

Non-financial performance

Our objectives for the 2015–16 reporting period are contained in the Public Trustee's Strategic Plan 2012–2016.

Objectives and performance indicators

Below are our achievements against the Queensland Government's objectives for the 2015–16 reporting period.

Our clients

Meet the needs of our clients in an ethical, professional and responsive way

- delivered over \$31.3 M in Community Service Obligations 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 Enduring Powers of Attorney with an emphasis on planning for life
 - support for a range of community services such as the Office of the Public Guardian and funding of the Civil Law Legal Aid Scheme administered by Legal Aid Queensland.
- made 25,448 Wills and 2,746 Enduring Powers of Attorney for Queenslanders
- provided financial administration services for 8,919 adults with impaired decision-making capacity and acted as financial attorney for 243 people
- implementation of recommendations from the deceased estate end to end review to improve service delivery to clients
- preparation for the end to end review of the financial management activities to identify opportunities for improvement
- contributed increased funding to the Department of Communities, Child Safety and Disability Services' *No excuse for elder abuse* campaign.
- provided funds to the Department of Communities, Child Safety and Disability Services to fund projects to meet the need for education on elder abuse for culturally and linguistically diverse communities
- undertook the annual client satisfaction surveys which demonstrate we exceeded targets in the provision of services for:
 - deceased estate administration
 - Will making services
 - financial management for clients with impaired decision-making capacity.

Our services

Develop innovative services in a client responsive manner

- implemented the testamentary trust Client Service Centre to improve service to clients
- maintained our outreach services to ensure Queenslanders can access our services
- broadened the client base for client investment strategies
- exceeded our Will making target and continued to implement strategies to increase our appointment rate.

Our business

Maintain a viable business model and develop our internal operations to fund a broad range of services at no cost to government and in line with government objectives

- ongoing review of service delivery models and locations to better meet growing and changing demographic needs of Queenslanders
- continuing review of the governance arrangements of large charitable trusts to meet changes in the regulatory regime
- a strong financial performance
- implemented recommended improvements to the practices of the Office of the Official Solicitor to increase efficiencies and improve service to clients.

Our people

Develop and maintain a committed workforce

- continuation of technical training for trust officers as part of a comprehensive training framework including:
 - delivery of structured level one and two technical training for trust officers. This training is delivered over a six month period
 - ongoing development of a structured level three technical training for trust officers for delivery in 2016–17.

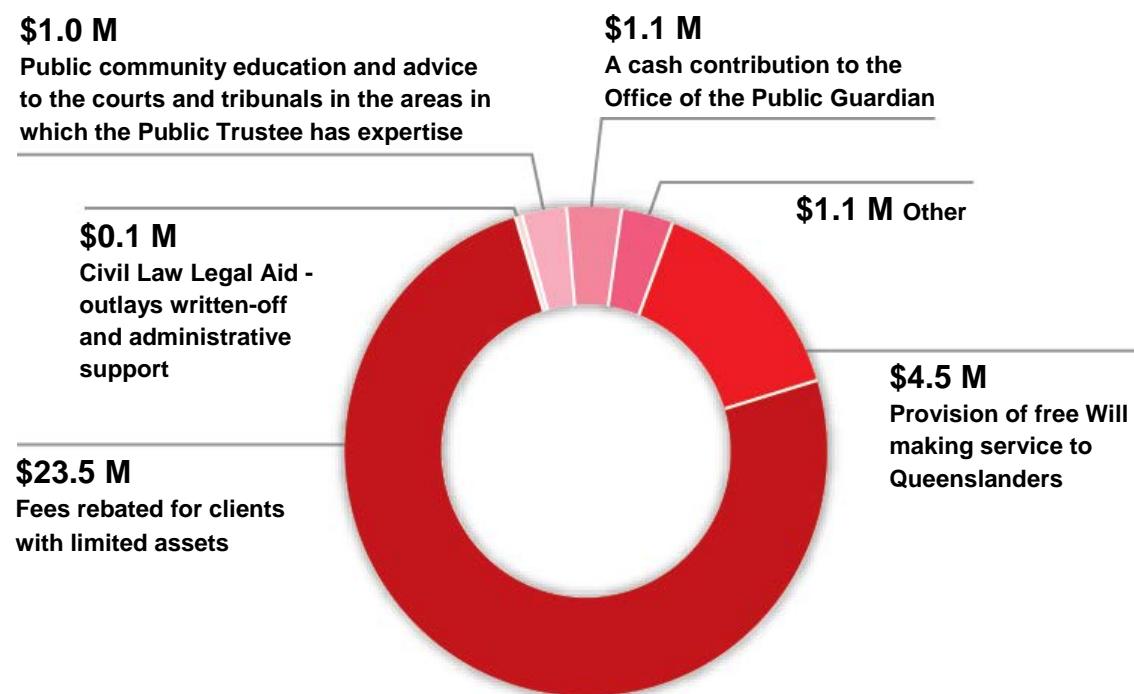
The delivery of the training is the culmination of a three year project to increase the technical skills of trust officers leading to improved client service.

- supporting line managers in inducting new employees, by providing the following resources on our intranet:
 - induction guidelines
 - induction planner
 - employee induction manual.

The induction manual provides a comprehensive overview of the environment in which an employee will work, their employment conditions and expected behaviour and conduct.

Community Service Obligations

A range of Community Service Obligations have been provided including:



The total cost of Community Service Obligations delivered for the 2015–16 financial year was \$31.3 M representing an increase of 3.2 per cent from the previous financial year which was \$30.4 M. An amount of \$34.2 M is budgeted for 2016–17.

Category of Community Service Obligations	2015–16 Actual	2016–17 Budget
Fees rebated for clients with limited assets	\$23,530,687	\$25,539,525
Fees rebated for principal residence and other	\$877,868	\$755,037
Management of estates of prisoners	\$200,612	\$287,504
Public community education and advice to the courts and tribunals in the areas in which the Public Trustee has expertise	\$1,049,405	\$1,379,000
Providing free Will making service to Queenslanders	\$4,504,296	\$4,859,000
Cash contribution to the Office of the Public Guardian	\$1,112,000	\$1,164,445
Civil Law Legal Aid - outlays written-off and administrative support	\$60,102	\$232,500
Total	\$31,334,970	\$34,217,011

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

- deduction from fee revenue (\$30.2 M 2015–16) where they are a rebate of fees or services provided at no charge
- expenditure (\$1.1 M 2015–16) as contributions towards other sector operations.

Service delivery

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 2015-16 are published on page 12.

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

Our service areas and service standards

Client Services 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 Services 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 2015–16, the Public Trustee received 2,049 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 2015–16, the Public Trustee provided financial management for 8,919 clients and acted as financial attorney for 243 people. Fees rebated for clients with limited assets under our Community Service Obligations were \$23.5 M.



Will making service

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

In 2015–16, the Public Trustee prepared 25,448 Wills for Queenslanders.

The Public Trustee also prepared 2,746 Enduring Powers of Attorney.

This table outlines our performance against three service measure targets and three service standards.

Service Standards	Notes	2015–16 Estimated Target	2015–16 Actuals
Service: Deceased Estate Administration			
<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%	70%
Service: Financial Management			
<i>Effectiveness measure</i> Overall client satisfaction with financial management service as measured by client satisfaction index	3	70%	73%
<i>Efficiency measure</i>	4		
Service: Will Making Service			
<i>Effectiveness measure</i> Overall client satisfaction with Will preparation services as measured by client satisfaction index	5	90%	97%
<i>Efficiency measure</i>	4		

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 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 overall satisfaction score and 50 per cent of the single overall weighted satisfaction factors score to obtain a total index score.
4. An efficiency measure is being developed for this service and will be included in a future *Service Delivery Statement*.
5. All clients preparing a Will with the Public Trustee receive a Wills Questionnaire. The Wills Questionnaire contains eight questions relating to the quality of the Will making service provided. Six of the eight questions in the survey relate to quality of the service provided. The remaining two relate to the delivery of the service. The overall satisfaction level is calculated as a percentage of positive responses to total number of responses received.

Philanthropic charitable trusts

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 2015–16 and now has funds under management exceeding \$70 M. During the year, QCF paid distributions to a broad range of charities in excess of \$2.7 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 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.

Scholarships of more than \$2.2 M for 1,209 Indigenous students from 204 Queensland high schools were approved in 2015–16. A total of 4,909 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 \$4.6 M.

During 2015–16, the ongoing support of Roma House and grant funding totalled \$70,000.

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 \$3.8 M, with distributions totalling \$352,708 in 2015–16.

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 \$10.46 M. In 2015–16, the foundation awarded grants totalling \$3.18 M for four major projects in the Gladstone region. After taking into account the balance of grant round commitments to be paid, the balance of uncommitted funds at 30 June 2016 was \$8.93 M.

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