

## **DRAFT**

### **VALUATION OFFICE**

#### **STATEMENT OF STRATEGY January 2009 - December 2011**

##### **Mandate**

The core business of the Valuation Office is the maintenance of equitable Valuation Lists through the provision of accurate, up-to-date valuations of commercial and industrial properties to ratepayers and rating authorities as laid down by statute. The Office also provides, where possible, a non-statutory valuation consultancy service to other Government Departments and State Agencies

##### **Mission Statement**

Our mission is to deliver a high-quality, impartial, valuation service to our customers, at a competitive cost, through skilled and motivated staff.

##### **The Balanced Scorecard**

This Strategy Statement is structured on the basis of the Balanced Scorecard. The Balanced Scorecard is a performance planning and management tool that allows organisations to supplement traditional output/financial measures with criteria that monitor performance from the perspective of the customer, internal business processes and innovation and learning.

## **Environmental Analysis**

### **External Environment**

The key environmental issues of concern to the Office are:

#### **Political**

- The Valuation Act 2001 provides for a revaluation of all commercial property in the State. This involves the assessment of modern valuations for in the region of 180,000 units and presents an unprecedented challenge to the Office.
- In relation to the Revaluation Programme, the task facing Management is the delivery of the revaluation within a reasonable timeframe and at an acceptable cost
- In regard to Revision, the task is the maintenance of a service which meets the needs of our rating customers  
This level of service to our customers also applies to our other statutory work
- The Government's decision to decentralise the Valuation Office to Youghal has been deferred until 2011
- The Valuation Office will prepare amendments to the Valuation Act 2001 for consideration by Government. These amendments will seek to simplify procedures and increase efficiency of our operation.

#### **Economic**

- The economy is expected to contract or grow at a very low level for the period covered by this Strategy Statement. This is likely to be reflected in lower levels of activity in the property market.
- Because of the slowdown in the property sector we may lose fewer experienced staff to the private sector than in the preceding three-year period.
- The maintenance of adequate staffing levels to meet our business needs may present a challenge in the current budgetary environment
- The downturn in economic activity will place increasing demands on Local Authorities to maximise their potential rates revenue
- The increasing trend towards early retirement will have an impact on the Office

## **Social**

- Fluctuations in population growth, increased emphasis on delivery of local services, environmental measures and quality of life issues place increasing demands on local authorities to maximise their potential rates revenues. This in turn requires that the Office continues to provide local authorities with quality, timely valuations where revisions and `new builds` are concerned
- There is a continuing shift in Irish demographics with an increasing proportion of the population living within 80 km of Dublin. This means that approximately 50% of the work of the Office will continue to be concentrated in this growth area.
- Increased participation of women in the workforce and the development of a multicultural society require the Office to develop flexible and attractive Human Resource policies. Legislative and social pressures will require continuing initiatives to make the work environment more appreciative of diversity as well as offering equality of opportunities.

## **Technological**

- A key technological development is the continued development and availability of broadband services. .
- There will be increased opportunities for the Valuation Office to improve the range of web-based services to our customers
- The possibilities offered by GIS/GPS technology should impact positively on the delivery of our services to our customers
- The experience of Valuation Agencies in other jurisdictions, including Northern Ireland, in advancing, developing and applying technology, offer clear possibilities to further enhance our existing methodologies

## **Customer requirements**

- We anticipate that our Local Authority customers will continue to demand faster case turn-around as a result of the BIDS Act.

- There is a continuing requirement for transparency in the delivery of public services including valuation work. The Office needs to provide full information showing how valuations are arrived at, and provide an opportunity to ratepayers to make representations, before the valuations are used to assess rates liability.

## **Internal Environment**

- There is currently full compliance with the industrial peace provisions of “Towards 2016” and a range of change options agreed with Unions for the period.
- The flexibility provided for in our “Towards 2016” agreements provides scope for the development and improvement of our operations
- The agreement of stakeholders to the implementation of the Rainey Report is critical to the optimal delivery of the revision & revaluation programmes over the period of the statement.

## **Conclusion**

Initiatives have been formulated in this Strategy Statement to address the issues identified in the analysis of the external and internal environments. The Strategy Statement was prepared by the Management Committee in consultation with the Partnership Committee. Specific actions to give effect to the initiatives in the Strategy Statement will be incorporated in our annual Office and team Business Plans for 2009 to 2011.

## **FINANCIAL PERSPECTIVE**

### ***Objective***

- Pursue organisational efficiencies so as to ensure appropriate controls, accountability and value for money.

### ***Critical Success Factors***

- Control of costs.
- Maintenance of customer satisfaction with our services at realistic fee levels.

### ***Measures***

- Unit cost of rateable valuation.

### ***Initiatives***

- Further develop our financial systems with particular emphasis on reporting and cost analysis
- Monitor income and expenditure on a monthly basis
- Further develop an effective fee collection and control system
- Review our fee charging policies in conjunction with our stakeholders

### ***Targets***

- 80% of fees collected within the statutory 30 day time period by the end of 2009
- Develop an effective unit cost measurement system during the period of this Statement

## **CUSTOMER PERSPECTIVE**

### ***Objective***

- Establish and meet customer needs.

### ***Critical Success Factors***

- Maintenance of a close and positive business relationship with our customers.
- Maintenance of adequate resources both human and other.
- Delivery of agreed work programmes to customers.

### ***Measures***

- Customer satisfaction levels as measured by annual customer surveys and by the survey of Public Office clients

### ***Initiatives***

- Manage available resources to maximise service delivery
- Incorporate initiatives in business/team plans to deliver on undertakings in SLAs and Ratepayers' Charter.
- Review annual customer surveys by end of each year to ensure accurate customer feedback on delivery of services.
- Ensure regular contact with customers at point of service delivery.
- Provide service information – appeal rights etc- to customers at service delivery.
- Further develop our on-line service for customers
- Provide Public Office clients with material using digital media

### ***Targets***

- Maintain an overall customer satisfaction rating in the region of 80% in our annual customer surveys.
- Determine the feasibility of providing on-line services to genealogical customers by the end of 2009

## **INTERNAL PERSPECTIVE**

### ***Objectives***

- Maximise output of high quality valuations, on time, within budget
- Deliver the Revaluation programme within a reasonable timeframe
- Maintain the level of statutory valuation service required by customers
- Continue the progress to digitise and preserve archival material

### ***Critical Success Factors***

- Active management of performance
- Positive IR environment in the Valuation Office
- Optimal deployment of staff resources
- Availability of sufficient numbers of skilled and motivated staff
- Use of existing and emerging technology by staff
- Action on annual customer survey results
- The delivery of the required flexibility envisaged by the “Rainey Report”
- Completion of SLAs agreed with Local Authorities

### ***Measures***

- Total case output
- Appeal rate
- % Change on appeal
- Number of properties completed for revaluation annually.
- Percentage of archival material scanned and digitised

### ***Initiatives***

- Continue to refine output/outcome measurement system.
- Use SLAs to manage workflow
- Secure the flexibility necessary, in the deployment of staff, to optimise the use of available resources
- Bring forward proposals for amending legislation
- Maintain contacts with relevant external valuation authorities.
- Review our experience of the full revaluation cycle in the South Dublin County Council area

- Incorporate as necessary risk management and internal audit measures in our business/team plan cycle
- Examine the feasibility of re-establishing our market value services to an appropriate level
- Establish Data Unit
- Develop our GIS/GPS capabilities to enhance the delivery of services to our customers

### ***Targets***

- Meet revision targets as agreed in SLAs with Local Authorities
- Appeal rate to be maintained at current levels.
- (Target for % change on appeal required here)
- Carryout further Global Valuations as required by statute.
- Proposals submitted for legislative amendments (Valuation Act & Data Protection Act) within the first quarter of 2009
- Develop agreed methodology for performance measurements by the end of 2009
- 30% of archival books and maps digitally scanned by the end 2011
- Complete Revaluation tribunal appeals in South Dublin by 31 March 2009.
- Publish new valuation list for Fingal County Council on 31 December 2009.
- Publish new valuation list for Dunlaoghaire – Rathdown on 31 December 2010.
- Publish a new valuation list for Dublin City Council on 31 December 2011

## **INNOVATION AND LEARNING PERSPECTIVE**

### ***Objective***

- Continue the development of the Office into a progressive, responsive, learning organisation.

### ***Critical Success Factors***

- A climate where all staff are open to change and development.
- Adoption of latest technology
- Provision of focused training and development

### ***Measures***

- Level of positive responses to climate survey.
- Management response to staff surveys
- Level of staff absenteeism.

### ***Initiatives***

- Training for managers.
- Introduce management development programmes for new and existing management
- Continue staff rotation policy
- Establish a group to examine research and report on the use of technology to enhance valuation systems by the end of 2009.

### ***Targets***

- Maintain staff rotation consistent with our Business plan
- Annual surveys completed
- Representations, Appeal and Revision listings on line by the end 2009
- Agree management development programme by mid 2009
- Develop and agree comprehensive HR policy by the end of 2009
- Develop Public Office customer services staff through the provision of training opportunities in genealogy