



Customers First Strategy

2021 – 2026



Public Trustee



Contents

Forewords.....	3	Our People	9	Our Customers First Priorities	15
Introduction.....	4	Our Customers	10	Our Actions	16
Our Story.....	5	Our Challenges	12		
Our Services	7	Our Customers First Agenda	13		

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.

Please note: Aboriginal and Torres Strait Islander readers are warned that photographs within this report may contain images of deceased persons which may cause sadness or distress.



A message from the Minister

I am pleased to be able to release this Customers First Strategy 2021 – 2026 with the Public Trustee of Queensland. It is a document which reflects the resilience, innovation and awareness of a modern-day organisation to respond to the emerging needs of a community.

Queensland is a growing and changing state and we need our services to be responsive to these trends. The COVID-19 pandemic has been a clear example of how organisations need to be responsive to the changing landscape around them.

Here, with this Strategy, the Public Trustee is leading the sector by example and taking a clear position on the value of customers in every aspect of their work. This is a commitment to Queenslanders that they are central to all decisions, practices and policies of the Public Trustee and every interaction is valued.

It is this approach that underpins the humanity and maturity of an organisation such as the Public Trustee and makes me proud to be part of this journey.

**The Honourable Shannon Fentiman MP
Attorney-General and Minister for Justice
Minister for Women and Minister for the
Prevention of Domestic and Family Violence**



A message from the Public Trustee of Queensland

2020 will always be a year to remember. The global impact of the COVID-19 pandemic challenged the Public Trustee, like many other organisations, but we mobilised a workforce and continued to provide services to Queensland — a testament to the dedicated and passionate workforce of the Public Trustee.

For me, as Acting Public Trustee and Chief Executive Officer, I am proud of the commitment and achievements of all staff. We have continued to drive outcomes for Queenslanders while remaining positive, supportive, compassionate and ethical in our work, our engagements and our services.

The Public Trustee has been providing services to the people of Queensland for more than 100 years and, to meet the challenges of the next decade and beyond, we will continue to evolve into a more modern, customer-centric and sustainable organisation that upholds its professional and ethical standards in the valuable services provided for Queenslanders.

In 2021, we will continue to raise the bar on customer service and enhance our commitment by delivering a range of Customers First initiatives — now and into the future. These initiatives aim to build on community trust, provide greater transparency and ensure the voice of our customers guide our future decision making.

I look forward to implementing this strategy which will continually promote and improve our customer's experience here at the Public Trustee.

**Samay Zhouand
Acting Public Trustee of Queensland and CEO**

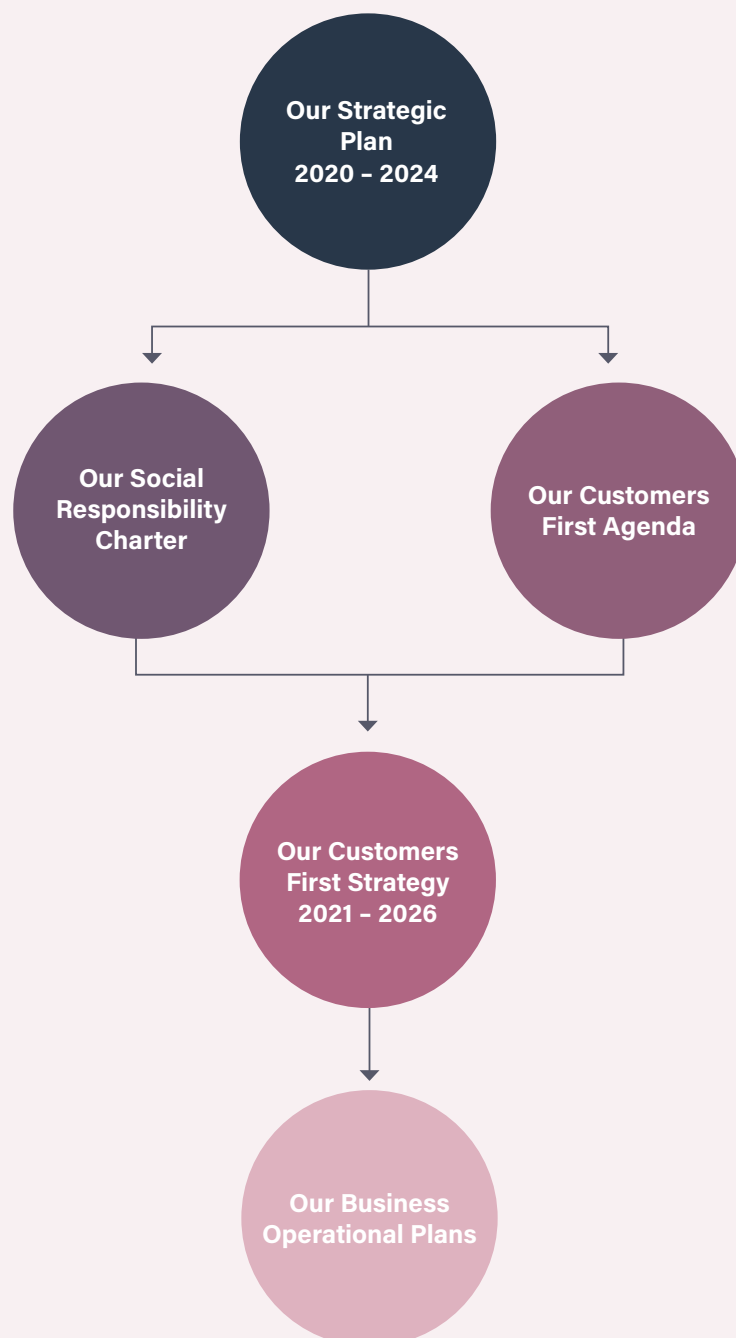
Introduction

The Public Trustee is committed to developing into a sustainable, modern and customer-centric organisation. As part of this, we implemented our Customers First Agenda to ensure that our customers are the focus of all our processes and decisions.

Through this strategy, we will set an expectation on ourselves and explore how we will continue to learn and improve as an organisation. This will ensure that our actions are aligned to customer support and access, and reflect the core values of the Public Trustee.

As an organisation, we must challenge expectations and focus on customer needs, wants and requirements. In our first Customers First Strategy, we have identified opportunities to drive innovation and excellence in this space and across the sector to become a leading authority in customer-centric design, process and outcomes.

The Customers First Strategy aligns with our Strategic Plan 2020 – 2024 which defines our vision, purpose and our Social Responsibility Charter. This Strategy expands on our commitment to our customers and the Queensland public to provide responsible, transparent and ethical services.



Our Story

The Public Trustee was established on 1 January 1916 to support Queenslanders departing for the first World War to create Wills. A lot has changed since then and, as an organisation, we too have changed. We have continued to serve Queensland through two World Wars, a global recession and the adoption of the computer as our services have expanded to include enduring powers of attorney, deceased estate and trust management, unclaimed money and other fiduciary services.

We have had our challenges and our successes and, through it all, we continue to provide security and peace of mind for Queenslanders.

We have seen many changes, as has our state and we as Queenslanders. To this day, we continue to learn and evolve as an organisation, meeting the changing values, priorities and requirements of our customers.

We have innovated to enhance the rights, dignity and interests of Queenslanders.

We have embraced the *Human Rights Act 2019* and are focused more than ever on advancing Queenslanders' human rights through our service delivery.

Even in recent days, we have seen the impact of a global pandemic, COVID-19. As an organisation, we have pivoted like many others to put the safety of our people and our customers first — moving online and delivering our services remotely.

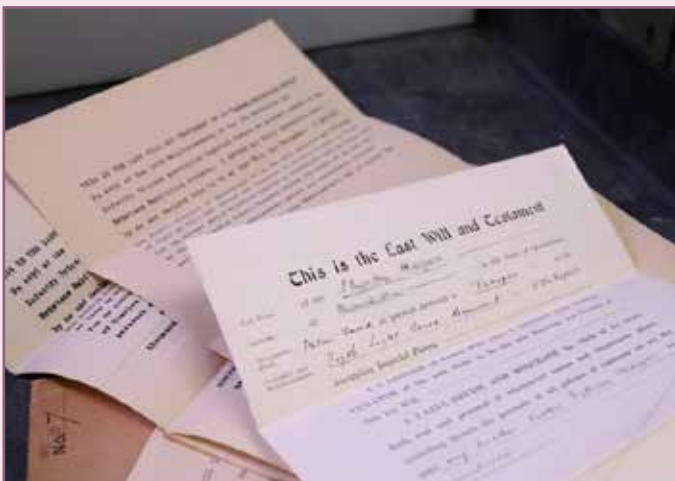
As a long-standing organisation, we have seen change, we have embraced change and we have embodied change. Importantly, we will continue to change to meet the needs of our customers and the community.

Our Customers First Strategy 2021 – 2026 solidifies our commitment to provide security and peace of mind for Queenslanders by building a modern, professional and customer-focused organisation.



Will number three written in 1916.

This Will was written just weeks after the establishment of the Office of the Public Curator in 1916 for a Queensland soldier soon to depart for World War I.



The third, fourth and seventh Wills created in Queensland with the Public Curator.

These Wills were created at the RNA Showgrounds in Brisbane by soldiers on their way to the frontline of World War I.

Source: ABC News, Liz Pickering

Our Story

1916

At the height of the first World War, the government of the day unanimously votes to create Queensland's first Public Curator to make Wills for Queenslanders. The new Brisbane Office begins at the Treasury Building with a handful of staff and Mr W.A. Douglas, the first Public Curator. Offices also open in Townsville and Rockhampton.

1918

The end of World War I. The Reserve Fund was established to provide funds "to make good any losses (should that unfortunately happen at any time) before the Government will be called upon to honour its guarantee."

1926

Public Curator Act is amended and a Deputy Public Curator is based in Cairns.

1932

The Brisbane Office relocates to a new building in Edward Street. When Public Curator F.W. Mole retires, in his address to the Queensland Parliament he says "The Office continues to pay its way and never has been, since its inception, a charge on the general revenue of the State."

1939

The Public Curator supports the war effort with evening and weekend opening times during World War II.

1945

World War II ends and staff volunteer weekends to help dismantle the air-raid protection that was built around the Brisbane Office. Many returned service people are employed by the office and the staff actively contribute to post war recovery efforts.

1964

The Mental Health Act 1962 changes the Public Curator's role to take control only when mentally ill persons are certified as being incapable of managing their own affairs.

1978

Public Trustee Act 1978 replaces all earlier Acts, and changes the name from the Public Curator to the Public Trustee.

1997

The Queensland Community Foundation is established, with The Hon. Mike Ahern chairing the Advisory Board, allowing individuals, groups and organisations to establish charitable trusts for a cause or charity of their choice.

2000

The Guardianship and Administration Act 2000 makes significant changes to how we support our clients with a disability.

2019

With the introduction of the *Human Rights Act 2019*, the Public Trustee makes a commitment to ensure the interests of our customers are at the forefront of our service delivery.

2016

The Public Trustee celebrates 100 years of self funded services to Queenslanders. The introduction of the National Disability Insurance Scheme revolutionises the way services are provided to people with a disability.

Our Services

We provide the following essential services:

Life-planning services
(Wills and Enduring Powers of Attorney)

Private Probate Services

Deceased Estate Administration

Financial Administration

Trust Administration

Unclaimed Moneys Register

Other essential services
(legal, taxation and real estate sales)



We are located right across Queensland through a network of regional offices in:

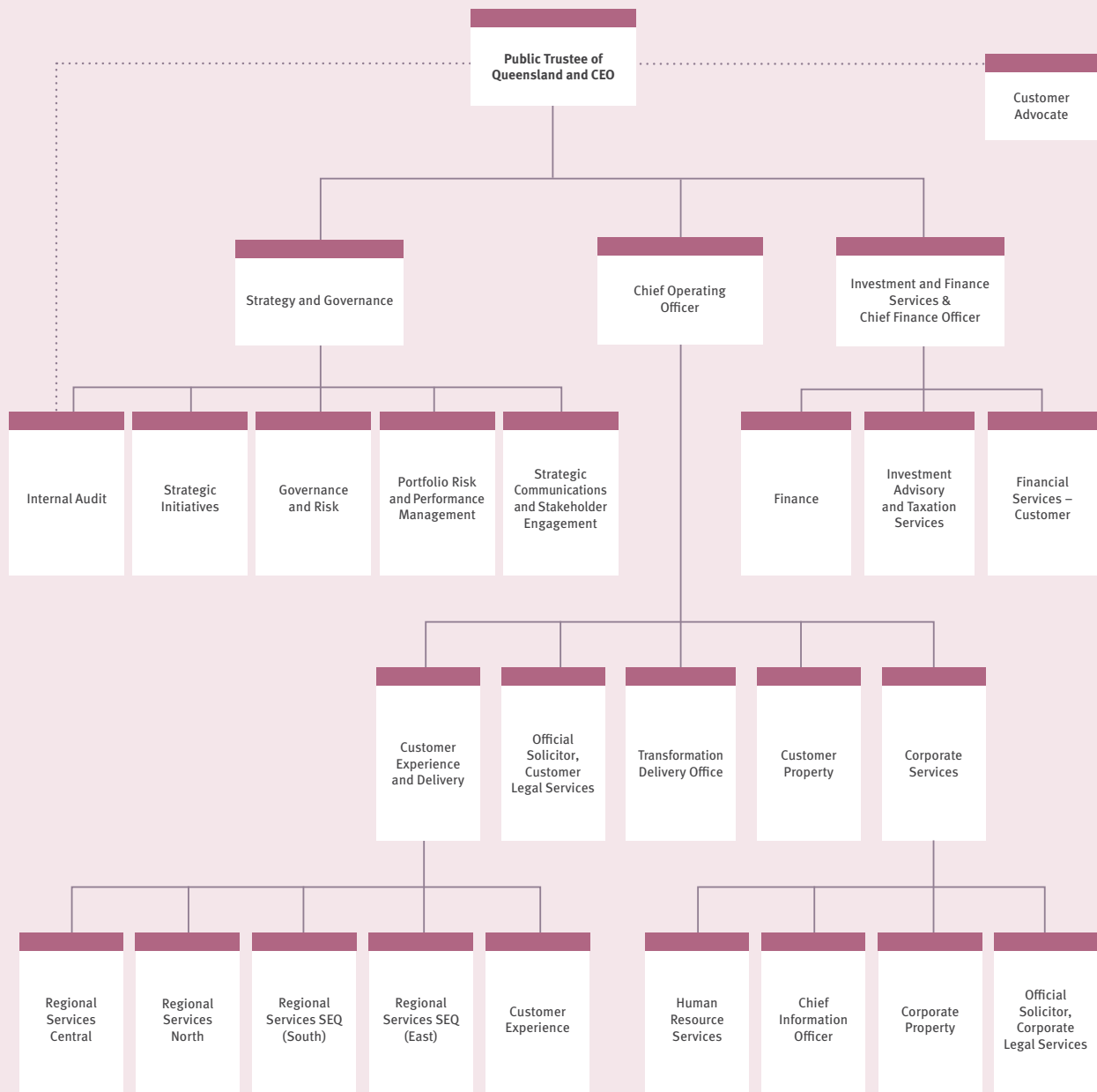


Our people

Our people are the foundation of who we are and what we achieve. We are experts in what we do. We continue to provide services at the highest quality for Queenslanders with our specialist teams spanning legal services, taxation, customer engagement, real estate, genealogy, government benefits, disability support, investment, governance and more.

With more than 600 staff across Queensland, our people are dedicated, knowledgeable and strive for continuous improvement. As a customer-centric organisation, our people are dedicated to working with our customers and listening to their suggestions and feedback to strive for greater customer satisfaction in our work.

Our operating structure places a priority on service delivery and customer engagement:





Our Customers

Our customer base today is vastly different to that of 100 years ago and, as our customers continue to change, so do we. Working across a variety of customers with differing requirements, we endeavour to fully understand every customer's needs to deliver excellence in service.

Working to know our state and our population is the first step in understanding our customers. We know that the population is ageing, that Queensland is diverse, that the family unit is evolving, and that our personal interests may be different.

On top of this, we work directly with our customers to best understand our individual customers and how they like to operate. Taking these learnings, we build our customer experience. We encourage our customers to provide us feedback during and after interactions to make sure that we are learning and growing as an organisation.

Combining our customer experience work, complaints, feedback, evaluation, surveys and quantitative data, we have the following understandings of our customers.

Financial Management Services

Sometimes in life, a person needs assistance with their financial affairs. Without support, the person's needs may not be met or they may be vulnerable to exploitation or neglect. We act as administrator for financial matters for clients with impaired capacity for decision-making under the *Guardianship and Administration Act 2000* or as a financial attorney under the *Powers of Attorney Act 1998*.

This customer group may include people with an intellectual disability, psychiatric illness, acquired brain injury or an age-related illness.

 
The lady that helped us [...] explained things in a way we understood.



 
I'm grateful. They helped me save money, which I didn't know I could.



 
I want my carer to have access to my details so they can help me.



Trust Administration

Trusts can be established for reasons including preservation of assets, tax planning, providing for children or those with disabilities and charitable causes. We provide trustee services for a range of trusts including testamentary, family and charitable trusts.

Beneficiaries of a Trust can be highly engaged about their Trust or not understand Trusts and how it works at all.

 
I called them because [...] I really didn't know how to deal with things. They updated my details and they advised me of the process and what will be happening in the future, they were really helpful.



 
It was really easy to go through the steps involved, took about 10 minutes.



 
When you're dealing with new found grief you can't process information well.



Deceased Estates Administration

All estates are different and some can be quite complex, with various assets, numerous beneficiaries, and/or conflicting family relationships. We administer deceased estates pursuant to Wills or on intestacy, delivering quality service for the estate and its beneficiaries.

Beneficiaries may be going through an emotionally hard time due to their grief and/or family conflict that may be occurring.

 
Initial meeting built confidence. They knew what they were doing: tried, true and robust.



 
She kept us informed. Phoned each week and emailed promptly if new things happened.



 
Written materials are wordy and difficult to detect actionable and important information.



Will-making Services

We provide education and prepare Wills free of charge as a community service for all Queenslanders.

Being such a broad group, our Will-making customers can be almost anyone, from young couples through to the elderly. They may not have made a Will before and it could be a daunting experience.

 
They gave me a list of things to bring to the meeting which was helpful.

 
The PT Officer showed what's going on by displaying the questions and my answers on the screen – made me feel involved and included.

 
None of my social circle use PTQ for their will. It seems to be something the older generation does.

As a learning organisation, we recognise that we are continuing to understand and grow from every interaction with customers and we take every opportunity to include customer views and opinions into our evaluation and improvement work.

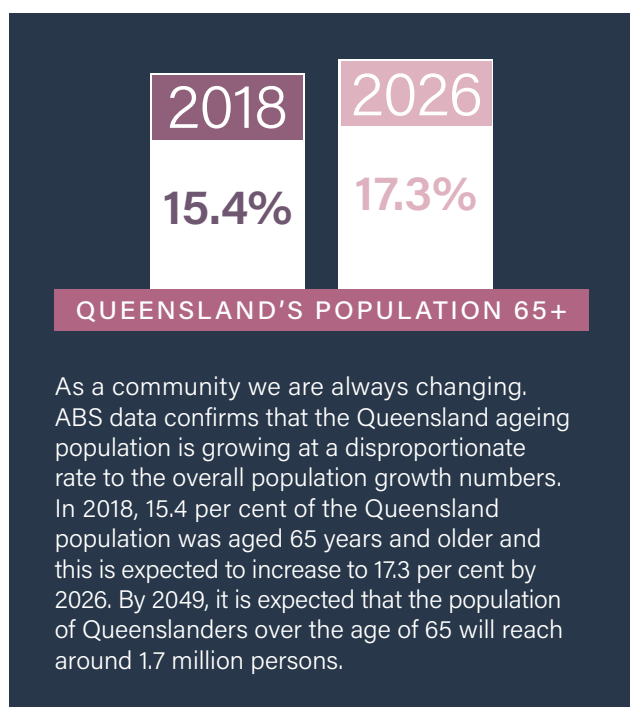
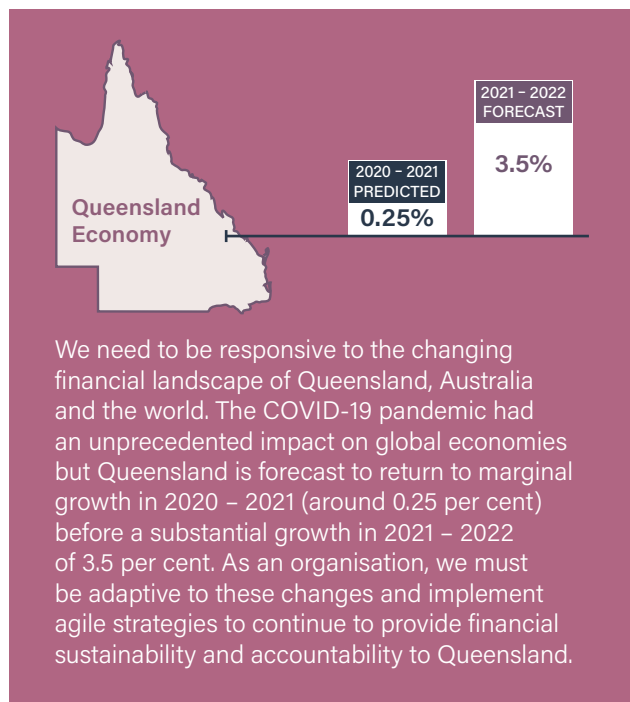
We continue to work with our customers to consider their requirements and to understand their individual and group attributes and needs.

Our Challenges

Our customers come from all walks of life across Queensland. We recognise that we are uniquely placed to make a positive difference to the lives of Queenslanders and partner with the community in times of need.

The events of 2020 challenged Queenslanders with a rapidly changing social and economic landscape and highlighted the need for us all to connect and be supported in every stage of life.

Like many organisations, we were challenged to innovate and respond to the COVID-19 pandemic. Our service models and interactions needed to change to meet the global expectations for online delivery and contactless support for our customers — and we made this a reality across all our offices.



Embracing our challenges and change, we see our future as a modern and accessible organisation that partners with our customers and their support networks and stakeholders to focus on continuous improvement.



Our Customers First Agenda

We have already commenced our transformation journey with the implementation of our Customers First Agenda at the commencement of 2020. The Agenda is our ongoing commitment to put our customers first in every interaction and is based on Queensland's important human rights reforms as we become a more modern, socially and financially responsible service.

Our ongoing work and commitment to our customers and the community can be seen through the activities that we have already delivered or are underway, as well as our forward commitment through this Customers First Strategy.

Delivered

Customer and Government Reference Groups

To further build on customer and community confidence, a Customer and Government Reference Group have each been established to provide strategic advice, insights and guide the development of the agenda. Representatives on these groups include key external customer stakeholders, and representatives from Queensland government agencies.

A new streamlined organisational structure

We have implemented a customer-focused functional structure. The structure separates customer service delivery and corporate service delivery from strategy and planning, and financial functions.

Four service regions to provide support to our customers and staff

Four service regions have been established: North, Central, SEQ South and SEQ East. Each region is balanced with staff numbers and customer volumes. This represented a significant change to drive enhanced regional service delivery led by experienced, customer-focused leaders.

Official Solicitor – Customer Legal Services

The Official Solicitor function is now separated into an Official Solicitor – Corporate and Official Solicitor – Customer. The separation of the legal services in this way minimises the risk of conflicts of interest, while ensuring a dedicated focus on the delivery of customer-centric legal services with the customer at the centre of all considerations.

A National Redress Scheme Unit

A National Redress Scheme team was established to assist customers who have experienced institutional child sexual abuse to make a claim through the National Redress Scheme. The team actively supports customers who are thinking about applying for redress to understand what support services are available to them as well acting as legal nominee for the customer in making the claim where this is appropriate.

A Social Responsibility Charter and Strategic Plan 2020 – 2024

To guide the strategic direction of the agency, we launched a Social Responsibility Charter and Strategic Plan 2020 – 2024. These documents embed the agenda and reflect the purpose of the agency to enhance and protect the rights, dignity and interests of Queenslanders.

Improved access to information about our fees and charges

To support customers and their support network, our fees and charges were published on our website in a new, easy to read format. This is supported by case studies to provide context and assist our customers to identify the fees that may be charged in their individual circumstances.

A Steps to Financial Independence program

We implemented a Steps to Financial Independence guideline to help our staff support their customers to have more control over their money with the aim of achieving greater financial independence.

A nation-leading framework to empower customer decision-making

We established a decision-making framework to assist frontline staff to deliver services aligned to and in compliance with the *Human Rights Act 2019*, and the changes brought about by the *Guardianship and Administration and Other Legislation Amendment Act 2019*. The framework is based on best practice and was developed in consultation with Latrobe University.

A QCAT Referral Program

We developed a Queensland Civil and Administrative Tribunal (QCAT) Referral Program to assess and approve the lodgement of any applications to QCAT for greater transparency in decision-making and promoting the identification of systemic issues.

In progress

- An independent review into our fees and charges, including consultation with stakeholders to ensure our fees and charges are fair, reasonable and sustainable
- Enhancements to our complaints management processes
- Updating our Customer Investment Strategy to address the current low interest rate environment
- Exploring options to provide customers with faster access to their money in emergencies
- Continuing to reduce red tape to improve our customer service experience
- Improving our engagement with our customers
- Reviewing our Financial Management customer communication plan

Our Customers First Priorities

To drive our Customers First Agenda, we have categorised our actions into the following focus areas:

Enhancing our customer experience

We will work directly with our customers to ensure that every interaction is tailored, supportive and useful.

Engaging with the community

We will work to support the community with accessible and clear financial information, to encourage understanding of the complex systems where customers need our key services.

Building a sustainable and efficient organisation

We will embrace sustainability across all aspects of our organisation including economic, environmental and strategic sustainability.

Empowering our People

We will support an engaged, empowered and customer-focused workforce.

Being a Sector Leader

We remain committed to building a modern, professional and customer-focused organisation which strives to be a leader in providing financial management, estate and trustee services.

Strengthening our Governance

We will continue to ensure that sound governance is applied across all aspects of the Public Trustee including policies, practices, conduct, decisions, culture and structure.



Enhancing our customer experience

Committing to putting our customers first starts with ensuring that our services, systems and practices are based on and built for our customers.

We will work directly with our customers to ensure that every interaction is tailored, supportive and useful.

Actions:

- Embrace online delivery of our services by enhancing our customer platforms and digital services to provide anywhere, anytime access
- Where possible, co-locate Public Trustee offices with other human service providers
- Increase information accessibility for our customers
- Enhance our cultural capacity across the agency
- Enhance our customer experience
- Continue to elevate our cultural sensitivity and disability inclusivity practices

Aspiration statement: We will position the Public Trustee as a modern and accessible organisation that provides customer-centric, fair and equitable experiences.

Empowering our people

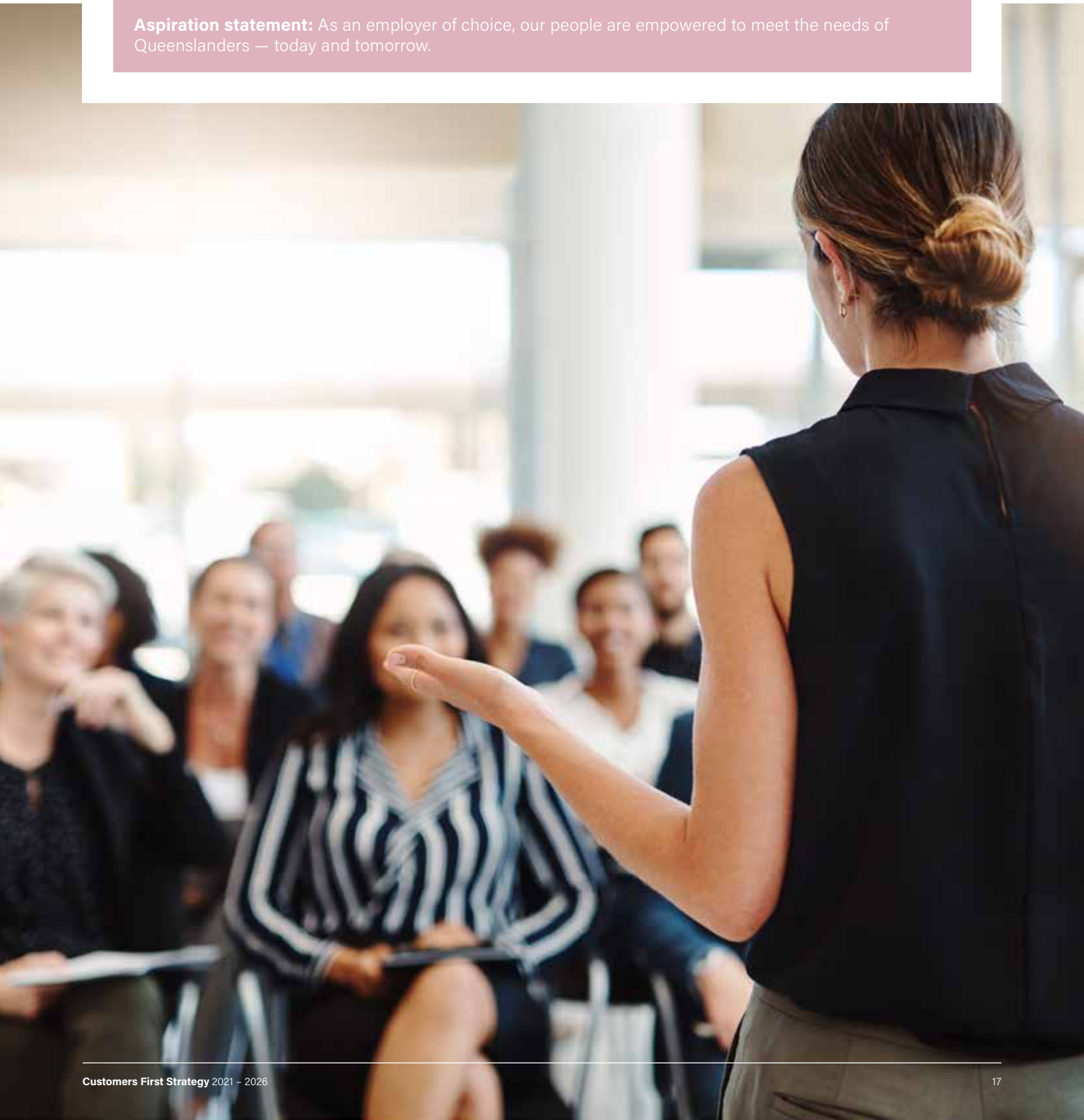
Our people are our greatest asset. We will continue to encourage, and build on, the qualities that our staff already have, assisting our customers through some of the most difficult times in their lives.

We will support an engaged, empowered and customer-focused workforce.

Actions:

- Provide more targeted training to staff to continue to raise the bar in customer service
- Nurture our emerging leaders
- Achieve White Ribbon Australia Workplace Accreditation
- Foster cross-sector relationships to support work development opportunities for staff
- Continue to provide emerging employee wellness opportunities

Aspiration statement: As an employer of choice, our people are empowered to meet the needs of Queenslanders — today and tomorrow.





Engaging with the community

As part of our commitment to be a customer-centric organisation, we will continue to leverage our customer and community engagement systems and processes, to improve the lives of Queenslanders.

Actions:

- Deliver community education programs to support engagement in financial and life planning
- Co-design our products and services with our customers
- Explore opportunities to work with other organisations to provide financial literacy support
- Participate in our local communities

Aspiration statement: We will engage meaningfully with the community to improve the quality of life of Queenslanders.

Building a sustainable and efficient organisation

We embrace sustainability across all aspects of our organisation including economic, environmental and strategic sustainability.

Through continuous review and improvement, we will constantly challenge ourselves to strive for better outcomes across our organisation and drive efficiency.

Actions:

- Modernise our ICT to increase efficiency
- Deliver an innovative target operating model
- Update the Common Fund Investment Strategy to meet the needs of a changing economic environment
- Develop a specialised Charitable Trust Investment vehicle
- Roll out environmental sustainability measures for all Public Trustee offices
- Establish an innovation process to allow our staff to continuously improve our practices and processes

Aspiration statement: We are a modern agency that harnesses our expertise to nurture a resilient, sustainable and efficient organisation.





Being a sector leader

We remain committed to building a modern, professional and customer-focused organisation which strives to be a leader in financial management, estate and trustee services.

Queensland will continue to benefit from our expertise and resources, not only at a customer level, but as an advocate, community educator and innovator.

Actions:

- Drive a strategic policy agenda
- Lead joint initiatives with sector partners and key stakeholders
- Advocate for continuous improvement in the sector
- Upskill the sector in financial and legislative services

Aspiration statement: As one of the major players in Queensland's Guardianship System, we will lead a continuous improvement agenda throughout the sector.

Strengthening our governance

We have challenged ourselves to embody integrity and accountability beyond the responsibilities expected of us.

We will ensure that exemplary governance is applied across all aspects of the Public Trustee including policies, practices, conduct, decision, culture and structure.

Actions:

- Make recommendations to modernise the *Public Trustee Act 1978*
- Equip all lawyers with practising certificates
- Ensure our fees and charges remain contemporary and fair
- Establish a business intelligence function to improve our customer service and governance
- Establish a Legal Expert Transformation Panel to guide practice improvements for customer legal services

Aspiration statement: Our products and services are grounded in our values and exemplary governance that provides quality support for our customers.





Enhancing and protecting the rights, dignity and interests of
Queenslanders by putting people at the centre of everything we do.

Phone **1300 360 044** - Email **clientenq@pt.qld.gov.au**
For further details, visit **www.pt.qld.gov.au**