



‘Shaping the Future’

The Forward Plan for

THE VALUATION TRIBUNAL SERVICE 2008-2011

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Foreword by the Chairman

I have great pleasure in presenting our Forward Plan for 2008-2011, incorporating our business plan for 2008-2009. This plan sets out the priorities we will address over the next three years.

The VTS is now at the start of its fifth year of operation, and this Forward Plan is based on what has been achieved so far and the challenges ahead as we work towards our vision of promoting an effective, customer focussed, independent tribunal service. For this reason we have entitled our Forward Plan for 2008-2011 "Shaping the Future".

A key factor influencing our thinking is the new legislation which provides the legal underpinning for the establishment of the new single Valuation Tribunal for England and the appointment of a national President. Preparing for the successful introduction of these major changes must therefore form a very significant element of our plans for the year and thereafter. However, in planning for these important developments, we are also keen to continue to pursue some key pervasive themes, namely further improvements in our service to users in ways which reinforces and emphasises the independence of the tribunals and to continue to develop our people, processes and technology to support our modernisation aims. We will be monitoring carefully the impact of the new system of appeals direct in relation to council tax valuation cases, where the major success criteria on which we will judge its impact is whether it results in increased awareness of the independence of the tribunals and greater understanding of the different roles of the Valuation Office Agency and the Valuation Tribunals.

We are mindful that our major programme of modernisation must also take full account of the developments across the world of tribunals generally. We recognise the importance of maintaining effective communication with our tribunal members, so that they will be kept up to date with the impact of the various changes, and how they may be affected. Understanding their needs and their motivation will be an important element of maintaining their interest and commitment over the forthcoming year.

The programme we have set is challenging, and we must seek to support and develop our staff to enable them to lead and sustain the changes. Many of them have played a significant part in developing and refining the way forward, and I trust that they will take satisfaction from our achievements to date. It promises to be an exciting time.

Anne Galbraith OBE
Chairman, Valuation Tribunal Service

1. Our Vision Statement

1.1 The Valuation Tribunal Service (VTS) seeks:

‘to promote an effective customer focused independent tribunal service for business rates and council tax appeals, that commands public confidence’.

2. What we do

2.1 Set up by the Local Government Act 2003, established as a non-departmental public body on 1 April 2004 and sponsored by Communities and Local Government (CLG), the VTS supports the operation of valuation tribunals by providing the following services:

- Accommodation.
- Staffing (including clerks to tribunals).
- Information technology.
- Equipment.
- Training for members and staff of (including clerks to) tribunals.
- General advice about procedure relating to the proceedings before tribunals.

2.2 There are currently 56 valuation tribunals in England, administered out of 16 offices spread across England. Established by the Local Government Finance Act 1988, valuation tribunals have a statutory duty to hear and determine non-domestic (business) rate, council tax (valuation and liability) and drainage rate appeals. Valuation tribunals are independent of the Valuation Office Agency (VOA), who set rateable values on non-domestic properties and council tax bands for homes, and the councils that send out the rates and council tax bills.

2.3 Appeals arise when the VOA in the case of business rates or council tax valuation, or the council in the case of council tax liability appeals, do not agree with a ratepayer or council taxpayer’s contention and the ratepayer or taxpayer is not satisfied.

- Liability appeals against a council’s decision are made direct to the valuation tribunal within two months of receiving the council’s decision. However, where a council has failed to respond within this period, the timescale for appealing must be within a maximum of four months from the date of the initial request made by the individual.
- Business rate appeals are forwarded to valuation tribunals by the VOA under a regulatory framework that requires them to transmit any proposals that they have not resolved after three months.
- Until 1 April 2008, council tax valuation (banding) appeals were also forwarded to valuation tribunals by the VOA under a regulatory framework requiring the VOA to transmit any proposals that they have not resolved within a six month period. The regulatory process has now been amended to allow such appeals to be made direct to the valuation tribunal (see section 10.10 – Appeals Direct).

2.4 The VTS currently employs 123 members of staff, supporting a lay and volunteer tribunal membership of approximately 900 members. Members of valuation tribunals come from all walks of life and receive training to support them in their statutory role in the hearing and determining of business rate and council tax appeals. They are unpaid and commit to one hearing per month, but receive reimbursement of expenses incurred based on prescribed amounts determined by the Secretary of State. In certain circumstances, members may also receive reimbursement of any financial loss incurred as a result of undertaking tribunal duties. Again, such amounts are prescribed by the Secretary of State.

2.5 Some members serve on more than one valuation tribunal. A chairman and a maximum of two members preside at tribunal hearings, and are supported at hearings by a professional clerk who is responsible for providing procedural and technical advice.

3. Our management framework

3.1 Our Management Statement, incorporating the Financial Memorandum, is the key document. It governs the relationship between the VTS and our sponsoring department and sets out the broad framework within which the VTS operates to:

- Establish a cohesive national structure for the VTS within which policies on training, information technology, accommodation and staff terms and conditions are applied consistently.
- Improve customer understanding of, and satisfaction with, the work of the valuation tribunals.
- Work with valuation tribunals and other stakeholders to improve the appeals process from lodgement to settlement.
- Secure improvements in the efficiency, effectiveness and consistency of service provided by valuation tribunals.
- Offer general advice to valuation tribunals in relation to proceedings before hearings.

3.2 In working within the framework of the Management Statement, we will continue to focus on:

- Working with our sponsoring department in developing procedural rules in modernising our tribunal procedures and meeting the challenges of a single Valuation Tribunal for England (VTE).
- Enhancing our independence within the appeals process. We will do this by learning from the introduction of a new system of appeals direct, whereby council tax valuation appeals are made directly to the valuation tribunal, and develop our thinking, in consultation with our sponsoring department and stakeholders, in aspiring towards an appeals direct system for appeals against business rates.

- Building on our customers' perceptions of fairness at valuation tribunal hearings, so that we enhance public confidence in the process. This will involve listening to customers' opinions and making appropriate changes both to what we communicate and how we communicate it.
- Consulting with staff and valuation tribunal members on policies and guidance with the aim of delivering greater consistency in practice and procedure.
- Making better use of existing tribunal resources, achieved through the review and development of an estate strategy and a new IT strategy.

3.3 Much of this focus is contained within our strategic priorities and translated into our business objectives for the financial year (Appendix A).

4. The organisational structure

4.1 The VTS carries out its administrative processes in support of valuation tribunals from a total of 16 offices, operating out of four regions (North, Central, East and South) and a head office located in Angel, London. Accountable to the Corporate Director, each region is headed by a regional manager to provide greater leadership and managerial direction. The table below shows the breakdown of offices within each region and the number of staff we currently employ within the regions¹:

Region	Office locations	Total head count of staff	Numbers shown as Full-time Equivalents
North	Durham, Doncaster, Preston, Bolton	33	31.1
Central	Stafford, Nottingham, Leamington Spa	21	18.5
East	Peterborough, Harrow, Whitechapel, Witham	25	24.1
South	Croydon, Winchester, Horsham, Weston-super-Mare, Plymouth	29	25.5

4.2 We remain committed to retaining and developing staff wherever possible, although we recognise that staff may choose to leave our employment whether through natural retirement or for alternative employment. In such circumstances we will replace or appoint staff where there is an operational need to do so, based on sound operational need. The table below shows our estimated head count of staff, by grade, based on current forecasts, spread over three years.

¹ Figures as at 1 April 2008

Staff Numbers:	2008-09	2009-10	2010-11
Executive Management Team	3	3	3
Chief Executive Office Staff	14	14	14
Regional Managers	4	4	4
Technical Staff	62	62	63*
Administrative Support Staff	50	50	52*
Domestic Operatives	2	2	1
Total	135	135	137

* The increase in technical and administrative support staff numbers in 2010-11 financial year reflects possible recruitment following the 2010 business rates revaluation.

5. Workload

5.1 As an appeals service, our workload is naturally determined by the number of appellants dissatisfied with the initial decision provided by the body being challenged. The number of council tax banding appeals received on an annual basis averages about 30,000, although the number finally requiring a tribunal decision is more within the region of 5,500 appeals per year. The number of council tax liability appeals account for about 1000 appeals received on an annual basis.

5.2 Valuation tribunals are currently dealing with business rate appeals from the 2005 rating list, introduced on 1 April 2005. Around 500,000 appeals have been received by valuation tribunals since this rating list was introduced. Annual movement in numbers is very largely dependent on economic market conditions and any legislative and regulatory changes introduced by government (for example, see page 11, Empty Property Rates).

5.3 The next revaluation of business rates will be introduced on 1 April 2010 and we are currently working with the VOA, the sponsoring department and the professional bodies (Royal Institution of Chartered Surveyors, Institute of Revenues, Rating and Valuation, Rating Surveyors' Association) to understand better, at an early stage, the workload expectations of such a revaluation so that we may gear our resources appropriately to the challenges that lie ahead.

6. The Estate

6.1 Reflecting the changing environment of the modernising tribunal world in general, and valuation tribunals in particular, we are continually reviewing

our portfolio of leases to ensure that our estate continues to focus on the future operational requirements of the organisation.

6.2 In the last financial year, we brought to an end our liability on Worcester, Maidstone, Wokingham and Peterborough offices through natural breaks in leases. We have achieved this without any disruption to the operation of valuation tribunals previously administered from those offices. Following these closures, the administrative processes carried out in Worcester were transferred to our Stafford office. The administration previously provided from Wokingham was transferred to our Winchester office and that of Maidstone to our Croydon office. A new acquisition in the suburbs of Peterborough (Werrington) provided a replacement for the 'old' Peterborough office and opened in October 2007. These closures have allowed us to focus better on the administration provided in support of valuation tribunals.

6.3 We have also carried out an option appraisal focusing on the future of our London estate (Croydon, Angel, Whitechapel and Harrow). This exercise has led to a decision not to renew the Croydon lease, which will come to an end on 13 May 2008, and to transfer the administration carried out by this office to Whitechapel. This is a change to our 2006 Development Strategy, but we are confident that bringing the administrations together in this way will provide a better customer and operational focus. The Harrow administration will transfer to Whitechapel when the office lease comes to an end on 24 December 2008 and this move will bring with it further opportunities for standardising processes, creating greater harmonisation of practices, as well as creating more flexibility in the deployment of staff. We are working with our sponsoring department in progressing a business case in relation to offices at Angel and Whitechapel.

6.4 The table below illustrates offices where leases are coming to an end, whether through natural breaks or inter-governmental MOTO (Memorandum of Terms of Occupation) agreements, over the next four financial years.

Year	
2008-09	Nottingham, Angel, Winchester, Weston-super-Mare, Harrow, Croydon, Durham
2009-10	Whitechapel, Horsham, Leamington Spa
2010-11	Stafford, Werrington
2011-12	Plymouth, Preston

6.5 All our offices provide in-house hearing rooms and, wherever reasonable to do so, meet the requirements of the Disability Discrimination Act. In addition to providing in-house hearing rooms, we also hire a range of hearing rooms across the country to provide more local accessibility for our users.

6.6 We continue to be committed towards modernising tribunal support processes and further enhancing the facilities valuation tribunals provide to users. This is done through active venue management and monitoring by the regions to ensure that the venues they use:

- are easily accessible (i.e. identifiable buildings, easy to get to by road, public transport, etc.);
- demonstrate appropriate independence;
- meet user expectations;
- comply with Disability Discrimination Act provisions; and
- provide value for money.

7. The IT landscape

7.1 The key business functions rely on:

- SAP Accounting - provided by Financial Services Support Department on behalf of our sponsoring body, through a service level agreement;
- the Appeals Database - a bespoke development maintained by Capgemini under a set of framework agreements with Her Majesty's Revenue & Customs and the VOA. The VTS part of this database is separate from that of the VOA. However, there are a number of interdependencies built into the application in that data is automatically transferred between the appeal body (the valuation tribunal) and the body whose decision is being appealed (VOA).
- ASR – an HR application database.

7.2 Our aim, as part of our business objective, is to carry out a full IT options appraisal, reviewing our current arrangements for IT support and looking at how this can be improved and further developed.

8. Our resources

8.1 Expenditure plans for the next three years reflect the needs identified to provide for the operation of valuation tribunals. This expenditure can be categorised as:

- Revenue - includes staff, members' and board costs, customer services, stakeholder communications, telecommunications, office supplies and training.
- Capital - includes the costs of major IT purchases, IT software enhancements and estate improvements.

8.2 As the Accounting Officer for the VTS, the Chief Executive is personally responsible for safeguarding public funds, for ensuring propriety and regularity, and submitting our accounts for public scrutiny. The table below shows the financial resource sought to fund planned activities.

Type of Expenditure	2008-09 £k	2009-10 £k	2010-11 £k
Revenue	10,333	10,639	10,535
Capital	900	800	400
Total	11,233	11,439	10,935
Comprising:			
Grant in aid	11,233	11,439	10,935
Other income	0	0	0
Total	11,233	11,439	10,935

8.3 The table below provides a breakdown of the expenditure by main areas of spend.

Main areas of spend:	2008-09 £k	2009-10 £k	2010-11 £k
Staff costs	5,186	5,135	5,260
Estates	1,886	1,975	1,940
Professional services	1,090	1,250	1,100
General administration	1,426	1,395	1,350
Members' costs	506	495*	495*
Capital purchases (includes IT development)	900	800	400
Board costs	209	360*	360*
Contingency fund	30	30	30
Total	11,233	11,439	10,935

* reflects the implications of the VTE and creation of the national president as a Board Member.

9. Delivering efficiency

9.1 As with all public bodies, we are required by our sponsoring department to seek efficiency gains. The VTS is expected to contribute savings of at least 3% year on year. Ensuring value for money remains a key objective for us, and our continuing scrutiny of expenditure on estates and IT will reflect our aim to improve our effectiveness in these areas.

9.2 However, saving money is not the sole driving force in delivering efficiency. Also important is the need to fulfil the principles we deem important. These include:

- Greater customer focus.

- Enhancement of independence.
- Tribunal partnership working.
- A strong public image of fairness and effectiveness.
- Consistency of practice and procedures.
- Streamlined and responsive management structures.
- Greater utilisation of people and resources.

10. Recent developments

10.1 In implementing changes and conducting business we have been very mindful of the external and internal environment. Some of the key factors are outlined below:

❖ External

The Tribunal Service

10.2 The Tribunals, Courts and Enforcement Act 2007 received Royal Assent on 19 July 2007. The Act contains provisions for a new, and widely accepted, judicial and legal framework to complement the common administrative arrangements of the Tribunals Service, including:

- The creation of two new tribunals, the First-tier Tribunal and the Upper Tribunal, into which most existing tribunal jurisdictions will be transferred;
- Creating a Tribunal Procedure Committee to bring greater consistency to tribunal procedure rules;
- Permitting the flexible deployment of Judges and Members across jurisdictions and the creation of judicial 'chambers' each with responsibility for a range of related jurisdictions.

10.3 The Tribunals Minister (Ministry of Justice) issued a consultation document on 28 November 2007 setting out proposals for the First-tier and Upper Tribunals and seeking views. Of particular interest to us are:

- How the chambers in the Tribunals should be structured; and
- the role of non legal members in the new Tribunals.

10.4 The outcome of the consultation may have great significance for valuation tribunals. We will, therefore, continue to liaise regularly with the Tribunal Service so that we keep pace with external developments and ensure that we move forward in harmony with the modern thinking for tribunals generally.

Modernisation and reorganisation of valuation tribunals

10.5 The Local Government and Public Involvement in Health Act received Royal Assent on 30 October 2007, and contained provisions to bring the

current 56 valuation tribunals together as a single Valuation Tribunal for England (VTE). This is a major legislative change for us, as this Act provides for the appointment of a national president, appointed by the Lord Chancellor following selection by the Judicial Appointments Commission. The national president will provide judicial leadership and guidance to a volunteer membership. No date has yet been set for the establishment of the VTE. However, it is anticipated that the appointment of the national president will be made in this financial year. We continue to work with our sponsoring department towards the successful introduction of the VTE and partnership working with the national president.

Government Consultation on Empty Property Rates

10.6 The Government's consultation paper, entitled "Modernising Empty Property Relief", invited views on detailed proposals for changes to the system of empty property rates for unoccupied business properties. This followed the passage of the Rating (Empty Properties) Act 2007, which received Royal Assent on 19 July 2007 to give effect to the Government's reforms to reliefs from business rates in respect of empty properties, as announced in the 2007 Budget. The reforms were designed to provide an incentive for owners to re-use, re-let or re-develop their empty properties. The consultation closed on 1 October 2007 and the Government's main conclusions were:

- Increase the empty property rate from 50% to 100% of the basic occupied business rate after initial void periods have elapsed. For most properties, excluding industrial, the void period is three months. In the case of industrial properties the void period is six months. Government's intention is to encourage owners to re-let, re-develop or sell non domestic buildings.
- There should continue to be a permanent exemption from rates for vacant non-domestic properties that are listed or enjoy statutory protection.
- A permanent exemption from empty property rates should be introduced for empty business properties owned by companies in administration.
- A decision should be deferred on anti-avoidance legislation. The Government will monitor and make regulations at a later date if there is evidence that anti avoidance activity is taking place.

10.7 The major impact for the valuation tribunals would have been the introduction of anti avoidance legislation where the remedy was expected to lie with valuation tribunals in the form of appeals. We naturally await the Government's future thinking on anti-avoidance legislation.

10.8 The effects of these decisions come into force on 1 April 2008 and it remains to be seen what the real impact of the Government's conclusions are on our own workload and resources. Whilst the expectation is that there will well be a surge of proposals from owners and their agents made to the Valuation Office Agency where void periods come to an end, the impact on

valuation tribunals will be dependant on whether these proposals translate into appeals.

❖ Internal

Customer Survey

10.9 Since 2005 we have commissioned annual, independent, customer surveys. Feedback from these surveys has contributed to the implementation of improvements in the services we provide and shows a continuing trend upwards in overall satisfaction level from the first survey. There is still more that we can do to learn from our tribunal users and we will continue to commission independent surveys annually to inform further developments in our service. In 2007, 254 appellants who presented their cases at valuation tribunals in England were interviewed. The overall satisfaction index for 2006 was 72.7% and the increase in the satisfaction index for 2007 is 5% (to almost 78%). Some of the positive findings are reflected below.

- Increase of 7% (to 69%) in those who said our family of leaflets helped them and provided all the information required.
- Increase of 6% (to 73%) in numbers of those who said their treatment up to the start of the hearing was “excellent” or “good”.

10.10 A particular area of concern was a slight decrease of 3% in those who felt they had a fair hearing. We will work towards enhancing the perception of fairness and independence during the next financial year.

Appeals Direct

10.11 We have been working in partnership with our sponsoring department to introduce a new process for the lodgement of council tax appeals. This process allows appeals to be made direct to the tribunal rather than through the VOA whose decision is being challenged. The system was introduced on 1 April 2008 under The Council Tax (Valuations, Alteration of Lists and Appeals) (England) Regulations 2008. We have established a project steering group with our sponsoring department and the VOA to monitor the implementation, communication and effectiveness of the system, to digest any lessons learnt, and to be ready to respond quickly to implement identified problems. Any significant developments during the course of the year may impact on our longer term strategic thinking as we continue to aspire to an appeals direct process for business rates.

Listing after Target Date (LATD)

10.12 During the past year, we have been monitoring the national listing policy introduced on 1 April 2006 as part of our commitment to the better management of business rate appeals. This policy is designed to:

- improve the handling of business rate appeals lodged with valuation tribunals;
- work in tandem with the VOA’s programming processes; and

- provide a focus for parties to enter a period of negotiation before a hearing is convened.

10.13 As part of our monitoring process we have been in discussion with the professional bodies, through our Rating Liaison Group, and have listened to views expressed from internal and external stakeholders, we have reviewed our guidance in respect of handling postponement requests, and our clerks are now actively considering the postponement applications submitted by the parties on individual merit, through the application of a 'reasonableness' test that considers a range of criteria. This approach (introduced in July 2007) is aimed at providing a better customer focus in the handling of such requests and we will continue to monitor the effect of this policy nationally.

10.14 Whilst LATD has been successful in its introduction as a national listing policy for all 56 valuation tribunals, national statistical analysis shows that, on average, approximately 55% of cases listed for hearing are settled prior to the hearing date itself. We will be working with the professional bodies in defining possible solutions.

10.15 We will continue to adopt LATD as a national listing policy for the 2005 rating list and will be working with the professional bodies to develop a process that will meet the needs of the 2010 revaluation. However, in the long term, we continue to aspire to a system whereby business rate appeals are made direct to the tribunal rather than through the body the appeal is made against. We see this major step as truly enhancing the independence of valuation tribunals given that all other types of appeals are now made direct.

11. Progress last year

11.1 Appendix A details our intentions in the current financial year to build on the foundations for the improvement of service delivery. This section reflects briefly on some of the key challenges we faced over the last year. A more detailed report of these activities will be found in our Annual Report and Accounts for 2007-08 to be published in July. The headline messages are:

<p><i>"We will work with internal stakeholders to introduce nationally consistent procedures that provide a significant improvement to users and ensure that such procedures remain effective".</i></p>	<p>We have carried out a staff survey that has assisted us in better understanding motivational factors. We have implemented regional events where results were discussed with staff and action plans prepared.</p> <p>We have implemented active case management - a process whereby staff contact users prior to the hearing date to establish whether they are attending and, if so, to provide a mutually convenient estimated time for when the hearing will take place.</p> <p>We have completed work on job evaluation which has provided generic job descriptions, in addition to providing a better understanding of the wide range of activities staff undertake across the organisation. This work has provided a platform for a future HR strategy.</p>
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“We will contribute in enhancing the level of service to our stakeholders by providing ‘user friendly’ quality decisions that stakeholders understand and reduce time delay in sending out reasons of decisions”.

The result of our recent customer survey has shown a 5% increase in overall satisfaction in the service we provide to our customers.

We have, following consultation, implemented guidance to our clerks outlining the format and content of reasoned decisions issued to parties with the aim of ensuring national consistency. We also introduced a monitoring system to improve on the number of decisions issued to parties within 21 working days (a key performance indicator requirement).

Our continued work on Appeals Direct Council Tax to advance the perception of independence of valuation tribunals has now resulted in the introduction of a new regulatory framework on 1 April 2008.

“We will continue to develop members within their statutory role and improve our administrative support to provide appropriate guidance”.

We have improved our relationship management with valuation tribunal members. We continue to develop the communication process between the VTS and valuation tribunals via Presidents through Quarterly Presidents Meetings.

We have also developed a Members’ Training Plan and established a Members’ Training Strategy Committee for the enhancement of members’ training.

We have also supported the development of a revised appraisal system for members of valuation tribunals to be implemented by valuation tribunals in May 2008.

12. Strategic priorities for 2008–09

Five strategic priorities underpin our business objectives for the financial year ahead and provide the focus for our forward look beyond 2008-09. Our business objectives are outlined in Appendix A.



1 To make significant improvements in our customer service delivery, reinforcing the independence of the tribunals

We will deliver a high quality and efficient service and seek to improve awareness of the independence of the valuation tribunal and access to our services.

2 To support and assist with the set up and operation of the Valuation Tribunal for England (VTE) and work in partnership with the VTE National President when appointed

We will work with our sponsoring department by providing administrative support and advice to the new national president to ensure an effective programme for the establishment of the VTE, and we will work with the national president when appointed to ensure the VTE, when established, is able to fulfil its role effectively.

3 To work effectively in partnership with the valuation tribunal presidents

We will work with valuation presidents to sustain an effective an effective service and maintain effective communications.

4 To deliver an efficient service that provides value for money

We will improve the quality of what we do whilst reducing costs, building on the current financial management framework and making best use of our resources.

5 To develop our people, processes, and technology to support our modernisation aims

We will continue to work towards transforming our service in line with our vision.

13. Delivering the Business Plan for 2008-2009

The delivery of this Plan will be monitored at three levels, each on a quarterly basis. The delivery of targets will be monitored by the Chief Executive; the Board will monitor the achievements of the Plan; and we will share our achievements with the sponsoring department, through the regular liaison meetings.

In line with our business objectives for 2008–09 (Appendix A, the Business Plan) we also look to further develop our key performance indicators (outlined in Appendix B) within a balanced scorecard framework.

14. Risk management

We maintain a risk register to identify the risks associated with achieving our strategic and business objectives. Major risks (termed high or medium risks) are evaluated regularly. We have started to separate our strategic risks from our operational risks and will be managing these at different levels. Strategic risks will be reviewed and monitored quarterly at Board level whilst operational risks will continue to be monitored by the Corporate Director. The Audit Committee continues to assess the effectiveness of the processes for managing risks.

This process of reviewing the risk register ensures that corrective action is taken to eliminate or reduce potential risks.

15. Beyond 2008-09

In committing to continued development and to meet the challenges of modernisation, we need to follow through some important initiatives already under way, and take steps to develop our thinking further in a number of areas. This section provides a forward look at our intentions for the financial years 2009-10 and 2010-11.

Aims for 2009-10

Our aims are to:

- Work with our sponsoring department in successfully implementing the single Valuation Tribunal for England (VTE), prepare for the smooth transfer of functions of valuation tribunals to the VTE and provide support to the VTE by building partnership working arrangements with the national President and vice-presidents when appointed.
- Work with the Judicial Appointments Commission in introducing a new system of member appointments, when required, based on a competence framework and supplementing the current cohort of members.
- Improve customer satisfaction with the work of valuation tribunals and improve the perception of fairness and independence from the body whose

decisions are being appealed and to raise awareness of the VTS and valuation tribunals as part of the appeals direct environment.

- Implement an IT solution to support the work of the VTS and VTE that will support the VTE in the production of more meaningful operational management information. We will improve the quality and quantity of statistical outputs by increasing the degree of automation of the current manual system of producing and monitoring key performance indicators.
- Work towards becoming fully accredited as an 'Investor in People' in recognition that we value and support the continued development of our staff and valuation tribunal members. This will be build on the responses to a staff opinion survey, by monitoring the outcomes of the personal development review scheme, and by working in partnership with valuation tribunal members, particularly in facilitating the training programme for member development.
- Review and develop our estate strategy in line with our sponsoring department's policy in relation to procurement and high performing properties so that our estate portfolio reflects the vision of the organisation. We will achieve this by project planning, backed up with effective communication.
- Work with all stakeholders towards the successful introduction of the 2010 non-domestic revaluation, ensuring IT development supports improved processes and an increased focus on electronic communication.

Aims for 2010-11

Our aims are to:

- Maintain an effective interface on partnership working arrangements with the national president and VTE to further enhance appropriate support mechanisms that will continue to provide an effective interface between judicial and administrative processes.
- Continue to evaluate and monitor the estates strategy, ensuring that the VTS portfolio continues to meet the organisational needs and remains in line with our vision of modernisation.
- Continue to monitor and review performance management systems and ensure appropriate resources are available to efficiently deal with 2010 rating list appeals and any increased workload emanating from changes to council tax regulations.
- Build on the outcomes of the annual customer surveys, implement appropriate improvements to our service and research other methods for further developing a strategy for improving our interactions with all stakeholders and enhancing our customer focus.

Appendix A

The Business Plan 2008-09

Business Plan Objectives for 2008-09**Strategic priority 1: To make significant improvements in our customer service delivery, reinforcing the independence of tribunals**

Code	Business Objective	Completion Date	Accountability
1.1	Work with the Board, internal stakeholders and our sponsoring department in identifying a name that embraces the partnership working of the Valuation Tribunal for England (VTE) and the VTS.	Q. 3	Chief Executive
1.2	Undertake a further customer survey to measure user satisfaction and implement an action plan to investigate methods of further investigating ways of continuously monitoring user satisfaction.	Q. 3 + ongoing	Chief Executive
1.3	Implement Appeals Direct Council Tax as a first step to enhance independence in the appeals system and to evaluate the effectiveness of the scheme in addressing enhanced perceptions of the independence, fairness and awareness of the VTS and valuation tribunals from the Valuation Office Agency.	Q. 4	Corporate Director
1.4	Review hearing venue management guidance to ensure that we continue to provide good quality, local hearing accommodation, in easily identifiable buildings for our tribunal users, within available resources.	Q. 1 + ongoing	Regional Managers
1.5	Consider enhancing e-services to embrace on-line electronic communications with tribunal users.	Q.4 + ongoing	IT Manager

Business Plan Objectives for 2008-09**Strategic priority 2: To support and assist with the set up and operation of the Valuation Tribunal for England (VTE) and work in partnership with the VTE National President when appointed**

Code	Business Objective	Completion Date	Accountability
2.1	Work with CLG and the new national president to agree a framework for establishment of the VTE, implement legislation and determine requirements for appropriate guidance literature.	Ongoing	Chairman
2.2	Prepare briefing documents and an induction programme to support the national president following appointment.	Q.3	Chief Executive
2.3	Agree a memorandum of understanding with the national president in enhancing partnership working.	Q. 4	Chairman
2.4	Identify necessary resources to support the office of national president and the statutory function of the Valuation Tribunal for England (VTE).	Q. 2	Chief Executive
2.5	Establish management information requirements of the president and parameters for collation and reporting.	Q. 4	Corporate Director
2.6	Agree with national president his/her priorities for inclusion in the strategic plan, and implementation milestones.	Q. 4 + ongoing	Chief Executive
2.7	Work with the national president in reviewing member numbers in the period leading up to the establishment of the VTE to ensure the continued effective operation of the tribunals	Ongoing	Corporate Director and Clerks

Business Plan Objectives for 2008-09			
Strategic priority 3: To work effectively in partnership with valuation tribunal presidents and the membership			
Code	Business Objective	Completion Date	Accountability
3.1	Review current internal communication methods and implement a model that builds on effective partnership working, and engages the 56 presidents.	Q. 3	Chief Executive
3.2	Conduct a member survey to understand better the motivation, needs and pattern of work of members, and to gauge their experience and expertise. Collate findings and prepare a report to link in with national president's briefing pack.	Q. 2	Corporate Development Manager
3.3	Work in partnership with presidents to introduce and maintain a member' appraisal system.	Q. 1	Clerks
3.4	Implement a training strategy in partnership with the membership and publish and implement a members training and development programme.	Q. 1 + ongoing	Training Manager

Business Plan Objectives for 2008-09**Strategic priority 4: To deliver an efficient service that provides value for money**

Code	Business Objective	Completion Date	Accountability
4.1	Based on NAO recommendations, review our current financial management system (SAP) and agree with CLG an action plan for the implementation of appropriate changes.	Q. 4	Resource Director
4.2	Further develop common measures on efficiency (ineffective hearings, adjournment rates etc) and implement an audit tool to assess local office compliance with policies and guidance.	Q. 3	Corporate Director & Regional Managers
4.3	Improve the allocation of budget for front line activity year on year to ensure efficient and effective delivery of core services.	Q. 1 + ongoing	Resource Director
4.4	Set up a project group to conduct a management information audit with the aim of implementing a coherent performance management scheme, using a balanced scorecard on core areas and establishing key performance indicators to monitor service efficiency and effectiveness.	Q.1 + ongoing	Corporate Director
4.5	Review the workload of the VTS regions and provide a report to the VTS board with key recommendations.	Q. 3 + ongoing	Corporate Director & Regional Managers

Business Plan Objectives for 2008-09**Strategic priority 5: To develop our people, processes, and technology to support our modernisation aims**

Code	Business Objective	Completion Date	Accountability
5.1	Develop appropriate processes for managing change and provide development for staff to ensure that they are equipped to lead / contribute to change.	Q. 4	Chief Executive
5.2	Carry out an independent review of how our IT services, systems and processes are provided and to establish where improvements are needed and where further developments are required.	Q. 3	Chief Executive
5.3	Review work undertaken on developing a coherent performance management system and develop an appropriate staff appraisal system for 2009– 10.	Q. 3	Chief Executive
5.4	Develop and implement national and regional action plans based on outcomes from the staff survey and evaluate impact with a view to working towards Investors in People accreditation.	Q. 2 + ongoing	Regional Managers
5.5	Work towards a HR strategy by carry out an independent review of our organisational structure to include roles, conditions of service, pay and rewards and developing an appropriate staff appraisal system for 2009–10.	Q. 3	Chief Executive
5.6	Develop a business case for IT solutions to support our modernisation agenda and organisational change, looking specifically at areas such as increased remote working, a national telephone system and automated digital dictation.	Q. 4	IT Manager
5.7	Carry out an independent strategic review of our estate, develop and implement a long term strategy, seeking central funding if necessary.	Q. 2	Chief Executive

Appendix B - Key Performance Indicators for 2008-09

	Performance Measures	Target
Customer Service	The percentage of reasoned decisions issued within one calendar month from the valuation tribunal hearing	90%
	The percentage of council tax appeals listed for a first hearing date that fall within 5 months of the date of receipt	95%
	The percentage of 2005 business rate appeals listed within 10 weeks of the programmed target date	95%
	The percentage of settled pre 2005 Rating List appeals	98%
	The percentage of non-domestic civil penalty appeals listed within 3 months of receipt	100%
	The percentage of responses to complaints issued within 10 working days	95%
	Increase the percentage in overall satisfaction levels from the 2007 customer survey by a minimum	3%
Value for Money	Build on CSR efficiency savings by working towards a further reduction in operating costs of up to	3%
	Using the 2007-08 baseline, reduce the percentage of working time lost to absence by a minimum	3%