



HM Revenue & Customs

CASE STUDY

Using New Technology for Valuation: How InRule® is Putting the VOA in Control of Valuation Logic

The Valuation Office Agency (VOA) is an executive agency of His Majesty's Revenue and Customs (HMRC) for the United Kingdom.

The VOA is responsible for the valuation of all domestic and non-domestic properties for Council Tax and business rates purposes. They also help determine fair rents and housing allowance received, as well as undertaking property valuation work for a range of public sector clients. All in all, **VOA helps to generate around £60 billion for essential public services**. NDR properties are currently revalued every five years, with plans to conduct Revaluations every three years from 2023.

£60

for essential public services
generated by VOA

In an effort to transform into a more flexible, efficient and agile organization, the VOA created a seven-part vision to guide its **Business Systems Transformation (BST) initiative**. The organization completed enhancements related to people, customers, compliance, policy, processes and data. Beyond these actions, VOA embarked on a digital transformation initiative to replace outdated and end-of-life core IT systems to improve resilience for the systems that underpin the collection of local taxes.

For decades, the VOA relied on numerous, disparate systems and applications for valuation. Siloed data stores include a central database, licensed property app, mast valuation app, *Excel* files, *Power BI*, *Visual Basic Scripting* and more. The nature of legacy systems caused lack of transparency to data and logic. There is a wealth of knowledge in the VOA, but also a lot of manual handling, ageing technology and information from

a wide variety of sources that just wasn't working fluently. These issues stood in the way of VOA achieving its vision for the future.

To help meet the needs of the VOA today and in the future, the organization selected the InRule no-code platform for managing its valuation decision logic. The open-architecture system smoothly integrates with **Microsoft Dynamics 365**, VOA's preferred CRM (customer relationship management) environment for storing valuation records for each organization and individual tax payer. Seamless integration between InRule and **Dynamics 365** enable quick and easy calculations of the most complex valuations.


InRule serves as a "single source of truth", centralizing complex logic outside of code and making it easy for VOA valuers to update logic directly as part of change cycles, rather than relying on IT teams to modify hard-coded logic spread across multiple applications.





Centralized, reusable decisions
(aka Single Source of Truth)

Empowering VOA valuers to own logic creation and changes reduces the risk of communication errors. SMEs can immediately execute logic updates they understand best. Using unique, plain-language vocabulary, they're empowered to create new business-specific commands to write and modify tax logic, further speeding change cycles and minimizing errors.

InRule provides complete transparency with an audit trail that reveals all past decisions and change history. InRule further provides the ability to reset course by reverting to a previous version of decision logic.

Trace Results						
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82	ActivateRuleSetsByCategory (A...		Activate Category	ActivateRatingRules	Policy:1/ActivateRatingRules/Acti...	
83	Execute MinPremiumValidation		Execute RuleSet	EvaluatePolicy	Policy:1/EvaluatePolicy/PolicyIsVal...	
84	MinPremiumValidations		Apply Explicit Sing...	Policy	Policy:1/MinPremiumValidations	
85	Premium *	1150	Calculate Field	Policy	SubRate:1/Premium	
86	Premium *	975	Calculate Field	Policy	SubRate:2/Premium	
87	Premium *	1550	Calculate Field	Policy	SubRate:3/Premium	
88	Premium *	2600	Calculate Field	Policy	SubRate:4/Premium	
89	Premium *	4200	Calculate Field	Policy	SubRate:5/Premium	
90	Premium *	6300	Calculate Field	Policy	SubRate:6/Premium	
91	ExposureBaseRate *	16775	Calculate Field	Policy	Policy:1/ExposureBaseRate	
92	StateProvinceModifiedRate *	16775	Calculate Field	Policy	Policy:1/StateProvinceModifiedRate	
93	HighClaimsFactor *	1	Calculate Field	Policy	Policy:1/HighClaimsFactor	
94	HighSalariesModifier *	1	Calculate Field	Policy	Policy:1/HighSalariesModifier	
95	CreditingFactorsRate *	17278.25	Calculate Field	Policy	Policy:1/CreditingFactorsRate	
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Trace Event Detail		
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LOOKING AHEAD

The InRule platform offers much more than the capability to manage and execute complex tax decisioning. VOA can run ‘what-if’ scenarios on its valuation data to better understand how adjustments in valuation logic and calculations may impact accuracy and integrity of outcomes.

The VOA can also leverage the no-code platform’s powerful process automation. Exception handling capabilities enable instant diversion to the right team member, facilitating swift issue resolution and minimizing negative outcomes.

By leveraging InRule to manage complex valuation logic, HMRC VOA is well-positioned to keep pace with changing government requirements and evolving constituent expectations – today and in the future.

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