

# Statutory Valuations Team (SVT) Customer Survey: Findings 2014/15

Prepared by BMG Research



## Valuation Office Agency

### Main Findings

- Over 9 in 10 (93 per cent) SVT customers rated their most recent dealing as good overall, including half of all respondents (50 per cent) who rated it as very good. Only one in fifty (2 per cent) rated it as fairly poor, with no respondents rating it very poor.
- Satisfaction with all aspects of the quality of the work delivered by SVT was high, ranging from 90 per cent to 95 per cent.
- The highest rated aspects were the friendliness/ approachability of SVT staff (75 per cent of respondents very satisfied) and their professionalism (68 per cent).
- While satisfaction was relatively high across all aspects, the following issues did emerge:
  - One in ten (11 per cent) customers were dissatisfied with the promptness of response to queries and one in five (18 per cent) reported that their case had not been completed in the time agreed in their Service Level Agreement with SVT.
  - One in seven (14 per cent) were dissatisfied with the degree to which they were kept informed throughout their case.
  - One in twenty (6 per cent) were dissatisfied with the ease of use of standard forms.
- Whilst around one in twenty (6 per cent) of customers felt that the service they received last time they used SVT had worsened compared with their previous experiences, one in five (21 per cent) felt it had improved. Speed of response was the commonly cited improvement (mentioned by 67 per cent of those observing an improvement).
- When asked to suggest how SVT could improve the services it offers to customers, the main issues mentioned were being kept informed/communication (23 per cent of all respondents) and speed of response (13 per cent).

### About this report:

This report has been written by BMG Research, based on research carried out in August 2014 to April 2015. The views and findings expressed in the report are the author's own and do not necessarily reflect those of the Valuation Office Agency.

This report summarises the results from the 2014/2015 Statutory Valuations Team (SVT) Customer Satisfaction Survey, undertaken on behalf of the VOA and makes comparisons with the 2013/14 results, where relevant.

SVT provides valuations to support the administration, principally by HMRC, of taxation.

Interviews were undertaken using Computer Aided Telephone interviewing (CATI) with customers who have had personal dealings with SVT within the last 2 years.

For all tables, to protect confidentiality counts are rounded to the nearest 10. Counts of zero are reported as "0" and counts derived from fewer than five responses are reported as negligible and denoted by "\*\*". Charts do not show data based on fewer than five responses. Data is shown unweighted.

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**Summary of results**

**Dealings with SVT**

The pattern of dealings with SVT over 2014/15 is similar to that seen in the 2013/14 survey.

Two thirds (66 per cent) of respondents have most recently dealt with SVT in the last month, and 93 per cent of respondents have dealt with SVT within the last year.

Of those who have had dealings with SVT in the last 6 months, a third (34 per cent) deal with SVT on at least a weekly basis, and the vast majority have dealings with SVT on at least a yearly basis.

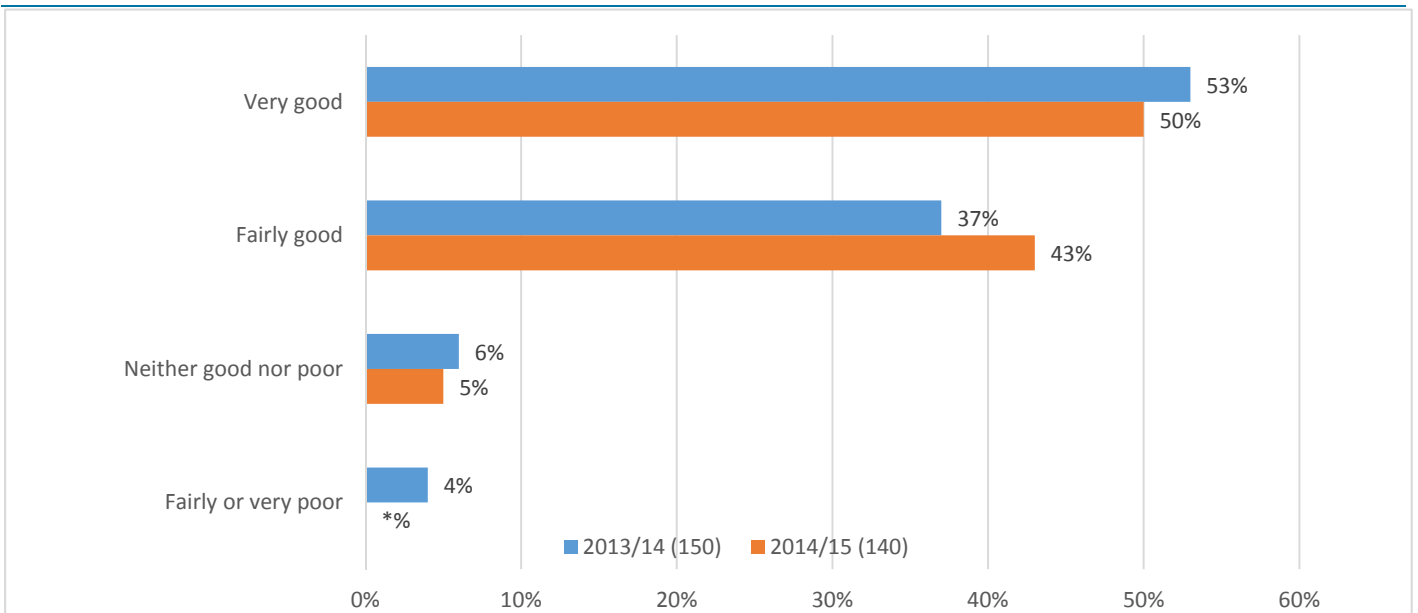
Over a third (37 per cent) of respondents have dealt with SVT for more than 10 years, close to half (47 per cent) between two and ten years, and one in six (16 per cent) for up to 2 years.

Almost all (98 per cent) have used SVT for valuations/negotiations in the last two years, two thirds (67 per cent) for general advice (a significant increase since 2013/14), and the majority (57 per cent) for compliance enquiries. Around one in twenty (7%) have used SVT for building surveyor services for capital allowances.

**Overall rating of most recent dealing with SVT**

Respondents were asked to rate the experience of their most recent experience of dealing with SVT. Over nine in ten (93 per cent) rated their most recent dealing as good overall, including half of all respondents (50 per cent) who rated it as very good, broadly in line with 2013/14.

**Figure 1: Overall rating of most recent dealing with SVT (all respondents)**



Q12. So overall how would you rate your most recent experience of dealing with SVT?  
Rounded bases in parentheses

When asked what impressed them about the service provided, over two thirds (69%) provided a response. As in 2013/14, the most common responses were as follows:

- Prompt/quick/good response times (28 per cent of all respondents);
- Expert/good understanding/knowledgeable/accurate (18 per cent);

- Keep well informed/good communication/acknowledge requests (13 per cent);
- Responsive/approachable/friendly (9 per cent);
- Professional (7 per cent);
- Helpful/useful (6 per cent);
- Informal channels/advice/ease of contact (5 per cent).

While close to three in five (57 per cent) respondents did not mention anything when asked what could have been better about the service provided, one in ten (10 per cent) did mention the speed of response (although this is significantly lower than the 21 per cent who did so in 2013/14), and around one in ten (12 per cent) made comments relating to communication/being kept informed (similar to 2013/14).

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

Figure 2 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. The figures to the right of the bar chart represent the proportion who rated themselves as very satisfied with each aspect in 2013/14.

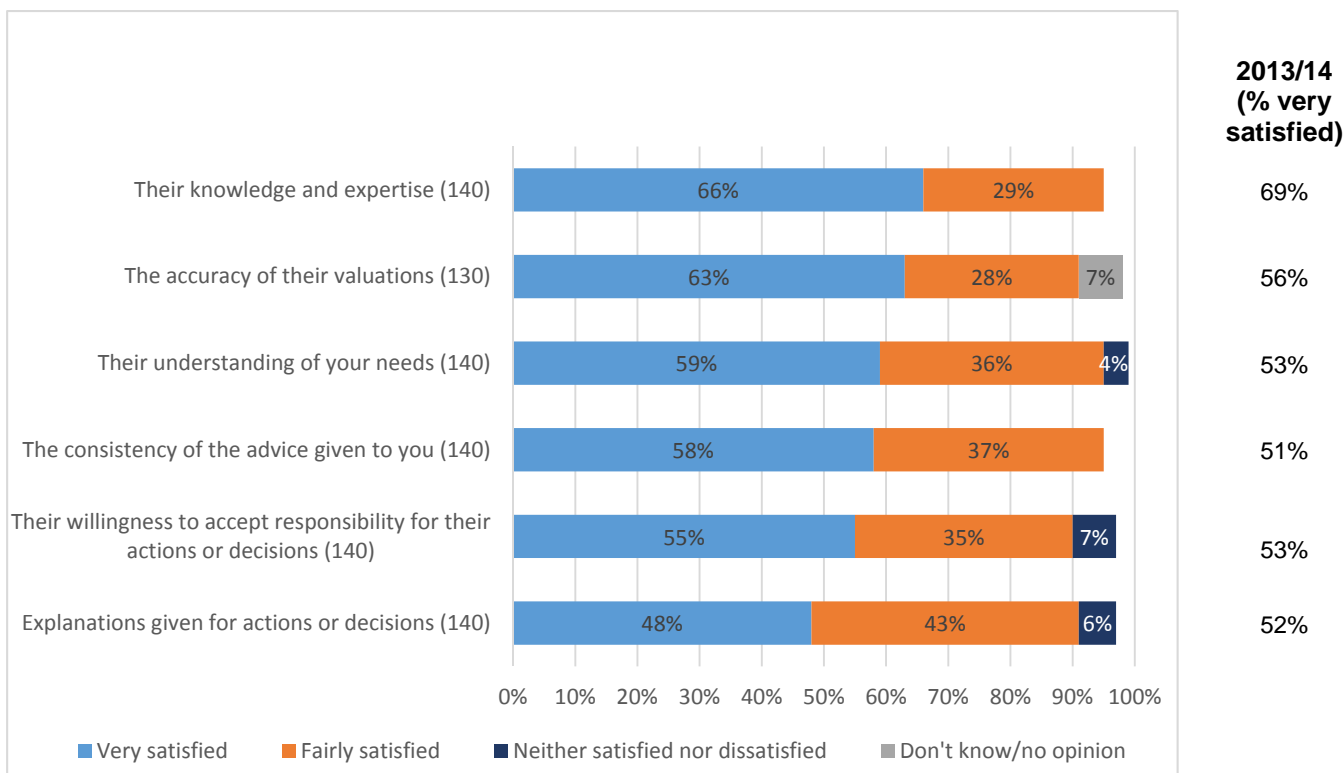
Overall satisfaction was high across all aspects, with the proportion who were very or fairly satisfied ranging from 90 per cent to 95 per cent. No more than 3 per cent indicated that they were dissatisfied to any extent with any aspect of the quality of the work<sup>1</sup>. Satisfaction was particularly high in relation to the knowledge and expertise of staff (66 per cent very satisfied).

There were no statistically significant differences in the results in 2014/15 and 2013/14.

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<sup>1</sup> These small proportions are not shown on the chart as they represent responses from less than 5 respondents, so are suppressed to protect confidentiality.

**Figure 2: Satisfaction with quality of work (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

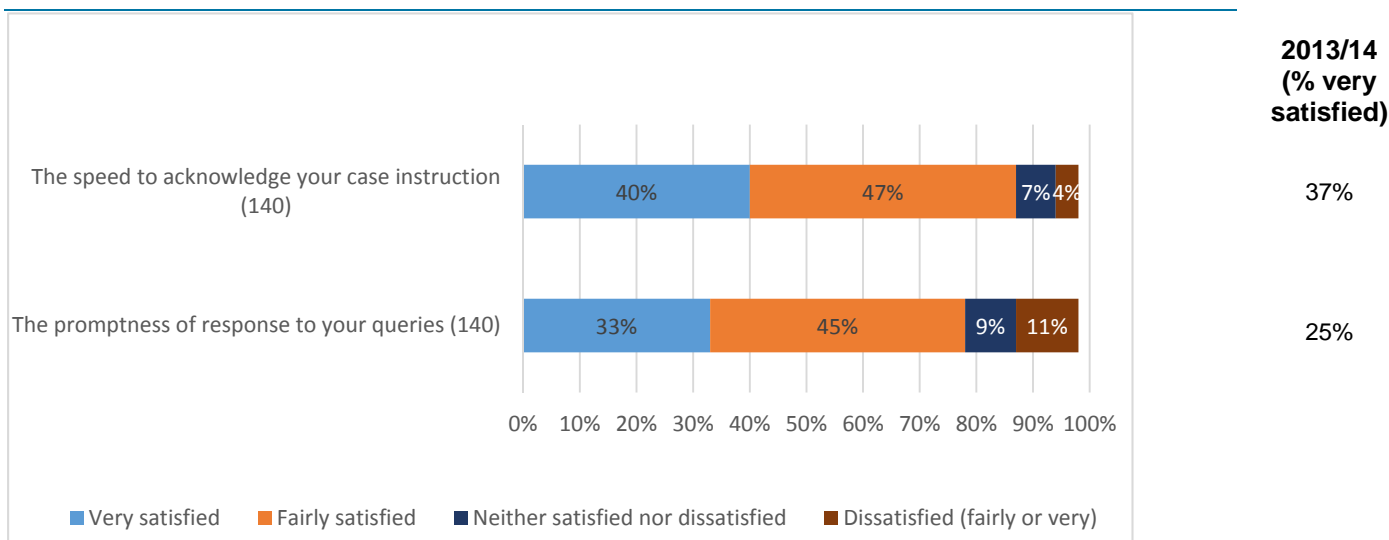
**Satisfaction with time taken to do the work**

The figure below 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.

Again, results were broadly in line with 2013/14, with close to nine in ten (87 per cent) satisfied with the speed to acknowledge case instruction, including two in five (40 per cent) who were very satisfied. One in twenty (4 per cent) expressed dissatisfaction with this aspect.

Overall satisfaction with the promptness of response to queries was somewhat lower at four in five (79 per cent), with a third (33 per cent) very satisfied in this respect, and one in ten (11 per cent) expressing a level of dissatisfaction.

**Figure 3: Satisfaction with time taken to do work (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

As was the case in 2013/14, whilst three quarters (75%) of respondents reported that SVT did complete their case within the average time agreed in the Service Level Agreement, one in five (18%) reported that they did not, and a further one in twenty (6%) were unsure.

When asked why they thought timescales had not been met (among the 18% of all respondents), 27 per cent of these mentioned speed of response, and 23 per cent mentioned staff levels/volume of work.

**Satisfaction with level of service**

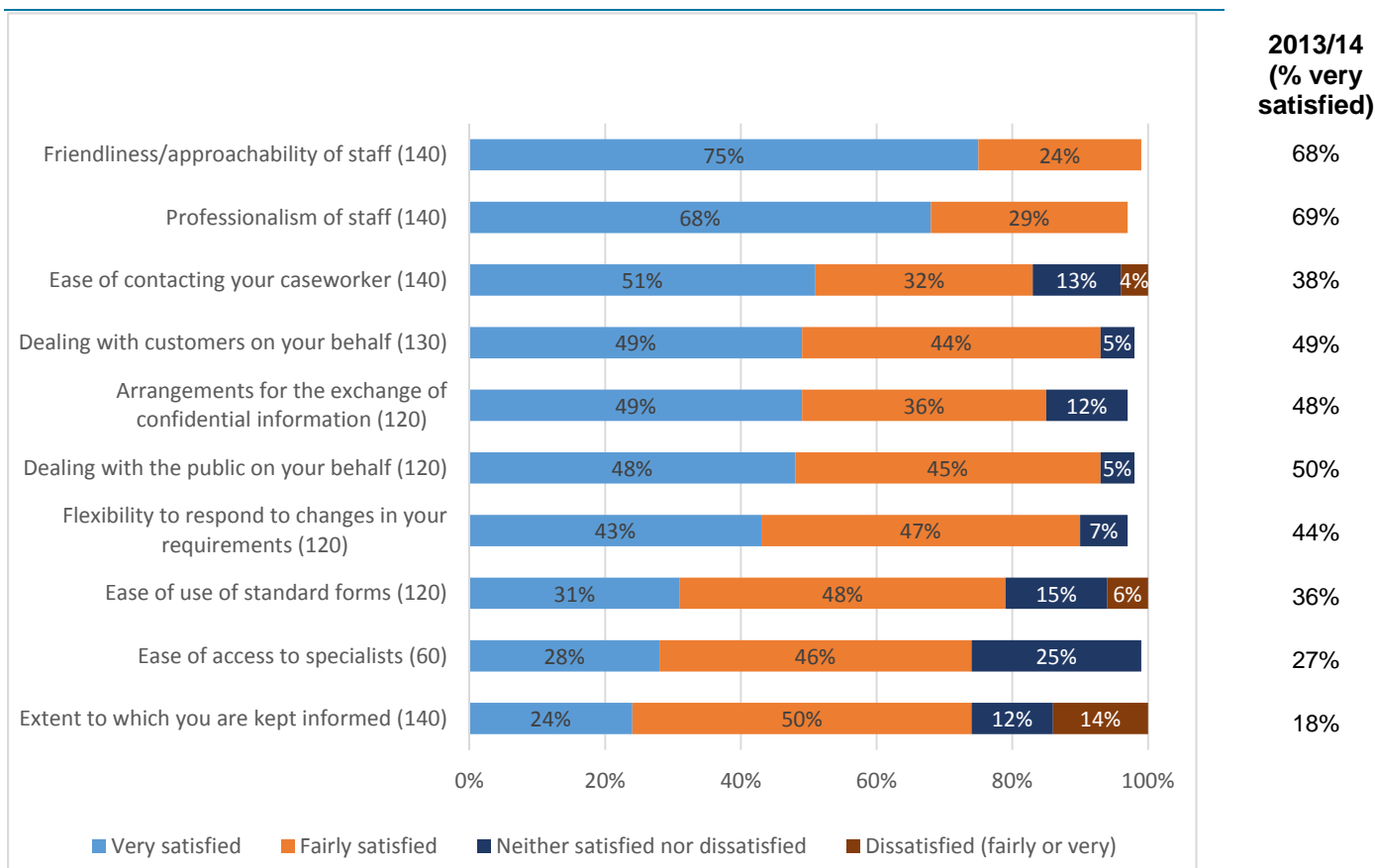
Figure 4 illustrates the extent to which customers were satisfied or dissatisfied with the aspects of the level of service in their most recent contact with SVT, ranked on the proportion rating themselves as very satisfied.

The level of satisfaction with the friendliness/approachability of staff and the professionalism of staff was particularly high (99 per cent and 97 per cent respectively, including over two thirds in both instances who were very satisfied).

Results were largely consistent with 2013/14, with the exception that there has been a significant increase in the proportion who are very satisfied with the ease of contacting the caseworker (from 38 per cent to 51 per cent).

There were low levels of dissatisfaction across all elements, however one in seven (14 per cent) were dissatisfied with the extent to which they were kept informed throughout their case.

For some aspects of service, some respondents did not offer an opinion or felt that it was not applicable to them – especially for ease of access to specialists. However, where respondents did offer an opinion this was largely positive, as shown in the figure below.

**Figure 4: Satisfaction with level of service (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

### Extent of improvement

Two thirds (65 per cent) 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 ten (8 per cent) said they had no prior experience.

While only one in twenty (6 per cent) felt it had worsened, one in five (21 per cent) felt that it had improved.

Where respondents felt the service had improved, this often related to perceived improvements in response times (67 per cent of those observing an improvement).

### Suggestions for improvement

When asked to suggest how SVT could improve the services it offers to customers, over half (52 per cent) could not think of anything.

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

- Being kept informed/communication (23 per cent of respondents);
- Speed of response (13 per cent);
- Staff levels (6 per cent);
- Knowing who is dealing with the case (6 per cent).

## **Multivariate analysis (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.

To maximise the robustness of the analysis, results from all 10 waves undertaken so far – covering research from Q3 2012-13 to Q4 2014-15 - have been included.

Further technical description of the process of Key Driver Analysis is provided in Appendix 2.

Figure 5 summarises the results from this analysis, which considers a range of variables relating to performance and their relationship with the outcome measure of 'overall satisfaction'.

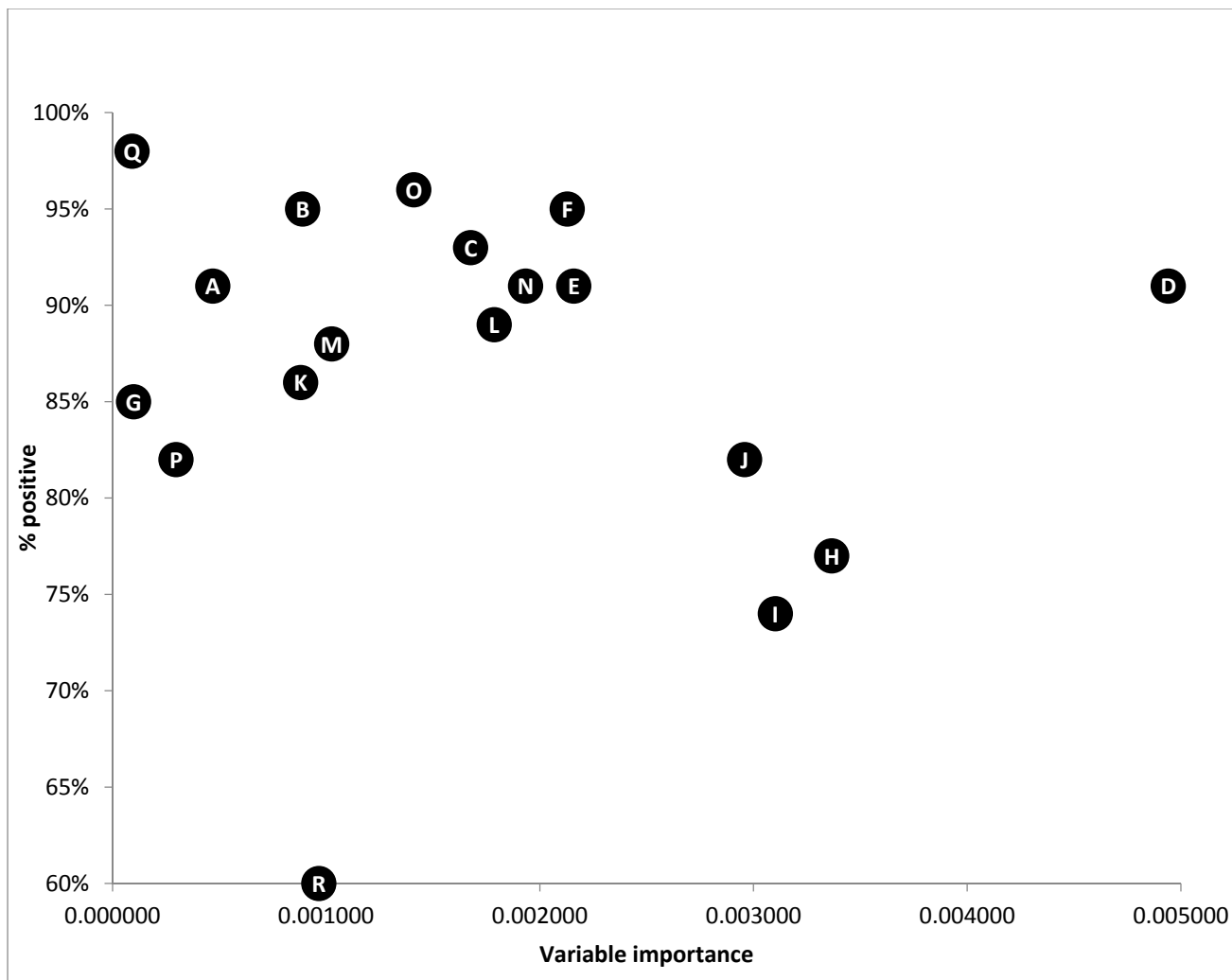
The figure shows the statistical importance of each performance aspect plotted along the horizontal axis. The vertical axis indicates the extent to which SVT is rated positively on each performance aspect.

This analysis indicates that the most important predictor of overall satisfaction is 'explanations given for actions or decisions', and that this is an aspect on which SVT performs more strongly than the average across all aspects.

In contrast, other important predictors of overall satisfaction include the 'promptness of response to queries', being 'kept informed throughout a case', and the 'ease of contacting your caseworker', and SVT performs less well on these than on most other aspects (although still is rated largely positively).

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'.

Figure 5: Overview of multivariate analysis



Key	
A	The accuracy of their valuations
B	Their knowledge and expertise
C	The consistency of the advice given to you
D	Explanations given for actions or decisions
E	Their willingness to accept responsibility for their actions or decisions
F	Their understanding of your needs
G	The speed to acknowledge your case instruction
H	The promptness of response to your queries
I	The extent to which you are kept informed throughout a case
J	The ease of contacting your caseworker
K	Arrangements for the exchange of confidential information
L	Dealing with the public on your behalf
M	Dealing with customers on your behalf
N	Their flexibility to respond to changes in your requirements
O	The professionalism of staff
P	The ease of use of standard forms
Q	The friendliness/approachability of staff
R	Completion of case within agreed time (ongoing cases and don't know responses treated here as negative)



## Case study

The case study below exemplifies the generally very positive views of the SVT:

An individual working in Inheritance Tax (IHT) within HMRC, who has had personal dealings with SVT for between 5 and 10 years. Services used over the last 2 years include valuations/negotiations and compliance/116 queries.

They were very satisfied overall, remarking that the service was promptly and courteously delivered, and the advice provided was very precise.

They were also satisfied with all relevant aspects of SVT's performance in their most recent contact, including the time taken to do the work, which was completed within the average time agreed in the SLA.

They felt the service had improved since their previous experience, citing the provision of direct contact details of the valuer as a key reason for this.

## Background Notes

The VOA is an executive Agency of HMRC. Its strategic function is to provide “the valuations and property advice required to support taxation and benefits” 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 has had contact with in the course of their work to provide valuations to support the administration of taxation.

## Methodology

Interviews were undertaken between August 2014 and April 2015 using Computer Aided Telephone Interviewing (CATI), with employees of 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 140 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 each year.

**Table 1: Breakdown of achieved sample by customer type**

	2013/14	2014/15
HMRC: Inheritance Tax (IHT)	56%	50%
HMRC: Non-IHT	37%	44%
Other Government	8%	6%
<b>TOTAL</b>	100% 150 interviews (rounded)	100% 140 interviews (rounded)

The figure below identifies how the HMRC element of the sample breaks down in terms of area of work by respondent identification.

**Table 2: Breakdown of HMRC sample by area of work**

	2013/14	2014/15
Inheritance Tax (IHT)	45%	41%
Individuals and Public Bodies (I&PB)	35%	39%
Trusts	15%	8%
Other	4%	12%
<b>TOTAL</b>	100% 140 interviews (rounded)	100% 130 interviews (rounded)

A sample size of 140 carries a maximum confidence interval of  $\pm 7\%$  at the 95% level of confidence<sup>2</sup>.

<sup>2</sup> Differences between quarters/years and between subgroups have been indicated at the 95 per cent level of confidence ie we can be 95 per cent confident that the differences are real and did not occur by chance

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

	Positive	Neutral	Negative	DK/ no opinion
Overall rating	93%	5%	*	0%
<b>Satisfaction with quality of work (excludes 'not applicable')</b>				
Knowledge and expertise	95%	*	*	*
Consistency of advice	95%	*	*	*
Understanding of your needs	95%	4%	*	0%
Explanations given for actions or decisions	91%	6%	*	0%
Willingness to accept responsibility for their actions or decisions	90%	7%	*	*
Accuracy of valuations	90%	*	*	7%
<b>Satisfaction with time taken to do work (excludes 'not applicable')</b>				
Speed to acknowledge case instruction	87%	7%	4%	*
Promptness of response to queries	79%	9%	11%	*
Case completed within average time agreed in SLA	75%		18%	6%
<b>Satisfaction with level of service (excludes 'not applicable')</b>				
The friendliness/approachability of staff	99%	*	0%	0%
The professionalism of staff	96%	*	*	0%
Dealing with the public on your behalf	93%	5%	*	0%
Dealing with customers on your behalf	93%	5%	*	0%
Their flexibility to respond to changes in your requirements	90%	7%	*	0%
Arrangements for the exchange of confidential information	85%	12%	*	*
The ease of contacting your caseworker	83%	13%	4%	0%
The ease of use of standard forms	79%	15%	6%	0%
The extent to which you are kept informed throughout a case	74%	12%	14%	0%
The ease of access to specialists such as the Building Surveyors or Mineral Valuers	74%	25%	*	0%
<b>Comparison with previous experience</b>				
	Improved	Same	Worsened	N/A
Improvement	21%	65%	6%	8%

## 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.

## Use Made of the Data

This publication is being released as part of a general drive towards making VOA data more accessible. The report will support the Department for Communities and Local Government (DCLG) and Wales Government (WG) in carrying out its duties and the data will also be used to inform government policy, respond to Freedom of Information requests and to parliamentary questions as well as to conduct operational analyses to support the VOA.

## Further Information

The 2013/14 annual report of the SVT Surveys is available at the following location:

<https://www.gov.uk/government/publications/statutory-valuations-team-customer-survey-finding-2013-2014>