

37. In making provision for the staffing of the Office the requirements of the future are not being lost sight of, and promising juniors are put through a specialized course of training in Office practice and methods. The training-class at Christchurch, which has been dealt with at length in past reports, was continued during the year on the same lines as hitherto. The results have been very gratifying, and show that the class is serving a very useful purpose in training and developing promising junior officers and qualifying them to undertake the exacting duties which they will be called upon to perform.

At all times the staff is encouraged to become acquainted with matters of importance in the administration of estates and the other classes of work undertaken by the Public Trustee.

RECORDS.

38. I have already made reference to the endeavour which is constantly being made to simplify and standardize, where possible, methods and procedure in the Office work. With the rapidly expanding business and the increase in responsibilities, it is recognized that on the grounds of expedition and efficiency, as well as under the irresistible urge of economy, the Office must seek to co-ordinate the various divisions and branches, and scrap wasteful and inadequate machinery and methods. Even in trusteeship, where the procedure and methods, at least in their legal aspect, have long been well known and clearly defined, in the actual handling of a large volume of business a trust concern cannot afford to remain static or hidebound, and, as a rule of rote, cling too tenaciously to more or less useless traditions and archaic forms which have largely survived their serviceability. It must survey its systems and see whether the experience which it is continually gathering in its large turnover does not suggest instances where it might advantageously alter or fashion anew its methods and routine, so that, whilst the duties and responsibilities of a fiduciary are scrupulously fulfilled, the transaction of the business will be facilitated and the running-expenses curtailed.

In accordance with this policy of simplification and standardization, considerable attention has been devoted to the record system, which, when efficient, contributes no small part to the successful organization of a large concern, and may be said to be the pivot in the office routine. It is essential that the records relative to estates, loans, and the multitudinous other matters handled by this institution should be correct, straightforward, and of ready access. To facilitate the recording at the larger offices, where the volume of correspondence is heavy, there are special record sections, but at the smaller branches the record duties are carried out by officers who are partly engaged on other work.

39. The departmental record system aims at simplicity, so far as is consistent with safety and accuracy, and has been favourably commented on by numbers of outside persons who have come into contact with it. A separate file is kept for each estate or other matter, and to this all correspondence relative to the particular estate or transaction is attached. In estates with numerous assets or matters involving a considerable amount of correspondence appropriate sub-files are made. This facilitates the handling of such a matter, for it obviates the perusal of a voluminous mass of papers which have no reference to the transaction under consideration.

The record index for estates and loans is an alphabetical card one. There is a card for each estate or Common Fund mortgage, both current and closed, thus providing a reliable and easily accessible record. The filing of the records is of the simplest possible nature. The files are classified—

- (a) "Estates," which include deceased persons' estates, trusts and benefit funds, sinking funds, &c.; filed alphabetically.
- (b) "Mortgages," comprising the papers relating to the Common Fund mortgage investments; filed alphabetically.
- (c) "Miscellaneous" or "General," being in the main the papers relating to the internal management and organization of the Office. These papers are filed under numerical systems, and a special index is kept to facilitate reference to them.