

# **VALUATION OFFICE STRATEGIC PLAN**

**2015-2016**



# Foreword

The Valuation Office has been responsible for Ireland's State valuation service since 1830. The core business of the organisation is the provision of accurate, up-to-date valuations of commercial and industrial properties to ratepayers and rating authorities, as provided by the Valuation Act 2001. These valuations are integral to the commercial rating system in Ireland, and form the basis for over €1.3 billion of Local Authority funding each year.

In conducting its business, the Valuation Office interacts with a wide range of customers and other stakeholders, including ratepayers and other members of the public, Local Authorities, professional agents acting on behalf of ratepayers or other clients, genealogical researchers and genealogical agents, and staff of other Government Departments and Offices.

As part of its programme of rationalisation of State bodies, the Government is proceeding with the merger of the Valuation Office, Property Registration Authority and Ordnance Survey Ireland. The new organisation arising from the merger, Tailte Éireann, will have responsibility for several important functions, including:

- The State property registration system
- The State mapping and surveying infrastructure
- The State property valuation service
- The development and maintenance of State geospatial information
- Dealing with applications for purchase of ground rents and
- Ensuring the proper functioning of the Valuation Tribunal.

At the time of developing this Strategic Plan, the Minister for Justice has approved the General Scheme of the Bill through which the new organisation will be established and, subject to the passage of the legislation through the Oireachtas, 1<sup>st</sup> January 2016 has been indicated as the target vesting date.

As outlined in the environmental analysis, this document is being prepared against a backdrop of unprecedented change for the staff and customers of the Valuation Office. It outlines the strategic direction which the Valuation Office will take in the period immediately leading up to the establishment of Tailte Éireann and immediately after the enactment of the Valuation (Amendment) Act 2015. Accordingly, this Strategic Plan is necessarily short-term in duration and intended to facilitate a smooth transition of the valuation function to the new organisation. For the reasons outlined within, its immediate focus is on continuing the strategies set out in the Valuation Office *Statement of Strategy 2011 to 2014*.

It is intended that a draft Strategic Plan for Tailte Éireann will be prepared for consideration by its Board immediately following vesting day. It is anticipated that the preparation of the Tailte Éireann plan will present a fresh opportunity to review and establish the strategic direction of each statutory function, including the valuation function, within the new organisation. The plan adopted by the Board will, of course, supersede this document.

John O'Sullivan  
Commissioner of Valuation  
April 2015

# Valuation Office Strategic Plan 2015-2016

## Mandate

The core function of the Office is the production and maintenance of fair and equitable valuation lists of commercial and industrial properties under the provisions of the Valuation Acts, 2001 to 2015. These valuation lists provide the basis for the assessment and levying of commercial rates by local authorities.

## Mission

Our mission is to deliver a high-quality impartial valuation service.

## Vision

Our vision is to develop a high-performing and responsive organisation, with a shared culture and common purpose. We will deliver on our mandate, using leading-edge emerging technologies, through the provision of excellent services in a customer-friendly environment

# Our Values

Each member of staff of the Valuation Office is committed to the development of an organisation which embodies the following core values:

## Honesty and Integrity

We will carry out our work in an impartial, objective, ethical and professional way and we will share our skills, knowledge, experience and information for the greater good.

## High-quality service to our stakeholders

We are committed to meeting the needs of our stakeholders through the provision of high quality services carried out in the public interest.

## Responsiveness, adaptability and innovation

We will strive to ensure that our systems and processes are flexible, adaptable and innovative and are capable of responding continuously to the demands of our stakeholders.

## Positive Working

We are committed to the creation of a positive work environment in which we treat each other fairly, and with dignity and respect. We recognise that the success of our organisation is based on strong and committed leadership, individual contributions and co-ordinated team efforts.

## Commitment to Personal and Organisational excellence

We will foster an environment where everyone is encouraged to reach his/her full personal potential and where everyone's contribution is recognised. We will promote a working environment in which each member of staff takes personal ownership of, responsibility and accountability for their actions, behaviours, decisions and results.

# Environmental Analysis

## The External Environment

The key external environmental issues of concern to the Office are:

### Political

- The Valuation Act 2001 provides for a revaluation of all commercial property in the State on a rolling basis. However, no national revaluation has been conducted since the mid-nineteenth century and there is a compelling need to address this as a matter of urgency. The assessment of modern valuations for some 146,000 properties, through the National Revaluation Programme which is now underway, continues to present major operational and other challenges for the Office. There is a demand from key stakeholders and a political expectation that the organisation will deliver the revaluation programme nationwide within a reasonable timeframe and at an acceptable cost
- As well as revaluation, there is ongoing demand for prompt action on requests from our customers for Revisions to existing Valuation Lists
- There are pressures from external stakeholders to increase the efficiency of our operations. To this end, the Valuation (Amendment) Act 2015, which contains several measures to facilitate this, has been brought forward by Government and will be enacted before the end of April 2015
- As part of its programme of rationalisation of State bodies, the Government is proceeding with the merger of the Valuation Office, Property Registration Authority and Ordnance Survey Ireland. Considerable work on preparing for the merger has been underway across the three organisations. The new organisation arising from the merger will be known as Tailte Éireann and draft legislation to establish the new body has been announced.

## Economic

- Several major indicators are pointing to recovery taking place across key sectors of the Irish economy. This is almost certain to be reflected in ongoing increased levels of activity in the commercial and industrial property market, albeit with uneven distribution
- The maintenance of adequate budgetary and staffing levels to meet our business needs and deliver effectively and efficiently on our mandate is likely to remain challenging in the context of the current public finances situation
- Underlying changes to their funding model is requiring Local Authorities to maximise their potential rates revenue
- Analysis of market developments is a more complex task in the current property environment
- In the current environment there is an even greater need for the Valuation Office to communicate with stakeholders in an open and transparent way.

## Social

- There is a continuing shift in Irish demographics with an increasing proportion of the national population living within the greater Dublin area together with Kildare, Meath and Wicklow.
- Legislative and social pressures will require continuing initiatives to make the work environment more appreciative of diversity as well as offering equality of opportunities and flexible working conditions.
- In the present circumstances, the implementation of work/life balance policies presents a particular challenge to the management of workloads and resources to maintain effective delivery of services.

## Technological

- Continuing advancements in desktop and field technologies will improve the quality, timeliness and delivery of our valuation services
- Improved and wider access to third-party data will continue to assist the Office in carrying out its valuation services
- The increased development and availability of both fixed and wireless broadband services will continue to improve points of service delivery
- Customers now demand greater access to on-line services and expect that public service providers make optimum use of information and communications technology. The Office will continue to widen the range of on-line revision and revaluation services and supports offered to our customers.

## Customer Requirements

- The quantity of challenges to and appeals against valuations are expected to increase as ratepayers seek to reduce the burden of rates on their businesses
- Demand for an acceleration of the revaluation programme will increase from ratepayers seeking to address perceived historical anomalies and inequities in their rates
- The Office must endeavour to ensure that ratepayers understand the valuation process, and their rights in relation to representations and appeals
- We must also continue to communicate the independence of our role
- There is also a growing demand for greater efficiency in the delivery of our valuation services, in particular the extension of additional online services to ratepayers and local authorities
- With regard to the Revision of existing valuation lists, the task is to deliver the revision service in an efficient manner so that we meet the needs of our customers and can release resources that could be deployed in accelerating the Revaluation Programme. There are several provisions in the Valuation (Amendment) Act 2015 which seek to simplify procedures and increase the efficiency of our operations.

## The Internal Environment

The key internal environmental issues of concern to the Office are:

### **Strengths**

The Valuation Office has access to a vast repository of corporate knowledge. Many of our staff members have been with the Office for the duration of their careers and they have gained invaluable experience and expertise in the delivery of our services.

The Office maintains a strong focus on customer needs and on the independence of its function. Evidence shows that we are generally trusted by our customers.

We have a strong programme of support for the ongoing education and professional development of our staff.

### **Weaknesses**

Due to changing demographics in the Office and a loss of experienced staff in recent years, the challenge for the organisation and for staff will be to capture and share corporate knowledge most effectively at all levels.

A considerable proportion of the data held in the Office is not in a readily accessible format and needs to be captured, stored and indexed electronically.

The Office needs to better manage its performance so as to raise its productivity and outputs, and to make best use of information technology and other means to assist with this task.



## Opportunities

The Valuation Office is facing considerable challenges but there is also a great opportunity for each member of staff to develop their skills in a changing work environment.

The National Revaluation Programme provides a unique opportunity for the Valuation Office to move forward and bring our valuation lists up to date for the first time since the mid-nineteenth century. It also provides an excellent opportunity for staff to extend their skills and competencies. We have a diverse, knowledgeable and experienced workforce capable of grasping these opportunities.

We have to continually look at new and smarter means of undertaking the work and we must continue to leverage our investment in information technology and online services.

The Office must continue to take advantage of developments in mobile technologies and information systems which are currently to the forefront of technological advancement in order to modernise our processes and methodologies.

The Office has a comprehensive database of all commercial properties throughout the country which will be populated with current information as part of the national revaluation. This information, in conjunction with data from the Property Registration Authority, Ordnance Survey Ireland and other public bodies, will form an important resource for the future strategies and business services of Tailte Éireann.

Appropriate opportunities for outsourcing some elements of our operations, in conjunction with advances in technology, will assist the office in delivering on its mandate. This will be the subject of a pilot project.

Opportunities will also arise for ratepayers to use elements of “occupier assisted valuation”. These will be tested in a pilot project initially.

## Threats

The pace of progress in implementing the roll out of the National Revaluation Programme has improved considerably but remains insufficient to complete the project in a timely manner in line

with customer demands and political expectations. This is a major threat to the reputation and political credibility of the Valuation Office.

The loss of experienced staff at all levels of the organisation remains a major threat, given the moratorium on recruitment, the age profile of senior staff and the retirement incentives which have been in place for a number of years.

# Organisational Goals

The Valuation Office will endeavour to deliver on the following goals during the course of this Strategic Plan:

1. Produce and maintain up-to-date valuation lists
2. Provide an efficient, effective, accessible and high-quality service to our customers to meet their evolving needs
3. Develop appropriate human, management, financial and technological resources to create a modern, capable and responsive organisation which is focussed on the achievement of organisational goals.
4. Undertake the necessary preparatory work in advance of the establishment of Tailte Éireann.

## Goal 1 - Produce and maintain up-to-date valuation lists

### Objectives

- Achieve greater efficiencies through the transformation of the delivery of Valuation Services using innovative work practices and technologies
- Complete the revaluation of particular Local Authorities in accordance with our annual business plans.
- Deliver a timely effective Revision service for existing valuation lists
- Accelerate the national revaluation programme

### Strategies

1. Continue to develop and modernise our ICT systems
2. Review and model current valuation processes and procedures in line with best practice in peer organisations
3. Update the Valuation Lists and implement required changes to give effect to changes arising from the enactment of the Valuation Amendment Act 2015
4. Seek out and develop synergies and partnerships with other Government organisations at central and local level
5. Assess current data capture methodologies and explore options for further development of the function
6. Implement alternative valuation methodologies and work practices
7. Implement effective Performance Measurement Systems

### Performance Indicators

- Outcomes increased to a level commensurate with efficient delivery of the Office work programme
- Quantity of valuations delivered under the National Revaluation Programme
- Timeliness of the Revision service delivered
- Quality of the outcomes delivered.
- Robustness of the outcomes when measured against appeals

## Goal 2 - Provide an efficient, effective, accessible and high-quality service to our customers to meet their evolving needs

### Objectives

- Meet the various business needs of customers and stakeholders by agreement
- Improve communication with, and the level of service to, our customers and stakeholders
- Provide valuation advice to other Government and Public service organisations as required and agreed

### Strategies

1. Agree appropriate levels of service delivery to Local Authorities in consultation with the Local Government Management Agency (LGMA).
2. Monitor and review service delivery on a constant basis.
3. Engage with our merger partners to develop an enhanced service to the public, leveraging the combined strengths of the three organisations
4. Increase the range and quality of online services offered to our customers in line with our e-Government strategy
5. Carry out an assessment of the service provided by our Public Office and Archives unit to ensure optimum service to our customers
6. Continue to provide effective administrative services which support the delivery of our core functions

### Performance Indicators

- The rate of increase in the use of our online services
- The level of satisfaction ratings from our Public Office customers

Goal 3 - Develop appropriate human, management, financial and technological resources to create a modern, capable and responsive organisation which is focussed on the achievement of organisational goals.

## Objectives

- Maintain a flexible organisational structure
- Develop a skilled, well-trained, committed, focused and flexible workforce
- Maintain appropriate accountability and value for money in the delivery of our services
- Exploit emerging ICT developments to improve our services
- Progress the development of a positive working environment
- Cultivate a positive and enthusiastic attitude among staff to ensure delivery of the office objectives
- Advance change and modernisation proposals in accordance with the provisions of the Public Service Agreements (Croke Park and Haddington Road Agreements) and deliver on stated commitments

## Strategies

- Deliver our objectives within budget using effective financial management systems and procedures
- Develop appropriate communication approaches that will involve every member of staff in the delivery of our commitments
- Engage staff at all levels in facilitating innovative organisational improvements
- Align individual goals with organisational goals
- Embed the ethos of individual responsibility and accountability at all levels in the organisation
- Secure commitment to attaining organisational goals in line with our stated values
- Maintain a robust corporate governance structure
- Monitor organisational risks at appropriate levels and in a timely fashion
- Manage and develop staff effectively using the mechanisms of the Performance Management and Development System (PMDS)
- Participate constructively in preparatory work leading to the establishment of Tailte Éireann
- Prepare for, and co-operate fully with, the migration of the Human Resource function to PeoplePoint (Human Resources (HR) & Pensions Shared Service Centre (HRSSC))
- Prepare for, and co-operate fully with, the migration of the payroll and financial functions to central shared services
- Develop and maintain a Business Continuity Plan
- Develop an organisational Workforce Plan

## Performance Indicators

- Delivery of organisational objectives and services within available resources
- Staff satisfaction levels as indicated by survey results
- Maintenance of a contemporary corporate Risk Register
- Meaningful participation in and implementation of the PMDS process by staff and managers at all levels of the organisation

- Positive reports from the Internal Audit Unit, the Audit Committee and the Comptroller and Auditor General
- Seamless transition to Shared Services facilities



## Goal 4 - Undertake the necessary preparatory work in advance of the establishment of Tailte Éireann (merger of the VO with PRA and OSi)

### Objectives

- Contribute to the development of a corporate brand and identity for Tailte Éireann
- Arrange for the transfer of functions of the Valuation Office to the Department of Justice and Equality
- Participate in engagement with union interests to agree a protocol for non-pay terms and conditions in Tailte Éireann
- Contribute to the development of a combined Workforce Plan for Tailte Éireann
- Contribute to the development of an appropriate Organisational Structure for Tailte Éireann
- Agree an appropriate 3-year budgetary allocation as part of the multi-annual Estimates process.
- Implement common projects and initiatives with PRA and OSi
- Work with PRA and OSi to develop a Corporate Data model
- Prepare a draft Strategic Plan for Tailte Éireann in conjunction with colleagues in PRA and OSi
- Implement an effective Public Information Programme on the merger
- Enhance services to the Public using the combined resources of the merging partners

### Strategies

1. Participate in a series of working groups which have been established to examine and implement key organisational objectives and make recommendations on a wide range of issues. The working groups are as follows:
  - Governance Arrangements, Strategy, Strategic Performance
  - Central Shared Services
  - Support Functions and Infrastructure

- Finance
- Legislation
- Strategic HR Policy and Change management
- Branding and Identity

## Performance indicators

- Successful integration of the Valuation function into Tailte Éireann on vesting day
- Successful transition to a common financial and accounting structure
- Smooth alignment of support functions with the merging organisations.

