



VALUATION & LANDS
AGENCY

BUSINESS PLAN
2004-05

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FOREWORD

In the period of this Business Plan the Valuation and Lands Agency (VLA) will, in addition to providing our normal services, progress the important issues of delivering a market value based Domestic Revaluation in 2006 and the introduction of a new core IT system, the full implementation of which is programmed for August 2004.

This year will also see further developments in our collaborative working with RCA and Building Control, the implementation of a Computer Assisted Mass Appraisal (CAMA) system and significant steps in the development of an over-arching Change Management Programme – VLA 2007.

VLA will monitor progress against Key Targets set by the Minister, as contained in this Plan. Additionally, we will test ourselves against a range of Performance Indicators covering all aspects of our business. Our internal targets are in line with those set by the Department in their “Priorities and Budget 2004-06”, Public Service and Service Delivery Agreements. We will also include Departmental initiatives such as the preparation for full implementation of the Freedom of Information Act 2000, on 1 January 2005.

The Agency has again used a Balanced Scorecard approach to planning, developing objectives and targets focussed on achievement of our three business goals. Management Board will undertake monitoring, on a monthly basis throughout the life of this Plan.

The opportunities open to the Agency through various projects to: create a modern expert rating assessment system; improve service to existing customers; and achieve better value for money, are exciting as well as, of course, being very challenging.

The Agency clearly faces another very busy year. I am confident that with the support and dedication of everyone in the Agency, and by working with our colleagues within the Department, its Agencies and the wider public sector we will achieve our goals.

Nigel Woods

Commissioner of Valuation
and Chief Executive

1. INTRODUCTION

1.1 Our Business

The Valuation and Lands Agency is an Executive Agency within the Department of Finance and Personnel and has been in existence for 11 years. Originally known as the Valuation Office we have been responsible for rating assessments for over 150 years, and since 1945, for a range of general valuation and estate management services within the public sector.

Our main business areas and associated goals are:

DOMESTIC RATING:

“To maintain a Domestic Rating Assessment Service that achieves high credibility with all stakeholders, delivering regular Revaluations, the next by April 2006”.

NON-DOMESTIC RATING:

“To maintain a Non-Domestic Rating Assessment Service that achieves high credibility with all stakeholders”.

CLIENT SERVICES:

“To deliver a Valuation and Advice Service to the public sector which achieves high levels of satisfaction with all stakeholders”.

The mandate for these activities flows from the departmental Objective 2 - “To meet the social and economic needs of the community in the Department’s areas of executive responsibility”. In addition, we were mandated to undertake our estate management and advisory functions, following a report by the Northern Ireland Efficiency Scrutiny on the “Management and Disposal of Government Owned Land” (March 1994).

2. PLANNING CONTEXT

2.1 Planning Environment

In its Public Service Agreement (PSA) the Department of Finance and Personnel sets out how it will undertake its responsibilities under the Government paper "Building on Progress: Priorities and Plans 2003-06". In its Service Delivery Agreement (SDA) the Department details how it will achieve the associated objectives and outcomes. Both these documents are contained within the Department's Business Plan (available on the website www.dfpni.gov.uk).

This Business Plan establishes Key Ministerial Targets and sets out how we will monitor our progress towards achievement. It also takes into account our responsibilities to support departmental corporate targets.

The DFP aim is "To help Ministers secure the most appropriate and effective use of resources and services for the benefit of the community". Within this aim the Department has 2 objectives:

- "To promote the continuous improvement in the availability, use and deployment of resources and in the business of Northern Ireland Departments".
- "To meet the social and economic needs of the community in the Department's areas of executive responsibility".

In pursuance of this second departmental objective the Agency delivers its 3 main business areas of maintaining the Valuation List for both Domestic and Non-Domestic properties and providing a valuation, estate management and property advisory service.

The Service Delivery Agreement (SDA) includes details of targets relating to VLA and links directly to our Business Plan. It describes performance targets for service delivery; reform plans for the Review of Rating Policy and for the raising of service standards.

2.2 Planning Process

As in the previous year, the Agency is using the Balanced Scorecard approach. This has assisted the Agency's Management Board to focus on the key goals and success factors that will lead the Agency towards the achievement of its Vision and Mission within the context of its framework document and legal mandates.

The Minister's announcement in December 2002 of rating reforms and the decision to change to market value as the basis for the domestic rating system in Northern Ireland continue to be key factors in the planning process for 2004-05.

The timely implementation of the new IT Core System Replacement is critical to the Agency's ability to take forward the revaluation of Domestic property on a market value basis, whilst maintaining the current Valuation List on a rental basis. Phase I work is well advanced, with plans for the new system to be fully operational by August 2004.

2.3 Vision and Mission

Our Vision is:

“To be recognised as a leading public sector valuation organisation.”

Our Mission is:

“To provide a property valuation and advice service which: meets the needs of DFP in the fair operation of the property taxation system and of the public sector in carrying out its functions; and is open and accessible to the public in general.”

The Balanced Scorecard (see attached) details how the Agency will move towards the achievement of its Vision and Mission statements.

2.4 Staff Resources

Our Chief Executive, who also occupies the statutory post of Commissioner of Valuation (CEO/COV), is responsible to the Minister for the effective operation of the Agency, the fulfilment of its statutory functions and providing Valuation Services to the public sector. The Chief Executive is assisted by a Management Board – which comprises the CEO/COV, 2 Assistant Commissioners, 6 District Valuers and Head of Corporate Services. This group has overall responsibility for delivering our business.

At the commencement date of this Business Plan, some 317 staff work in the Agency, 178 of whom are in the Professional and Technical discipline.

We deliver our services from a network of 7 District Offices across Northern Ireland. The public have access to all of these offices (see annex).

2.5 Financial Resources

The Agency has been allocated £12.97m in respect of Departmental Running Costs in 2004/2005, of which £1.38m is to be earned through receipts.

3. MAJOR PROJECTS

3.1 Domestic Revaluation

The Agency's objective is to complete a Revaluation of all 700,000+ domestic properties in Northern Ireland by April 2006. In this year a number of challenging milestone targets have been set that will facilitate the achievement of this overall objective.

3.2 Core System Replacement

The £2.4m project to develop a replacement core IT system for the Agency is well advanced. Phase I rollout is scheduled for June/July 2004 and completion of all development planned for August 2004.

3.3 VLA 2007

To ensure an integrated approach across these and a number of other key projects, the Agency, assisted by external consultants, will, over the coming year, establish a programme management structure and put in place a Programme Management Board. The Agency will, in due course, assign support staff to the Programme.

4. TARGETS

4.1 Ministerial Targets

Ian Pearson, Parliamentary Under-Secretary of State at the Northern Ireland Office has approved the following targets for VLA in 2004-05:

- To achieve a rating unit cost no greater than £233, expressed in 2001-02 prices;
- To demonstrate the ability to achieve full-cost-recovery in respect of client services;
- To issue at least 90% of certificates for all rating revision cases (excluding domestic alterations) which are subject to retrospective backdating, within 12 months of the revision date;
- To achieve a satisfaction rating of 76 or greater from respondents to a Client Satisfaction Survey as measured by the Customer Performance Index (CPI); and
- To achieve the key milestones for 2004-05 for the Domestic Revaluation Project, which are:
 - CAMA (Computer Assisted Mass Appraisal), implementation to be completed by 31 August 2004.
 - Neighbourhood delineation to be completed by 31 December 2004.
 - All non-computer assisted valuations to be completed by 31 March 2005.
 - An accurate, current and complete sales file will be achieved by 31 December 2004.

BUSINESS PLAN 2004/05: CORPORATE INDICATORS FOR MONITORING PURPOSES

ANNEX A

BALANCED SCORECARD: 1. DELIVERABLES

Area	Actions	Division	Performance Indicators (MT) = Ministerial Target (M) = Monthly	Position @
1.1 Value new/altered properties accurately and <u>on time</u> .	Ongoing Performance Management.	R	MT “90% certs (ex ADs) backdated <12mths” By 30 th June to have developed a report to show the average days outstanding of rating cases by event type/sub type (new non-domestic/altered non-domestic/new domestic).	
1.2 Dealing effectively with applications	Monitor activity.	R	Report on A3CNs ‘Outstanding.’ (M)	
1.3 Dealing effectively with Appeals	Ensure timely action to agreed standards.	CPS	“Turnaround of 12 weeks average.” (M)	
1.4 Non-Domestic Revaluation 2008	Rolling forward the 2008 Revaluation, through a Project Plan.	NDR/ CPS	By 30 th Sept 2004 to bring a paper to MB dealing with: publication date, update on status of schemes, market analysis, initial estimate of project milestones and key work areas for remainder of 2004-05.	
1.5 Client Satisfaction	To deliver a valuation and advice service to the public sector which achieves high levels of satisfaction with all stakeholders.	CSD	MT “76 CPI” of clients in work programme. Revised procedures to monitor timeliness and communication with clients in place by 30 th Sept. Reduce work in progress from 26 weeks (Mar 04) to 8 weeks by March 05.	
1.6 AD Backlog Reduction	To be completed.	R	To be completed.	

BALANCED SCORECARD: 2. IMPROVEMENT/CAPACITY BUILDING

Area	Actions	Division	Performance Indicators (MT) = Ministerial Target (M) = Monthly	Position @
2.1 Core System Replacement	Develop and implement in line with plan to achieve 'go live' May 04 & further releases by August 2004.	CS	Phase I – 'go live' date of end May 04. Phase II – programmed for end of Aug 04.	
2.2 Domestic Revaluation Project Plan	Produce new Domestic List on a Capital Value basis accurately and on time.	DR	MT "Progress against project milestones" <i>(Reporting by exception).</i> CAMA implementation to be complete by 31 August 2004. Neighbourhood delineation to be completed by 31 December 2004. All non-computer assisted valuations to be completed by 31 March 2005 An accurate, current and complete sales file will be achieved by 31 December 2004.	
2.3 Rating Database	Identify fitness of current rating database for non-domestic revaluation and progress improvement.	CPS	Complete an audit report for non-domestic and issue data standards by 30 Sept 04.	
2.4 Improvement Projects	Take forward Improvement Projects with RCA/BCNI	CPS	Initial Project Board meeting to be held 31 May 2004. PID and Project Plan to be in place by August 2004.	
2.5 Rating Reforms	Respond/liaise with RPB on matters of policy and legislation.	CPS	VLA input to contribute to bringing forward reforms on target. Update to MB.	

BALANCED SCORECARD: 2. IMPROVEMENT/CAPACITY BUILDING (CONT'D)

Area	Actions	Division	Performance Indicators (MT) = Ministerial Target (M) = Monthly	Position @
2.6 Skills Audit & Analysis of Training Needs	To undertake a skills audit and provide analysis of development needs against business needs, in line with Performance Management process.	CPS/OPS	Complete skills audit by August 2004.	
2.7 Freedom of Information	To ensure that VLA has systems in place in line with DFP's Information Strategy.	CPS	To have systems in place to answer Fol requests by 1 Jan 2005. Monthly update to MB (<i>report against milestones</i>).	

BALANCED SCORECARD: 3. PROCESSES

Area	Actions	Division	Performance Indicators (MT) = Ministerial Target (M) = Monthly	Position @
3.1 Value new/altered properties <u>accurately</u> and on time.	Ongoing management to agreed standards.	R	"Valuation Standards - Domestic – (95%) (M) "Valuation Standards - Non-Domestic – (87%)(M)	
3.2 Client SLAs	Review and agree service levels and standards for client work.	CSD	All SLAs for notional clients to be reviewed by December 2004 in line with Departmental Charging Review Plan. (M)	
			All SLAs for hard charge clients to be reviewed by December 2004 (M).	
3.3 Client Management	Ensure that client work is managed against planned resource allocation.	CSD/CS	Internal Budgets allocated to clients by 31 st May. Monitoring arrangements in place by 30 th Sept.	
3.4 Training and Development	Implement and evaluate the Agency's T&D Plan and District Plans.	CPS	Quarterly Report being developed.	
3.5 Corporate Governance	Ensure the proper operation of Corporate Governance throughout the Agency.	CPS/ALL	Satisfactory internal report from the Audit Risk Committee on 6 monthly basis. Stewardship Statements to be completed on time.	

BALANCED SCORECARD: 4. RESOURCES

Area	Actions	Division	Performance Indicators (MT) = Ministerial Target (M) = Monthly	Position @
4.1 Expenditure	Ongoing financial management.	CPS	"Maintain Expenditure within Limits and Plans" (M)	
			Monthly Finance update.	
4.2 Full Cost Recovery	Ongoing management and review to ensure full cost recovery.	CSD/CPS	MT "Demonstrate ability to achieve full cost recovery"	
			Implement monthly update and quarterly Review by October 2004.	
4.3 Receipts	Manage Client Services work to achieve Receipts Target.	CSD/CPS	Monthly update to MB.	
4.4 Rating Unit Cost	Ongoing management to ensure cost effective completion of rating casework.	R/CPS	MT "Achieve Rating Unit Cost Target"	
			Monthly update and Quarterly Review	
4.5 Resource agreed work programme	Ongoing close working between operations and Corporate Services to provide proper resources to meet agreed business needs.	CPS/ALL	Report on exceptional deviation from plans (M)	

BALANCED SCORECARD: 4. RESOURCES (CONT'D)

Area	Actions	Division	Performance Indicators (MT) = Ministerial Target (M) = Monthly	Position @
4.6 Contingency	Provide Contingency to guarantee continuity in delivery of core services. To monitor and ensure that resources are provided.	ALL	To submit a contingency plan to MB by 24 June 04. Publish service and client priorities by 1 May 04.	

ANNEX B

DISTRICT OFFICE	DISTRICT COUNCIL AREA	ADDRESS TELEPHONE AND FAX NUMBERS
Ballymena	Ballymena, Ballymoney Carrickfergus, Larne Moyle, Newtownabbey	Government Offices, 12-14 George Street, Ballymena BT43 5AP Tel: 028 2566 0700 Fax: 028 2566 0711 Email: Ballymena.VLA@dfpni.gov.uk
Bangor	Ards, Castlereagh North Down	Crown Buildings, Hamilton Road, Bangor BT20 4LQ Tel: 028 9127 9111 Fax: 028 9147 1644 Email: Bangor.VLA@dfpni.gov.uk
Belfast	Belfast	Queen's Court, 56-66 Upper Queen Street, Belfast BT1 6FD Tel: 028 9025 0700 Fax: 028 9054 3930 Email: Belfast.VLA@dfpni.gov.uk
Craigavon	Armagh, Craigavon Newry & Mourne	Marlborough House, Central Way, Craigavon BT64 1AD Tel: 028 3834 1144 Fax: 028 3832 0177 Email: Craigavon.VLA@dfpni.gov.uk
Lisburn	Antrim, Banbridge Down, Lisburn	1 The Sidings, Antrim Road, Lisburn BT28 3AJ Tel: 028 9262 3500 Fax: 028 9262 3555 Email: Lisburn.VLA@dfpni.gov.uk
Londonderry	Coleraine, Derry, Limavady Magherafelt, Strabane	Waterside House, 75 Duke Street, Londonderry BT47 6FP Tel: 028 7131 9000 Fax: 028 7131 9087 Email: Londonderry.VLA@dfpni.gov.uk
Omagh	Cookstown, Dungannon Fermanagh, Omagh	Boaz House, 19 Scarffe's Entry, Omagh BT78 1JG Tel: 028 8225 4888 Fax: 028 8225 4880 Email: Omagh.VLA@dfpni.gov.uk
Central Advisory Unit		Queen's Court, 56-66 Upper Queen Street, Belfast BT1 6FD Tel: 028 9054 3774 Fax: 028 9054 3770 Email: CAU.VLA@dfpni.gov.uk