

WORKFORCE PLAN 2023-2026

CENTRAL SCOTLAND VALUATION JOINT BOARD -THE OFFICE OF THE ASSESSOR & ELECTORAL REGISTRATION OFFICER

> The Assessor & ERO compiles the Council Tax List, the Valuation Roll and the Electoral Registers for Falkirk, Stirling & Clackmannanshire Councils. The Assessor is an independent statutory official who is answerable to the courts in valuation and registration matters.

Foreword

The workforce of Central Scotland Valuation Joint Board is crucial to the successful delivery of the Strategic Objectives set out in the Corporate Plan.

The need for the right people, with the right skills, in the right roles, at the right time and at the right cost is the driving elements of this plan. There are concerns over skills shortages and increasing competition to attract 'talent' to our organisation making workforce planning a necessary tool.

There are a number of elements which will drive and influence the plan, these will align with changing organisational needs and the people we require to meet these changes.

This is the first Workforce Plan developed for CSVJB, it highlights the challenges and opportunities facing not only CSVJB but partner organisations and sets out an agenda which has been designed to address the challenges and to identify and capitalise on our existing strengths.

The Workforce Plan provides a framework for the team and partners to participate in the success of CSVJB. It is important the Board has the right number of people with the right skills to meet and take forward any challenge put to them. This is a difficult task where there are increasing workloads and tight restrictions on resources. The funding granted for the Barclay Review of non-domestic rates has gone some way to alleviate resource pressures for the legislative changes brought about from the Non-Domestic Rates (Scotland) Act 2020, however the economic outlook remains extremely challenging.

This will not be an easy task and the Assessor and Electoral Registration Officer is personally liable for the delivery of valuation and electoral services adding to the already building pressure.

The implementation and development, through time, of the technology we invest in will have a significant impact on the work we do and how we do it. If anything is to be learned from the coronavirus pandemic from an organisational point of view is that we need to continue to embrace flexibility and agility to adapt to the rapid pace of change as well as flexible working opportunities sought by employees.

This position makes it more important the Board has the support of its close partners, to share best practice to modernise and transform how the Board delivers services.

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1.0 Overview of the workforce plan

1.1 What is Workforce Planning?

Workforce planning is the process that Central Scotland Valuation Joint Board employs to ensure we have the right people with the right skills at the right time.

This Workforce Plan focuses on the next 3 years (2023-2026), but also aims to look beyond that by setting foundations that will deliver requirements for several years to come.

What the Central Scotland Valuation Joint Board, under the office of the Assessor & Electoral Registration Officer, does and what we achieve is documented in a series of strategic plans, strategies and policies. Although CSVJB is a relatively small organisation what we must deliver is extensive and with a significant impact on partners and service users.

The purpose of the workforce plan is to establish how to best ensure the workforce delivers the organisations vision, values, mission and strategic objectives.

For example -

- The strategy to deliver the reforms in non-domestic rates may require a broader range of skills for some employees.
- The strategy to rationalise the Boards property will require an increased requirement for employees to adopt a hybrid model of working.

Effective workforce planning considers the current workforce in terms of number of employees, skills, turnover and diversity and then extends that analysis to identify and determine the future staffing requirements and associated skills and competencies.

In effect the workforce strategy details a range of methods as to how CSVJB might achieve their goals but it is the workforce plan that will articulate and determine what the achievement of our goals might look like.

There is no doubt this plan will have to be modified and developed on a continual basis to capture both internal and external changes that impact on what the Board does and how we do it, including:

- Further Regulations to support the Non-Domestic Rating (Scotland) Act 2020

- Changes to the current non-domestic appeals system
- Changes in Electoral Registration
- Possible review of Council Tax
- Budgetary Constraints
- Government Requirements

It is common that workforce plans consider a 3-year period, and this will broadly align with the refresh of the Assessor's Service Plan.

The Board has an overarching vision, mission, values and goals and these highlight the required strategic objectives and supported actions the Board must take to achieve these.

Vision	 Our Vision is to provide a range of valuation and electoral services to the stakeholders of the Valuation Joint Board in accodance with statute and at levels of excellence which exceed their expectations.
Values	 Valuing Stakeholders Service Delivey Co-Operation Positive Partnership working Communication
Mission	 As an independent Local Government organisation, Central Scotland Valuation Joint Board's mission is to provide equitable, transparent, customer focussed, best value, high quality, professional valuation and electoral services for all is stakeholders.
Strategic Goals	 Service Delivery in Accordance with Statutory Requrements Best Value and Continuous Improvement Sound Governance Consultation Supported and Motivated Colleagues

Elements of workforce planning already occur organically, however, a formal plan explores and plans our workforce requirements as one organisation and forecasts the future needs of the organisation taking account of the known and possible changes to what

we do and how we do it. The organisational outputs are relied upon by various partners and the actions we plan within the workforce plan will help them achieve their aims and objectives.

The plan also aims to compare information and data on our workforce which can be a reference to demonstrate the progress we have made and the various trends within the workforce overtime.

1.2 What is the makeup of Central Scotland Valuation Joint Boards workforce?

Across the three core function of CSVJB we have diverse teams. These range from administration staff; to staff who are members of the Royal Institute of Chartered Surveyors. There are a number of factors which have contributed to the need for organisational change and Workforce Planning, see figure 1.

Figure 1:



In larger organisations there would be a need for strategic and operational plans. However, given the size of CSVJB this plan aims to blend these elements into a medium forecast of workforce requirements.

Over a number of years we have focused on transactional change where we looked at short-term resource needs to modify and improve our existing processes. This will continue as the organisation changes and develops.

Transitional change has taken place where we have changed processes and allocated resources to meet our Service Plan requirements.

The need now is for transformational change which will involve the restructuring of the workforce to meet the demands now and in the future.

1.3 National & Local Context

At national and local levels there are a number of events and partners which influence the work of the Joint Board Consequently, all of which influence the workforce plan.

The following organisations impact on the Assessor & EROs in the following ways.

Influencer	Impact
Westminster and the Department of Levelling Up Housing and	Changes to legislation; Guidance and Directions
Communities	Funding of CSVJB
Scottish Government	Changes to legislation; Guidance and Directions
	Funding of CSVJB
Clackmannanshire Council - Service Level Agreement	Internal review/s impacting on CSVJBs requirements
Other Constituent Councils - Falkirk & Stirling	Information exchange
Registers of Scotland	Receipt of information is crucial to KPIs
Keeper of the Registers of Scotland	Records Management Demands
Scottish Water	Locational information on NDR subjects; information to allow
	allocation of water rates; Portal development
Health & Safety Executive	Keeping our people and service users safe
Staff Consultation Forum	Engagement on changes that impact on staff
Scottish Assessors Association	Staff resource demands contributing to national valuation
	harmonised practice

2.0 Workforce Planning Process

In order to restructure the organisation we analysed the current workforce, identified gaps between the current workforce and CSVJBs future needs.

Figure 2 details the steps in the planning process:



The organisation was slightly restructured in light of the Non-Domestic Rates Act, retirals, skills shortages and the need to plan for future requirements of the Board.

The current structure (July 2023) is now detailed in Figure 3 below.



Figure 3

3.0 Workforce information

The current organisational structure has 44 members of staff (40.81 full time equivalent posts, including vacant posts), see Chart 1 for the organisation's age profile at 1 July 2023

3.1 Age Profile

Chart 1:



The age profile of our workforce showed that the majority were aged over 50 which highlights a need to increase employment opportunities for the younger age ranges. The main focus is to employ trainee technicians/valuers and this also will help with bridging of the skills gap in the valuation sections in future years. Current trainees are at various stages in their professional career and range from those that are just starting their university course to those that are embarking on the Assessment of Professional Competence to become members of the Royal Institution of Chartered Surveyors. Any vacancies for fully qualified chartered surveyors will be filled by trainees where recruitment for qualified staff has proven unsuccessful.

There is a nationwide shortage of chartered surveyors across the sector. In an attempt to address this shortage of qualified staff going forward we are looking to change the way we recruit trainee valuers – currently we recruit only part qualified trainee staff, those with some experience, typically graduate surveyors having already gained their RICS exempting degree or fully qualified technicians looking to move forward in their career.

Recruitment of Level 1 trainee valuers i.e. those with no experience but with qualifications which meet the entrance requirements towards the RICS exempting degree, will increase our potential pool of candidates and will hopefully lead to a situation where we invest in staff members from the outset of their career through to becoming a qualified member of staff. Exploration of the national Graduate Apprentice Scheme will also take place to potentially facilitate an alternate method toward RICS qualification.

Chart 2 details the distribution of the grades throughout CSVJB, by section (including vacant posts).



Chart 2:

Within an organisation like CSVJB there is a real need for succession planning to ensure the transfer of knowledge and skills for service delivery and develop our employees and managers at all levels for future challenges.

4.0 Hybrid and flexible working

Our workforce has embraced the temporary hybrid working arrangements the Board offered as a result of the covid pandemic. The organisation had to move forward at a rapid pace when Covid-19 struck moving from only managers that could work from home to all staff with the capability of home working.

Following very positive feedback from an all staff survey on the temporary arrangements currently in place, a formalised Hybrid Working Policy based on the current temporary arrangements is being drafted with a view to adoption in 2023.

It is now possible for all staff to work from home, some staff may, for a number of reasons, prefer to work within the office environment, and as an organisation we are flexible with requests. There are still a number of tasks which require an office presence and this is carefully monitored.

There has been considerable investment in IT and other equipment. However, this has paid dividends following the recent office rationalisation programme – the Board approved a downsizing in office requirements following the expiry of our lease at Hillside House in May 2023, with the resultant move to smaller office premises at The Castle Business Park.

5.0 Leadership

It is my role as Assessor & ERO to understand, develop and evolve our organisational style, developing leadership at all levels by:

- o ensuring corporate governance
- o promoting a culture of strategic thinking
- o promoting a culture of change
- o promoting communication at all levels
- o encouraging collaboration and partnership working
- $\circ~$ ensure a safe and healthy working environment
- o training & development commitment to investing in our people

Working in partnership and through my interface with the Board I will have:

- o the authority to shape CSVJB
- $\circ~$ be supported in policy decisions
- \circ be accountable for the organisation
- $\circ\;$ given the opportunity to manage and facilitate change
- o and influence the future agenda and corporate objectives of CSVJB

Senior Managers will build on our aims and objectives and develop behaviours through:

- $\circ~$ encouraging innovation and create an empowerment culture
- o being accountable for their actions take ownership
- o supporting new ways of thinking and working
- o providing a positive and supportive working environment
- providing support to meet challenges, motivating and recognising those staff that are rising to the challenges and supporting staff where necessary
- o ensuring the correct organisational structures are in place to support effective governance and workforce configuration
- o developing plans for implementing and managing the change process, with particular emphasis on the impact on people
- o defining the impact of change on our workforce and identify skills/knowledge gaps which will be addressed through training

Change will be part of the ever-evolving environment in which CSVJB operates, the Management Team's role will be to keep our vision in our sights and recognise change as a means to achieve it, whilst constantly being aware of what is happening around us, ensuring we shape our organisation for the future. This will require supporting forward planning of organisational change and in new methods of service delivery; consultation at all levels in advance of change; encourage active participation in the change process.

6.0 Developing our people

Through our staff training programme and our annual appraisal process we continually seek opportunities to improve the skills and abilities of our workforce to ensure they are multi-skilled and capable of working across all 3 of our statutory functions whilst supporting other partners that rely on our services and outputs. The nature of our Service is such that staff account for over 90% of our budget and it is therefore imperative that we invest in them to ensure they are capable of meeting the demands of the dynamic valuation and registration areas of our business.

The key areas of focus will be:

4 Ensure our workforce delivers our services in a manner that supports the Joint Board's expectations of service delivery

- Refocus our workforce to deliver the changes that will be brought about by legislative changes in both valuation and electoral services
- 4 Equip our workforce to support the delivery of our mission and vision
- **4** Manage our workforce to meet customer and elected members needs
- Develop a customer feedback system fit for a modern organisation

7.0 Diversity of our people

We want to develop the future workforce, support succession planning and support training programmes to ensure more opportunities exist for our workforce. We want to enhance the diversity of our staff complement to better reflect our population and make our Service an exemplar in celebrating diversity and equality.

8.0 Recruitment & retention

More innovative and pro-active approaches to recruitment needs to be explored. The Board has, over the last 12-24 months, had low numbers of applications for several technical posts, some of which are senior posts. This has left them unfilled for a significant period and they have had to be re-advertised on several occasions. The Assessor & ERO aims to improve the information available to candidates, look at other cost effective methods of advertising posts and thus ensuring the Board is an employer of choice, and we will continue to explore alternative, or supplementary, measures that encourage applications from the relevant talent pool.

Recent improvements include our hybrid working arrangements which is attracting candidates from a wider geographical area.

Turnover of Board employees is not unreasonable given the age demographics of the organisation and scarcity of staff within the wider employment pool – the predominant reason for staff are leaving is for career development and/or financial betterment. This is a reflection of the decreasing talent pool specific to qualified chartered surveyors. As you can see from the chart at 4.1 above, the age profile tends towards the 50+ group although this has been addressed with recent recruitment during 2022/23. Table 1 shows the numbers that have left the organisation and the reasons for this.

Table 1:

Year	No.	Valuation	Reasons	Admin/	Reasons	Management	Reasons
	Left			IT			
2019-20	3			2	Resigned	1	Retired
2020-21	3			3	Resigned/Retired		
2021-22	8	3	Resigned	3	Resigned	2	Resigned
2022-23	9	5	Resigned – all	3	Resigned – 2	1	Promotion/financial
			promotion/financial		retirements, 1 career		betterment
			betterment		betterment		

To further understand why any employee would choose to actively leave the Board, and to identify any dissatisfaction a new employee might have, the staff questionnaire and other communication methods will be employed to monitor dissatisfaction levels.

9.0 Succession planning

Improvements in the quality of the data we hold will help identify the future needs of the organisation. Succession planning aims to facilitate enough people with the right skills to step into critical positions when required.

Currently there is no transition period that allows a manager to work on their incoming replacement. Where the organisation has retirals these are known in advance and recruitment is not taking place until the member of the team has actually retired. This could potentially lead to important skills and knowledge not being available to any incoming team member to allow them to 'hit the ground running' which can have a detrimental impact on service delivery. Even a short period of hand over would alleviate training needs on the remaining staff members. This is something that will be addressed in the action plan.

10.0 Absence management

We will ensure the Maximising Attendance Policy and Procedures maintain their high profile and will promote measures to positively and directly address all absence from work in a positive manner.

11.0 Professional competencies

The organisation has staff with a wide range of professional disciplines including electoral registration; valuation; management; customer care; health & safety and other disciplines. We encourage engagement in professional associations and our training plan recognises the importance of keeping up to date. We also maintain a list of essential training for all staff for areas like cyber security. We recognise that staff training is an essential and integral part of how we develop our organisation and as such we have formally created a Staff Training Forum which, chaired by a Divisional Assessor, will meet quarterly commencing in 2023.

We have 4 members of staff accredited with the Association of Electoral Administrators (AEA) - membership of the AEA provides access to training events, legislation and registration resources. The AEA also works closely with governments and agencies to provide us with regular updates during electoral events.

We have 9 RICS qualified Chartered Surveyors (including the Assessor) who must undertake a minimum of 20 hours of mandatory continual professional development each year. This is achieved through attendance at relevant internal and external courses as well as in-house training on new legislative changes or relevant case law.

Technicians are encouraged to become associate members of the RICS and we currently have three technicians who are RICS affiliated.

The introduction of the NDR (Scotland) Act 2020 has provided opportunities to recruit additional staff from externally funded sources.

We currently have 2 Trainee Valuers at different stages in gaining relevant qualifications, with the intention of recruiting two more trainee valuers to commence study in 2023 (see 4.1 above).

12.0 Equalities

The Board has specific duties under the Equality Act 2010, and has published information on Equality Outcomes, workforce analysis, gender and disability pay gap analysis in it's Mainsteaming Report, approved November 2022. This means that it meets the requirements of the Equality and Human Rights Commission for Scotland and sets out what the Board will do over the next two years to;

- Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited under the Act.
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
- Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

It also confirms the following set of equality outcomes:

Equality Outcome 1

Employment - That Central Scotland VJB is recognised as an employer that promotes equality of opportunity and where diversity is welcomed and respected.

Equality Outcome 2

Service – That services provided by Central Scotland VJB promote a culture of inclusion and prevent discrimination and harassment.

Equality Outcome 3

Understanding - Everyone who works for Central Scotland VJB fully appreciates the equality duties placed upon the board and their individual duty to promote equality and prevent discrimination and harassment.

Equality Outcome 4

To increase the representation of men and women in roles where gender segregation is evident.

Over the next two years we will work individually and collaboratively to deliver these Outcomes. We will report progress in achieving these aims in November 2024.

13.0 Staff Consultation

The Board engages with its employees by way of a Staff Consultation Forum. The Forum is chaired either by the Assessor or one of the Divisional Assessors, there are five representatives on the Forum which are as follows

- One representative for managers
- One representative for Unison
- Three representatives for employees

A member of Clackmannanshire Council's HR Team also attends meetings. The Staff Consultation Forum considers general staffing matters, HR policies and Health & Safety matters.

14.0 Workforce plan actions

We will base our action plan on our requirements now and in the future with a focus on:

- 4 Identifying skills gap and plan effectively for our future needs.
- Implement and undertake effective succession planning.
- 4 Develop a flexible multi skilled team to help build capacity and resilience within the organisation.
- 4 Be an employer of choice attracting motivated, committed and flexible staff, and that they have a voice within the workforce.
- 4 Meet the requirements of existing and developing legislation, and be guided by national, regional and local strategy/policy.
- 4 Link workforce planning to financial planning.
- Continued engagement with staff.

15.0 Service improvements

Activities to support service improvement are monitored by the Management Team and in-house working groups on at least a monthly basis. The main projects include:

- Non-Domestic Revaluation 2023
- **4** Running Roll Appeals as a result of Covid-19 Disposal
- Non-Domestic Rating (Scotland) Act 2020
- Canvass Reform
- Upgrading/Replacement IT Systems
- Records Management / Data Protection / Freedom of Information
- Complaints Handling

We have already progressed a number of major corporate initiatives:

- **4** Improvements in workforce information dissemination
- 4 Developing the workforce to meet the demands of the Non-Domestic Rating (Scotland) Act 2020 and Canvass Reform
- Review and Monitor results from the Staff Questionnaires; invite feedback through our in-house staff consultation forum and working groups
- Upskilling of existing workforce

As well as continuing with the above we will now focus on:

- Succession Planning
- 4 Develop the workforce to be flexible allowing them to move between areas of service delivery
- ↓ IT development to support efficiencies
- **I**T development in respect of Barclay Review recommendations
- **4** Expansion of trainee valuer uptake at school leaver level

16.0 Monitoring and Evaluation

Successful workforce planning is an active and continuous process which requires on-going monitoring and evaluation. Action plans will be reviewed regularly by the Board's Management Team to ensure the appropriate level of progress is being made and that the required outcomes are being met in addressing workforce gaps.

Wherever possible, existing reports, including budget and operational function reports (KPIs etc), will be used to evaluate the effects of actions or inactions. Plans will be adjusted if they are not having the desired impact or if circumstances change.

Evaluating progress will involve a consideration of the following questions:-

- 4 Are the identified strategies being implemented in accordance with the action plan?
- **4** Have the strategies delivered against the required outcomes?
- **Have the conditions (internal or external) changed?**
- 4 Are there any other factors preventing achievement required outcomes?
- Is there a need to modify the strategies or actions?

Reports on progress will be provided to the Joint Board as is appropriate.

17.0 Assessor & ERO Workforce Action Plan

Assessor & ERO Workforce Plan – Action Plan				
Objective	Responsibility	Timescale	Action	
1. Support	Assessor &	Annual	1.	Continue to undertake WFP activity in line with Board Policy and any
and	ERO	Reporting		statutory responsibilities.
implement		Template	2.	Identify and nominate responsible officers to ensure elements of the WFP
the		reported to the		are undertaken in line with timescales.
Workforce		Board and	3.	Identify any training requirements to undertake WF Planning.
Plan.		complete	4.	Compile and complete WF Planning Reporting Template to be presented to
		review of WFP		the Board to complement the Annual Report and the Delivering Good
		in 3 years.		Governance Reports.

Assessor & ERO Workforce Plan – Action Plan					
Objective	Responsibility	Timescale	Action		
2. Plan for our future needs.	Assessor & ERO	On-going	 Age Continue to, where possible, give young people opportunities. Need to focus on succession planning. Develop potential managers/leaders within CSVJB. Employee Profile Continue to improve on the employee profile of CSVJB. Flexible & Hybrid Working Continue to promote smarter working to increase flexibility and achieve efficiencies. Review the successes and areas of improvement in hybrid working. Post Review Review each post as it becomes available. Restructure as required within budgetary constraints. Redeploy resources where required – training required. 		

Objective	Responsibility	Timescale	Action
3. Hybrid Working	Assessor & ERO with SMT	On-going	 Develop and formalise new Hybrid Working Policy Explore development of the core system to support mobile technology. Scan all NDR files to facilitate improved home working.
4. Future Skills & WF Needs	Assessor & ERO with SMT	On-going	 Review and update APC training and guidance for trainee valuers to achieve industry leading standards. Identify training needs through the appraisal process. Continue to develop essential training requirements. Explore the Graduate Apprentice Scheme. Where there are appropriate candidates within CSVJB internal promotion to be considered. Examine the reasons why staff move on and look at ways of retaining staff. Look at areas where there may be future retirements and plan. Where vacancies exist within the organisation – review these and advertise in appropriate mediums to fill essential posts. Continue to develop staff at all levels to prepare them for career progression.

Objective	Responsibility	Timescale	Action
5. Efficiency Savings	Assessor & ERO	On-going	 Monitor the number of staff required to run all services on a 12 month basis. Identify areas of service delivery that can be delivered by less qualified staff. Reduce site visits in line with new ways of working. Develop the core system to support modernisation & transformation. The scanning of NDR files to be undertaken by when time and resources allow.
6. Engage with staff	All Managers		 Review Communication Strategy. Ensure team briefings are taking place. Measure employee satisfaction through the Staff Questionnaire and report to the Management Team Undertake additional ad hoc staff surveys where necessary. Continue full engagement with Staff Consultation Forum.
7. Develop Performance measures.	Management Team		 Learning & Development Continue to develop training in a way that supports remote working. Identification of training needs through the appraisal process. Continue to maintain a training programme of training essentials utilising Clacks Academy and Bob's Business. Address any performance issues through the appraisal process and appropriate policies. Maintain the list of monthly training staff engaged in. Expand internal suite of KPIs. Maintain the review of absence statistics at each Management Team Meeting. Monitor vacancies. Monitor staff turnover.