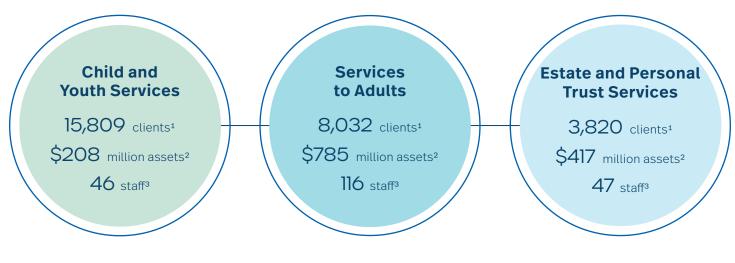


# Year in review

2022/2023 Annual Report



Client counts reflect the number of individual clients served throughout the year.
2 Total value of assets under administration (at March 31, 2023).

3 Full time equivalent employee positions.

### **Performance results**

- Reviewed and initiated action on 98% of critical incident reports (1,557) received directly from MCFD and ICFSAs within 30 calendar days of receiving the report
- Reviewed 97% of the proposed minors' settlement cases (233) and advised the parties of the PGT position within 60 calendar days of all relevant information being received
- child and youth trust accounts (**1,630**) within **30** calendar days of request

• Disbursed 97% of client/guardian requests for funds from

- Developed and implemented **92%** of personalized case plans for new adults **(209)** within 6 months of PGT being appointed committee of estate
- Reviewed 76% of submitted private committee accounts (387) within 6 months of receipt
- Visited 100% of PGT committee of person clients (119)
- Disbursed **96%** of adult trust client fund requests (**37,240**) within **30** calendar days of request
- Made 98% of major health care decisions as temporary substitute decision maker (TSDM) for incapable adults (126) under the Health Care (Consent) and Care Facility (Admission) Act, within 3 business days
- Took protective measures for 100% of abused, neglected and self-neglecting incapable adult cases (111) under the Public Guardian and Trustee Act within one business day of confirming the risk
- Transferred 95% of administered estate entitlements (\$27,743,849) to intestate successors and beneficiaries rather than transferring to the BC Unclaimed Property Society
- Received rating of good or very good from 95% of intestate successors and beneficiaries that responded to the survey (176)
- Secured and recorded **99%** of client inventory reports (**593**) within 5 business days of receiving work order

## Rights, choices and security for British Columbians



- 1 The number of individual clients served by both the division and by major business lines throughout the year. Because of this, the divisional total is typically less than the sum of the business lines as clients may require service in more than one business line.
- 2 Total value of assets under administration (at March 31, 2023).
- 3 Full time equivalent employee positions.
- 4 Figure reflects the count or amount of particular activity across the year.
- 5 This survey is conducted every 2 years by BC Stats with the next survey expected in 2024.

### **Notable activities**

- Acted on approximately 4,100 legal issues
- Responded to 49 requests for information for production of records
- Investigated clients' eligibility for settlement payments in 10 class actions and filed claims where appropriate. The PGT continues to monitor 41 class actions and/or potential class actions on behalf of clients
- Refreshed the PGT's values to remain aligned with the needs and expectations of the people served by the PGT
- Worked with Indigenous Governing Bodies (IGB) and partner agencies on Bill 38, Indigenous Self-Government in Child and Family Services Amendment Act. The PGT strongly supports services delivered by Indigenous People for Indigenous children and youth

#### Key figures

Exceeded established investment return benchmarks	
Premium Money Market Fund	(+0.42%)
Balanced Income Fund	(+0.20%)
Balanced Growth Fund	(+0.15%)
Assets under administration	
Client funds invested	\$1 billion
Client real property administered	\$319 million
Other	\$59 million
Business indicators	
Client bills paid <sup>4</sup>	\$214 million
Client receipts processed <sup>4</sup>	\$269 million
Other	
Clients with trust accounts (at March 31, 2023)	14,946
Work Environment Survey Engagement Score <sup>5</sup>	76

- Completed an organizational review of the PGT's estate administration services, where demand is steadily rising
- Continued work to redesign the PGT website and offer new online services
- 97% of existing PGT staff completed at least 10 hours of client service related learning
- Made 86 public presentations to promote better understanding of the PGT's role and services
- Prepared discussion paper on the differences between personal and property guardianship roles within B.C.'s child protection system and why it matters



www.trustee.bc.ca View the full report <u>here</u>