

# Strategic Plan 2024 – 2028

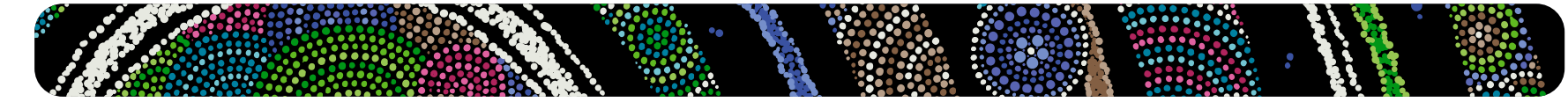
## Vision

A value for money, independent state trustee service dedicated to advancing and safeguarding the rights, interests and wishes of Queenslanders in need of financial management, estate and trust administration and planning support.

## Purpose

To provide trusted financial decision-making advocacy, education and services and empower Queenslanders to plan and prepare for key life events.

Our people-focussed approach helps us meet the individual needs of our customers with humanity, respect, integrity and diligence.



## 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 customers



### Objective

Deliver an empathetic service and experience that puts customers first

### Measure

Our customers and their support networks are satisfied with how we communicate with them and with the services we deliver

### Strategies

- Leverage data, insights and research to understand our customers and their changing needs
- Consult with customers, support networks and stakeholders to improve our services and delivery channels
- Provide accessible, timely and transparent communication to customers
- Deliver streamlined and efficient services for customers
- Implement appropriate investment strategies for customers to support their financial wellbeing
- Manage and monitor our fees and services to ensure they are fair, reasonable and transparent
- Ensure complaints management processes are accessible, timely and responsive

## Our people



### Objective

Engaged, empowered people and an employer of choice

### Measure

Our employees have the skills and resources they need to perform well in their roles, and demonstrate inclusive, safe and collaborative behaviours

### Strategies

- Enhance the health and wellbeing of our staff and provide a safe, inclusive and culturally respectful workplace
- Build the capability of our people and maximise their potential, through a culture of continuous learning and self-improvement
- Invest in developing empowered and engaged leaders, in a connected organisation that embraces diversity
- Model high standards of integrity and ethics
- Grow our capacity to meet environmental, social and governance (ESG) responsibilities

## Our organisation



### Objective

Financially and socially responsible leadership, governance and practices

### Measure

Our systems, policies and frameworks enable us to act effectively and efficiently

### Strategies

- Deliver best practice governance in fund management
- Manage our resources and investments effectively to ensure delivery of organisational priorities
- Ensure our governance frameworks enhance our commitment to transparency and accountability
- Modernise technology systems, operational models and processes to improve efficiency and meet changing needs
- Monitor and manage risks effectively to minimise their impacts and act on new opportunities

## Our community



### Objective

Community engagement that informs, improves and promotes the rights, choices and wishes of Queenslanders

### Measure

Our communities and stakeholders value our advice and support, and partner with us to share information and build awareness

### Strategies

- Deliver trusted advice and community education to build knowledge about planning for different life stages
- Engage with partner organisations to improve and protect the rights and interests of adults with impaired capacity
- Build and support communities by working with charitable foundations and philanthropy
- Ensure information and education activities are inclusive and accessible

## Our challenges

Meeting the increasingly complex and diverse needs of an increasingly large ageing, multicultural and vulnerable community

Changing community needs and expectations about our role and how we deliver services, particularly for people with disability

Social issues such as rising cost-of-living pressures are placing additional pressures on Queenslanders and the services they expect

Attracting, supporting, and retaining a safe, healthy and high-performing workforce and talent pipeline

Sustainably transitioning aged infrastructure to modern offerings and meeting the demands of constant cyber risk and continual technology and digital advances

## Our opportunities

▶ Increasing community education and awareness of advance life planning and financial safeguarding, particularly for our most vulnerable Queenslanders

▶ Service and operating model design anticipating and meeting changing customer base and service need

▶ Future sustainability as a contemporary, human services agency

▶ Contemporary capability uplift, empowering staff and benefiting customers

▶ Modernising systems for more efficient and customer-oriented service delivery

## We support Government's objectives for the community



### Good jobs

Good, secure jobs in our traditional and emerging industries



Investing in skills



### Better services

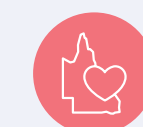
Deliver even better services right across Queensland



Backing our frontline services



Connecting Queensland



### Great lifestyle

Protect and enhance our Queensland lifestyle as we grow



Honouring and embracing our rich and ancient cultural history

## Human Rights

Respect · protect · promote

### Our commitment to Human Rights

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