerable Queenslanders
- Increasing community understanding of the different services and functions that the Public Trustee provides
- Maintaining confidence and trust in our ability to deliver fair and transparent services

Our Key Opportunities

- Foster a culture of continuous improvement to transform the way we provide services for our customers
- Implement digital transformation technologies to drive system improvements
- Collaborate and partner with government and community organisations to deliver accessible services
- Harness our shared strengths and expertise building a resilient and cohesive organisation

We will respect, protect and promote human rights in our decision-making and actions.

Objectives



Customers first
Customer-centric, fair and equitable experiences



Leadership
Engaged, empowered and customer focused workforce



Integrity
Socially responsible services that meet the needs of Queenslanders



Financially responsible
Financially and ethically responsible leadership and governance



Engagement
Engage meaningfully with the community to improve the quality of life of Queenslanders



Care for community
Inclusive with our customers, their support networks and our stakeholders

Strategies

- Understand our customers and their support networks' complex and changing needs so we can continue to improve our services, including new service delivery channels
- Continually improve the customer experience through gathering and analysing customer insights
- Develop, implement and continuously improve an enhanced, proactive customer engagement model
- Transition to best practice complaint handling standards
- Foster a culture of integrity, empowerment and continuous learning that enables workforce change
- Promote an environment where our people are resilient, high performing and agile leaders
- Invest in our training and development programs, building our peoples' leadership capability to achieve their potential
- Enhance and further develop a workforce that is reflective of the Queensland community we serve
- Enact our Social Responsibility Charter – applying our knowledge and understanding of the ethical and social responsibilities of our services
- Continue to review our policies to optimise our overall impact and value for Queenslanders
- Enhance integrity, empathy, respect and trust into our relationships with our customers and their support networks' and stakeholders
- Be financially responsible and transparent in the management of our customers' funds
- Be transparent about our fees and charges
- Focus on effective governance structures and systems, implementing business improvements, and allocating resources to deliver streamlined services for our customers
- Adopt a continuous improvement approach to our service delivery to ensure we remain relevant, sustainable, efficient and cost effective for our customers
- Enhance customer and community information and empowerment
- Highlight the quality of our services as a trusted partner of financial, estate and trust administration, and other essential fiduciary services
- Lead the way in Queensland's guardianship system to protect the rights and interests of adults with impaired decision-making capacity
- Focus on evolving customer needs to facilitate value-add and targeted services
- Make informed decisions through research and analysis of our data that benefits our customers and stakeholders
- Prioritise opportunities for process and performance improvement

Performance Indicators

- Our services continue to meet the changing complex needs of our customers as measured by our Customer Feedback Report
- Customers and stakeholders have increased positive experience with us as measured by our customer satisfaction research
- Service improvements arising from complaints analysis
- Staff are empowered and committed to improving the customer experience
- A safe and healthy workplace as monitored by our Health, Safety and Wellness report
- Workforce capability increased through the adoption of training, coaching and formal development opportunities
- Improved results in the Working for Queensland survey
- Improved accessibility to, and timeliness of, Public Trustee services as measured by our Customer Feedback Report
- Customer investment strategies, fees and charges are consistent with benchmarking
- Efficiencies in governance, structure and business processes as measured by our internal audit program
- Increased overall customer satisfaction as measured by our customer satisfaction research
- Increased capability and improved performance as evidenced in staff performance development plans
- Evidence, values and principles based reforms informed by data
- Responsible and accessible services as measured by our customer satisfaction research

Our acknowledgment

We acknowledge the Australian Aboriginal peoples and Torres Strait Islander peoples of this nation, the traditional custodians of these lands. We pay our respects to their ancestors, our First Nations peoples, their spirits and their legacy which give strength, inspiration and courage to current and future generations, both Indigenous and non-Indigenous, towards creating a better Queensland.

Our Strategic Plan 2020–2024 continues to drive the Public Trustee towards a more modern, professional and customer focused organisation. The Plan serves as our blueprint to help us achieve our vision to 'provide security and peace of mind for Queenslanders', and clearly articulates our purpose to 'enhance and protect the rights, dignity and interests of our customers and the community'.

Our priorities

Our key priority for 2021–22 will be to continue our Customers First Strategy to deliver organisational capability, process and technology changes aligned with our strategic objectives, including ensuring continued financial responsibility and sustainability, and to support future business needs. These initiatives build on community trust, provide greater transparency and ensure the voice of our customers is heard to guide our future decision-making. We will engage collaboratively with our stakeholders by building goodwill, sharing knowledge and expertise, and fostering partnerships for the benefit of our customers and the community.

Specific goals for 2021-22 are to:

- undertake a comprehensive review of all the Public Trustee's fees and charges to ensure they are fair, sustainable and transparent
- continue a review of Public Trustee Office locations
- embrace online service delivery by enhancing our customer platforms and digital services
- deliver community education programs to support engagement in financial and life planning
- implement a new Public Trustee complaints management system to support best practice complaints management
- continue the introduction of Easy English materials to support engagement with our customers, stakeholders and the community
- continue with steps to establish a Legal Expert Transformation Panel to support the Official Solicitor - Customer Legal Services reviewing the policies of the office
- enhance our cultural capacity across the agency
- continue to elevate our cultural sensitivity and disability inclusivity practices.

Our strategic challenges and opportunities

In reviewing our Strategic Plan 2020-2024, we considered the major challenges facing Queensland now and into the future, and how they will impact the Public Trustee. We have identified a number of key risks and opportunities in achieving our vision and purpose, as outlined below.

Our strategic challenges include:

- understanding and responding to the impact of changing economic factors on our services
- increasing demand for services that meet the changing complex needs of vulnerable Queenslanders
- maintaining confidence and trust in our ability to deliver fair and transparent services
- building the capability of our workforce and systems to enable us to respond effectively to the needs of our customers
- maintaining service delivery through effective planning and business continuity responses.

Our key opportunities include:

- embedding a culture of learning and continuous improvement to drive customer-centric service delivery
- innovating through data and digital transformation
- ensuring our fees and charges are transparent, fair and reflect value for the services provided
- contributing to the community's understanding about the importance of planning for different life-stages
- being recognised for our professionalism by customers, their support networks and sector partners.