



Valuation Office  
Agency

# Statutory Valuations Team Customer Survey: Findings –2013-14

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# 1. Executive Summary



This report summarises the results from the 2013/2014 Statutory Valuations Team (SVT) Customer Satisfaction Survey, undertaken on behalf of the Valuation Office Agency (VOA). SVT provides valuations to support the administration, principally by HMRC, of taxation. A total of 150 interviews were undertaken between July 2013 and May 2014 via Computer Aided Telephone Interviewing (CATI) with customers who have had personal dealings with the Statutory Valuations Team (SVT) within the last two years.

## Key Findings

Overall, responses were generally very positive:

- Nine in ten (90%) rated their most recent dealing as good overall, including over half (53%) who rated it as very good. Only one in twenty (6%) rated their experience as neither good nor poor, and a similar proportion (4%) rated it as poor overall.
- Satisfaction with all aspects of the quality of the work was high, ranging from 89% to 96%.
- Satisfaction with the professionalism and friendliness/ approachability of staff was particularly high (69% and 68% were very satisfied respectively).
- Whilst satisfaction was relatively high across all aspects, the following issues did emerge:
  - One in ten (10%) were dissatisfied with the promptness of response to queries and around one in five (18%) reported that their case had not been completed in the time agreed in the SLA.
  - Just under one in ten (9%) were dissatisfied with being kept informed throughout their case.
  - One in twenty (6%) were dissatisfied with the ease of contacting their caseworker and the same proportion (5%) were dissatisfied with the ease of use of standard forms.

Whilst one in ten (8%) felt that the service they received last time they used SVT services had worsened compared with their previous experiences, one in five (21%) felt that it had improved. Despite the issues mentioned above in relation to timeliness, speed of response was the most commonly cited improvement (44%).

## Key Drivers

The following dimensions were found to contribute the most to overall satisfaction

- Explanations given for actions or decisions
- The extent to which customers are kept informed throughout a case
- Understanding of customer needs.

# 2. Introduction



## 2.1 Background

The Valuation Office Agency (VOA) is an executive Agency of HMRC. Its strategic function is to provide “the valuations and property advice required to support taxation and benefits”<sup>1</sup> in England and Wales. The Statutory Valuations Team (SVT) principally provides valuations to support the administration of inheritance tax, capital gains tax and other HMRC administered taxation, as well as some services administered by other government departments. Its customers principally include HMRC, the Department for Works and Pensions (DWP), Department for Communities and Local Government (DCLG) and the Scottish Government. The respondents of this survey are employees of these Government departments, primarily from HMRC, with whom SVT have had contact with in the course of their work to provide valuations to support the administration of taxation.

This report summarises the results from the 2013/2014 Statutory Valuations Team Customer Satisfaction Survey, undertaken on behalf of the VOA.

## 2.2 Methodology

Interviews were undertaken between July 2013 and May 2014 using Computer Aided Telephone Interviewing (CATI), with employees of other Government Departments who have had personal dealings with SVT within the last two years (the majority in the last month).

The sample was provided by VOA, and a total of 150 interviews (rounded) were completed from the 340 contacts supplied. Targets were set to ensure a representative spread across customer types, with the following breakdown achieved by quarter.

**Figure 1: Breakdown of achieved sample by customer type<sup>2</sup>**

	2013/14
<b>HMRC: Inheritance Tax (IHT)</b>	56%
<b>HMRC: Non-IHT</b>	37%
<b>Other Government</b>	8%
<b>Rounded Total</b>	100%
<b>(150 responses)</b>	

Figure 2 identified how the HMRC element of the sample breaks down in terms of area of work by quarter by respondent identification.

A sample size of 150 carries an approximate maximum confidence interval of  $\pm 6\%$  at the 95% level of confidence.

<sup>1</sup>VOA Annual Report 2014 [http://www.voa.gov.uk/corporate/\\_downloads/pdf/ARandA2014.pdf](http://www.voa.gov.uk/corporate/_downloads/pdf/ARandA2014.pdf)

<sup>2</sup> Figures may not sum due to rounding

**Figure 2: Breakdown of HMRC sample by area of work<sup>3</sup>**

	<b>2013/14</b>
<b>Inheritance Tax (IHT)</b>	45%
<b>Individuals and Public Bodies (I&amp;PB)</b>	35%
<b>Trusts</b>	15%
<b>Other</b>	4%
<b>Rounded Total</b>	100% (140 responses)

Respondents were asked their level of satisfaction on various aspects of the quality of work, level of service, time taken, as well as their overall experience of dealing with SVT, Respondents were also asked to rate whether or not service had improved in comparison to previous dealings with SVT.

Differences between quarters and between subgroups are indicated at the 95% level of confidence, i.e. where we can be 95% confident that the differences are real and did not occur by chance.

# 3. Summary of results



## 3.1 Dealings with SVT

Two thirds (64%) of respondents have most recently dealt with SVT in the last month, and all but seven respondents have dealt with SVT within the last year.

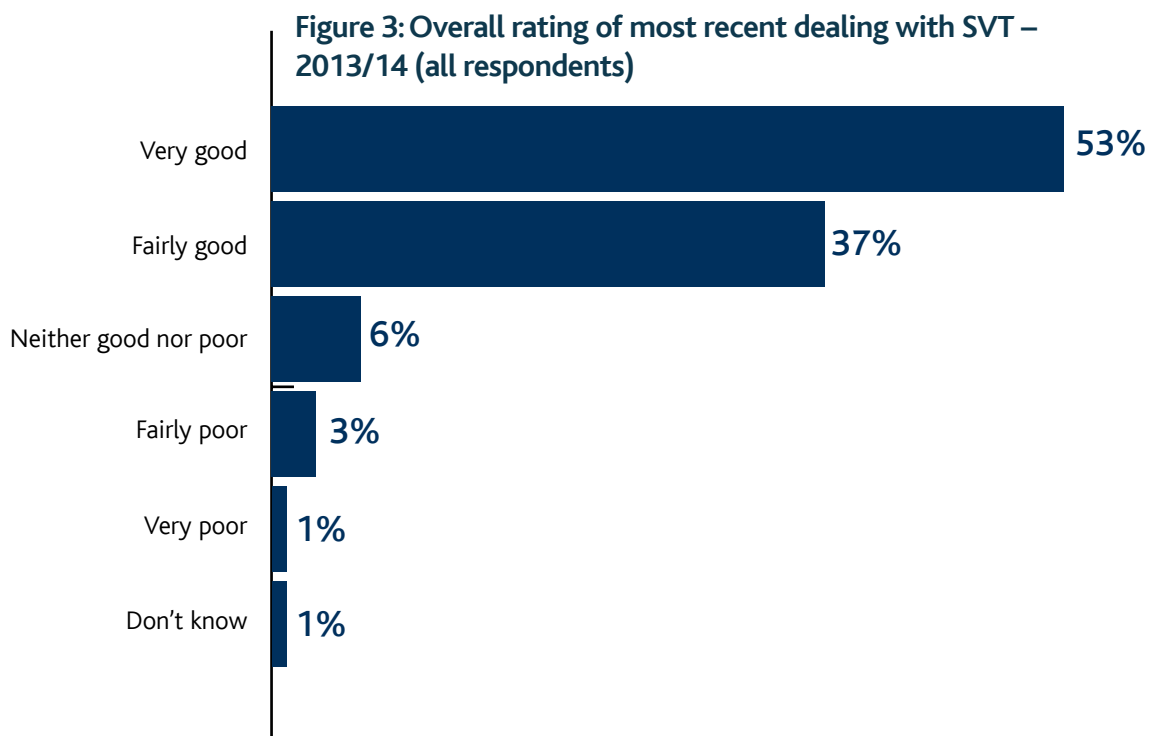
Of those who have had dealings with SVT in the last 6 months (130 respondents), a third (35%) deal with SVT on at least a weekly basis, and almost all have dealings with SVT on at least a yearly basis.

A third (34%) have dealt with SVT for more than 10 years, two in five (46%) between two and ten years, and a fifth (20%) for up to 2 years.

Almost all (96%) have used SVT for valuations/negotiations, just over half (53%) for general advice and half (50%) for compliance enquiries. One in twenty (5%) have used SVT for building surveyor services for capital allowances.

## 3.2 Overall rating of most recent dealing with SVT

Appendix 1 summarises the results of the key closed questions in the survey, indicating where responses were positive, neutral or negative. Respondents were asked to rate the experience of their most recent experience of dealing with SVT. Nine in ten (90%) rated their most recent dealing as good overall, including over half (53%) who rated it as very good.



Q12. So overall how well would you rate your most recent experience of dealing with SVT?  
Rounded base = 150

When asked what impressed them about the service provided over two thirds (69%) provided a response, with the most common responses as follows:

- Prompt/quick/good response times (26%);
- Expert/good understanding/knowledgeable/accurate (18%);
- Keep well informed/good communication/acknowledge requests (15%);
- Professional (10%);
- Responsive/approachable/friendly (7%);
- Informal channels/advice/ease of contact (7%);
- Helpful/useful (5%).

While over half (53%) of respondents did not mention anything when asked what could have been better about the service provided, a fifth of all respondents (21%) did mention the speed of response, and one in ten (10%) made comments relating to communication/being kept informed.

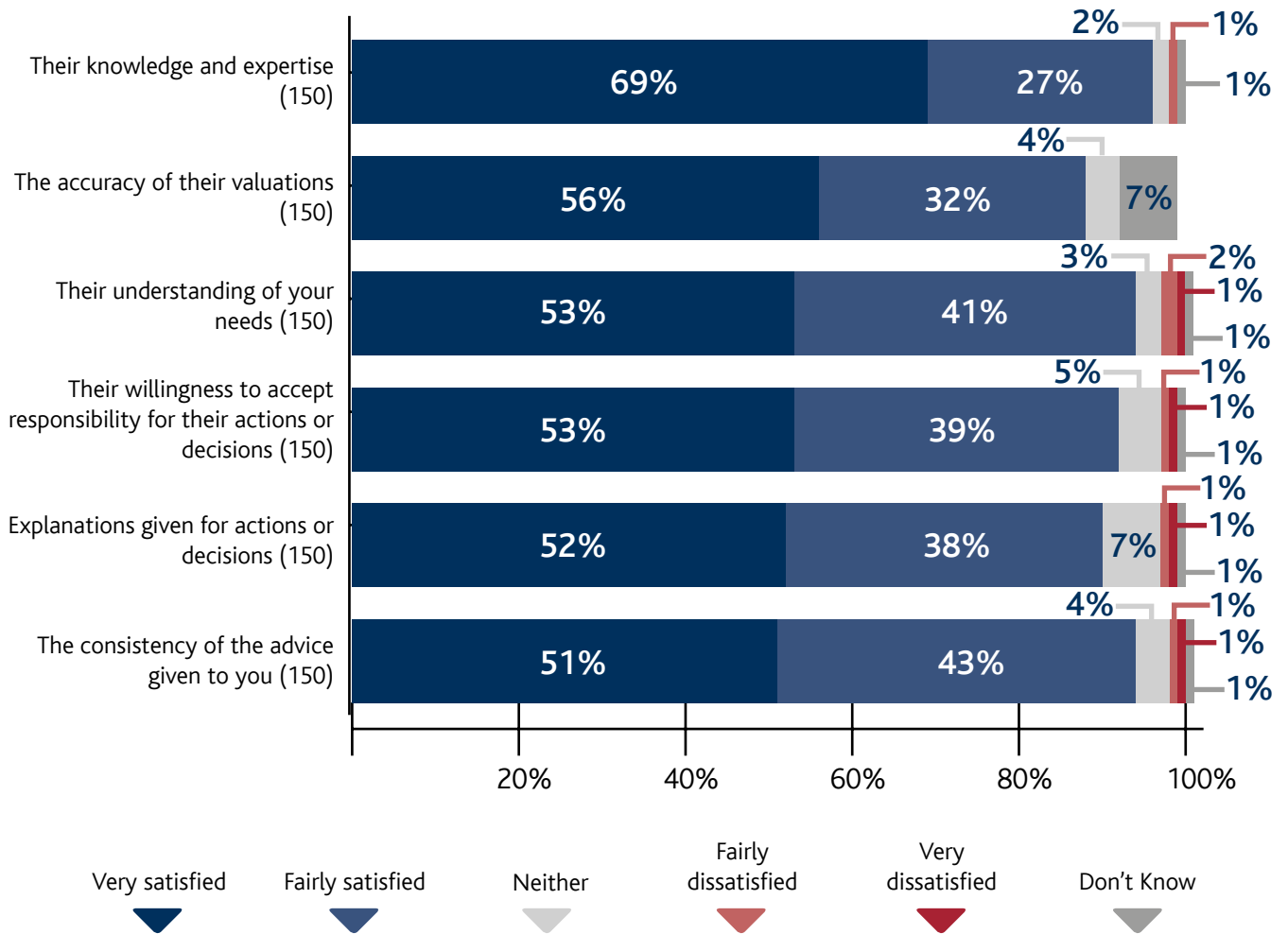
### **3.3 Satisfaction with quality of work**

Figure 4 illustrates the extent to which customers were satisfied or dissatisfied with aspects of the quality of the work in their most recent contact with SVT, ranked on the proportion rating themselves as very satisfied.

Overall satisfaction was high across all aspects, with the proportion who were very or fairly satisfied ranging from 89% to 96%, and up to 3% indicating that they were dissatisfied to any extent with any aspect of the quality of the work. Satisfaction was particularly high in relation to the knowledge and expertise of staff (69% very satisfied).



**Figure 4: Satisfaction with quality of work – 2013/14  
(excludes not applicable)**



Q5. I'm going to ask you to rate how satisfied you were with various aspects of SVT's performance in relation to your current or most recent contact with them. So first, thinking about the quality of SVT work in your most recent contact with them, please rate how satisfied you were with the following aspects of their performance...  
Rounded bases in parentheses

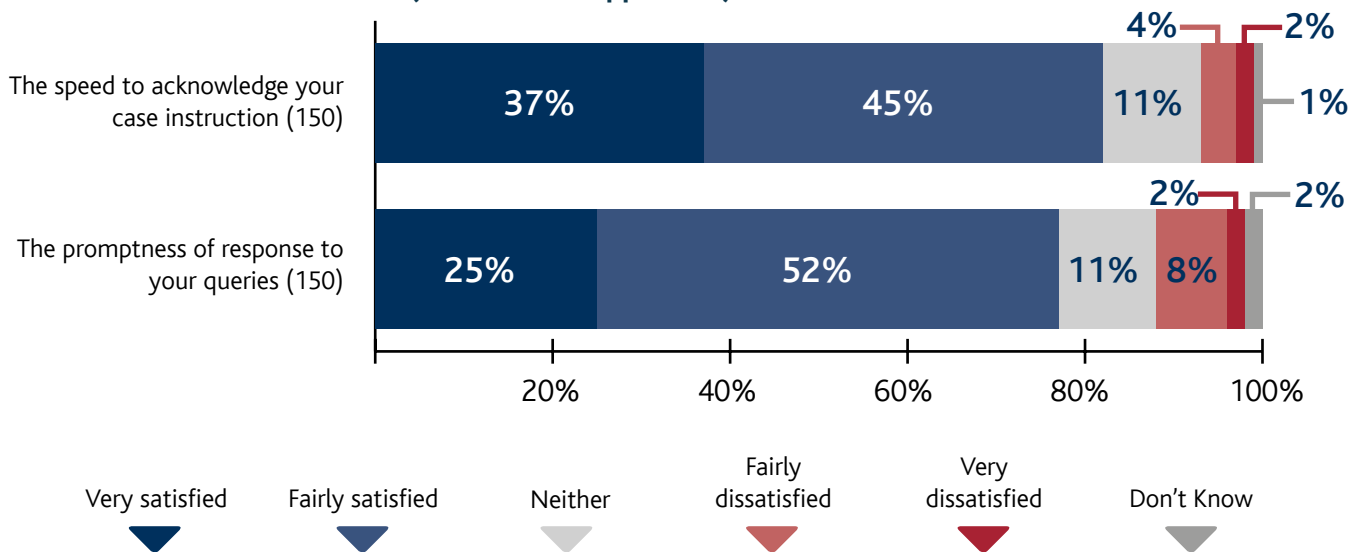
### 3.4 Satisfaction with time taken to do work

Figure 5 illustrates the extent to which customers were satisfied or dissatisfied with aspects of the time taken to do the work in their most recent contact with SVT, ranked on the proportion rating themselves as very satisfied.

Overall, eight in ten (82%) were satisfied with the speed to acknowledge case instruction, including close to two in five (37%) who were very satisfied. One in twenty (6%) expressed dissatisfaction with this aspect.

Overall satisfaction with the promptness of response to queries was somewhat lower at three quarters (77%), with only a quarter (25%) very satisfied in this respect, and one in ten (10%) expressing a level of dissatisfaction.

**Figure 5: Satisfaction with time taken to do work – 2013/14  
(excludes not applicable)**



Q6. Now thinking about the time taken to do the work, how satisfied were you with the following aspects of their performance, using the scale of...?  
Rounded bases in parentheses

Whilst three quarters (74%) of respondents reported that SVT did complete their case within the time agreed in the Service Level Agreement, one in five (18%) reported that they did not, and a further one in ten (8%) were unsure.

When asked why they thought timescales had not been met (18% of all respondents), 67% mentioned staff levels/volume of work, 44% mentioned complexity and two mentioned not being kept informed/lack of communication. Other comments made by individuals included speed of response, meeting requirements and knowing who is dealing with the case.

### 3.5 Satisfaction with level of service

Figure 6 illustrates the extent to which customers were satisfied or dissatisfied with the aspects of the level of service in their most recent contact with SVT, ranked on the proportion rating themselves as very satisfied.

Relatively high proportions did not offer an opinion or felt that the following were not applicable to them:

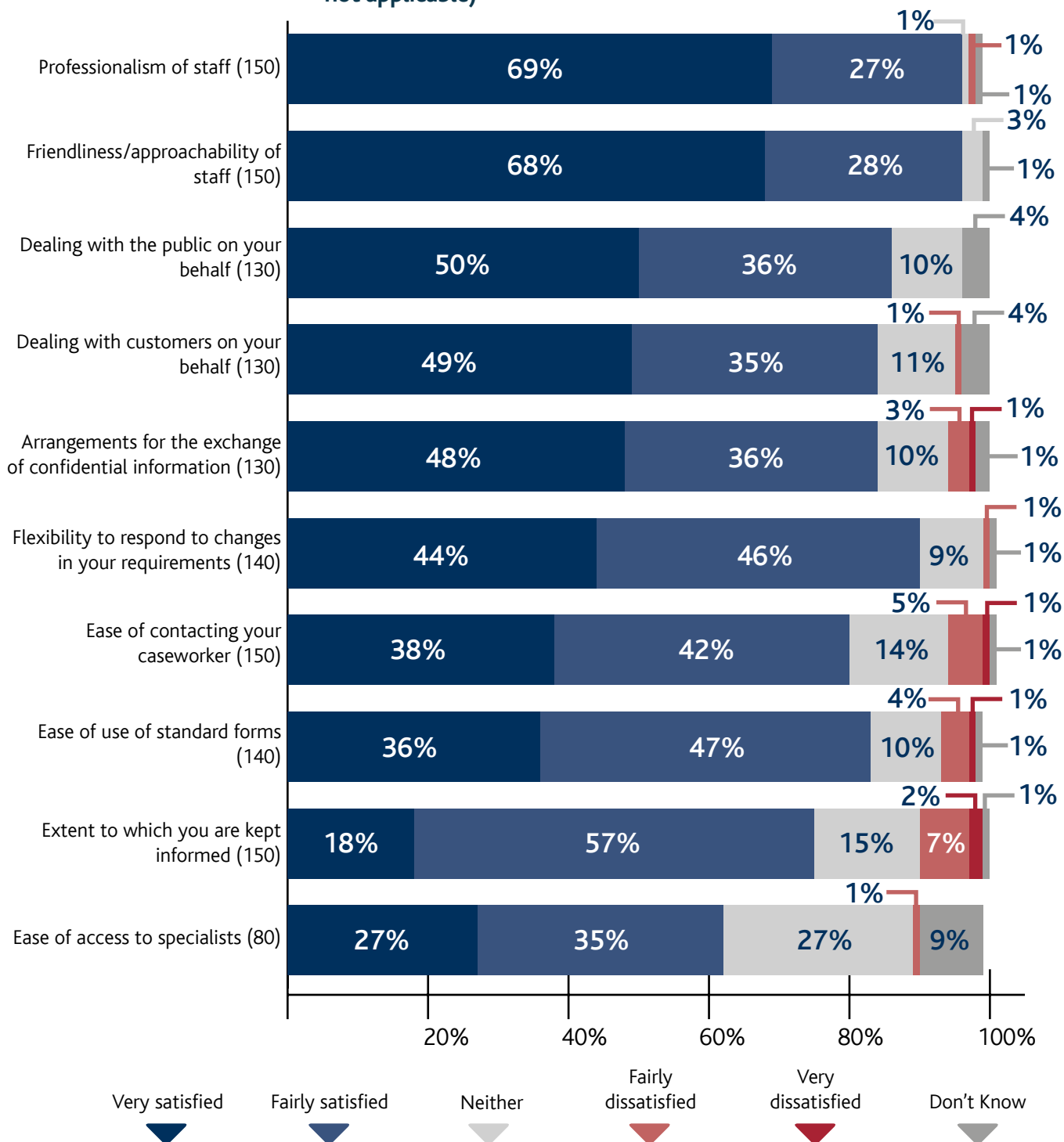
- Ease of access to specialists (55% answered 'don't know' or 'not applicable');
- Dealing with customers on your behalf (17%);
- Dealing with the public on your behalf (16%);
- Arrangements for the exchange of confidential information (16%);
- Flexibility to respond to changes in requirements (12%);
- The ease of use of standard forms (10%).

However in each instance, where respondents did offer an opinion this was largely positive, as shown in Figure 6.

The level of satisfaction with professionalism of staff and their friendliness/approachability was particularly high (both 95%, including around two thirds in both instances who were very satisfied).

There were low levels of dissatisfaction across all elements, however one in ten (9%) were dissatisfied with being kept informed, one in twenty were dissatisfied with the ease of contacting their caseworker (6%), the ease of use of standard forms (5%), and arrangements for the exchange of confidential information (4%).

**Figure 6: Satisfaction with level of service – 2013/14 (excludes not applicable)**



Q7. Now thinking about other aspects of the service you received, how satisfied were you with the following aspects of their performance, using the scale of...  
Rounded bases in parentheses

### 3.6 Extent of improvement

Two thirds (67%) of respondents felt that, compared to their previous experiences, the service they received the last time they used SVT services had stayed the same, and one in twenty (5%) said they had no prior experience or did not know.

While only one in ten (8%) felt it had worsened, which equates to twelve respondents, one in five (21%) felt that it had improved.

Where respondents felt the service had improved, this often related to perceived improvements in response times (44%). Two fifths (38%) also mentioned communication/being kept informed.

### 3.7 Suggestions for improvement

When asked to think about their experience of dealing with SVT overall, and to suggest how it could improve the services it offers to customers, over two fifths (42%) did not know or did not offer a response. An additional 7% commented on how well SVT currently performs.

The main areas for improvement mentioned can be summarised as follows:

- Being kept informed/communication (20%);
- Speed of response (15%);
- Staff levels (6%);
- Meeting requirements (4%).

### 3.8 Key Driver Analysis

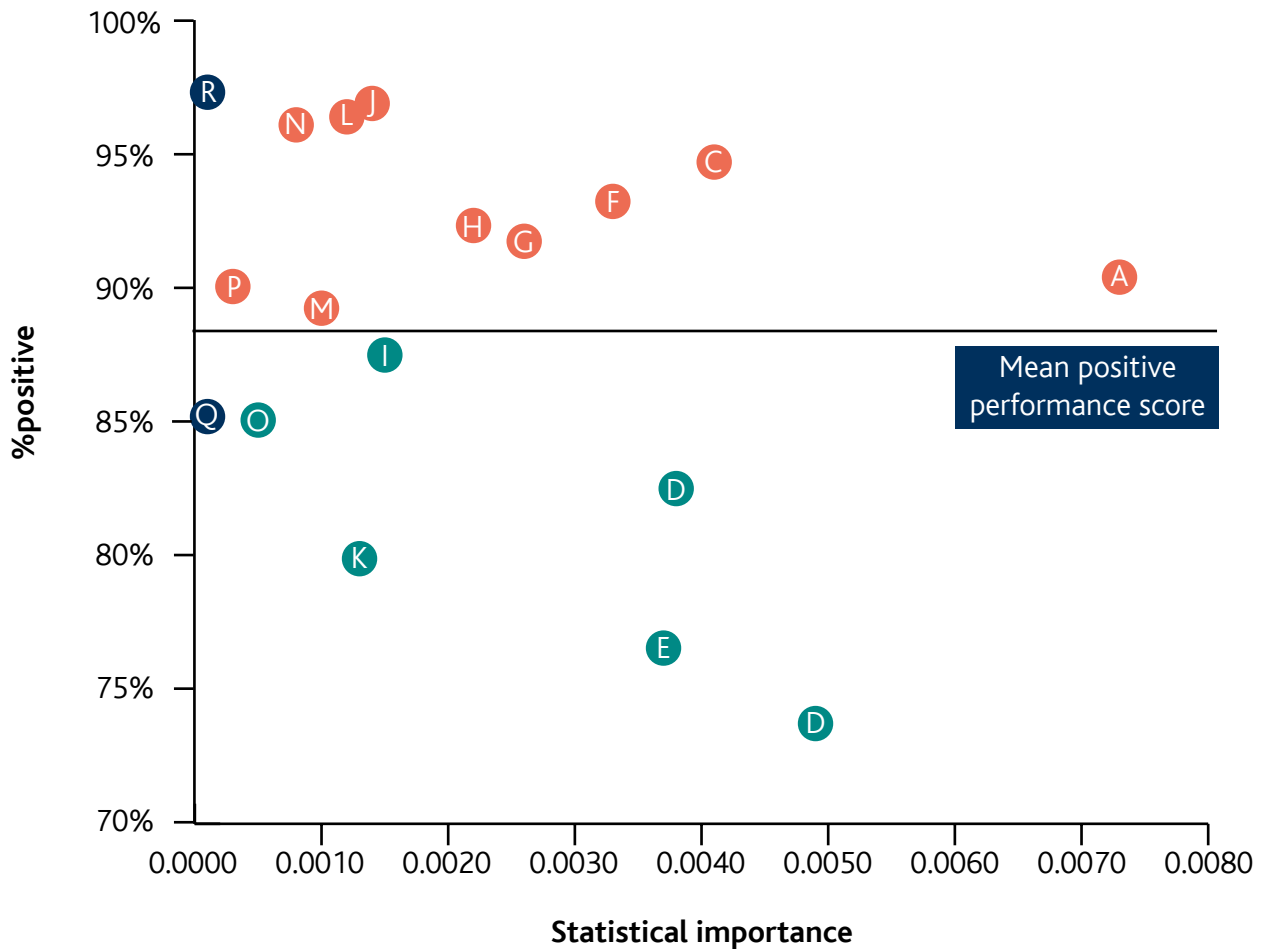
The aspects of performance that are most important in predicting levels of overall satisfaction (its 'key drivers') were also explored through statistical analysis.

Figure 7 summarises the results of this, which considers a range of variables relating to performance and their relationship with the outcome measure of 'overall satisfaction'. This analysis indicates that the most important predictor of overall satisfaction is 'explanations given for decisions and actions', followed by 'the extent to which you are kept informed throughout a case.'

The statistical importance of each performance aspect is plotted along the horizontal axis. It should be noted that this axis is set at zero, because the model identifies all performance aspects as being important to a greater or lesser degree in explaining the variability in overall satisfaction.

The vertical axis indicates the extent to which SVT is rated positively on each performance aspect, with the line parallel to the horizontal axis representing the mean positive score.

Figure 7: Overview of multivariate analysis



See table overleaf

Of the elements identified as the most important predictors of overall satisfaction, it can be seen that SVT performs particularly well in terms of the following:

- Explanations given for decisions and actions;
- Their understanding of your needs;
- The consistency of the advice given to you;
- Their flexibility to respond to changes in your requirements;
- Their willingness to accept responsibility for their actions or decisions.

However, performance is not quite so high with regard to the following, which are identified as important predictors of overall satisfaction:

- The extent to which you are kept informed throughout a case;
- The ease of contacting your caseworker;
- The promptness of response to queries;
- Completion of case within agreed time.

One variable has been excluded from the analysis due to a high proportion of respondents indicating that they do not know or that the aspect is not applicable to them – ‘the ease of access to specialists such as the Building Surveyors or Mineral Valuers’.

<b>Key</b>	
<b>A</b>	Explanations given for actions or decisions
<b>B</b>	The extent to which you are kept informed throughout a case
<b>C</b>	Their understanding of your needs
<b>D</b>	The ease of contacting your caseworker
<b>E</b>	The promptness of response to your queries
<b>F</b>	The consistency of the advice given to you
<b>G</b>	Their flexibility to respond to changes in your requirements
<b>H</b>	Their willingness to accept responsibility for their actions or decisions
<b>I</b>	Arrangements for the exchange of confidential information
<b>J</b>	The professionalism of staff
<b>K</b>	Completion of case within agreed time
<b>L</b>	Their knowledge and expertise
<b>M</b>	Dealing with customers on your behalf
<b>N</b>	The accuracy of their valuations
<b>O</b>	The ease of use of standard forms
<b>P</b>	Dealing with the public on your behalf
<b>Q</b>	The speed to acknowledge your case instruction
<b>R</b>	The friendliness/approachability of staff

# Appendices



## Appendix 1: Overview of results (all respondents)

	Positive	Neutral	Negative	Don't know/ no opinion
Overall rating	90%	6%	4%	*
<b>Satisfaction with quality of work (excludes 'not applicable')</b>				
Knowledge and expertise	96%	*	*	*
Consistency of advice	94%	4%	*	*
Understanding of your needs	94%	3%	3%	*
Willingness to accept responsibility for their actions or decisions	92%	5%	*	*
Explanations given for actions or decisions	90%	7%	*	*
Accuracy of valuations	89%	4%	0%	7%
<b>Satisfaction with time taken to do work (excludes 'not applicable')</b>				
Speed to acknowledge case instruction	45%	37%	13%	4%
Promptness of response to queries	44%	44%	10%	3%
Case completed within time agreed in SLA	74%		18%	8%
<b>Satisfaction with level of service (excludes 'not applicable')</b>				
The professionalism of staff	96%	*	*	*
The friendliness/approachability of staff	96%	3%	0%	*
Their flexibility to respond to changes in your requirements	90%	9%	*	*
Dealing with the public on your behalf	86%	10%	0%	4%
Arrangements for the exchange of confidential information	84%	10%	4%	*
Dealing with customers on your behalf	84%	11%	*	4%
The ease of use of standard forms	83%	10%	6%	*
The ease of contacting your caseworker	79%	14%	6%	*
The extent to which you are kept informed throughout a case	75%	15%	9%	*
The ease of access to specialists such as the Building Surveyors or Mineral Valuers	62%	27%	*	9%
<b>(Had dealings in last 2 years)</b>				
Improvement	21%	67%	8%	5%

To protect confidentiality, cells derived from values of less than 5 have been suppressed, denoted with a "\*".

Percentages may not sum due to rounding.

## Appendix 2: Technical note on Key Driver Analysis

Key Driver Analysis was conducted using random forest modelling. This statistical technique searches through all predictor variables, and potential splits between predictor variable categories, to determine which combination best predicts the outcome variable.

During this process splits may occur where the predictor response does not match the outcome response ('misclassification' at different stages), so most models are compiled using randomly selected subsets of the sample ('bootstrapping').

From these models the variables which have the lowest level of misclassification are determined, i.e. those that most accurately predict the outcome variable under a wide range of circumstances.

The variable importance measure that is produced is dependent on the type of random forest model used, conditional vs. unconditional; the difference between the two is how it best identifies splits in individual trees. For this analysis a conditional inference model was used.

**Conditional inference** models are computationally more intensive, but have twofold advantages:

- Predictor variables with more categories tend to be favoured in non-conditional models, as more detailed permutations are possible.
- Predictor variables may be highly correlated, in which case, it is likely that they share some inherent meaning. Whilst both correlated predictor variables are in the model, having conditional individual trees which include both, one or the other, or neither variable, helps to distinguish which is the more accurate predictor.

NB Respondents are originally split randomly, so running the model twice can produce marginally different variable importance scores. It is therefore important to run a random forest more than once, to check that the solution replicates itself. Multiple models were run with four or five different seed values (starting points for randomisation). If the variable importance rankings had been substantially different on a rerun, then a totally different model would have been pursued.