

Strategic Plan 2026 - 2029

OUR PURPOSE

We exist to support the estate wishes and financial interests of the South Australians we serve.




OUR VISION

To be a trusted and respected financial and estate professional organisation that is flexible, responsive, and empathetic.

OUR VALUES

Service | Professionalism | Trust | Respect | Collaboration and Engagement | Honest and Integrity |
Courage and Tenacity | Sustainability

Strategic Priorities 2026 - 2029

	STRATEGIES	ACTIONS
 <p>Our Customers – We promote a culture of responsiveness and resolution which shows empathy and respect</p>	<ul style="list-style-type: none"> • Understand our customers and their needs • Ensure customers can easily communicate with us • Advocate for policy and process changes that impact on our customers • Improve customer communications including timeliness 	<ul style="list-style-type: none"> • Standardise and simplify documents that are used to communicate with our customers • Implement a proactive communication program with customers regarding deceased estate case management • Streamline workflows and review service delivery • Collaborate with external agencies and organisations for positive customer outcomes • Provide advice on the implications of the Disability Royal Commission recommendations • Manage the financial implications to customers of Commonwealth Aged Care Reforms
 <p>Our People – We support the development and wellbeing of our valued staff</p>	<ul style="list-style-type: none"> • Support a positive culture for the health and wellbeing of our people • Invest in the skills of our staff and develop leadership capability and capacity • Foster and enable resilient and high performing teams • Ensure our HR function is able to support the business • Provide a safe, inclusive and respectful workplace • Ensure we have people with the right skills to respond to the organisation's current and emerging needs 	<ul style="list-style-type: none"> • Build the capability of the PT Human Resources group consistent with the AGD HR service delivery model • Develop an annual learning and development (training) program and publish it to all staff • Improve management of psychosocial risks • Improve our recruitment techniques to attract resilient and skilled candidates • Implement improvements within the Financial Administration Branch that have been agreed with PSA members • Monitor and manage workloads aligned to agreed targets • Implement a team building program • Build our people management capability through leadership develop programs • Performance expectations are clearly established through regular “one on one” discussions, team and branch meetings and performance development discussions
 <p>Our Business – We improve our business processes and systems and drive performance whilst effectively managing risk</p>	<ul style="list-style-type: none"> • Mature our new core business systems and streamline our processes to improve efficiency and customer service • Meet performance standards agreed with the government and collaborate with other government agencies • Utilise AGD and other government agencies where they are able to improve services that support the business • Continuous governance and risk management 	<ul style="list-style-type: none"> • Improve the efficiency of customer accounts payable and receivable processes • Improve the quality and availability of business information for decision making and performance management • Improve the functionality of the Connect CRM system and Transact financial systems • Consider the use of artificial intelligence to assist with documenting telephone conversations with customers • Modernise and upgrade peripheral ICT systems • Gain State Records accreditation for customer records • Consider further opportunities to take advantage of the expertise and scale of AGD ICT and Shared Services SA • Identify and manage emerging risks such as changes to AUSTRAC financial compliance laws • Digitise files and reduce hard copy storage