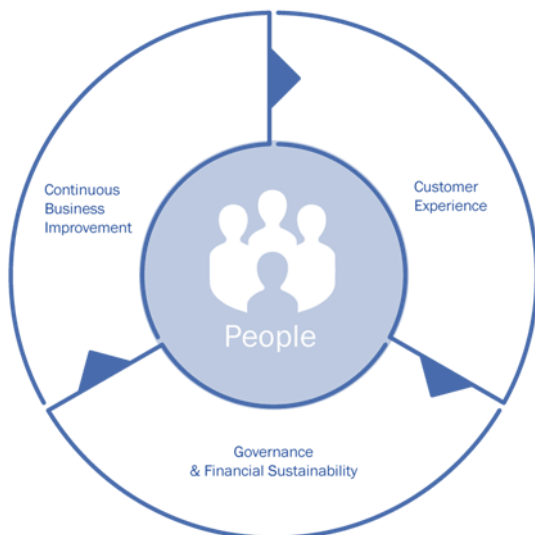


THE PUBLIC TRUSTEE STRATEGIC PLAN 2020 – 2023

OUR PURPOSE

We provide financial and administrative services to eligible South Australians. We help those who cannot manage their own affairs, and those who have trusted us to assist them.

OUR OBJECTIVES



PEOPLE

We will be a workplace of choice. Our staff will be engaged in our culture and feel empowered by leaders to develop their skills and capabilities.

CUSTOMER EXPERIENCE

We will engage with our customers, to understand their needs, and deliver a consistently high quality service, treating them with empathy and respect.

CONTINUOUS BUSINESS IMPROVEMENT

Our environment will encourage staff to collaboratively engage with business improvement ideas and initiatives, to find new ways to work and deliver excellent service to our customers.

GOVERNANCE & FINANCIAL SUSTAINABILITY

We will be supported by good governance that effectively manages risk, while meeting our agreed fiscal and service targets.

THE PUBLIC TRUSTEE STRATEGIC PLAN 2020 – 2023

ACTION ITEMS

PEOPLE

1. Develop a long-term Cultural Change Plan in consultation with staff and implement agreed actions in the Plan
2. Investigate ongoing flexible working arrangements and ways to improve work/life balance
3. Continue to develop a wellbeing program that focuses on organisational, branch and individual initiatives
 - a. Leverage the AGD "Workplace Wellbeing" link/website
 - b. Ensure the wellbeing program is tailored to focus on supporting Branches/teams that are undergoing the most significant change
4. Ensure training is timely and appropriate
 - a. Update the induction training program including adding information and requirements for Critical Incident Reporting
 - b. Implement a program to assist in training staff who change positions
 - c. Ensure refresher training is included in performance discussions
 - d. Monitor and ensure staff undertake annual training requirements
5. Continue to hold Annual Recognition Awards
6. Implement a team leaders forum and inter-branch forum to discuss ideas and foster communication

CUSTOMER EXPERIENCE

1. Enhance service delivery through call monitoring and coaching including
 - a. Developing a call coaching framework template
 - b. Reviewing call recordings and create a lessons learnt register to use for staff training
 - c. Exploring options to implement call recording when phones are diverted from the office to mobile phones
2. Improve external agency collaboration
 - a. Enhance relationships through information sharing forums with other agencies (ASU, DHS, NDIS, SAPOL, Centrelink) and create a register of key contacts
 - b. Continue to hold regular meetings with OPA to improve service delivery
3. Review current 'first contact packs' (both content and communication channels) and implement improvements
4. Create a new customer service charter for both internal and external customers

THE PUBLIC TRUSTEE STRATEGIC PLAN

2020 - 2023

ACTION ITEMS

CONTINUOUS BUSINESS IMPROVEMENT

1. Explore the viability of implementing BasWare for invoice payment
2. Replace the Recfind records management system with Objective
3. Develop a new real estate sales system with improved business functionality, monitoring and reporting
4. Work with AGD to improve use of technology for remote access
5. Commence the implementation of a CRM workflow system, starting with Estate Services
6. Progressively replace desktop personal computers with portable tablets and laptops
7. Complete the transition from Timepro to Timewise time management system
8. Review the current will making model in the context of falling demand
9. Review the personal estates case based model and the task based model

GOVERNANCE & FINANCIAL SUSTAINABILITY

1. Continue the review of customers discrete superannuation holdings
2. Continue to train and seek feedback from managers and staff on the use of dashboard reporting to meet KPI's
3. Implement enhancements to electronic verification of unit pricing and funds management compliance (Anova compliance and HiPortfolio unit pricing modules)
4. Integrate the Public Trustee's ICT network with the AGD ICT network and adopt a revised service model for ICT Services.
5. Continue to meet Performance Statement requirements that are agreed by the Attorney-General and the Treasurer.

THE PUBLIC TRUSTEE STRATEGIC PLAN 2020 - 2023

OUR VALUES. OUR BEHAVIOURS.

Service

Proudly serve the community and Government of South Australia

- Provide friendly, timely, knowledgeable and accurate information to customers.
- Explain things in an easy to understand and jargon-free way.
- Show empathy and put yourself in the customers' shoes.

Professionalism

Strive for excellence

- Provide relevant and timely responses to requests.
- Follow through on priorities, and care about your work.
- Encourage ongoing learning to maintain and update knowledge.

Trust

We have confidence in the ability of others

- Trust the team to do the right thing.
- Empower and encourage others to participate in decision making.

Respect

We value every individual

- Be polite, listen to opinions, and provide feedback.
- Treat everyone with dignity.

Collaboration and Engagement

We create solutions together

- Consult, genuinely listen to and consider people's views.
- Work together to solve problems.

Honesty and Integrity

We act truthfully, consistently, and fairly

- Act ethically and manage risks appropriately.
- Provide honest feedback.

Courage and Tenacity

We never give up

- Be brave and put forward ideas.
- Challenge accepted norms.

Sustainability

We work to get the best results for current and future generations of South Australians

- Value our customers and staff.
- Think broadly to increase efficiencies.