**State Trustees Ltd.**

**Disability Action Plan**

**2009 - 2012**

**Message from the Managing Director**

It is with great pleasure that I present the State Trustees Disability Action Plan as an important part of our organisational commitment to the Disability Act 2006.

For more than seventy years, State Trustees has worked closely with its clients, employees and advocacy groups within the disability and community service sector. Our organisation plays a critical role in ensuring that the most vulnerable Victorians are protected from a financial and legal perspective, whilst also providing professional level support where required. Due to the nature of our business and the unique set of organisational values upon which it is based, State Trustees takes an active interest in ensuring inclusion for those Victorians living with a disability.

This action plan is our contribution towards the broader Government initiative aimed at improving opportunities for people with a disability. The plan outlines the steps that State Trustees will take, and have already taken to facilitate the inclusion of those living with a disability. It is intended to be a living, breathing document that will evolve with our business and in light of the changing needs of the disability community.

A number of existing corporate initiates have formed the foundation for this plan, including the State Trustees Community Grants Program that serves to provide funding to many grass-roots organisations working within the disability sector. Further, our annual Connected art exhibition provides a wonderful opportunity for new and emerging artists living with a disability to showcase their work and connect to their communities. These are only some of the ways in which State Trustees is working to improve the opportunities for people living with a disability.

I look forward to the implementation of the State Trustees Disability Action Plan over the coming years and the realisation of the objectives contained therein.

Tony Fitzgerald

Managing Director

**About State Trustees**

State Trustees has been operating since 1939, when it was originally established as the Public Trust Office of Victoria. State Trustees became a State Owned Company on 1 July, 1994 under the State Trustees (State Owned Company) Act 1994. It was the first Government Business Enterprise (GBE) in Victoria to gain full company status.

The switch to company status was part of the Government's GBE reform program to deliver long-term public and community benefits. The objective of the program was to make State owned enterprises more efficient by exposing them to competition from the private sector. State Trustees has responded to the challenge of competition and since July 1994, it has evolved from a public service organisation acting as the Public Trustee, to a competitive, efficient organisation operating on an even footing with the private sector.

State Trustees' core purpose is to help people with their financial needs so that they can make the most of their opportunities. This is achieved through the provision of a comprehensive range of estate planning, trustee, executor, and personal financial administration [products and services](http://www.statetrustees.com.au/index.cfm?pageID=75&pageREF=70&). As a community service provider, we manage the financial affairs of more than 9000 Victorians who are unable to undertake this task themselves due to disability, injury or mental illness.  Through this work, together with our commercial activities, State Trustees has built a diverse and extensive depth of experience that enables us to deliver the best possible service to our clients with sensitivity, patience and understanding.

**The State Trustees Disability Action Plan**

The development of the State Trustees Disability Action Plan is in compliance to the Disability Act 2006. The Act requires that all government departments, statutory authorities and statutory corporations develop their own Disability Action Plans that satisfy the following goals:

* Reducing barriers to people with a disability accessing goods, services and facilities
* Reducing barriers to people with a disability obtaining and maintaining employment with State Trustees
* The promotion of inclusion and participation in the community of people with a disability and
* Achieving tangible changes in attitudes and practices which discriminate against people with a disability.

On 1 April 2009, State Trustees announced that it would be moving closer to its customers by opening service centres across suburban Melbourne and increasing the organisational presence in regional Victoria. This will see State Trustees move its business into new premises across a number of different locations. In terms of the Disability Action Plan, this will present a unique opportunity to achieve the above goals through the design and fit-out of new premises. In light of this, the plan is expected to realise its goals over the course of the next three years.

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## Development of the Plan

The State Trustees Disability Action Plan has been developed through internal consultation and review as well as input from industry experts. This has included:

* The establishment of the Disability Action Plan working group with broad representation across business areas within State Trustees. The working group consists of employees living with a disability, or those with experience or an interest in the sector
* Consultation with the People & Culture team within State Trustees
* Consultation with the Facilities Management team within State Trustees
* Consultation with the State Trustees Executive Team and
* Endorsement of the Disability Action Plan by the State Trustees Risk Committee of Management Team.

## Implementation, monitoring and review

The People & Culture division of State Trustees is responsible for the implementation and ongoing review of the Disability Action Plan. The business itself, however, will be responsible for the operationalisation of the plan and ensuring that is entrenched within the culture of the organisation. The Disability Action Plan will be promoted into the business by the People & Culture team, with assistance from the Disability Action Plan Working group.

People & Culture will monitor the implementation of the plan annually as part of its usual planning processes. Progress reporting will be provided to the Executive team and will also be presented in the State Trustees Annual Report.

In June 2012, State Trustees will formally review and evaluate the effectiveness of the Disability Action Plan over the course of the previous three years. The results of this review will facilitate the development of future action plans.

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# Implementation Plan 2009–2012

**Goal: Reducing barriers to people with a disability accessing goods, services and facilities.**

| **Objective** | **Action** | **Key Performance Indicator** | **Completed By** | **Responsibility** |
| --- | --- | --- | --- | --- |
| To ensure that new State Trustees premises promote accessibility for people living with a disability. | Disability Action Plan Working Group and People & Culture to be involved in building and facility design process to ensure inclusion and accessibility. | All State Trustees premises are compliant with current Australian Standards and relevant Building Codes. | June 2012  (some premises will be available prior to 2012) | DAP Working Group  General Manager, People & Culture  Manager, Facilities Management |
| To ensure that information sources in relation to the provision of goods and services, are easily available to people living with a disability. | Review website and the provision of information electronically. Review brochures and other promotional material with a view to providing a multi format offering. | Information regarding core products and services available in multiple formats – both via the internet and in hard copy. | June 2010 | General Manager, People & Culture  General Manager, Corporate Relations & Marketing |
| To ensure a broad range of communication options are available to people who visit State Trustees in person. | Display a communication picture and alphabet board at reception, and at various other points throughout all sites. Provide guidelines in “Easy English” to reception staff. | Communication boards in place and being used.  Easy English in place and being used. | November 2009 | Manager, Facilities Management |
| To ensure that State Trustees is as aware as it can possibly be, of any disability or special needs of its’ clients or customers. | Research and introduce a protocol within the initialisation process with new clients that seek information regarding any existing disability, or special need. | New step introduced into the initialisation process across all areas. | July 2010 | General Manager, People & Culture.  Senior Management Group. |
| To remove barriers to access within the existing buildings of State Trustees. | Ramps to be installed in all areas requiring significant access. Tactile indicators installed in floors. Audio and Braille functionality to be installed in elevators. | Initiatives in place. | May 2009  (complete). | Manager, Facilities Management |

**Goal: Reducing barriers to people with a disability obtaining and maintaining employment with State Trustees.**

| **Objective** | **Action** | **Key Performance Indicator** | **Completed By** | **Responsibility** |
| --- | --- | --- | --- | --- |
| To ensure that State Trustees adheres to robust recruitment processes that do not exclude or discriminate. | Review existing recruitment processes to ensure equity for all candidates. Ensure that all managers involved in recruitment are trained appropriately with regards to recruitment and EEO. Ensure all recruitment agencies enlisted by State Trustees have a disability recruitment policy. | The absence of formal or informal complaints regarding discrimination as part of the recruitment process. An increase in the number of disability candidates employed by State Trustees. | May 2009  (complete)  To be continually monitored. | General Manager, People & Culture  Senior Management Group  Recruitment Manager |
| To ensure that employees living with a disability feel supported whilst at work | Introduce Workplace Contact Officers across the organisation. The Workplace Contact Officers to be trained by the Victorian Equal Opportunity Commission in the prevention of harassment and discrimination in the workplace. | Workplace Contact Officers in place. | June 2009  (complete) | General Manager, People & Culture |
| To ensure that employees living with a disability feel supported whilst at work | Introduce Peer Support Officers across the organisation. Peer Support Officers to be trained in the provision of first level psychological support for those employees experiencing difficulties at work or in their personal lives. | Peer Support Officers in place. | June 2009  (complete) | General Manager, People & Culture |
| To ensure that State Trustees actively promotes itself as an equal opportunity employer. | Advertise equal opportunity employer status as part of recruitment process. | Increase the number of disability candidates applying to roles that are advertised by State Trustees. | May 2009  (complete) | General Manager, People & Culture  Recruitment Manager |
| Review of induction and training processes to ensure they are inclusive of and responsive to the needs of people with a disability. | Feedback forms on training will include responses relevant to the extent to which the training was inclusive of, and responsive to, the needs of people with a disability. | Positive feedback regarding inclusion as part of training and induction. | December 2009 | General Manager, People & Culture |
| To ensure that State Trustees maximises the opportunities for disability candidates to be employed | Work with current recruitment suppliers to ensure that opportunities for disability candidates are actively promoted. | Increase the number of disability candidates applying to roles that are advertised by State Trustees. | November 2009 | General Manager, People & Culture  Recruitment Manager |

**Goal: The promotion of inclusion and participation in the community of people with a disability**

| **Objective** | **Action** | **Key Performance Indicator** | **Completed By** | **Responsibility** |
| --- | --- | --- | --- | --- |
| To ensure that State Trustees adopts practical and realistic strategies to promote inclusion within the community. | Facilitate regular meetings of the DAP Working Group to continually review and consider State Trustees work in this area. The Working Group to provide advice and input to the business on how to further promote inclusion in the community. | Initiatives and improvements are undertaken and implemented. | June 2012  To be continually monitored. | General Manager, People & Culture  DAP Working Group |
| Actively explore new ways to promote inclusion within the community through strategic partnerships and positional influence. | Actively partner with disability sector agencies and service providers to implement initiates designed to promote inclusion. | Effective programs implemented. Positive feedback received. | June 2012  To be continually monitored. | General Manager, People & Culture  DAP Working Group |
| Continue to promote and develop existing programs. | Look for ways to broaden the exposure of programs like the Grants Program and Connected. | Greater exposure and involvement. | June 2012  To be continually monitored. | General Manager, People & Culture  DAP Working Group |
| Broaden the relationships that State Trustees has with its’ stakeholders to further promote inclusion. | Establish strategic and mutually beneficial relationships with disability sector agencies and other government departments that promote inclusion within the community. | Relationships established and maintained. | June 2012  To be continually monitored. | General Manager, People & Culture  Manager, Stakeholder Relations |
| Promote and support the achievements of State Trustees employees living with a disability. | Work closely with self-identified employees living with a disability to support their achievements within the broader community. | Greater involvement in and communication of the achievements of employees living with a disability. | June 2012  To be continually monitored. | General Manager, People & Culture  DAP Working Group  Corporate Relations & Marketing Team |

**Goal: Achieving tangible changes in attitudes and practices which discriminate against people with a disability**

| **Objective** | **Action** | **Key Performance Indicator** | **Completed By** | **Responsibility** |
| --- | --- | --- | --- | --- |
| To ensure that State Trustees managers and employees are aware of their obligations under anti-discrimination legislation, as well as according to the policies and values of the organisation. | Ensure that all employees undergo relevant training which includes timely refresher programs. Provide regular reporting to the executive team regarding training compliance. | Training in place and operational. Non-compliance minimized. | December 2008  (complete)  To be continually monitored. | General Manager, People & Culture  Manager, Compliance & Risk Management |
| To ensure that State Trustees adopts practical and realistic strategies to change attitudes and practises. | Facilitate regular meetings of the DAP Working Group to continually review and consider State Trustees work in this area. The Working Group to provide advice and input to the business on how to change attitudes and practise at work and in the community. | Initiatives and improvements are undertaken and implemented. | June 2012  To be continually monitored. | General Manager, People & Culture  DAP Working Group |

**Further Information**

Copies of this Disability Action Plan are available at:

[www.statetrustees.com.au](http://www.statetrustees.com.au)

You can also request copies of the Disability Action in alternative formats by contacting the People & Culture Team on (03) 9667 6444.