



Transforming the Public Trustee

Achieving a Client-Centric Model and More

Update November 2023

The Public Trustee dedicated the year to becoming a more client focused and responsive organisation. We have prioritised building strong and committed relationships with our clients and stakeholders.

We made significant progress implementing 26 of 28 recommendations from the Independent Review and we are listening to our clients, the community, and our workforce so that we can become an even better organisation.

Critical to our progress has been a focus on resourcing. After a major recruitment drive, we significantly reduced caseloads from 150 to 50 clients per Client Account Manager. With additional resources located around Tasmania providing dedicated support, our clients can access the personal service they deserve, and our staff are given the support they need.

Pleasingly, we are already seeing the impact of these initiatives with positive results recorded from our FY23 client, stakeholder, and staff experience surveys.

We have been active in the Tasmanian community providing information and education sessions around the key services we provide not only for clients appointed through the Guardianship stream but also assisting Tasmanians with wills, estate planning, deceased estate administration and managing trusts.

Our client and stakeholder reference group continues to actively work together implementing the Independent Review recommendations as well as an important piece of work developing a common approach to supported decision-making.

We acknowledge and thank our clients for their valuable feedback and contribution to these groups as well as the following organisations for their continued support and valuable insights:

Anglicare • Northwest Support Services • Speak Out Advocacy • MultiCap TAS • Office of the Public Guardian • TasCoss • Bapcare • Health Consumers Tasmania • Tasmanian Legal Aid • COTA TAS • Palliative Care Tasmania • Tasmanian Health Services.

The Tasmanian Government provided additional funding during the 2022-23 financial year for which we are grateful and has enabled us to implement widespread change at the Public Trustee.

I look forward to continuing our transformation and our focus on bringing a client-centric approach to all that we do.

Todd Kennedy, CEO

Our Client Centric Model

The Public Trustee undertook a comprehensive transformation in 2022-23 to establish a client-centric model based on Independent Review recommendations.

The approach taken included analysing the current environment, consulting with clients and stakeholders and implementing changes to improve the current client journey.

A summary of the key highlights are as follows:

Supported Decision-Making Framework: Prioritised client wishes and preferences, to provide personalised services to meet the client's needs.

Customer Journey Mapping: Identified and streamlined processes for tailored client interactions.

Financial Independence Pathway: Empowers clients to manage their financial affairs, to encourage independence.

Client Visitation Program: Strengthened client relationships to enhance the accessibility and quality of our services.

Stakeholder Reference Groups: Facilitated continuous improvement through client and stakeholder engagement.

Business Planning Approach: Cultivated a client-centric organisational culture.

Leadership: Established a new leadership framework, reinforcing our client-centric commitment.

Recruitment: Increased resources to provide personalised client service.

People Strategy: Supported staff development for improved client outcomes.

Staff Training and Engagement: Enhanced staff skills for client-focused practices.

Satisfaction Surveys: Improved measurement to help us improve the client experience.

Triage of Complex Matters: Standardised handling of complex client matters for efficiency and better outcomes.

KPIs: Revised indicators for better tracking of client experience.

File Management Practices: Enhanced file accessibility for more effective service delivery.

Updates to the Client Management System: Increased efficiency and reduced administrative tasks.

Client Visibility: Improved engagement through events and an active content calendar.

Complaints Process Review: Simplified process for enhanced client services.

Communications Review: Improved language and accessibility for a better client experience.

Policy and Procedures Process: A revised approach for a client-centric organisational culture.

Re-Structure of Client Services Team: Introduced Team Leaders for quality client service.

Board Reporting: Streamlined reporting for a more client-centric governance approach.

Independent review update

An update regarding implementation of the recommendations is as follows (✓ = implemented):

REF.	RECOMMENDATION	STATUS
1.1	The TasCAT ensure that hearings are held for the granting of all emergency orders and explain the emergency order process and outcome to the subject and his or her family and support group.	✓
1.2	The TasCAT update the Annual Report pro forma for Administrators to include a report on section 57 duties and outcomes.	✓
1.3	The Attorney General introduce legislation to amend the Guardianship and Administration Act 1995 in advance of implementing the recommendations of the TLRI: <ul style="list-style-type: none"> • to enable TasCAT to examine the extent of a conflict of interest. I suggest adopting the provisions in the WA Legislation; and • consider at the same time a minor amendment of the appeal provisions of the Act to incorporate the WA provisions. 	✓
2.1	Review communications across all fields of work of the Public Trustee.	✓
2.2	Consider the levels of service/communication required for represented persons and implement them.	✓
2.3	Consider the appropriateness of the CAMs pooling model and settle performance standards.	✓
2.4	Train all staff on record keeping, particularly accurate inventory recording when the Public Trustee takes possession of property.	✓
2.5	Consider its resourcing requirements for CSO clients in the context of the next CSO Agreement.	✓
3.1	Improve its file management practices and recording, including resubmit/reminders.	✓
3.2	Review filing separation between the legal section and operational filing for the same matter.	✓
4.1	The Public Trustee develop appropriate information and presentations so that the Tasmanian community understands the various roles and powers of the Public Trustee especially: <ol style="list-style-type: none"> in areas of managing a represented person's estate and when entering an aged care facility and more generally about the Trustee's powers when administering a represented person's affairs. 	✓
5.1	The Public Trustee engage with stakeholders and implement a Customer Reference Group to assist in the development of appropriate service initiatives and improve its services to clients.	✓
6.1	Develop a customer centric model to support the journey of all Public Trustee clients with a focus on delivering best practice in the industry so that Tasmanians feel secure in their engagement whether that be as a represented person, executor or administrator of last resort.	✓
6.2	Provide training to staff about customer service standards and appropriate expectations as a professional trustee.	✓
6.3	Implement a program of training for client account managers that covers the policies and procedures of the Public Trustee to better support staff.	✓
6.4	Develop a policy to be able to identify and triage complex matters including legal/commercial and to obtain appropriate advice to avoid delays in the administration of estates	✓
6.5	Expand management reporting to the Board to include a regular Board report on compliance with administrator obligations under the Guardianship and Administration Act 1995 Include in the report under 6.5 a separate section which addresses performance against best practice standards for administrators.	✓

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REF.	RECOMMENDATION	STATUS
7.1	The Government appoint the Disability Services Commissioner to an oversight role for represented persons with a grievance.	✓
C1.1	The Attorney General and Treasurer update the Public Trustee's Ministerial Charter to reflect their expectations in respect of CSO and represented person clients and the management of funds held in trust.	✓
C1.2	The Public Trustee include in its Statement of Corporate Intent performance measures relating to: <ul style="list-style-type: none"> • trustee industry financial performance targets; • its obligations under the Guardianship and Administration Act 1995 Act to represented persons in respect of promoting their independence and communication in respect of their wishes; • client satisfaction with CSO delivery; and • its obligations under the Public Trustee Act 1930 as a manager of trust funds. 	✓
C3.1	The Treasurer request the Tasmanian Economic Regulator to undertake a review of the Public Trustee's fees and charges for those clients who are required by legislation to use its services.	✓ Review expected to be completed Feb 2024
C3.2	The Public Trustee match the fees charged to represented persons with those in the Northern Territory.	Supported in principle - subject to completion of the review under C.3.1.
C3.3	The Public Trustee keep the Treasurer informed on the status of its request for a GST exemption for represented person fees.	✓
C4.1	The Attorney General and the Treasurer review the scope of the CSO services purchased from the PT where there appears to be private sector provision such as for the administration of estates under \$60k.	✓
C4.2	The Public Trustee include performance indicators relating to the quality of client service provided in the next CSO agreement.	✓
C4.3	The Attorney General and the Treasurer fully fund the Public Trustee's net avoidable costs of service provision in the next CSO agreement, with funding escalation to reflect demand growth.	Supported in principle
C4.4	The counterparty to the next CSO agreement should be the Minister for Community Services supported by the proposed Tasmanian Disability Commissioner.	✓
C6.1	The Attorney General and the Treasurer retain the existing GBE model for the Public Trustee and use the performance framework in the Government Business Enterprises Act 1995 to improve service delivery to its CSO clients and represented persons.	✓

If you have any questions or would like to find out how the Public Trustee can help you, please call 1800 068 784 or visit publictrustee.tas.gov.au



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