

## **Item: 6**

**Orkney and Shetland Valuation Joint Board: 30 September 2021.**

**Workforce Plan.**

**Report by Assessor and Electoral Registration Officer.**

### **1. Purpose of Report**

To present the proposed Workforce Plan for the period 2021 to 2024.

### **2. Recommendations**

The Board is invited to note:

#### **2.1.**

That, as part of the 2019-2020 audit, the auditors recommended that the Board consider adopting a workforce plan.

#### **2.2.**

The Orkney and Shetland Valuation Joint Board Workforce Plan 2021-24, attached as Appendix 1 to this report, which has been developed in order to address the action contained in the Governance Action Plan arising from the 2019-2020 audit.

**It is recommended:**

#### **2.3.**

That the Orkney and Shetland Valuation Joint Board Workforce Plan 2021-24, attached as Appendix 1 to this report, be approved.

### **3. Background**

#### **3.1.**

As part of the annual audit recommendations from 2019-2020, the auditors recommended the Board should consider adopting a workforce plan.

#### **3.2.**

The above recommendation was incorporated into the Board's Governance Action Plan last presented to the Board meeting on 24 June 2021 with a proposed revised completion date of 31 December 2021.

## **4. Workforce Plan**

The Orkney & Shetland VJB Workforce Plan, attached as Appendix 1 to this report, sets out its current workforce and identifies the process to be undertaken to identify the workforce it currently needs, the workforce it needs in the future, the gaps between the current workforce and the needed workforce and actions to fill those gaps (recruitment, training, changing service provision).

## **5. Link to Board Plan**

The matters referred to in this report contribute to the Board's strategic objectives detailed in the Corporate Plan 2019-2022.

## **6. Financial Implications**

There are no financial implications arising from the contents of this report other than the planned budgetary implications of the workforce planning.

## **7. Legal Aspects**

There are no legal implications arising from the contents of this report.

## **8. Contact Officer**

Dennis M Stevenson, Assessor and Electoral Registration Officer, Email [dennis.stevenson@orkney.gov.uk](mailto:dennis.stevenson@orkney.gov.uk).

## **9. Appendix**

Appendix 1: Orkney and Shetland VJB Workforce Plan 2021 -24.

# **Orkney and Shetland Valuation Joint Board**

## **The Office of the Assessor and Electoral Registration Officer**

### **Workforce Plan 2021-2024**

The Assessor & ERO compiles the Council Tax List; the Valuation Roll and the Electoral Registers for the Orkney and Shetland Islands. The Assessor is an independent statutory official who is answerable to the courts in valuation and registration matters.

## Foreword

The workforce of Orkney & Shetland Valuation Joint Board (OSVJB) 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 (WFP) developed for OSVJB, it highlights the challenges and opportunities facing not only OSVJB 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 WFP provides a framework for the team and partners to participate in the success of OSVJB. 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 you have increasing workloads and tight restrictions on resources. It is hoped the funding granted for the Barclay Review of non-domestic rates will go some way to alleviate resource pressures for the legislative changes brought about from the Non-Domestic Rates (Scotland) Act 2020.

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 was to be learned from the pandemic from an organisational point of view, it is we need greater 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.

**Dennis M Stevenson, Assessor & ERO.**

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## 1.0. Leadership

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

- Ensuring corporate governance.
- Promoting a culture of strategic thinking.
- Promoting a culture of change.
- Promoting more joint working between Elected Members and Officers.
- Promoting communication at all levels.
- Encouraging collaboration and partnership working.
- Ensure a safe and healthy working environment.
- Training and development - commitment to investing in our people.

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

- Have the authority to shape OSVJB.
- Be supported in policy decisions.
- Be accountable for the organisation.
- Be given the opportunity to manage and facilitate change.
- Influence the future agenda and corporate objectives of OSVJB.

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

- Encouraging innovation and creativity.
- Being accountable for their actions – taking ownership.
- Supporting new ways of thinking and working.
- Providing a positive and supportive working environment.
- Providing support to meet challenges, motivating and recognising those staff who are rising to the challenges and supporting staff where necessary.

- Developing plans for implementing and managing changing processes, with particular emphasis on the impact on people.
- Defining the impact of change on our workforce and identifying skills/knowledge gaps which can be addressed through training.

Change will be part of the ever evolving environment in which OSVJB operates, the Senior Management Team's role will be to keep our vision in our sights and recognising 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.

## **2.0. Overview of the Workforce Plan**

### **2.1. What is the Workforce Planning?**

Workforce planning is the process that OSVJB 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 (2021-2024), but also aims to look beyond that by setting foundations that will deliver requirements for a number of years to come.

What the OSVJB, 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 OSVJB is a relatively small organisation what we have to 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 organisation's 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 deliver the reforms in electoral registration may require a broader range of skills for some employees.
- A strategy to address the Board's properties with a view to establishing if these are fit for purpose in accommodating requirements.
- Any strategy to review and modernise our Information Technology may increase the dependency of the Board on our current IT suppliers of Orkney Islands Council and Shetland Islands Council.

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 OSVJB 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 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 align with the refresh of the Board's Corporate Plan 2022-2025.



## Vision

- Our Vision is to provide a range of valuation and electoral services to the stakeholders of the Valuation Joint Board in accordance with statute and at levels of excellence which meet or exceed their expectations.

## Values

- Valuing Stakeholders
- Service Delivery
- Co-Operation
- Partnership Working
- Communication

## Mission

- As an independent Local Government organisation, Orkney & Shetland Valuation Joint Board's mission is to provide equitable, customer focused, best value, high quality, professional valuation and electoral services for all its stakeholders.

## Strategic Goals

- Service Delivery in Accordance with Statutory Requirements
- Best Value and Continuous Improvement
- Sound Governance
- Consultation
- Supported and Motivated Colleagues

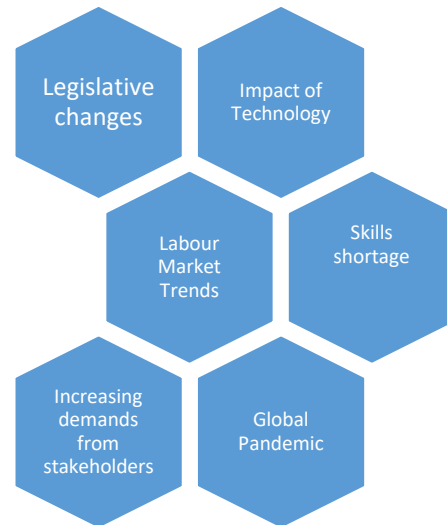
Elements of workforce planning already occur organically, however, a formal plan explores and plans our workforce requirements as one organisation and forecasts the future needs of the organisation taking account of the known and possible changes to what we do and how we do it. The organisational outputs 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 over time.

## 2.2. What is the makeup of Orkney & Shetland Valuation Joint Board’s workforce?

Across the three core functions of OSVJB we have diverse teams. These range from administration staff; to staff with various qualifications ranging from members of the Association of Electoral Administrators to members of the Royal Institution 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 OSVJB 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 may take place where we have changed processes and allocated resources to meet our Service Plan requirements.

### 2.3. National and Local Context

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

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

Influencer	Impact
Westminster and the Cabinet Office.	Changes to legislation; Guidance and Directions. Funding of OSVJB.
Scottish Government	Changes to legislation; Guidance and Directions. Funding of OSVJB.
Orkney Islands Council – Asset Valuation & Insurance Valuation Service Level Agreement.	Internal review/s impacting on OSVJB's requirements and available resources.
Registers of Scotland.	Receipt of information is crucial to Key Performance Indicators.
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 and Safety Executive.	Keeping our people and service users safe.
Unions.	Engagement on changes that impact on staff.

### 3.0. Workforce Planning Process

In order to restructure the organisation we analysed the current workforce, identified gaps between the current workforce and OSVJB's future needs. Figure 2 details the steps in the planning process.

Figure 2:

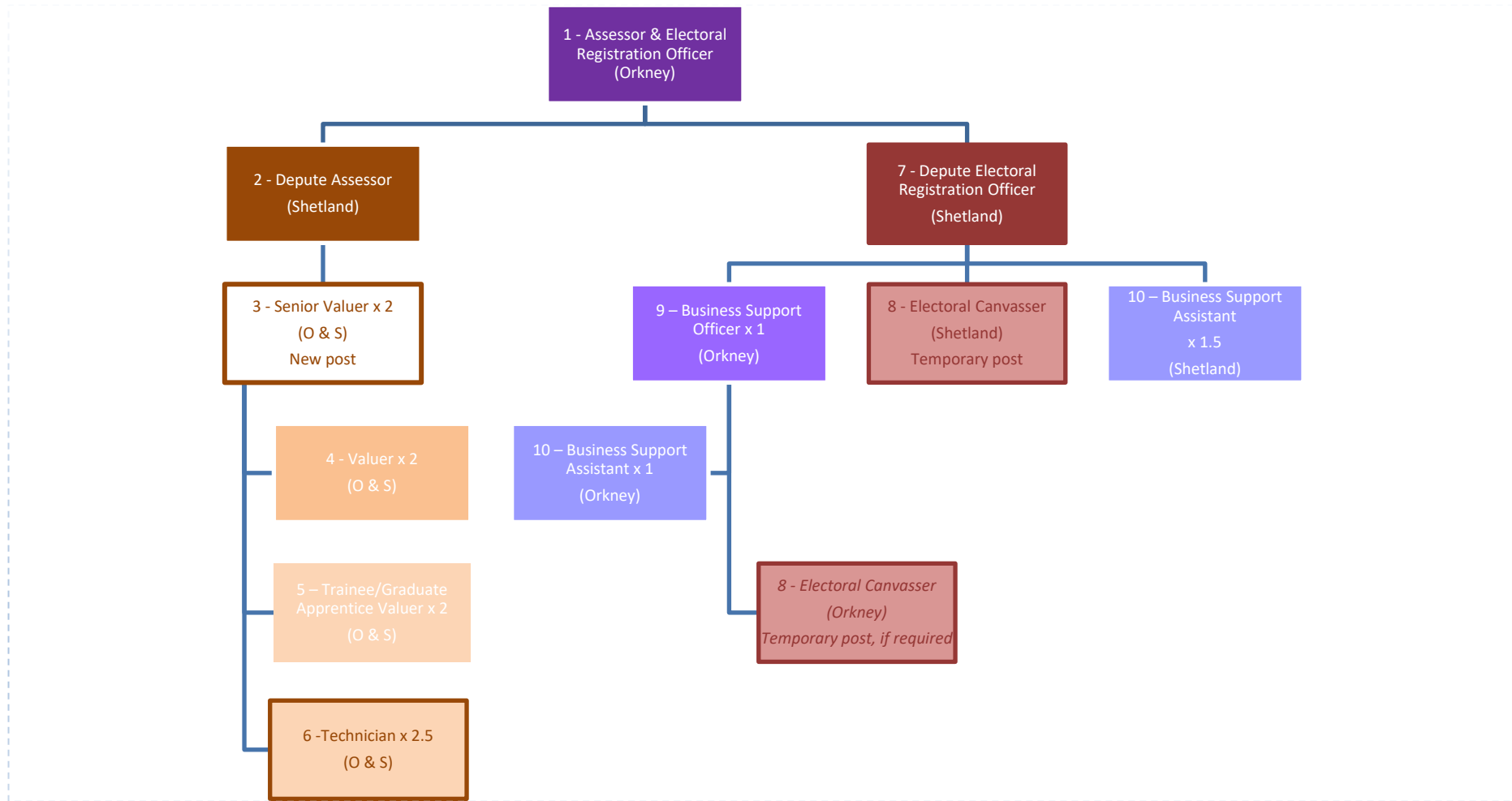


The organisation was restructured in light of the Non-Domestic Rates (Scotland) Act 2020, Electoral Canvass Reform requirements, retirements, skills shortages and the need to plan for future requirements of the Board.

The current structure is detailed in Figure 3.

Figure 3.

Post 2 (Depute Assessor) and Posts 3 (Senior Valuers) are currently vacant.



## 4.0. Workforce information

The current organisational structure has 15 full time equivalent posts (including vacant posts). It should be noted that the two Senior Valuer posts are currently aspirational and will be filled when valuation staff become fully qualified Chartered Surveyors with the relevant experience. In time, when the structure and vacant posts are filled, this will free up Trainee positions at the lower end of the structure that will become vacant. Trainee positions will be filled as and when required to take account of the employee workforce plan requirements for future succession planning. It should be noted that the minimum time from becoming a Trainee Valuer to fully qualified Chartered Surveyor is over 5 years.

### 4.1. Age Profile

The age profile of our workforce showed that over half are aged over 50 which highlighted a need to increase employment opportunities for a wider range. Under statutory requirements from the Non-Domestic Rates (Scotland) Act 2020 the main focus was to employ Trainee Valuers and this will also help with bridging of the skills gap in the valuation sections in future years. The trainees are at various stages in their professional career and range from those who are working through their university course to those embarking on the Assessment of Professional Competence to become full members of the Royal Institution of Chartered Surveyors. Table 1 shows the age profile by gender at 31 March 2021.

Table 1: Employee Age Distribution

Age	Male	%	Female	%	Total	%
0-19	0	0.0%	0	0.0%	0	0.0%
20-29	2	28.6%	1	16.7%	3	23.1%
30-39	0	0.0%	0	0.0%	0	0.0%
40-49	1	14.2%	2	33.3%	3	23.1%
50-59	2	28.6%	3	50.0%	5	38.4%
60-69	2	28.6%	0	0.0%	2	15.4%
70+	0	0.0%	0	0.0%	0	0.0%
All	7	100%	6	100%	13	100%

Within an organisation like OSVJB 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.

## **5.0. Agile and Flexible Working**

Our workforce has embraced the agile working arrangements the Board offers. The organisation had to move forward at an alarming pace when COVID-19 struck, moving from two managers who could work from home to 85% of all staff with home working.

It is now possible for most staff to work from home, a number of staff for a number of reasons prefer to work within the office environment, 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. At the date of presenting this plan staff migration back to offices is underway, while retaining the option of home working or a blended model where appropriate.

There has been considerable investment in IT and other equipment.

It has to be recognised that home working or agile working has barriers in the form of poor rural broadband connectivity which resulted in these options not being available to some staff, particularly in Orkney.

## **6.0. Developing our people**

Through staff training 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 three 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 80% of our budget costs 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:

- Ensure our workforce delivers our services in a manner that supports the 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.
- 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 young people. We want to maintain the diversity of our staff complement to reflect our population and make our Service an exemplar in celebrating diversity and equality.

## **8.0. Recruitment and retention**

More innovative and pro-active approaches to recruitment needs to be explored. The Board over the last 6 years has 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 numerous occasions. The Assessor & ERO aims to improve the information available to candidates, look at other 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, including the partial ability to work from home, may attract candidates from a wider geographical area.

Turnover of Board employees is generally in line with the age profile and the age demographics of the organisation where most reach an age where retirement is one of the primary reasons for staff turnover.

## **9.0. Succession Planning**

Improvements in the quality of the data we hold has and will identify where we should concentrate our potential 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 along side their incoming replacement. Where the organisation has retirements these are known in advance and recruitment is not taking place until the member of the team has actually retired or about to retire. This leads 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. It should be recognised that two separate Island offices may be a geographical barrier to this in some instances.



## 10.0. Absence Management

We will ensure that, where possible, maximising attendance maintains a high profile and we encourage consideration of reasonable adjustments which avoid or reduce a period of absence, and we promote a culture of wellbeing.

## 11.0. Professional Competencies

The organisation has staff with a wide range of professional experience in disciplines including electoral registration; valuation; management; customer care and health & safety. We encourage engagement in professional associations and our training requirements should recognise the importance of keeping these up to date.

We have one member 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 one RICS qualified Chartered Surveyor (the Assessor) who has to have 20 hours of mandatory continual professional development to undertake 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.

The introduction of the NDR (Scotland) Act 2020 has provided opportunities to recruit additional staff with the support of external funding.

We currently have four Trainee Valuers at different stages in gaining relevant professional qualifications:

Institution or RICS Training	Number
Napier University: Graduate Level Apprentice Scheme	2
Have their Degree and are working towards their membership of the RICS	2

## **12.0. Equalities**

The Board has specific duties under the Equality Act 2010, and has published information on Equality Outcomes, a Mainstreaming Report, workforce analysis, disability, gender, ethnic group and pay analysis. This means that the Board meets the requirements of the Equality and Human Rights Commission for Scotland and sets out what the Board will do over the next four 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.

## **13.0. Unions**

The Board's terms and conditions and a large number of our adopted HR policies are taken from Shetland Islands Council who fully engage with trade unions. However, where required, the Assessor & ERO will meet with unions on matters that impact solely on the staff of the Board. At such meetings the Assessor & ERO would be accompanied by a member of the HR team in Orkney Islands Council who currently supply support services to the Board. As Orkney Islands Council provides the Board's HR support, and the introduction of a new pay & grading model is in place from April 2021, this gives the opportunity to review all the people policies and procedures over time, in consultation with staff.

## **14.0. Workforce plan actions**

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

- Identifying skills gap and plan effectively for our future needs.
- Implementing and undertaking effective succession planning.
- Developing a flexible multi-skilled team to help build capacity and resilience within the organisation.
- Being an employer of choice attracting motivated, committed and flexible staff, with a voice within the workforce.
- Meeting the requirements of existing and developing legislation, and being guided by national, regional and local strategy/policy.
- Linking workforce planning to financial planning.
- Continued engagement with staff.
- When resources allow, review and update HR people policies and procedures.

## **15.0. Service improvements**

Activities to support service improvement are monitored by the Senior Management Team on at least a six monthly basis. The main projects include:

- Revaluation 2017 Appeal Disposal.
- Running Roll Appeals as a result of COVID-19 Disposal.
- Non-Domestic Rating (Scotland) Act 2020.
- Revaluation 2023 Delivery Planning.
- Electoral Canvass Reform.
- UK Elections Bill.
- Maintaining and developing IT Systems.
- Working with Partners to Deliver Efficiencies, where appropriate.
- Records Management / Data Protection / Freedom of Information.
- Complaints Handling Procedures.

## 16.0. Assessor & ERO Workforce Action Plan

Objective	Responsibility	Timescale	Action
1. Support and implement the Workforce Plan.	Assessor & ERO.	Complete review of WFP in 3 years.	<ol style="list-style-type: none"> <li>1. Continue to undertake WFP activity in line with Board's Corporate Plan and any statutory responsibilities.</li> <li>2. Identify and nominate responsible officers to ensure elements of the WFP are undertaken in line with timescales.</li> <li>3. Identify any training requirements to undertake WFP.</li> <li>4. When resources allow, review and update HR people policies and procedures.</li> </ol>
2. Plan for our future needs.	Assessor & ERO.	Ongoing.	<p>Age</p> <ol style="list-style-type: none"> <li>1. Continue to, where possible, give young people opportunities.</li> <li>2. Need to focus on succession planning.</li> <li>3. Develop potential managers/leaders within OSVJB.</li> </ol> <p>Employee Profile</p> <ol style="list-style-type: none"> <li>1. Continue to improve on the employee profile of OSVJB.</li> </ol> <p>Flexible and Agile Working</p> <ol style="list-style-type: none"> <li>1. Continue to promote smarter working to increase flexibility and drive down costs.</li> <li>2. Review the successes and barriers in home working.</li> <li>3. Consider potential office space requirements.</li> </ol> <p>Post Review</p> <ol style="list-style-type: none"> <li>1. Review each post as it becomes available.</li> <li>2. Restructure as required within budgetary constraints.</li> </ol>

Objective	Responsibility	Timescale	Action
			3. Redeploy resources where required – training required.
3. Agile/Mobile Working.	Assessor & ERO with Senior Management Team.	Ongoing.	<ol style="list-style-type: none"> <li>1. Monitor and review the productivity of staff to inform managers of the success or not of home working.</li> <li>2. Review required office accommodation in light of home working.</li> <li>3. Consider scanning Council Tax and Non-Domestic Rating files as part of Records Management Planning to facilitate improved home working.</li> </ol>
4. Future Skills and Workforce Needs.	Assessor & ERO with SMT.	Ongoing.	<ol style="list-style-type: none"> <li>1. Identify training needs of all staff.</li> <li>2. Continue to develop essential training requirements.</li> <li>3. Support the Graduate Apprentice Scheme.</li> <li>4. Where there are appropriate candidates within OSVJB promote internally.</li> <li>5. Examine the reasons why staff move on and look at ways of retaining and retraining staff.</li> <li>6. Look at areas where there may be future retirements and plan ahead.</li> <li>7. 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, while taking account of two separate island locations.</li> <li>8. Consider attendance of key Senior Management at Board meetings.</li> </ol>

Objective	Responsibility	Timescale	Action
			9. Consider backfilling posts with Trainee Valuers as the existing Trainee Valuers qualify, depending on service requirements.
5. Efficiency Savings.	Assessor & ERO.	Ongoing.	<p>1. Identify the number of staff required to run electoral services on a 12 month rolling basis.</p> <p>a. The difficulty is there are points of intense use and these need to be covered – consider overtime when we reach pinch points.</p> <p>b. In addition to existing staff, consider bringing in temporary staff to help at peak times.</p> <p>2. Continue to review all posts as and when they become vacant.</p> <p>3. Identify areas of service delivery within the valuation section that can be delivered by less qualified staff.</p> <p>4. Reduce site visits where possible.</p> <p>5. Consider the scanning of Council Tax and Non Domestic Rates files to be undertaken by staff when time and resources allow.</p> <p>6. Use the Graduate Apprentice Scheme to fund university places for trainee valuers.</p>
6. Engage with Staff.	All Managers.		<p>1. Review Communication Strategy.</p> <p>2. Monitor the number of remote team briefings taking place.</p> <p>3. Consider undertaking staff surveys.</p>
7. Develop Performance Measures.	Management Team.		<p>Learning and Development</p> <p>1. Continue to develop ER training in a way that supports remote working.</p>

<b>Objective</b>	<b>Responsibility</b>	<b>Timescale</b>	<b>Action</b>
			<ol style="list-style-type: none"><li>2. Identification of training needs of all staff.</li><li>3. Continue to maintain a training programme of training essentials.</li><li>4. Monitor vacancies.</li><li>5. Monitor staff turnover.</li></ol>