

Market Research Dashboard



The Public Trustee of Tasmania

Represented Persons Survey

July 2024



Research Overview

The Public Trustee commissioned this independent report of their service delivery to their clients (known as represented persons) to measure the level of client satisfaction with services provided by the Public Trustee.

The research involved contacting client's, either a represented person or a nominated support person in their support network, providing an opportunity to give feedback on experiences with the Public Trustee, measured across previously established KPIs.

Research outcomes provide an accurate measure of levels of client satisfaction, and are tracked against data collected from the 2023 survey, using comparable methodology.

This research report provides a comprehensive overview of all elements of the research findings, and methodology notes, with collated comments for open-ended questions included in full as appendices. It comprises quantitative statistically valid data, and thematic analysis of respondent qualitative verbatim comments.

Research results have been reported for each Branch code (region location or level of funds managed), with reference to the relevant survey question where appropriate.

Key research findings are presented as Executive Summary.

Methodology

Quantitative telephone survey

The quantitative study was conducted via telephone survey during the period 1 - 14 July 2024, with a total of n=206 completed responses, comprising:
represented persons n=139
support network contacts n=67.

In previous surveys, prior to 2020 the Public Trustee has provided a selected contact list. For 2023 and 2024, the Public Trustee provided a comprehensive list of represented persons who had a telephone contact number. This gives a much more reliable and accurate measure of client satisfaction, reflective of the total client population. Results will therefore be reported against 2023 measures only, as methodology is now more comparable.

Telephone interviews were conducted by the Myriad Research qualified interview team. Interviewers used a similar survey instrument for clients and support network representatives, ensuring consistency of responses from both perspectives.

The interview process also collected verbatim comments from represented persons and support agents.

Research outcomes reported are statistically robust at the 95% confidence level, with a maximum sampling error range of between 3.1% and 7.1%.

Survey parameters

Letters were sent from the Public Trustee to all available clients to introduce the research consultants and to confirm their willingness for survey participation. Clients were able to opt out if they chose. A final list of potential respondents (first name and telephone number only) was provided to the research consultants for follow-up interview contact.

Strict privacy protocols were implemented to ensure that the research consultant's interview team only contacted those Public Trustee clients who were willing to participate in the survey. The interview team adhered to the Public Trustee privacy considerations.

The survey instrument was based on the previously used questionnaire, with minor edits, to enable direct comparison of outcomes against previous years' results.

Survey programming and hosting was managed by the consultant using the Forsta Plus platform to enable accurate data collection, in real time.

All data collection was conducted in accordance with relevant industry Quality Assurance standards (ISO 20252:2019) and privacy protocols (Market and Social Research Privacy Code) relating to telephone survey methodology.

Data collation, analysis and reporting has been completed by the consultant.

Executive Summary

On behalf of the Public Trustee, Myriad Research has conducted an independent assessment of service delivery to represented persons to determine current levels of client satisfaction. The survey sampled 206 respondents which included represented persons (n=139) and their support network contact (n=67).

Research findings have been reported for represented persons and support contacts and are tracked against baseline measures from the 2023 research report.

This executive summary covers five key areas:

1. Overall satisfaction
2. Represented persons - areas of satisfaction
3. Support network - areas of satisfaction
4. Service experience over the past year
5. Recommendations for future improvement.

Research results are segmented by relevant sub-groups where appropriate:

- Branch region (Hobart, Launceston, Devonport)
- Level of funds managed (code 10, 20, 30).

1. Overall satisfaction

2. Represented persons - satisfaction

3. Support network - satisfaction

4. Service experience over the past year

5. Future improvements

Overall Satisfaction

Represented persons

Overall, the survey results indicate a higher level of satisfaction and a lower level of dissatisfaction for represented persons than in 2023, across all measured areas.

81% of clients surveyed gave a nett positive response to s9 'Overall, I am satisfied with the way Public Trustee manages my financial affairs', compared with 75% in 2023.

Clients now report 81% nett agreeance with s32 'Overall I'm satisfied with the Public Trustee' compared to 72% agreeance in 2023.

Nearly three quarters (72%) of respondents feel things have improved for them since the Public Trustee has become involved in their financial affairs (s33), an improvement from last years result of 63% nett agreeance.

The charts below shows year on year tracking for the overall satisfaction statements (s9, s32, s33), for represented persons.

Pleasingly a high level of nett agreement (82%) was reported for s35 'I feel supported by the Public Trustee to become financially independent' (new statement).

See Table 'RP. Overall Satisfaction Statements (Nett)' below.

Support network

The overall nett level of satisfaction among support network contacts appears slightly higher at 86%, as shown in the equivalent statement s11 'Overall, I'm satisfied with the service provided to ... by the Public Trustee', and has improved from last year (81%).

Examining the Support Network ratings by the average nett agreement across statements 1-11, the level of satisfaction is broadly consistent with represented persons.

Most notably support contacts feel things have improved for their represented person client, since the Public Trustee has become involved (s7 - 78%). A significant increase from 60% in 2023.

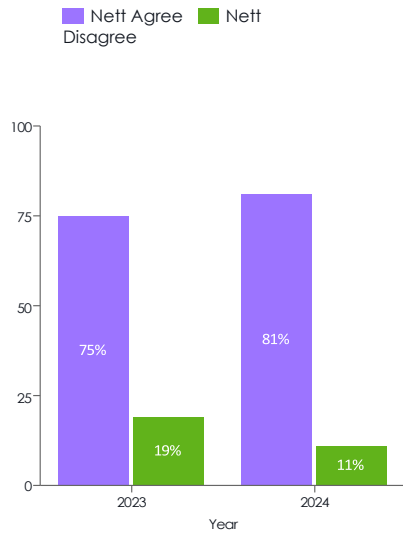
A significant improvement was evident for support contacts' overall satisfaction with the support the Public Trustee provides to help their represented person become financially independent (s8 - 80%), an increase from 2023 (68%).

See Table 'SN. Client Experience Statements (Nett)' below.



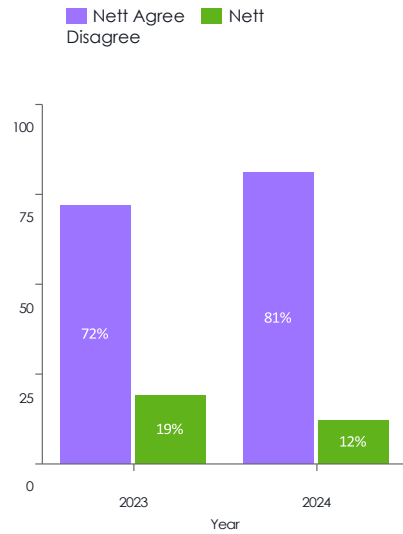
RP S9. Year on year tracking

Overall, I am satisfied with the way the Public Trustee manages my financial affairs.



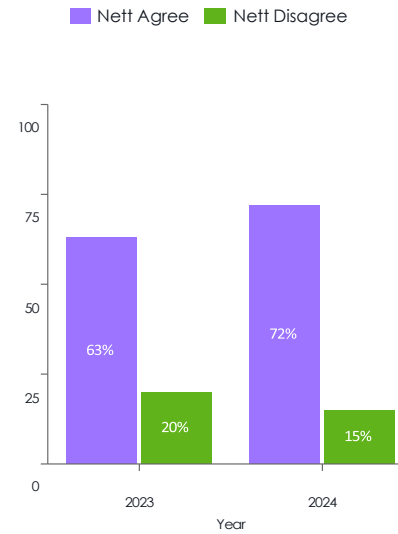
RP S32. Year on year tracking

Overall, I am satisfied with the Public Trustee.



RP S33. Year on year tracking

Things have improved since the Public Trustee has become involved in my financial affairs.



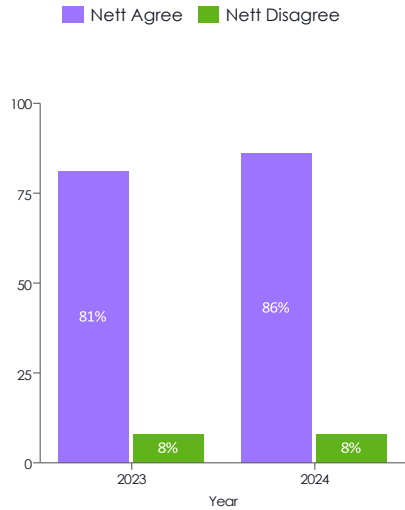
RP. Overall Satisfaction Statements (Nett)

And can you tell me whether you agree or disagree with the following statements about the Public Trustee. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s9. Overall, I am satisfied with the way the Public Trustee manages my financial affairs	100% 137	81% 111	8% 11	11% 15
s32. Overall, I am satisfied with the Public Trustee	100% 137	81% 111	7% 9	12% 17
s33. Things have improved since the Public Trustee has become involved in my financial affairs	100% 136	72% 98	13% 18	15% 20
s35. I feel supported by the Public Trustee to become financially independent	100% 130	82% 107	8% 10	10% 13

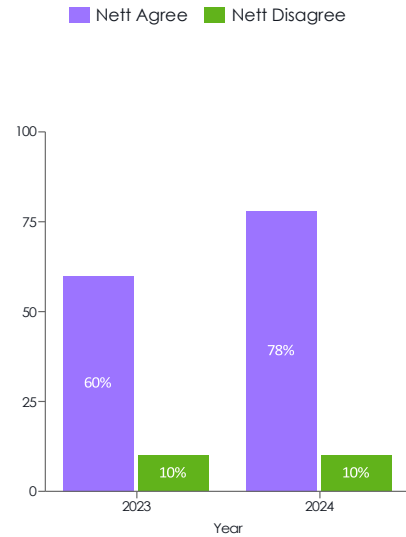
SN S11. Year on year tracking

Overall, I'm satisfied with the service provided to [CLIENT] by the Public Trustee.



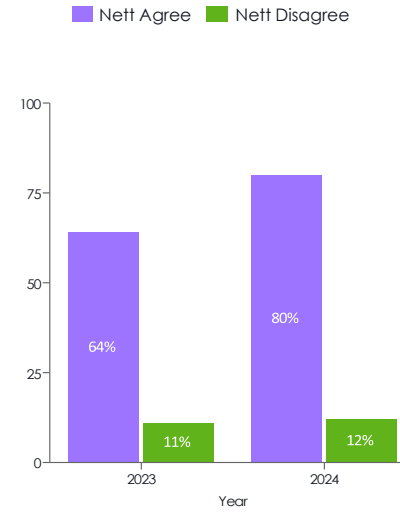
SN S7. Year on year tracking

Things have improved for [CLIENT], since the Public Trustee has become involved.



SN S8. Year on year tracking

Overall, I'm satisfied with the support the Public Trustee provides to help [CLIENT] become financially independent.



SN. Client Experience Statements (Nett)

I am going to start by reading you some statements about different aspects of the Public Trustee and its service to

'Client Name' Thinking about your experience over the past 12 months, please tell me whether you agree or

disagree with the following statements. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s1. Overall, I'm satisfied with the way the Public Trustee supports ... with their financial affairs.	100% 65	89% 58	2% 1	9% 6
s2. Overall, I'm satisfied with the way the Public Trustee communicates with ...	100% 61	84% 51	5% 3	11% 7
s3. Overall, I'm satisfied with ...'s client account manager	100% 62	89% 55	5% 3	6% 4
s4. Overall, I feel that the Public Trustee understands ...'s financial needs	100% 66	88% 58	3% 2	9% 6
s5. Overall, I find the Public Trustee to be accessible for ...	100% 65	86% 56	6% 4	8% 5
s6. Overall, I'm satisfied with the way the staff at the Public Trustee treat ...	100% 61	90% 55	3% 2	7% 4
s7. Things have improved for ..., since the Public Trustee has become involved	100% 59	78% 46	12% 7	10% 6
s8. Overall, I'm satisfied with the support the Public Trustee provides to help ... become financially independent	100% 59	80% 47	8% 5	12% 7
s9. The Public Trustee acts in ...'s best interests	100% 67	87% 58	6% 4	7% 5
s11. Overall, I'm satisfied with the service provided to ... by the Public Trustee	100% 66	86% 57	6% 4	8% 5

"I feel confident knowing I don't have to worry about it."

Represented Person.

"Very satisfied the way things are going at the moment."

Represented Person.

"Good for me to learn how to save my money and they are teaching me to do that."

Represented Person.

"He is better off financially. Money is put where he can access for his needs. Set up well. The continuity is good also."

Support Network.

"Being non-verbal he needs to have his affairs managed and the Public Trustee makes sure he has what he needs."

Support Network.

"They seem to be understanding me a bit more and they give me extra money and upgraded the money I get to a larger amount."

Represented Person.

Represented Persons Satisfaction

Areas of Highest Satisfaction

In alignment with last years results, represented persons highest area of satisfaction related to client account managers.

- s18. My client account manager treats me with respect (91% agree)
- s19. My client account manager is open and honest in their dealings with me (90%)
- s20. Overall, I am satisfied with my client account manager (88% agree).

See Table 'RP. Client Account Manager Statements (Nett)' below.

Some statements relating to the management of clients' financial situations had a wider range of nett positive response, varying from 75- 93%.

At the high end of satisfaction:

- s8. I understand what the Public Trustee does for me (93%, up from 85% in 2023)
- s9. I am confident my bills are paid correctly (90%, up from 81% in 2023).

See Table 'RP. Management of Financial Statements (Nett)' below.

Most Significant Improvements

A significant level of improvement was apparent when looking at year on year tracking measures. In an overwhelmingly positive result, a number of statements level of nett agreeance was up by ~20% year on year, 2023 to 2024. These statements related to the area of communication:

- s13. When I call the Public Trustee, the first person I talk to about my needs can usually help me (78%, up from 56% in 2023)
- s14. If I ask about my finances, the Public Trustee gives me accurate information (83%, up from 64% in 2023)
- s15. Overall, I am satisfied with the way the Public Trustee communicates with me (82%, up from 63% in 2023).

Areas of Lowest Satisfaction

While measures were all higher than the baseline measures set in 2023, the statements with lower levels of satisfaction indicate where improvements can be made. These related to the experience when first becoming a client of the Public Trustee.

- s27. When I first became a client of the Public Trustee, the Public Trustee explained what was going to happen next (69% agree).

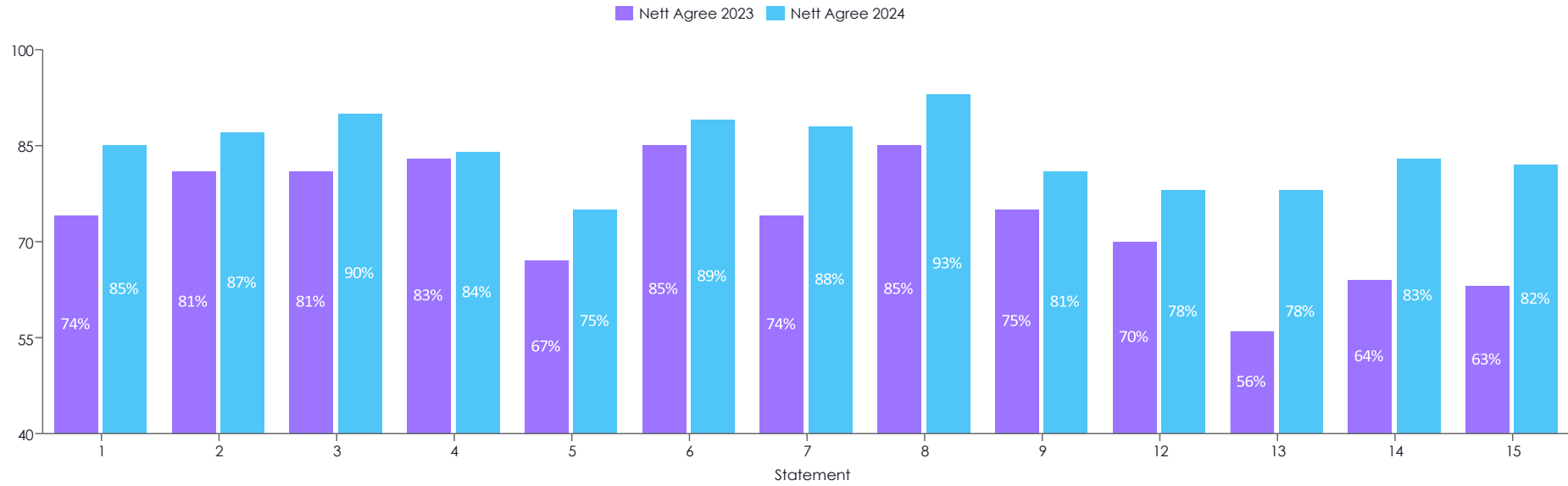
In line with previous measures, the statement with the highest level of disagreeance was:

- s5. The Public Trustee gives me as much spending money as I can afford (18% disagree).

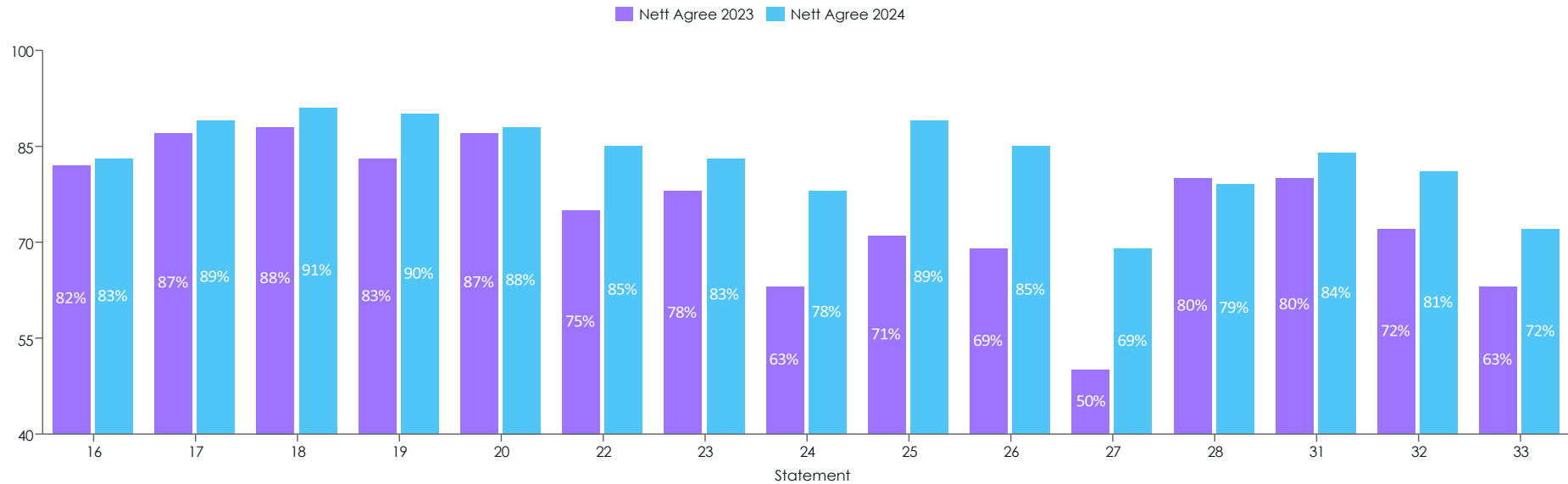
This aspect had one of the lowest nett positive ratings (75%), however a notable increase from last year (67%).



Year on year tracking - statements S1 - S15



Year on year tracking - statements S16 - S33



RP. Management of Financial Situation Statements (Nett)

I am going to start by reading you some statements about how the Public Trustee manages your financial situation.

Thinking about your experience over the past 12 months, please tell me whether you agree or disagree with the following statements. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s1. My money is safe with the Public Trustee	100% 136	85% 115	5% 7	10% 14
s2. I am confident that the Public Trustee will support me to pay my bills on time	100% 135	87% 118	7% 9	6% 8
s3. I am confident my bills are paid correctly	100% 134	90% 120	5% 7	5% 7
s4. I receive my regular spending money when I expect it	100% 135	84% 114	7% 10	8% 11
s5. The Public Trustee gives me as much spending money as I can afford	100% 130	75% 97	8% 10	18% 23
s6. I know how to request extra money	100% 134	89% 119	1% 2	10% 13
s7. I know the Public Trustee will protect my legal rights	100% 130	88% 115	5% 7	6% 8
s8. I understand what the Public Trustee does for me	100% 138	93% 128	4% 6	3% 4
s9. Overall, I am satisfied with the way the Public Trustee manages my financial affairs	100% 137	81% 111	8% 11	11% 15

RP. Budget Statement (Nett)

Your budget is prepared with support from the Public Trustee to ensure you have enough money to pay your expenses and have regular spending money. The next statement is about your budget. Please tell me whether you agree or disagree with the following statement.

Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s11. I feel that my wishes were considered when my budget was created	100% 132	80% 106	8% 11	11% 15

RP. Communication Statements (Nett)

Again, thinking about your experiences over the past year, these next statements are about how the Public Trustee communicates with you. Please tell me whether you agree or disagree with the following statements. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s12. The Public Trustee's staff give me information in a way in which I can understand	100% 136	78% 106	9% 12	13% 18
s13. When I call the Public Trustee, the first person I talk to about my needs can usually help me	100% 129	78% 100	10% 13	12% 16
s14. If I ask about my finances, the Public Trustee gives me accurate information	100% 129	83% 107	5% 6	12% 16
s15. Overall, I am satisfied with the way the Public Trustee communicates with me	100% 137	82% 113	4% 6	13% 18

RP. Client Account Manager Statements (Nett)

Your client account manager, or CAM is the person who supports you to prepare your budget and works with you to make changes to your budget. They also make sure your financial entitlements (including pensions) are collected, your assets are protected, and your bills are paid.

These next statements are about your experience with your client account manager over the past year. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s16. My client account manager takes the time to listen to my needs when making plans for my financial future	100% 129	83% 107	6% 8	11% 14
s17. I believe my client account manager knows what they're doing	100% 128	89% 114	5% 6	6% 8
s18. My client account manager treats me with respect	100% 134	91% 122	1% 2	7% 10
s19. My client account manager is open and honest in their dealings with me	100% 128	90% 115	5% 7	5% 6
s20. Overall, I am satisfied with my client account manager	100% 131	88% 115	6% 8	6% 8

RP. Understanding Personal Situation Statements (Nett)

And now thinking about how the Public Trustee understands your personal situation, please tell me whether you agree or disagree with the following statements. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s22. If I am unhappy with the decisions made by the Public Trustee, I can talk to them about it	100% 133	85% 113	5% 7	10% 13
s23. Overall, I feel the Public Trustee staff understand my needs	100% 136	83% 113	6% 8	11% 15

RP. Accessibility Statements (Nett)

And now thinking about how accessible the Public Trustee is for you, please tell me whether you agree or disagree with the following statements . Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s24. The Public Trustee office is easy to get to	100% 116	75% 87	11% 13	14% 16
s25. The Public Trustee's opening hours suit me	100% 123	89% 109	9% 11	2% 3
s26. Overall, I find the Public Trustee to be accessible	100% 130	85% 111	8% 11	6% 8

RP. New Client Experience Statements (Nett)

These next statements are about when you first became a client of the Public Trustee. Please tell me whether you agree or disagree with the following statements. Recoded to nett positive, neutral, nett negative. (Asked of those who have become clients in the previous 12 months)

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s27. When I first became a client of the Public Trustee, the Public Trustee explained what was going to happen next	100% 16	69% 11	6% 1	25% 4
s28. The Public Trustee did their best to find out about my financial situation	100% 19	79% 15	11% 2	11% 2
s29. I feel comfortable talking with my Client Account Manager	100% 17	76% 13	12% 2	12% 2
s30. The Public Trustee reached out to me when I first became a client	100% 19	84% 16	11% 2	5% 1
s31. Overall, I was satisfied with the way the Public Trustee treated me when I first became a client	100% 19	84% 16	11% 2	5% 1

RP. Overall Satisfaction Statements (Nett)

And can you tell me whether you agree or disagree with the following statements about the Public Trustee. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s9. Overall, I am satisfied with the way the Public Trustee manages my financial affairs	100% 137	81% 111	8% 11	11% 15
s32. Overall, I am satisfied with the Public Trustee	100% 137	81% 111	7% 9	12% 17
s33. Things have improved since the Public Trustee has become involved in my financial affairs	100% 136	72% 98	13% 18	15% 20
s35. I feel supported by the Public Trustee to become financially independent	100% 130	82% 107	8% 10	10% 13

Support Network Satisfaction

Areas of Highest Satisfaction

From support network contacts, the statements with the highest levels of agreeance related to their personal relationship with the organisation:

- The Public Trustee's role has been made clear to me (s16 - 94%, 78% in 2023)
- I know who to contact for my queries (s17 - 92%, 72% in 2023).

See Table 'SN. Contact Relationship with Public Trustee Statements (Nett)' below.

When examining the client experience with the Public Trustee from the support contacts perspective, high levels of satisfaction were also indicated for:

- Overall way the staff treat client (s6 - 90%)
- Management of the clients financial affairs (s1 - 89%)
- Satisfaction with the clients client account manager (s3 - 89%).

Figures are relatively high across the board with the majority of statements receiving a 80%+ agreeance and have significantly improved from last years results.

See Table 'SN. Client Experience Statements (Nett)' below.

Most Significant Improvements

A significant level of improvement was also evident from the support network perspective, comparing baseline measures from 2023 data. The below statements stood out as those with overwhelming increases year on year, 2023 to 2024. These statements again related to the area of communication:

- s2. Overall, I'm satisfied with the way the Public Trustee communicates with [CLIENT] (84%, up from 63% in 2023)
- s3. Overall, I'm satisfied with [CLIENT] client account manager (89%, up from 60% in 2023)
- s15. The Public Trustee's staff provide explanations when they decline client requests (83%, up from 50% in 2023).

Areas of Lowest Satisfaction

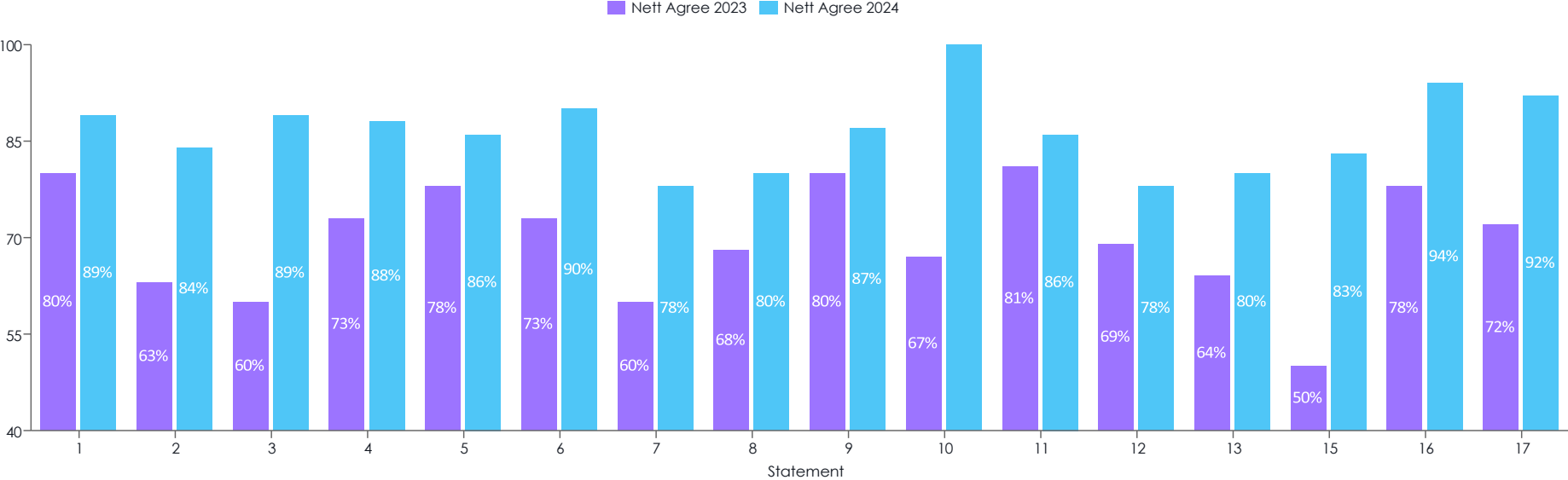
Support network contacts gave a lower overall rating for the recommendation of the organisation:

- I would recommend Public Trustee to others (s12 - 78%)
- If I knew someone who was not able to manage their own money, the Public Trustee would be my first choice (s13 - 80%).

See Table 'SN. Contact Relationship with Public Trustee Statements (Nett)' below.



Year on year tracking - all statements



SN. Client Experience Statements (Nett)

I am going to start by reading you some statements about different aspects of the Public Trustee and its service to

'Client Name' Thinking about your experience over the past 12 months, please tell me whether you agree or

disagree with the following statements. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s1. Overall, I'm satisfied with the way the Public Trustee supports ... with their financial affairs.	100% 65	89% 58	2% 1	9% 6
s2. Overall, I'm satisfied with the way the Public Trustee communicates with ...	100% 61	84% 51	5% 3	11% 7
s3. Overall, I'm satisfied with ...'s client account manager	100% 62	89% 55	5% 3	6% 4
s4. Overall, I feel that the Public Trustee understands ...'s financial needs	100% 66	88% 58	3% 2	9% 6
s5. Overall, I find the Public Trustee to be accessible for ...	100% 65	86% 56	6% 4	8% 5
s6. Overall, I'm satisfied with the way the staff at the Public Trustee treat ...	100% 61	90% 55	3% 2	7% 4
s7. Things have improved for ..., since the Public Trustee has become involved	100% 59	78% 46	12% 7	10% 6
s8. Overall, I'm satisfied with the support the Public Trustee provides to help ... become financially independent	100% 59	80% 47	8% 5	12% 7
s9. The Public Trustee acts in ...'s best interests	100% 67	87% 58	6% 4	7% 5
s11. Overall, I'm satisfied with the service provided to ... by the Public Trustee	100% 66	86% 57	6% 4	8% 5

SN. Budget Statement (Nett)

I am going to start by reading you some statements about different aspects of the Public Trustee and its service to

'Client Name' Thinking about your experience over the past 12 months, please tell me whether you agree or

disagree with the following statements. Recoded to nett positive, neutral, nett negative.

(Asked of those who have become clients in the previous 12 months)

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s10. Overall, I'm satisfied with the way the Public Trustee treated ... when they first became a client	100% 6	100% 6	0% 0	0% 0

SN. Contact Relationship with Public Trustee Statements (Nett)

Now, some more statements about the Public Trustee which are about your relationship with the organisation. Please tell me whether you agree or disagree

with each statement. Recoded to nett positive, neutral, nett negative.

	Total	Nett positive (4+5)	Neutral (3)	Nett negative (1+2)
s12. I would recommend the Public Trustee to others	100% 65	78% 51	9% 6	12% 8
s13. If I knew someone who was not able to manage their own money, the Public Trustee would be my first choice for them	100% 64	80% 51	8% 5	13% 8
s15. The Public Trustee's staff provide explanations when they decline client requests	100% 48	83% 40	13% 6	4% 2
s16. The Public Trustee's role has been made clear to me	100% 65	94% 61	3% 2	3% 2
s17. I know who to contact for my queries	100% 65	92% 60	3% 2	5% 3

Service Experience

Previous 12 Months

The majority of represented persons believe that the service of the Public Trustee has improved or stayed the same (89%) over the past year. This result is almost identical to the 2023 results (36% improved, 54% stayed the same) and is an encouraging result overall with only 11% of respondents feeling that service has deteriorated in the previous year.

Some differences were identified across locations:

- The perception of improved service was higher in the Hobart (41% improved) and Devonport (40% improved) locations.
- Launceston had lowest improvements noticed (21% improved), with the majority of respondents from this region (68%) claiming the service has stayed the same.

In terms of category of funds under management (10, 20, 30):

- Branch code 10 clients felt that service had improved (44%)
- Branch code 30 only reported 20% improvement (small sample size).

Support Network contacts identify 28% improvement in the Public Trustee's service over the past year, with 69% feeling the organisation has stayed the same. In contrast to the represented clients, support contacts claimed the highest level of improvement was in Devonport (33%), and for those under branch code 30 (37%) - small sample sizes.

See Tables RP 6. & SN 6a. below.

Key Themes

Survey participants were asked to specify why they felt the service they had received over the last 12 months had changed.

Common recurring themes, mentioned by both represented persons and support network contacts were:

- Improved communication and contact
- Better access to and more understanding from client account managers.

The 2023 report specified that both represented persons and their support contacts had proposed these as key areas for improvement, so this is a very positive outcome.

Among represented persons who feel the Public Trustee's service has improved over the last year, there were multiple mentions relating to:

- Improvements in communication/ contact ability (33% mention, compared with 58% in 2023)
- Advice regarding finances and budgeting (22% mention)
- A general feeling of improvement and that things were going well (22%).

See Table RP 6a. below.



RP 6. Previous 12 months

Over the past year, has the service you've received from the Public Trustee improved, stayed about the same or got worse?

	Branch Code - Region			Branch Code - Level			
	Total	Hobart	Launceston	Devonport	10	20	30
Improved	37% 51	41% 35	21% 6	40% 10	44% 26	39% 19	20% 6
Stayed the same	52% 72	48% 41	68% 19	48% 12	41% 24	59% 29	63% 19
Worse	11% 15	11% 9	11% 3	12% 3	15% 9	2% 1	17% 5

RP 6a. Why has Public Trustee's service improved?

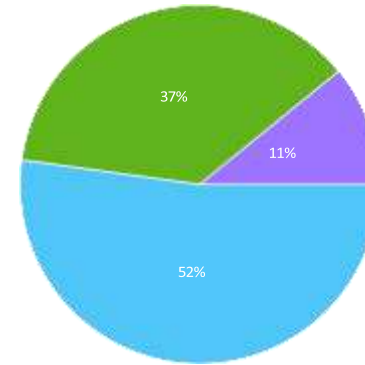
Over the past year, why has the service you've received from the Public Trustee improved? (Multiple responses allowed)

Key themes from open text responses.

	Responses
Contact/ communication/ CAM	33% 17
Advice about finances/ budgeting/ saving	22% 11
Generally better/ good/ improved	22% 11
Understanding needs/ easier/ advice/ helping/ listening	20% 10
Money - amount/ payments	16% 8
Total	100% 51

RP 6. Previous 12 months (total)

Worse Improved Stayed the same



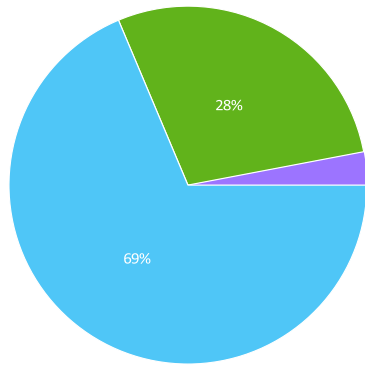
SN 6a. Previous 12 months

Over the past year, has the service you've received from the Public Trustee improved, stayed about the same or got worse?

	Branch Code - Region			Branch Code - Level			
	Total	Hobart	Launceston	Devonport	10	20	30
Improved	28% 19	25% 9	31% 5	33% 5	33% 3	23% 9	37% 7
Stayed the same	69% 46	72% 26	63% 10	67% 10	67% 6	72% 28	63% 12
Worse	3% 2	3% 1	6% 1	0% 0	0% 0	5% 2	0% 0

SN 6a. Previous 12 months (total)

Worse Improved Stayed the same



"Every time I call them they now pick up the phone or when I request a call back they do. They have improved their communication with me."

Represented Person.

"Yes they are having meetings with me and allowing me to save. Which is giving me more choices about what I can do."

Represented Person.

"Because my CAM is much better now. I have had a few but they haven't really understood me and the one I have now does."

Represented Person.

"Don't have to explain myself anymore and I've got into the routine of what the Public Trustee involves. Feel more comfortable with them.."

Represented Person.

"Immensely, it's like a different organisation."

Represented Person.

"I have been speaking to them quite often and they understand me a lot more. They sympathise with me too."

Represented Person.

"They are getting better for him, the communication has improved."

Support Network.

"Just because the staff that are now here, they have been working really closely with their clients and I can see they are applying best practice."

Support Network.

"If we require something for her they are very approachable and accessible."

Support Network.

Future Improvements

Represented Persons

Represented persons identified three key areas where they would like to see improvement:

- Communication and contact (12% mention, down from 23% in 2023)
- Amount of money given/ more timely payments (11%, down from 19% in 2023)
- Understanding of needs (9% mention, down from 13% in 2023).

Overall the identified areas of concern clients suggest improvement in are a much lower level than previous years.

Once again approximately a quarter (22%) (27% in 2023) of represented persons felt happy with the service that the Public Trustee provides and didn't identify an area for potential improvement.

See Table RP 7. below for a more extensive list of future improvements suggested.

Support Network

Support network contacts identified two key areas where they would like to see improvement:

- Understanding of client needs/ abilities (13% mention)
- Communication and contact (12% mention).

Pleasingly there was a decrease in the number of support network contacts raising these issues compared with 2023 measures.

Similarly, as with represented persons, these top two themes identified for improvement by support persons are consistent with those raised in previous surveys. The reduced need for improvements overall however may be evidence of measures that the Public Trustee have put into place over the past 12 months i.e. "Supported Decision Framework", and continues to provide useful grounds for continuing quality improvement activities.

Overall, 24% of support network respondents felt happy with the service that the Public Trustee provides and didn't identify an area of improvement.

See Table SN 7a. below.



RP 7. Future improvements

How could the Public Trustee improve its service to you? (Multiple responses allowed)

Key themes from open text responses.

	Responses
No comment/ unsure	37% 51
No improvements needed/ happy with service	22% 30
Contact/ communication/ transparency	12% 17
Additional money/ payments	11% 15
Understanding my needs/ empathy/ respect	9% 12
Independence/ assist with autonomy	6% 9
Financial information/ statements	4% 6
Generally need to improve/ everything	4% 5
Access/ more staff	2% 3
Total	100% 139

SN 7a. Future improvements

How could the Public Trustee improve its service to you and 'client'? (Multiple responses allowed)

Key themes from open text responses.

	Responses
No comment/ unsure	43% 29
No improvements needed/ happy with service	24% 16
Understanding clients needs/ abilities	13% 9
Communication/ contact	12% 8
Fees	6% 4
Finances/ statements	3% 2
Change in CAMs/ staff	3% 2
Payments/ bills	3% 2
Visits to clients/ meetings/ access to CAM	3% 2
Other	3% 2
Total	100% 67

"Keep in contact more often, preferably on the phone. Send me statements about my money."

Represented Person.

"Be more open - more transparent with information. When you ask for something they go around in circles."

Represented Person.

"Give me more money and make my budget more. Once a month let me do it by myself and wean me off the Public Trustee."

Represented Person.

"That initial contact needs to be smoother having appropriateness of who they are contacting and their disabilities."

Support Network.

"I expect care from Public Trustee, the client's life depends on the money and the service we get through the PT. This needs to be of a high standard and consistent to build trust for the client with PT into the future."

Support Network.

"Keep communication open and work out a plan that hits all of her goals, communication drops when there are staff changes."

Support Network.

RP. Management of Financial Situation Statements

I am going to start by reading you some statements about how the Public Trustee manages your financial situation.

Thinking about your experience over the past 12 months, please tell me whether you agree or disagree with the

following statements. On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor

disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s1. My money is safe with the Public Trustee	100% 139	35% 48	48% 67	5% 7	5% 7	5% 7	2% 3
s2. I am confident that the Public Trustee will support me to pay my bills on time	100% 139	26% 36	59% 82	6% 9	4% 6	1% 2	3% 4
s3. I am confident my bills are paid correctly	100% 139	24% 34	62% 86	5% 7	4% 6	1% 1	4% 5
s4. I receive my regular spending money when I expect it	100% 139	25% 35	57% 79	7% 10	7% 10	1% 1	3% 4
s5. The Public Trustee gives me as much spending money as I can afford	100% 139	19% 26	51% 71	7% 10	15% 21	1% 2	6% 9
s6. I know how to request extra money	100% 139	21% 29	65% 90	1% 2	9% 12	1% 1	4% 5
s7. I know the Public Trustee will protect my legal rights	100% 139	19% 27	63% 88	5% 7	5% 7	1% 1	6% 9
s8. I understand what the Public Trustee does for me	100% 139	18% 25	74% 103	4% 6	3% 4	0% 0	1% 1
s9. Overall, I am satisfied with the way the Public Trustee manages my financial affairs	100% 139	17% 24	63% 87	8% 11	6% 8	5% 7	1% 2

RP. Budget Statement

Your budget is prepared with support from the Public Trustee to ensure you have enough money to pay your expenses and have regular spending money. The next statement is about your budget. Please tell me whether you agree or disagree with the following statement.

On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s11. I feel that my wishes were considered when my budget was created	100% 139	17% 23	60% 83	8% 11	10% 14	1% 1	5% 7

RP. Communication Statements

Again, thinking about your experiences over the past year, these next statements are about how the Public Trustee communicates with you. Please tell me whether you agree or disagree with the following statements. On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s12. The Public Trustee's staff give me information in a way in which I can understand	100% 139	18% 25	58% 81	9% 12	12% 16	1% 2	2% 3
s13. When I call the Public Trustee, the first person I talk to about my needs can usually help me	100% 139	16% 22	56% 78	9% 13	12% 16	0% 0	7% 10
s14. If I ask about my finances, the Public Trustee gives me accurate information	100% 139	19% 27	58% 80	4% 6	9% 13	2% 3	7% 10
s15. Overall, I am satisfied with the way the Public Trustee communicates with me	100% 139	19% 27	62% 86	4% 6	10% 14	3% 4	1% 2

RP. Client Account Manager Statements

Your client account manager, or CAM is the person who supports you to prepare your budget and works with you to make changes to your budget. They also make sure your financial entitlements (including pensions) are collected, your assets are protected, and your bills are paid.

These next statements are about your experience with your client account manager over the past year.

On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s16. My client account manager takes the time to listen to my needs when making plans for my financial future	100% 139	22% 31	55% 76	6% 8	7% 10	3% 4	7% 10
s17. I believe my client account manager knows what they're doing	100% 139	24% 34	58% 80	4% 6	6% 8	0% 0	8% 11
s18. My client account manager treats me with respect	100% 139	27% 38	60% 84	1% 2	5% 7	2% 3	4% 5
s19. My client account manager is open and honest in their dealings with me	100% 139	22% 30	61% 85	5% 7	4% 5	1% 1	8% 11
s20. Overall, I am satisfied with my client account manager	100% 139	31% 43	52% 72	6% 8	4% 5	2% 3	6% 8

RP. Understanding Personal Situation Statements

And now thinking about how the Public Trustee understands your personal situation, please tell me whether you agree or disagree with

the following statements. On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s22. If I am unhappy with the decisions made by the Public Trustee, I can talk to them about it	100% 139	17% 24	64% 89	5% 7	6% 9	3% 4	4% 6
s23. Overall, I feel the Public Trustee staff understand my needs	100% 139	12% 17	69% 96	6% 8	9% 12	2% 3	2% 3

RP. Accessibility Statements

And now thinking about how accessible the Public Trustee is for you, please tell me whether you agree or disagree with the following statements . On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s24. The Public Trustee office is easy to get to	100% 139	13% 18	50% 69	9% 13	10% 14	1% 2	17% 23
s25. The Public Trustee's opening hours suit me	100% 139	12% 17	66% 92	8% 11	2% 3	0% 0	12% 16
s26. Overall, I find the Public Trustee to be accessible	100% 138	12% 17	68% 94	8% 11	4% 5	2% 3	6% 8

RP. New Client Experience Statements

These next statements are about when you first became a client of the Public Trustee. Please tell me whether you agree or disagree with the following statements.

On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree) (Asked of those who have become clients in the previous 12 months)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s27. When I first became a client of the Public Trustee, the Public Trustee explained what was going to happen next	100% 19	26% 5	32% 6	5% 1	21% 4	0% 0	16% 3
s28. The Public Trustee did their best to find out about my financial situation	100% 19	11% 2	68% 13	11% 2	11% 2	0% 0	0% 0
s29. I feel comfortable talking with my Client Account Manager	100% 19	26% 5	42% 8	11% 2	11% 2	0% 0	11% 2
s30. The Public Trustee reached out to me when I first became a client	100% 19	16% 3	68% 13	11% 2	5% 1	0% 0	0% 0
s31. Overall, I was satisfied with the way the Public Trustee treated me when I first became a client	100% 19	26% 5	58% 11	11% 2	5% 1	0% 0	0% 0

RP. Overall Satisfaction Statements

And can you tell me whether you agree or disagree with the following statements about the Public Trustee. On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s32. Overall, I am satisfied with the Public Trustee	100% 138	22% 31	58% 80	7% 9	9% 12	4% 5	1% 1
s33. Things have improved since the Public Trustee has become involved in my financial affairs	100% 138	15% 21	56% 77	13% 18	10% 14	4% 6	1% 2
s35. I feel supported by the Public Trustee to become financially independent	100% 138	13% 18	64% 89	7% 10	6% 8	4% 5	6% 8

RP 4a. Contact for help

If you have a concern about the Public Trustee, do you know who to contact for help?

	Branch Code - Region				Branch Code - Level		
	Total	Hobart	Launceston	Devonport	10	20	30
Yes	66% 92	66% 56	66% 19	68% 17	61% 36	72% 36	67% 20
No	34% 47	34% 29	34% 10	32% 8	39% 23	28% 14	33% 10

RP 6. Public Trustee's service

Over the past year, has the service you've received from the Public Trustee improved, stayed about the same or got worse?

	Branch Code - Region				Branch Code - Level		
	Total	Hobart	Launceston	Devonport	10	20	30
Improved	37% 51	41% 35	21% 6	40% 10	44% 26	39% 19	20% 6
Stayed the same	52% 72	48% 41	68% 19	48% 12	41% 24	59% 29	63% 19
Worse	11% 15	11% 9	11% 3	12% 3	15% 9	2% 1	17% 5

RP 6a. Why has Public Trustee's service improved?

Over the past year, why has the service you've received from the Public Trustee improved?
(Multiple responses allowed)

Key themes from open text responses.

	Responses
Contact/ communication/ CAM	33% 17
Advice about finances/ budgeting/ saving	22% 11
Generally better/ good/ improved	22% 11
Understanding needs/ easier/ advice/ helping/ listening	20% 10
Money - amount/ payments	16% 8
Total	100% 51

RP 7. Future improvements

How could the Public Trustee improve its service to you? (Multiple responses allowed)

Key themes from open text responses.

	Responses
No comment/ unsure	37% 51
No improvements needed/ happy with service	22% 30
Contact/ communication/ transparency	12% 17
Additional money/ payments	11% 15
Understanding my needs/ empathy/ respect	9% 12
Independence/ assist with autonomy	6% 9
Financial information/ statements	4% 6
Generally need to improve/ everything	4% 5
Access/ more staff	2% 3
Total	100% 139

SN. Client Experience Statements

I am going to start by reading you some statements about different aspects of the Public Trustee and its service to 'Client Name'. Thinking about your experience over the past 12 months, please tell me whether you agree or disagree with the following statements. On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s1. Overall, I'm satisfied with the way the Public Trustee supports ... with their financial affairs.	100% 67	34% 23	52% 35	1% 1	4% 3	4% 3	3% 2
s2. Overall, I'm satisfied with the way the Public Trustee communicates with ...	100% 67	25% 17	51% 34	4% 3	6% 4	4% 3	9% 6
s3. Overall, I'm satisfied with ...'s client account manager	100% 67	28% 19	54% 36	4% 3	3% 2	3% 2	7% 5
s4. Overall, I feel that the Public Trustee understands ...'s financial needs	100% 67	25% 17	61% 41	3% 2	3% 2	6% 4	1% 1
s5. Overall, I find the Public Trustee to be accessible for ...	100% 67	22% 15	61% 41	6% 4	4% 3	3% 2	3% 2
s6. Overall, I'm satisfied with the way the staff at the Public Trustee treat ...	100% 67	33% 22	49% 33	3% 2	3% 2	3% 2	9% 6
s7. Things have improved for ..., since the Public Trustee has become involved	100% 67	21% 14	48% 32	10% 7	4% 3	4% 3	12% 8
s8. Overall, I'm satisfied with the support the Public Trustee provides to help ... become financially independent	100% 67	22% 15	48% 32	7% 5	6% 4	4% 3	12% 8
s9. The Public Trustee acts in ...'s best interests	100% 67	31% 21	55% 37	6% 4	4% 3	3% 2	0% 0
s11. Overall, I'm satisfied with the service provided to ... by the Public Trustee	100% 67	28% 19	57% 38	6% 4	3% 2	4% 3	1% 1

SN. Budget Statement

I am going to start by reading you some statements about different aspects of the Public Trustee and its service to 'Client Name' Thinking about your experience over the past 12 months, please tell me whether you agree or disagree with the following statements. On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

(Asked of those who have become clients in the previous 12 months)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s10. Overall, I'm satisfied with the way the Public Trustee treated ... when they first became a client	100% 7	43% 3	43% 3	0% 0	0% 0	0% 0	14% 1

SN. Relationship with Public Trustee Statements

Now, some more statements about the Public Trustee which are about your relationship with the organisation. Please tell me whether you agree or

disagree with each statement. On a scale where 5 = Strongly Agree, 1 = Strongly Disagree (3 = neither agree nor disagree)

	Total	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	DK/NA
s12. I would recommend the Public Trustee to others	100% 67	22% 15	54% 36	9% 6	7% 5	4% 3	3% 2
s13. If I knew someone who was not able to manage their own money, the Public Trustee would be my first choice for them	100% 67	21% 14	55% 37	7% 5	6% 4	6% 4	4% 3
s15. The Public Trustee's staff provide explanations when they decline client requests	100% 67	10% 7	49% 33	9% 6	1% 1	1% 1	28% 19
s16. The Public Trustee's role has been made clear to me	100% 67	21% 14	70% 47	3% 2	3% 2	0% 0	3% 2
s17. I know who to contact for my queries	100% 67	19% 13	70% 47	3% 2	4% 3	0% 0	3% 2

SN 6a. Public Trustee's service

Over the past year, has the service you've received from the Public Trustee improved, stayed about the same or got worse?

	Branch Code - Region				Branch Code - Level		
	Total	Hobart	Launceston	Devonport	10	20	30
Improved	28% 19	25% 9	31% 5	33% 5	33% 3	23% 9	37% 7
Stayed the same	69% 46	72% 26	63% 10	67% 10	67% 6	72% 28	63% 12
Worse	3% 2	3% 1	6% 1	0% 0	0% 0	5% 2	0% 0

SN 7a. Future improvements

How could the Public Trustee improve its service to you and 'client'? (Multiple responses allowed) Key themes from open text responses.

	Responses
No comment/ unsure	43% 29
No improvements needed/ happy with service	24% 16
Understanding clients needs/ abilities	13% 9
Communication/ contact	12% 8
Fees	6% 4
Finances/ statements	3% 2
Change in CAMs/ staff	3% 2
Payments/ bills	3% 2
Visits to clients/ meetings/ access to CAM	3% 2
Other	3% 2
Total	100% 67