



Renfrewshire Valuation Joint Board

Notice of Meeting and Agenda Renfrewshire Valuation Joint Board

Date	Time	Venue
Friday, 20 January 2017	14:00	The Robertson Centre, 16 Glasgow Road, Paisley, PA1 3QF

KENNETH GRAHAM
Clerk

Additional Item

I refer to the agenda for the meeting of the Renfrewshire Valuation Joint Board to be held on 20 January 2017 and enclose the undernoted additional report which was not included in the notice calling the meeting and which the Convener has agreed be considered as an urgent item of business:

Service Plan 2015/18

Report by Depute Assessor and Electoral Registration Officer.

Items of business

(a) Service Plan 2015/16

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Report by Depute Assessor and Electoral Registration Officer.



Renfrewshire Valuation Joint Board

Report to: Renfrewshire Valuation Joint Board
Meeting on: 20 January 2017
Subject: Service Plan
Author: Depute Assessor & Electoral Registration Officer

1.0 Introduction

As part of the ongoing review of all the Board's policies and procedures the Service Plan has been updated.

This plan is prepared and updated regularly to ensure it reflects the most recent changes in circumstances facing the Board, a further Annual update will be produced for the next Board meeting.

2.0 Recommendation

The Board approves the Service Plan.

Note Attachment: Service Plan

Kate Crawford
Depute Assessor & ERO
22.12.2016

For further information please contact Kate Crawford on 0141-618-5903 or via email at kate.crawford@renfrewshire-vjb.gov.uk

RENFREWSHIRE VALUATION JOINT BOARD



SERVICE PLAN APRIL 2015 TO APRIL 2018

Title	Service Plan – April 2015 to April 2018
Author	Kate Crawford, Depute Assessor
Approved By	Management Team
Date of Approval	
Reviewer	Depute Assessor
Review Date	

Review History

Review No.	Details	Release Date

SERVICE MISSION AND VISION

WHO WE ARE

Renfrewshire Valuation Joint Board is an independent local government body which was established by The Valuation Joint Boards (Scotland) Order 1995

WHAT WE DO

We professionally compile and maintain the Valuation Rolls, Council Tax Valuation Lists and Registers of Electors for the Renfrewshire, East Renfrewshire & Inverclyde Council areas

OUR AIMS

Building on our established professionalism, we aim to provide high quality, effective and responsive services to all of our stakeholders

COMMITMENTS

We are committed to:

- Consulting our stakeholders, and listening and responding to their views
- Valuing staff and providing them with opportunities to develop and contribute
- Reacting innovatively to change
- Encouraging innovation and recognising achievement within the organisation
- Treating all stakeholders, including staff, in a fair, consistent manner and in accordance with equal opportunities requirements
- Striving for continuous improvement in all aspects of service delivery
- Ensuring that we are accessible and accountable to stakeholders
- Pro-actively planning workloads and deploying resources efficiently
- Using language which is easy to understand

Working with our partners in the Scottish Assessors' Association to ensure Scotland-wide consistency of approach to service delivery

RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER

SERVICE PLAN APRIL 2015- APRIL 2018

PART ONE **SERVICE FUNCTION**

1.0 INTRODUCTION

Renfrewshire Valuation Joint Board was established as part of the 1996 reorganisation of local government in terms of The Valuation Joint Boards (Scotland) Order 1995 and is vested with the functions of the valuation authorities of Renfrewshire, East Renfrewshire and Inverclyde. With the agreement of the three Councils, the Board also has responsibility for the Electoral Registration function for all 3 areas.

The Assessor is responsible for valuation for non-domestic rating (The Valuation Roll) and council tax banding (The Valuation List), and in his role as Electoral Registration Officer, the compilation of the Electoral Register.

The primary service functions are the compilation and maintenance of the Valuation Roll, the compilation and maintenance of the Valuation (Council Tax) List and the preparation and publication of the Register of Electors.

1.1 VALUATION ROLL

The Valuation Roll is a list of all non-domestic properties, which are not excluded properties, along with the Net Annual and Rateable Values which the Assessor has established for each property. These annual values form the basis for non-domestic rates charges. The Roll is published annually and updated weekly.

The Assessor is normally required to complete a 5-yearly Revaluation of all non-domestic properties within the Valuation Roll. The most recent of these was completed in accordance with the statutory timetable and came into effect on 1st April 2010. However, a decision by Government postponed the 2015 Revaluation until 2017, at present we are preparing for this next Revaluation which will become effective from 1st April 2017.

The number of properties in the Valuation Rolls for the three council areas varies around 10,350 with a total Net Annual Value at revaluation of c. £338 million.

The Assessor for Renfrewshire is the designated Assessor for fixed line telecommunication subjects throughout Scotland, this has added £38.5m to the Renfrewshire Valuation Roll. This is currently resourced from the existing budget allocation.

1.2 VALUATION LIST

The Council Tax Valuation List is a list of all domestic properties upon which Council Tax charges are based. It is published annually and updated weekly.

Each dwelling is placed in one of eight broad valuation bands according to its estimated market value as at 1st April 1991.

There are over 165,000 dwellings in the Valuation Lists for the Joint Board area.

1.3 REGISTER OF ELECTORS

The Register of Electors contains the names of all persons resident within the area and eligible to vote at Parliamentary, Scottish Parliamentary, European and Local Elections. It is published annually, by the 1st December, and outside of the canvass period (see below), is updated on a monthly basis. The number of electors on the register at April 2015 is 254,204.

The Revised Register is updated by a canvass of all households, which is carried out during August - November each year (The Canvass Period).

An Open Register of Electors, which is made available for a variety of purposes, is also prepared.

1.4 OTHER FUNCTIONS

Arising from legislative requirement or commitment to government policy, the assessor also carries out a range of functions in support of the above primary services. These include the following:-

Corporate Governance procedures and practices have been implemented and are adhered to at member and official level. These will be continually reviewed and improved with particular reference made to such good practice and good governance guidance as is provided by Audit Scotland. Risk Management forms an integral part of the corporate governance framework.

Accountability is achieved through a combination of external audit, internal audit, performance monitoring and reporting.

RVJB recognises its duty, under Section 1 of The Local Government in Scotland Act 2003, to make arrangements to secure Best Value. The Valuation Joint Board is committed to the principles and practices of Best Value and to the integration of this theme into all areas of operation.

In accordance with Equalities Act 2010, RVJB discharges its functions in a manner which encourages equal opportunities and the observance of equal opportunity requirements.

The Valuation Joint Board recognises its staff as valuable assets and key stakeholders.

Proper Financial procedures and practices, including annual budgeting, monthly monitoring and public reporting, are in place.

The services of RVJB will continue to be supported and improved on through the application and development of Information Technology systems in accordance with the approved IT Strategy.

In accordance with Section 23 of the Freedom of Information (Scotland) Act, both the VJB and the Assessor maintain Publication Schemes and comply with the requirements of the request for information regime. Further, they recognise and adhere to the Codes of Practice issued under the terms of the Act. The appropriate model publication scheme has been adopted. Section 23 does not apply to the statutory functions of the ERO but the general principles of openness will be reflected in responses to requests for information.

The Public Records (Scotland) Act 2011 requires that listed public authorities submit Records Management Plans to the Keeper for approval and to hold and maintain records in accordance with that plan. This period of this service plan will cover the development and submission of a Records Management Plan for approval and for the implementation of its terms within the Joint Board

RVJB operates in an ever more complex and financially challenging environment and continues to develop a range of key partnerships and stakeholder relationships.



RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER

SERVICE PLAN APRIL 2015- APRIL 2018

PART TWO **CORE OBJECTIVES**

The criteria for the planning, management, monitoring and reporting of the three main areas of function are included in Part Four, 'Performance Management'.

2.1 THE VALUATION ROLL

- 2.1.1 Maintenance of the Valuation Roll, including the addition of new subjects and the amendment of existing subjects, will continue, year-on-year, in accordance with the Joint Board's established procedures for completion within the statutory timescales and annual targets. Valuation Notices will be issued to all Proprietors, Tenants and Occupiers and all relevant changes will be notified to the billing authorities timeously.
- 2.1.2 The next Revaluation is scheduled for 2017 and preparations to ensure that our Statutory Duties are met are well under way. The shortened timetable for analysis and publication of the new Valuation Roll present a particular challenge. The Assessors staff will contribute at the Scottish Assessors Association (SAA) to ensure harmonisation throughout Scotland and will through the SAA liaise with the Valuation Office Agency to achieve harmonisation throughout the UK.
- 2.1.3 Approximately 15,000 Revaluation Notices will be issued to Proprietor Tenants and Occupiers of subjects within the Valuation Roll on 15th March 2017, each one of these has a right of appeal. The last date for submission of such appeals will be 30th September 2017, and the statutory timetable for their disposal will be 31st December 2020. To facilitate the timeous disposal of these, the Assessor in conjunction with the Secretary and Chairperson of the local Valuation Appeal Panel for Renfrewshire, will schedule Valuation Appeal Committee Hearings, and staff will invest significant effort in achieving settlement.
- 2.1.4 In addition, running roll appeals can be submitted at any time during the life of the Valuation Roll. The Assessor will include such appeals in his ongoing schedule of VAC Hearings in order that they are disposed of in accordance with their varying timetables.
- 2.1.5 In support of the appeals process, the Assessor's staff will continually ingather and analyse rental (and other) information. Additionally, staff have actively participated in the Working Groups and Committees of the Scottish Assessors' Association to confirm or amend the 'Practice Notes' produced by the SAA for the purposes of this forthcoming Revaluation. In the longer term, but quite possibly within the time period of this service plan, a review of the Scottish Tribunals Systems may result in changes to the local Valuation Appeals Panels and to the processes and procedures required when working with the Secretary/Assistant Secretary to the Panels.
- 2.1.6 Factors which may be out with the Assessor's control include the scheduling of appeals for a number of subjects or subject types which have been, or may in the future be, referred to the Lands Valuation Appeal Court or Lands Tribunal for Scotland. This effectively removes the timetabling of appeals from local control and provides a degree of uncertainty in service planning.
- 2.1.7 The Assessor for RVJB is responsible for the maintenance of all fixed line Telecom valuations for all of Scotland. The obligation to deal with these subjects, and their appeals in particular, may place significant additional obligations on the organisation and may impact on its functions, and structure. There are still some 2005 /2010 running roll and Revaluation appeals against the NAV/RVs of these subjects which have been referred to the Lands Tribunal. Further, similar information gathering, analysis and valuation processes will be required for these valuations in advance of the 2017 Revaluation. Close liaison with the Valuation Office Agency will be retained throughout.

2.2 THE VALUATION (Council Tax) LIST

- 2.2.1 Maintenance of the Valuation List, in particular the addition of new subjects, will continue, year-on-year, in accordance with the Joint Board's established procedures for completion within annual targets. Banding Notices will be issued to all interested parties and all relevant changes will be notified to the billing authorities timeously.

- 2.2.2 Band changes following alteration to and subsequent sale of properties will continue in accordance with the Joint Board's established procedures.
- 2.2.3 A small number of proposals/appeals against banding continue to be received. Discussions in relation to these are ongoing and, where necessary, the Assessor will refer such appeals within six months of receipt, to the Secretary to the local Valuation Appeal Panel for inclusion in the schedules of VAC Hearings.
- 2.2.4 There is a possibility that a Council Tax Revaluation may be ordered at any time. Although it is unlikely that such a Revaluation will be ordered in the near future, a watching brief will be retained and processes and procedure to facilitate such a Revaluation will be initiated as required. In the meantime, records of alterations to domestic properties will be maintained and updated.

2.3 THE REGISTER OF ELECTORS

- 2.3.1 The 'Full' Annual and 'Open' Registers will be published by 1st December in each year following a canvass carried out, as before, during August - November. The objective of the canvass will be to ensure the maximum possible number of returns, satisfactorily completed and that the register accurately reflects the information contained on them. This process will be supported by provision of a telephone, SMS and internet canvass return service. Door to Door inquiries will be carried out at houses where resident have failed to respond to the postal canvass.
- 2.3.2 The Register will be updated on a monthly basis between January and September by the production of Lists of Additions, Deletions and Alterations. All statutory Notices and Lists will be timeously provided to relevant parties.
- 2.3.3 Election Registers and Lists of Absent/Postal/Proxy voters etc will be produced as required by statute and by agreement with Returning Officers.
- 2.3.4 During the lifetime of this Service Plan the system of Electoral Registration in Great Britain will be changing from a household based collection of information ,to one based on individuals being invited to apply to registered and supplying information directly to the ERO. This system will be supplemented by household enquiry forms replacing the traditional canvass form. The applications received will be subject to verification from sources such as Department of Work and Pensions (DWP). The transition period has to be reviewed and may finish in either December 2015 or December 2016
- 2.3.5 Following the devolution of powers for Scottish Parliamentary and Local Government Elections to the Scottish Government , ERO's are required to compile a register which includes 14/15year olds , this is to facilitate preparing a register for either of the aforementioned elections in Scotland which will contain young persons who are 16yrs old on the date of the election.
- 2.3.6 Any constituency or ward boundary changes will require to be actioned timeously., however the major boundary review for the UK Parliament has been delayed until 2018. A Scottish Local Government Boundary Review is planned during the life of this Service Plan and appropriate changes to ward boundaries will require action to allow them to be processed in time for the 1st December register in 2016.
- 2.3.7 Working with the Electoral Commission through the Assessors Association –Electoral Registration Committee and the Association of Electoral Administrators (AEA) to assist with formation of policy regarding Individual Registration.
- 2.3.8 Following the creation of the Electoral Management Board for Scotland the ERO is subject to directions issued by the Convenor to this Board in respect of local government elections in Scotland and any future Scottish referendums.

2.4 CORPORATE GOVERNANCE

- 2.4.1 The Valuation Joint Board will ensure that the Assessor and Electoral Registration Officer is adequately resourced to perform his statutory functions. It will meet to discuss and approve Budgets, Policies and Practices as is deemed necessary and the members will act in accordance with the Code of Conduct for Councillors, which is approved by the Scottish Government.
- 2.4.2 The officers of the Valuation Joint Board will act in accordance with the relevant Schemes of Delegation, Financial Regulations, Standing Orders and Codes of Conduct. These will be reviewed on at least a three-yearly basis, or as required.
- 2.4.3 Strategic and detailed Annual Service Plans will be implemented, maintained and actioned. The Strategic Plan will cover a three year period, whilst noting matters of relevance beyond that timescale. Annual Service Plans will be reviewed prior to annual budget planning.
- 2.4.4 Policies covering Defalcation Procedures and Fraud Prevention have been implemented and will be reviewed on a three-yearly basis. An overarching Corporate Governance Statement will be implemented and reviewed regularly.
- 2.4.5 The Management Team will continue to be the primary forum for the development and implementation of Strategy and Policy and will oversee all operational matters. Actions will be communicated to staff by means of team briefings, written bullet points and minutes.
- 2.4.6 Effective performance management systems continue to be developed, with the Assessor's Management Team also forming the principle forum for matters relating to Performance Management, Planning and Reporting. A Reporting Framework has been implemented and is subject to continual review.
- 2.4.7 Specific operational matters will be within the remit of the various internal Forums and Working Groups who will report to the Assessor's Management Team. The format, remit and membership of these groups will be reviewed on a regular basis.
- 2.4.8 The Valuation Joint Board will continue to align its Personnel and other related policies, where appropriate, with those of Renfrewshire Council.
- 2.4.9 The finances and operations of the Valuation Joint Board will be subject to internal and external audit (see later).
- 2.4.10 A Risk Register is maintained and reviewed regularly by the Assessor and the Management Team, with significant risks reported to the Board.

2.5 ACCOUNTABILITY

- 2.5.1 Annual Accounts will be submitted for external audit. They will be published in accordance with the requirements of Audit Scotland and the Board's Publication Schemes.
- 2.5.2 The procedures and practices of the Valuation Joint Board will also be subject to external audit, in accordance with a timetable to be directed by Audit Scotland.
- 2.5.3 An audit plan encompassing the requirements of the external and internal auditors will be drawn up annually.
- 2.5.4 Performance will be monitored and reported internally and externally. A Reporting Framework of annual, quarterly, monthly, statutory, KPI and internal management reports has been developed. This Framework will, in response to changing external requirements and management need, be subject to continuous review.
- 2.5.5 Decisions of the Management Team, Forums and the Working Groups will be minuted and available for inspection.

2.6 BEST VALUE

- 2.6.1 Best Value is statutorily defined as 'continuous improvement in the authority's performance'. The Valuation Joint Board is committed to the principle of Continuous Improvement. In support of this Performance will be planned and monitored (see 2.5.4 above). Key Performance Indicators have been implemented in conjunction with the Scottish Government and the Scottish Assessors' Association and reported to the Scottish Government and other key stakeholders annually. The range of Key Performance Indicators will be further developed in association with the above bodies.
- 2.6.2 Performance Indicators have also been developed for Electoral Registration and will continue to be developed on an ongoing basis by the Management Team. These will be included in the VJB's annual electoral registration report.
- 2.6.3 Performance Indicators will be used for year-on-year comparisons as well as comparisons with other Assessors' offices, Local Authorities and other bodies.
- 2.6.4 In accordance with Section 13 of The Local Government in Scotland Act 2003, the performance of Renfrewshire VJB in relation to its functions will be reported to all stakeholders of the Valuation Joint Board, including staff, in the most appropriate manner.
- 2.6.5 The Joint Board's in-house Valuation and Electoral Forums will continue to be used and developed for reviewing performance and developing and implementing best practice.
- 2.6.6 Stakeholder Consultations will be continually developed and implemented and the outcomes taken account of in Service Planning.
- 2.6.7 There is a Customer Comments and Complaints procedure in place which has been revised in line with the Scottish Public Sector Ombudsman's Model Complaints Handling Procedure. All comment/complaints will be considered by the Management Team for improvement action and reported as required by the procedure.
- 2.6.8 A relevant set of Customer Service Standards will be agreed and implemented, along with systems for the monitoring of, and reporting on, these.
- 2.6.9 Renfrewshire VJB will give consideration to any guidance issued under the terms of Section 2(1)(b) of The Local Government in Scotland Act (2003). This is an external factor over which the Joint Board has no control and which may result in variations to the Service Plan.

2.7 EQUAL OPPORTUNITIES

- 2.7.1 The Valuation Joint Board is committed to equality in respect of race, faith, ethnicity, ability, age, gender and sexual orientation, both in staffing and service provision.
- 2.7.2 A review of all personnel etc policies to comply with the Equality Act 2010, and other public sector duties for race, disability and gender will continue. Impact Assessments will be carried out to examine the effect of any new or amended policies on relevant groups.. The Equality Act has required a review of policies to an outcome approach including all protected characteristics. This outcome approach was first defined in May 2013, and is under constant review.
- 2.7.3 All policies will be continuously reviewed to encompass equalities issues.
- 2.7.4 As policies are implemented or amended, staff will be adequately trained.

2.8 STAFFING AND PERSONNEL MATTERS

- 2.8.1 The Valuation Joint Board will continue to align its Personnel and other related policies, generally, with those of Renfrewshire Council where possible. Should it be necessary to produce a policy reflecting the independence of the statutory functions of the Assessor & ERO these will be written and published on both the intranet and the website along with all other relevant policies.
- 2.8.2 A Training and Development Programme, which aims to ensure that adequate training is provided to all members of staff, has been developed and implemented. Staff will review their training needs with their managers on an annual basis. There is a dedicated Training Working Group which reviews training needs for all employees and meets regularly.
- 2.8.3 To ensure that the Joint Board's personnel policies and procedures are kept up to date, regular contact will be maintained with Renfrewshire Council's relevant department.
- 2.8.4 In line with the Joint Board's Health and Safety Policy, Risk assessments covering all areas of function are reviewed annually.

2.9 FINANCE AND BUDGETING

- 2.9.1 The officers of the Valuation Joint Board will act in accordance with the relevant Financial Regulations and Standing Orders, which will be reviewed on a five-yearly basis or as circumstances demand.
- 2.9.2 In partnership with the Finance Resources of Renfrewshire Council, budgets will be prepared annually and approved by the Joint Board. A detailed report on the make up of the budget will also be prepared annually.
- 2.9.3 Appropriate procedures for procurement, authorisation and payment have been implemented and these will be subject to annual review.
- 2.9.4 In conjunction with Renfrewshire Council, a procedure for dealing with all aspects of debtor accounts will be produced. In particular, regular reports detailing outstanding amounts, arrears, write-off etc will be developed and presented to the Management Team.
- 2.9.5 Adequate training in respect of these procedures will be provided to relevant staff.
- 2.9.6 Financial monitoring reports are received from Renfrewshire Council and verified on a monthly basis. These are used to prepare reports detailing under and over spends, along with corrective actions, to Management Meetings on a monthly basis and to the Joint Board as required.

- 2.9.7 Year-end Accounts will continue to be prepared, audited and made available for public inspection.
- 2.9.8 Payroll checks will be formalised, in accordance with the Reporting Strategy, and reports presented regularly to the Management Team.
- 2.9.9 The current UK and Scottish Government Policies in relation to reducing Public Sector expenditure are likely to establish the context for many of the operational decisions and changes which require to be made in the foreseeable future.

2.10 INFORMATION TECHNOLOGY

- 2.10.1 The provision and maintenance of Information Technology assets, systems and services are carried out in accordance with the Joint Board's Information Technology Strategy. As and when required IT Liaison meetings are held with Renfrewshire Council IT personnel to discuss any issues where the Board and Renfrewshire Council share IT services.
- 2.10.2 The assets of the VJB will be refreshed in accordance with the IT Strategy.
- 2.10.3 Renfrewshire VJB adheres to the principles of Data Protection and reviews its Notification to the Information Commissioner annually.
- 2.10.4 Systems to deal with Freedom of Information requests have been developed and implemented and these will be reviewed in light of the demands of the request regime. A Freedom of Information log is maintained.
- 2.10.5 The Assessor's 'Progress' information technology system will be developed to facilitate improvement and changing external requirements in respect of the electoral registration, non-domestic rating and council tax valuation functions. Such development will normally be completed by an 'in-house' programmer located within Renfrewshire Council.
- 2.10.6 With the introduction of Individual Electoral Registration new systems have been designed utilising resources of an IT Programmer from Renfrewshire Council in conjunction with Assessor's staff.
- 2.10.7 Satellite systems including Domino, Alpha 5 & Strand to support primary functions and reporting requirements will continue to be maintained and developed as required.
- 2.10.8 Renfrewshire VJB will continue to commit resources to the Scottish Assessors Association Assessors Portal project.
- 2.10.9 The form and content of the RVJB Web Site will be reviewed on an on-going basis.
- 2.10.10 Renfrewshire VJB will continue to implement and develop its Notes intranet site which is the definitive source of all internal policies, procedures and guidance documents.

2.11 INFORMATION MANAGEMENT

- 2.11.1 A Freedom of Information Policy Statement has been approved by the Board and this will be reviewed regularly.
- 2.11.2 A Model Publication Scheme has been compiled both for Scottish Assessors and on behalf of the Valuation Joint Board. These have been approved by the Information Commissioner and will be reviewed when appropriate, to include information requests that result in repeated provision of information.

- 2.11.3 Procedures to enable compliance with the requirements of the Freedom of Information (Scotland) Act 2002 have been developed and implemented. These will be reviewed in light of the impact of the request for information regime.
- 2.11.4 The Valuation Joint Board recognises the importance of Codes of Practice issued under the terms of the Freedom of Information (Scotland) Act, and will review practices and procedures on publication of any of such guidance.
- 2.11.5 The Valuation Joint Board is a Data Controller in terms of the Data Protection Act 1998 and maintains a registration as such.
- 2.11.6 As a Data Controller the Joint Board will manage all personal data held in compliance with the 8 Data Protection Principles. Processes for handling information will be regularly reviewed to ensure continued compliance.

2.12 KEY PARTNERSHIPS

- 2.12.3 The support services provided by Renfrewshire Council are essential to the operations of Renfrewshire VJB. These services will continue to be managed by regular contact with relevant persons in each of the supporting Resources and by agreement of Service Level Agreements.
- 2.12.4 Being the primary recipients of operational outputs (Valuation Rolls, Councils Tax Valuation Lists and Electoral Registers), Renfrewshire VJB recognises its constituent Councils as key stakeholders, and will consult with these bodies in all areas relating to these matters.
- 2.12.5 The Valuation Joint Board recognises the important relationship it has with the Returning Officers of the 3 constituent authorities and will continue regular liaison with them. This will include the organisation and hosting of our Joint Electoral Forum.
- 2.12.6 The Joint Board will continue to commit resources to the workings of the Scottish Assessors Association. In this respect, it will participate in Plenary, Committee and Working Group meetings and fully engage in the exchange of information, ideas and knowledge provided by this association.
- 2.12.7 Through the SAA, the assessor for Renfrewshire VJB will maintain liaison with bodies such as the Scottish Government, Scotland Office, Valuation Office Agency (England and Wales), the Valuation and Land Agency (Northern Ireland), the Eire Valuation Office and The Royal Institution of Chartered Surveyors.
- 2.12.8 Similarly, Joint Board staff will continue to participate in the workings and proceedings of the Association of Electoral Administrators and the IRRV.
- 2.12.9 Renfrewshire VJB recognises the role of, and support provided by, The Electoral Commission and the Electoral management Board in respect of Electoral Registration matters.
- 2.12.10 Staff are recognised as both key assets of the Valuation Joint Board and primary stakeholders, and consultations with both staff and their representatives will continue on a regular basis.
- 2.12.11 Relationships with external suppliers of systems and services are subject to contract and/or Service Level Agreement and are managed through liaison with the relevant account manager or similar representative. Such services are, however, subject to continuous review regarding effectiveness, quality and price.

2.13 MISCELLANEOUS

- 2.13.1 The Public Records (Scotland)Act 2011 required public bodies to implement proper records management procedures in accordance with the Act. In particular, a Records Management Plan has to be submitted by October 2015.
- 2.13.2 The Valuation Joint Board is committed to various initiatives, not covered above but which have significant implications for Service Planning, priorities and actions. These tend to be of an ad-hoc nature and demand variable commitment.
- 2.13.3 The assessor for Renfrewshire VJB will respond, either directly or through its relevant associations, to pertinent legislative, and other, consultations.
- 2.13.4 Any future local authority boundary or electoral constituency changes will require resource allocation and planning.
- 2.13.5 Renfrewshire VJB is committed to the development and implementation of the Corporate Address Gazetteers of its constituent Councils (and through these initiatives to the formation of a National Gazetteer) and use of National Unique Property Reference Numbers. To that end it will provide such assistance, information and data as it reasonably can and participate in such joint projects as it can meaningfully contribute to.



RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER

SERVICE PLAN APRIL 2015- APRIL 2018

PART THREE

KEY ACTIVITIES AND OUTCOMES

Key To Business Objectives

The codes in the table below relate each Activity and Outcome contained in Part Three of the Service Plan to the relevant Business Objective(s) within the Joint Board's **Mission, Vision and Commitments** Statements.

Number	Business Objective
1	Compile the Valuation Roll
2	Compile the Council Tax Valuation List
3	Compile the Electoral Register
4	Maintain the Valuation Roll
5	Maintain the Council Tax Valuation List
6	Maintain the Electoral Register
All of the above are underpinned by the aim of providing these services in a high quality, effective and responsive manner.	
7	Listening and responding to Stakeholders needs
8	Valuing staff and providing them with opportunities to develop and contribute
9	Reacting innovatively to change
10	Treating all stakeholders in a fair, consistent manner and in accordance with equal opportunities requirements
11	Striving for continuous improvement in all aspects of service delivery
12	Ensuring that we are accessible and accountable to stakeholders
13	Pro-actively planning workloads and deploying resources
14	Using 'plain English'

3.1 THE VALUATION ROLL

3.1.1 Maintenance of the 2010 Valuation Roll

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record all known development activities, including planning permissions and building control warrants granted, in accordance with the RVJB Guidance Instructions and within the agreed timescales.	1,4,10,11	Divisional Assessors/ Clerical Manager	On receipt in accordance with schedules
(b)	Survey of all new, amended or demolished non-domestic properties in accordance with RVJB Survey Guidance.	1,4,10,11	Principal Valuers	Continual basis
(c)	Valuation of above in accordance with the SAA approved Practice Notes, in-house Practice Notes and with reference to relevant 'Narratives'.	1,4,10,11	Principal Valuers	Continual basis
(d)	Amend the Valuation Roll by input to the Assessors 'Live' computer system.	1,4,10,11	Clerical Manager	Continual basis
(e)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	1,4,10,11	Principal Valuers / Audit Team	Weekly
(f)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	1,4,10,11	Data Manager	Weekly
(g)	Issue Valuation Notices to all interested parties as required by statute.	1,4,10,11,12,14	) Data Manager	Weekly
(h)	Update data at SAA Portal in accordance with agreed schedules	7,9,11,12	Data Manager	Weekly
(i)	Complete the above in accordance within the annually reviewed targets relating to Key Performance Indicators	11,13	All staff	Continual basis
(j)	Compile and present Running Roll statistics to Management Team	4,11,13	Data Manager	Monthly
(k)	Issue questionnaires requesting information on ownership, tenancy and occupation of the property along with information relating to physical alterations and rental details. Electronic returns facility now available	4,10,12,14	DA's	Continual basis
(l)	Answer all ad-hoc enquiries from current, past and potential ratepayers in accordance with RVJB Working Practices.	4,7,10,12,14	All staff	Continual basis
(m)	Ingather information for Telecoms	4, 10,13,14	Data Manager	Various schedules
(n)	Complete year-end procedures for creation of refreshed Valuation Roll in accordance with Year-End Timetable	1,4,	Data Manager	Annually, March

3.1.2 Revaluation 2010 - Settlement of Appeals

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Maintain records of appeals including their status in relation to citation to appear at VAC, referral to Lands Tribunal etc.	1,4,10,13	Divisional Assessors	Continuous
(b)	Negotiate and settle appeals with ratepayers and their agents in accordance with statutory timetables and with recourse, where necessary, to the Local Valuation Appeal Committee, Lands Tribunal or Lands Valuation Appeal Court.	1,4,10,11,12	Divisional Assessors	Continuous
(c)	Cite all outstanding Revaluation Appeals, at least in accordance with the statutory timetable, and preferably for Hearing prior to the end of December 2015	1,4,10,11,12	Divisional Assessors /VAC Secretary	As scheduled
(d)	Prepare VAC cases including rental analysis, valuations, photographs, plans and other productions	1,4,10,11,12,14	Divisional Assessors	As required
(e)	Produce 'on-the-day' VAC Lists and administer VAC Hearings	1,4,10,12,14	Divisional Assessors	As scheduled
f	Provide SAA with information as required to support LT preparation & Hearings	1,4,10,12,14	Assessor, Depute, Divisional Assessors	As required
g)	Where appropriate, amend the Valuation Roll to reflect appeal settlements in accordance with procedures as above	1,4,10,11,12	Principal Valuers, Audit Team	Continuous
h)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	1,4,10,11,12	Principal Valuers, Audit Team	Weekly
i	Where appropriate, issue Valuation Notices to reflect appeal settlements.	1,4,10,11,12,14	Audit Team	Weekly
(i)	Compile and present Revaluation Appeal statistics to Management Team and Scottish Government.	11	Divisional Assessors & PAO	As required

3.1.3 Running Roll Appeals

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record appeals received arising from amendments made to the 2010 and 2017 Valuation Roll.	4,10,13	Principal Valuers, Data Manager	Continuous
(b)	Implement and maintain procedures to process appeals received via SAA Web Portal	4,7,9,10,11,12,14	Principal Valuers, Data Manager	Continuous
(c)	Maintain records of appeals including their status in relation to citation to appear at VAC, referral to Lands Tribunal etc.	4,10,13	Principal Valuers, Data Manager	Continuous
(d)	Negotiate and settle appeals with ratepayers and their agents in accordance with statutory timetables and with recourse, where necessary, to the Local Valuation Appeal Committee, Lands Tribunal or Lands Valuation Appeal Court.	4,10,11,12	Divisional Assessors	Continuous
(e)	Cite all outstanding Running Roll Appeals in accordance with the statutory timetable appropriate to each appeal.	4,10,11,12	Divisional Assessors/ VAC Secretary	As scheduled
(f)	Prepare VAC cases including rental analysis, valuations, photographs, plans and other productions	4,10,11,12	Divisional Assessors	As required
(g)	Produce 'on-the-day' VAC Lists and administer VAC Hearings	4,10,11,12,14	Divisional Assessors	As scheduled
(h)	Where appropriate, amend the Valuation Roll to reflect appeal settlements in accordance with procedures as above.	4,10,11,12	Valuers, Data Manager	Continuous
(i)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	4,10,11,12	Divisional Assessors, Audit Team	Weekly
(j)	Where appropriate, issue Valuation Notices to reflect appeal settlements.	4,10,11,12,14	Audit Team	Weekly
(j)	Compile and present Running Roll Appeal statistics to Management Team .	11	Divisional Assessors	Monthly

3.1.4 Revaluation 2017 (to include Telecoms as designated assessor)

Item	Description	Objective(s)	Ownership	Date/Recurrence
(b)a	Issue rental, and other, questionnaires.	1,4,7,10,11,12,13,14	Divisional Assessors & Clerical Manager	Spring 2015 and as required
(c)b	Manage returns of above in accordance with the RVJB procedures/clerical Instructions.	1,4,7,10,11,12,13,14	Data Manager/Clerical	On return
(d)c	Analyse rentals of 'bulk class' subjects as agreed within established Working Groups and in accordance with SAA rental analysis guidance. Facilitate same, using Information Technology.	1,4,10,11,12,13	Divisional Assessors	As required
(d)	Analyse local land sale information for use in contractor's valuations.	1,4,10,11,12,13	Divisional Assessors	July 15 – Spring 16
(e)	Draft Narratives and rates to be applied in valuations, where appropriate.	1,4,10,11,12,13,14	Divisional Assessors	Sept 15 – Dec 15
(f)	Approve Narratives and rates to be applied in valuations, where appropriate	1,4,10,11,12,13,14	Assessor/Depute/Divisional Assessors	Sept 15 – Dec 15
(g)	Provide information as required to SAA Practice Note authors, working groups and Category Committees.	1,4,10,11,12,13	Divisional Assessors	April 15 – May 16
(h)	Draft and present SAA Practice Notes for approval by Committees	1,4,10,11,12,13	SAA members	As required
(i)	Make comment on and provide input to draft/proposed Practice Notes.	1,4,10,11,12,13,14	Divisional Assessors	As required
(j)	Adopt and issue amended practice notes for use within RVJB (Make available through SAA on Web Portal)	1,4,7,10,11,12,13,14	Divisional Assessors	As required
(k)	Value subjects for Revaluation purposes in accordance with local schemes of valuation, SAA Practice Notes and RVJB targets for completion.	1,10,11,12,13	Divisional Assessors	As required
(l)	Authorise proposed Rateable Values (RVs)	1,10,11,12,13	Divisional Assessors	As required
(m)	Input proposed NAVs/ RVs to Assessor's 'Progress' Valuation system	1,10,11,12,13	Data Manager	As required
(n)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	1,4,10,11, 12, 13	Data Manager	Weekly
(o)	Export proposed NAVs/RVs (including summary valuation data where appropriate) to Assessors portal	1,4,10,11	Data Manager/IT Manager	Fortnightly after September 2015
(p)	Transfer all changes to relevant billing authorities.	1,4,10,11	Data Manager	15 th March 2017 or by agreement
(q)	Issue Valuation Notices to all interested parties as required by statute.	1,4,10,11,12,14	Divisional Assessors	January 2017 or by agreement with Scottish Govt
(r)	Prepare and circulate Revaluation Rolls as required	1,4,10,11,12,13,14	Data Manager	April 2017
(s)	Receive, process and dispose of Reval 2017 appeals as per 3.1.2 above	1,4,10,11,12,13,14	Various	April - Sept 2017
(u)	Develop priorities and specifications for improvement	1,4,7,8,9,11,13	Valuation/IT Working Group	As required
(v)	Develop systems in accordance with the above	1,4,7,8,9,11,13	Data Manager & IT Team	As required
(w)	Tests systems and make live	1,4,7,8,9,11,13	Data Manager & IT Team	As required

3.1.6 Telecoms Valuations

Both the appeal procedures for 2010 revaluation and the 2017 Revaluation preparations for these subjects follow similar procedures to 3.1.2 and 3.1.4 above with an added emphasis on liaison with the VOA. Note, too, the potential financial consequences and resource requirement of any protracted LT hearing.

3.1.7 Review of NDR Appeals Process

Other than having been scheduled for during 2014, the actual timing of the proposed review of the appeals procedures is unknown. The VJB will react timeously, probably through the SAA, to respond to any consultation and will implement any legislative change thereafter. Detailed timings for the latter will be added to service/operational plans once known.

3.1.8 Review of Tribunals System

Similar to 3.1.7 above, the timetables and effects of the review are currently unknown and any requirements for action will be added to plans in due course.

3.2 THE COUNCIL TAX VALUATION LIST

3.2.1 Maintenance of the Council Tax Lists

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record all known development activities, including planning permissions and building control warrants granted, in accordance with RVJB Guidance/Instructions and within the agreed timescales.	2,5,10,11	Principal Valuers, Audit Team	On receipt in accordance with schedules
(b)	Survey of all new or demolished domestic properties in accordance with RVJB Survey Guidance.	2,5,10,11	Principal Valuers, Audit Team	Continuous
(c)	Valuation and banding of above in accordance with the statutory valuation assumptions and RVJB procedures.	2,5,10,11	Principal Valuers, Audit Team	Continuous
(d)	Amend the Valuation List by input to the Assessors 'Live' computer system.	2,5,10,11	Principal Valuers, Audit Team	Continuous
(e)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	2,5,10,11	Principal Valuers, Audit Team	Weekly
(f)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	2,5,7,10,11	Audit Team	Weekly
(g)	Issue Banding Notices to all interested parties as required by statute.	2,5,10,11,12,14	Audit Team	Weekly
(h)	Complete the above in accordance within the annually reviewed targets relating to Key Performance Indicators.	11	All staff	Continuous
(i)	Compile and present Council Tax change statistics to Management Team in accordance with Reporting Framework	11	Divisional Assessors	Monthly
(j)	Update data at SAA Portal in accordance with agreed schedules	5,7,9,10,11,12,14	Data Manager & IT Manager	Weekly
(k)	Answer all ad-hoc enquiries from current, past and potential council taxpayers in accordance with the RVJB Working Practices.	5,7,10,12,14	All staff	Continuous
(l)	Complete year-end procedures for creation of refreshed Council Tax Lists and distribute in accordance with annually prepared Year-End Timetables	5,7,10,11,	Audit Team	Annually, April

3.2.2 Amendments to Bands following Alteration and Subsequent Sale

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Receive and record all the sales of all domestic properties in Renfrewshire, East Renfrewshire and Inverclyde and check for matches with development records.	2,5,10,11,12	Principal Valuers, Audit Team	On receipt of notification
(b)	Where appropriate, survey amended properties.	2,5,10,11,12	Principal Valuers, Audit Team	Ongoing
(c)	Value and band the above in accordance with the statutory valuation assumptions and RVJB procedures.	2,5,10,11,12	Principal Valuers, Audit Team	Ongoing
(d)	Amend the Valuation List by input to the Assessors 'Live' computer system.	2,5,10,11,12	Principal Valuers, Audit Team	Ongoing
(e)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	2,5,10,11,12	Principal Valuers, Audit Team	Weekly
(f)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	2,5,7,10,11,12	Audit Team	Weekly
(g)	Issue Banding Notices and covering letters to all interested parties as required by statute.	2,5,10,11,12,14	Audit Team	Weekly
(h)	Complete the above in accordance within the annually reviewed targets relating to Performance Indicators.	11	All staff	Continuous

3.2.3 Proposals and Appeals

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record proposals received in respect of entries in the Council Tax List, including those received via the SAA web portal and monitor their status through appeals to VAC or Court of Session.	5,10,11,12	Principal Valuers, Audit Team	On receipt Ongoing
(b)	Negotiate and settle proposals/appeals with council taxpayers and their agents, including defence, where appropriate, to Valuation Appeal Committee or Court of Session.	5,10,11,12	Principal Valuers, Audit Team	Ongoing
(c)	Facilitate the settlement of appeals by scheduling of VAC Hearings on an annually agreed basis.	5,10,11,12	Divisional Assessors, VAC Secretary	Ongoing
(d)	Prepare VAC cases including sales analysis, valuations, photographs, plans and other productions	5,10,11,12	Principal Valuers	As required
(e)	Produce 'on-the-day' VAC Lists and administer VAC Hearings	5,10,11,12	Principal Valuers, Admin Officer	As scheduled
(f)	Where appropriate, amend the Valuation List to reflect appeal settlements in accordance with procedures as above.	5,10,11,12	Principal Valuers, Audit Team	Ongoing
(g)	Where appropriate, issue Banding Notices to reflect settlement of proposals and appeals.	5,10,11,12,14	Audit Team	Weekly
(h)	All of the above to be completed in accordance with the RVJB procedures	5,11	Principal Valuers, Audit Team	Continuous
(i)	Compile and present Council Tax Proposals and Appeal statistics to Management Team in accordance with Reporting Framework	11,	Divisional Assessors	Monthly

3.2.4 Council Tax Revaluation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Restructure Council Tax data on "Progress" system	1, 10, 11	Divisional Assessors, Principal Valuers	Ongoing
(b)	Survey current altered domestic properties, including any back logs Develop survey input document for extended houses	1,10,11	Divisional Assessors, Principal Valuers	Ongoing
(c)	Amend valuations and, where appropriate, create 'potential' bands for amended subjects within the Assessor's 'Live' system.	1,5,10,11,13	Divisional Assessors, Principal Valuers	Ongoing
(d)	Integrate this process into regular recurring maintenance cycles.	1,5,10,11,13	Divisional Assessors, Principal Valuers	Ongoing
(e)	Survey all properties with sales records around the 'Valuation Date'	1,10,11,13	Divisional Assessors, Principal Valuers	On announcement of Valuation Date

3.3 THE ELECTORAL REGISTER

3.3.1 Annual Register of Electors

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review canvass procedures, including telephone, Internet /SMS facility and door to door enquiries	3,7,9,10,11,12,13	Principal Admin Officer (PAO)/ Clerical Manager	Annually, May
(b)	Prepare file of properties to be canvassed.	3,9	PAO	Annually, August
(c)	Invite tenders for printing and issuing canvass forms	3,9,10,11,12,13,14	PAO	May 2014
(d)	Award contract for above	3,9,10,11,12,13,14	Assessor/PAO	Sept 2014
(e)	Recruit door-to-door canvassers and order resources	3,8,9,10,13	PAO/Senior Clerical & Admin Support	Annually, October
(f)	Train door-to-door canvassers and provide resources	3,8,10,11,13	PAO/Senior Clerical	Annually, October
(g)	Obtain potential 'attainer' information from education authorities as appropriate.		Clerical Manager	Annually- pre canvass start date
(h)	Issue of HEF's, ITR's and, where appropriate, reminders to all households in accordance with annually established timetables.	3,9,10,11,12,13,14	PAO/ SAO	Annually, August – October
(i)	Complete such door-to-door canvass in accordance with annually established timetables	3,7,9,10,11,13	PAO/ SAO	Annually, August – October
(j)	Complete canvass of establishments	3,9,10,11,13	PAO/ Clerical Manager	Annually, –January - February
(k)	Load scanned images into EMS	3,9,10,11,13	IT Support Officer	Annually, August - November
(l)	Receive returns electronically from telephone, internet and SMS service and load to Progress	3,7,9,10,11,13	Renfrewshire Council Programmer	Annually, August - November
(m)	Process changes on EMS	3,9,10,11,13	Clerical & Senior Clerical	Annually, August - November
(n)	Arrange auto audit all changes to source images/documents.	3,9,10,11,13	Audit Team	Annually, August - November
(o)	Provide Management Team with canvass progress reports, including telephone and internet service returns	3,9,11	PAO	Weekly during canvass
(p)	Produce and publish 'Full' and 'Open' Registers, in accordance with statutory timetables, for provision to Government Departments and sale to Credit Reference Agencies.	3,7,9,10,12,14	Audit Team	Annually, by 1 st December
(q)	Timeous provision of Registers to appropriate bodies and places, including places of public display, in accordance with statute and EC Performance requirements	3,7,9,10,12,14	Audit Team	Annually, December - January
(r)	Answer all ad-hoc enquiries from current, past and potential electors in accordance with RVJB Working Practices.	3,7,10,12,14	All relevant staff	Continuous
(s)	Maintain a record of sale and supply of registers	7,10,12	Audit Team	Continuous
(t)	Production of Electoral statistics to GROS and Electoral Commission in line with statutory requirement	7,11	PAO	Annually, December - January

3.3.2 Maintenance of Register of Electors (Rolling Registration)

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Interrogate various data sources including Registers of Scotland, Council Tax systems, Housing records etc, to identify potential change	6, 7,10,11,12,13,14	Clerical Manager	As required
(b)	Issue BAU - ITRs and HEFs, 'Application to Vote by Post' and 'Review' forms/letters timeously to all parties requesting such, and as required from checks of change information received from council and other sources.	6, 7,10,11,12,13,14	Clerical Manager	As required
(c)	Issue Reminders to non-responses from the above (From 28 th February 2015)	6, 7,10,11,12,13,14	Clerical Manager	As required
(d)	Arrange for door-to-door canvass for BAU non-responses to (c) above (From 28 th February 2015)	6, 7,10,11,12,13,14	Clerical Manager	d-2-d Canvass routines to be confirmed
(e)	Record returns of these and receive applications via Government Digital Service (latter from 19 th September 2014)	6, 7,10,11,12,13	Clerical Manager	As required
(f)	Maintain a list of Applications.	6, 10,12,13	Clerical Manager	As required
(g)	With reference to the Integrity Checking staff guidance notes, process 'determined' changes via EMS as above.	6,10,12	Clerical Manager	Monthly, Jan – Sept. As per timetable
(h)	Issue, receive returns and process all Absent Voter Forms	6,7,10,12,14	Clerical Manager	As required
(i)	Check all changes to source document.	6,10,12,13	Clerical Manager	Monthly, Jan – Sept. As per timetable
(j)	Timeous production of monthly 'Lists of Alterations' and 'Notices of Alteration' to the Register of Electors and republish the new Open Register.	6,10,11,12,14	Audit Team	Monthly, Jan – Sept. As per timetable
(k)	Timeous supply of changes to appropriate persons and bodies in format of choice.	7,9,10,11,12,14	Audit Team	Monthly, Jan – Sept. As per timetable
(l)	Compile and present monthly update statistics to Management Team	11,13	PAO	Monthly
(m)	Answer all ad-hoc enquiries for supply of Electoral Registers	7,9,10,11,12,14	Audit Team	As requested
(n)	Answer all ad-hoc queries in line with RVJB working practices	7,9,10,11,12,14	All relevant staff	Continuous
(o)	Review non-returns of forms against Council's Council Taxpayer records to assist with issuing of HEF's	6,9,10,11,12,13	Clerical Manager	All year round from Oct 2014.
(p)	Triennial enquiry to proxy voters in line with statutory regulations	6,10,11,12,13	Clerical Manager	Annually, April – Aug
(q)	Liaise with Establishments etc regarding new residents' applications to register and absent vote applications.	6,7,10,11,12,13	Clerical Manager	Regularly
(r)	Issue and process Absent Voter forms, including signature waiver requests, in accordance with staff guidance and above timetables. (See 3.3.5 below)	3,6,7,9,10,11,12	Clerical Manager	Ongoing
(s)	Review Participation Strategy/Activities as shown in EC Planning documentation	3,6,7,9,10,11,12	PAO	At publication and then quarterly
(t)	Issue such forms, take part in such initiatives etc as are included in annual Participation Strategy.	3,6,7,9,10,11,12	All staff	As required
(u)	Receive and process applications for anonymous registrations in accordance with staff guidance notes.	3,6,7,9,10,11,12	Clerical Manager	Continuous

3.3.3 Elections/Electoral Events – For each Election, individual timetables will be agreed with ROs and other interested parties. Regard will be had to directions and advice from Elections Management Board and Electoral Commission.

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	In the event of an election, elections or referenda, produce an Election Register or 'Polling List' and special lists of electors such as Absent Voters (Postal and Proxy Voter) lists, to include Personal identifiers, and issue letters in accordance with statute and by agreement with Returning Officers.	3,7,9,10,11,12	ERO/PAO/Clerical Manager	As per election timetable
(b)	Liaise with Returning Officers regarding Polling Places/Schemes and apply changes to EMS where appropriate	7,9,11,12,	PAO	As required
(c)	Provision of data to allow the printing of Poll Cards etc, including testing of procedures and data exports.	3,7,9,10,11,12	PAO	As per election timetable
(d)	Provide split registers suitably marked with Absent Voters to relevant Returning Officers.	3,7,9,10,11,12	PAO	As per election timetable
(e)	Supply of election register and absent voters' lists to candidates and election agents in line with the statutory regulations, and to maintain a record of same.	3,7,9,10,11,12	Audit Team	As per election timetable
(f)	Check quality of Signature and Date of Birth data for Absent Voters in advance of electoral event	3,7,9,10,11,12	Clerical Manager	As per election timetable
(g)	Provide advice service to Returning Officers staff on day of poll.	7,10,12,13,14	PAO/Clerical Manager	Day of Poll
(h)	Receive report of Absent Votes which failed due to PI inconsistencies from ROs	6,7,9,10,12,13,14	PAO/ Data Manager	ASAP following electoral event
(i)	Issue relevant letters and/or forms to 'failed' Absent Voters	6,7,9,10,12,13,14	PAO/	ASAP following electoral event
(i)	Receive returns from (k) above and process as per normal procedures.	6,7,9,10,12,13,14	Data Manager	ASAP following electoral event

3.3.4 Absent Voters – Collection/Refresh of Personal Identifiers

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Issue and receive Postal and Proxy voting applications and check for completeness in accordance with VJB guidance notes and integrity checking procedures.	6, 7, 9, 10, 11, 12, 13, 14	Clerical Manager	Ongoing
(b)	Scan properly completed returned forms	6, 7, 9, 10, 11, 12, 13, 14	Clerical Manager	Ongoing
(c)	Escalate queries and signature waiver applications in accordance with RVJB guidance notes	6, 7, 9, 10, 11, 12, 13, 14	Clerical Manager	Ongoing
(d)	Confirm acceptability of signature waiver applications by such means as are necessary and process	6, 7, 9, 10, 11, 12, 13, 14	PAO/ Clerical Manager	Ongoing
(e)	Re-issue forms or make enquiries for incomplete applications	6, 7, 9, 10, 11, 12, 13, 14	Clerical Manager	Ongoing
(f)	Issue confirmations and/or rejection letters as required	6, 7, 9, 10, 11, 12, 13, 14	Clerical Manager	Ongoing
(g)	5-yearly refresh of personal identifiers as required by statute	6, 7, 9, 10, 11, 12, 13, 14	Clerical Manager	Annually from January 2016
(h)	Provide Electoral Commission with Absent Voter Statistics as requested	7, 9, 10, 11, 12, 13	PAO	Annually
(i)	Refresh 'failed' AV Personal identifiers as per 3.3.3 (j)-(l) above		Clerical Manager	ASAP following electoral event

3.3.5 Anonymous registration

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Investigate and determine anonymous registration applications	3, 6, 7, 10, 14	Clerical Manager	Ongoing
(b)	Maintain list of valid anonymous registrations	3, 6, 10,	Clerical Manager	Ongoing
(c)	Issue reminders before the termination date for anonymously registered electors	6, 7, 10, 12, 13, 14	Clerical Manager	Ongoing

3.3.6 Changes in Legislation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Actively participate in SAA and AEA Committees etc to maintain awareness of likely change	7,8,9,11,13	ERO/Depute/PAO	Ongoing
(b)	Receive all relevant draft legislation and input to all relevant consultations	7,9,11,13	ERO/Depute/PAO	Ongoing
(c)	Implement changes to practices and procedures	3,6,7,9,11,13	PAO	As required

3.3.8 Boundary Changes

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Provide assistance and advice to Boundary Commission and constituent authorities to inform the re-drafting and legislative processes.	6,7,9,10,12,13	PAO	As required
(b)	Adjustments to Register to accord with new ward or constituency boundaries as required by any boundary review or voting system.	3,6,7,9,11,13	PAO	As required
(c)	Assisting Returning Officers by allocating streets to Polling Districts to be used in the event of an election	3,6,7,9,10,11	PAO	As required

3.3.9 ER Data Standards

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Continue to match electoral registration data to CAG data from constituent councils	7,8,9,10,11,13	PAO / ICT	Ongoing basis
(b)	Cleanse name and address data and attach UPRNs	7,8,9,10,11,13	PAO / ICT	Ongoing basis/as required

3.4 CORPORATE GOVERNANCE

3.4.1 Joint Board Meetings

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Agree timetable for Valuation Joint Board Meetings	7,12,13	Clerk to RVJB	Annually
(b)	Nominate Report authors for VJB Meetings	13	Assessor	As required
(c)	Prepare Board Reports for VJB Meeting	8,12,13,14	Assessor/Treasurer/ Clerk/Depute/DA's	Jan/May/Aug/Nov, Annually
(d)	Attend Agenda Meetings of VJB	7,8,12	Assessor	Jan/May/Aug/Nov, Annually
(e)	Attend meetings of VJB	7,8,12	Management Team	Jan/May/Aug/Nov, Annually
(f)	Appoint Office Bearers and Committees as per Standing Orders	12,13	Board members and Clerk to RVJB	Following resignation/ by- election etc

3.4.2 Probity and Propriety

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaise with Treasurer to the Valuation Joint Board to review Financial Regulations and present to Board for approval (Revised May 2014)	7,12	Assessor	3-yearly.
(b)	Liaise with Treasurer to the Valuation Joint Board to review Standing Orders and present to Board for approval	7,12	Assessor	3-yearly
(c)	Liaise with Clerk to the Valuation Joint Board review Schemes of Delegation and present to Board for approval	7,12	Assessor	3-yearly
(d)	Review Codes of Conduct for officers of the Valuation Joint Board	7,12,14	Assessor	Following approval of above
(e)	Prepare and review internal procedural guides to ensure adherence to Schemes of Delegation, Financial Regulations, Standing Orders and Codes of Conduct	7,12,14	Assessor	Following approval of above.

3.4.3 Service Plans

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Prepare and Review 3-year strategic Service Plan	1-6,7,9,11,12,13,14	Assessor	Review annually in April
(b)	Prepare and Review Annual Service Plan	1-6,7,9,11,12,13,14	Assessor	Annually in April

3.4.4 Corporate Governance, Defalcation Procedures and Fraud Prevention

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Corporate Governance Statement	12	Assessor	Annually
(b)	Review Defalcation procedures	12	Depute Assessor	2015 and 3-yearly
(c)	Review Fraud Prevention procedures	12	Depute Assessor	2015 and 3-yearly
(d)	Review and adapt Renfrewshire Policies to meet RVJB requirements	7,8,12,14	Management Team	Ongoing
(e)	Implement and review RVJB Policies and Procedures to meet changes in legislation and good working practices	7,8,9,12,13,14	Management Team	As required

3.4.5 Strategic Management

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Strategy to be developed, implemented and reviewed by Management Team at regular, minuted meetings	1-6,7,9,11,12,13,14	Management Team	4/6 weekly
(b)	Review Vision and Mission statements and strategic objectives	7,9,10,11,12,13,14	Management Team	3-yearly
(c)	Communicate Vision, Mission and strategic objectives to all staff by means of Valuation Forum, Electoral Forum, team briefings and written bullet notes	7,9,10,11,12,13,14	Management Team	Ongoing
(d)	Assess progress in relation to objectives	1-6,7,11,13	Management Team	quarterly
(e)	Provide direction and remit, receive reports and consider outcomes of Valuation Forum, Electoral Forum and ad-hoc working groups	1-6,7,11,13	Management Team	4/6 weekly
(f)	Review progress in relation to Audit Actions, Risk Actions and Annual Service Plan/Forward Planner	1-6,7,11,13	Management Team	Ongoing
(g)	Receive Budget Monitoring Reports and consider any required actions	1-6,7,11,13	Management Team	Monthly

3.4.6 Performance Management, Planning & Reporting

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Consider and agree Performance Management Targets, Planning and Reporting in line with Best Value principles and SAA considerations	1-6,7,10,11,12	Management Team	Annually in April
(b)	Establish annual KPI targets for RVJB	1,2,4,5,7,9,10,11,13	Management Team	Annually in April
(c)	Plan performance to ensure compliance with Best Value and achievement of targets	1-6,11,13	All Managers	Continually
(d)	Continue to develop and review Reporting Framework including the suite of performance reports relevant to key activities	1-6,11,13	Assessor	Continuously reviewed
(e)	Produce RVJB performance reports for consideration by Management Team and submit to Joint Board for noting	7,10,11,12,14	Management Team	Monthly +/or in accordance with Board meetings
(f)	Produce and publish Public Performance Reports	7,10,11,12,14	Depute Assessor	Annually in June
(g)	Produce and Publish "Electoral Registration Annual" report	7,10,11,12,14	Assessor	Annually in May
(h)	Present KPI targets to Joint Board for approval	7,11,12	Divisional Assessors	Annually in May
(i)	EC Financial Performance report for submission to EC	7,11,12	ERO/PAO	July

3.4.7 Internal Working Groups

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Meet to ensure compliance with Health and Safety law and the RVJB Health and Safety Policy	7,8,9,11,13	Health and Safety Committee	Quarterly
(b)	Report all Health and Safety matters to Management Team	7,12,13	Health and Safety Committee	Quarterly
(c)	Communicate all Health and Safety issues and actions to staff	13,14	Health and Safety Committee	Quarterly
(d)	Develop, implement and review all processes and procedures in relation to Council Tax and Non-Domestic Rating Valuation	1,2,4,5,7,8,9,10,11,12,13	Valuation Forum	As required
(e)	Develop, implement and review all processes and procedures in relation to Electoral Registration and clerical/administrative support of the valuation functions	1-6,7,8,9,10,11,12,13	Electoral Forum	2 Weekly
(f)	Develop and review all ICT systems and related procedures, including PSN required activities	1-6,7,8,9,10,11,12,13	Depute , PAO & IT Forum	Monthly
(g)	Develop and Review Data Protection & Freedom of Information procedures.	8,9,10,12	Management Team	Quarterly
(h)	Review membership of working groups	1-6,7,8,11,13	Management Team	As required

3.4.8 Personnel, Policies and Procedures

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review and adapt Renfrewshire Council Policies to meet RVJB requirements as appropriate	7,8,10,14	Management Team	See WDC timetable for policy reviews
(b)	Consider new/revised Renfrewshire Council Policies and procedures for adoption/adaptation in R VJB	7,8,10,14	Management Team	On receipt
(c)	Provide such training as is required to support Polices	7,8,10,14	Management Team	Before/immediately after approval
(d)	Communicate all approved RVJB Policies and procedures to staff via Team Briefings and written bullet points.	7,8,10,14	Management Team	Immediately following approval
(e)	Make Policies and Procedures available on RVJB Intranet & Website	7,8,10,14	Management Team/IT Support Officer	Immediately following approval

3.4.9 Internal and External Audit

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Present Annual Accounts for external audit	12	Treasurer to VJB	Annually in June
(b)	Agree audit plan with External Auditors	11,12,13	Assessor	Annually
(c)	Agree audit plan with Internal Auditors	11,12,13	Assessor	Annually
(d)	Co-operate with internal and external auditors in completion of audit plans	7,11,12,13	Management Team	As per audit plan
(e)	Consider Audit Plans from other VJB's and actions required for RVJB	7,9,11,12	Assessor	As required
(f)	Add agreed audit actions to Collated Audit Actions List and report progress to Management Team	11,12,13	Assessor	As required
(g)	Co-ordinate implementation of actions arising from audit recommendations	9,11,13	Management Team	As required

3.4.10 Risk Management

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Risk Management Strategy	1-6,9,11,12,13	Depute & DA's	3-yearly
(b)	Implement and review Corporate Risk Register in accordance with the methodology contained in Policy	1-6,9,11,12,13	Management Team	Annually in April
(c)	Implement/Amend Risk Action Plan	1-6,9,11,12,13	Management Team	Annually in April
(d)	Monitor progress against Action Plan	11,13	Management Team	Monthly
(e)	Review Business Continuity/Disaster Recovery Plan	1-6,12,13	Depute & DA's	June 2010, annually
(f)	Liaise with RC Legal advisors to review all insurances	1-6,8,11,13	Depute	Annually

3.5 ACCOUNTABILITY

3.5.1 Annual Accounts

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Process, authorise and pass all Invoices to Creditors and Debtors sections, RC Finance	9,12	Depute Assessor/PAO	Daily*
(b)	Pass Internal Charges to Creditors section, RC Finance	9,12	Depute Assessor/PAO	As required*
(c)	Pass Accruals Forms to Creditors section, RC Finance	9,12	Depute Assessor/PAO	Annually*
(d)	Pass Manual Journals to Creditors section, RC Finance	9,12	Depute Assessor/PAO	Monthly*
(e)	All Revenue Accounts to be finalised	12	Treasurer/ RC Finance	Annually, June
(f)	Consolidation of Abstract Accounts and completion of Financial Statements for Annual Report	12	Treasurer/ RC Finance	Annually, June
(g)	Annual Report Produced	7,9,10,12,14	Treasurer/RC Finance	Annually in June
(h)	First Public Inspection	12	Treasurer/ RC Finance	Annually, July/August
(i)	Final Audit Reports and Audit Certificates to be received	12	Treasurer/ RC Finance	Annually, September
(j)	Submission of Annual Report and Accounts to Audit Scotland	7,9,10,12,14	Assessor/ERO	Annually
(k)	Final Public Inspection (including advertisement in appropriate local newspapers)	12	Treasurer/ RC Finance and IT	Annually

* Note: These are in accordance with the Renfrewshire Council Closure of Accounts Year End Procedures and Timetables' guidance notes, and may vary from year to year.

3.5.2 External Audit

The timetabling of, and resource allocation to, External Audits are out with the direct control of the Assessor and are subject to annual agreement.

3.5.3 Audit Plan

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Identify priorities for audit including areas of RVJB management concern and internal audit priorities.	1-6,7,10,11,12,13	Depute Assessor	By agreement with Auditors
(b)	Develop and implement an Audit Plan taking account of both internal and external auditors	1-6,7,10,11,12,13	Depute Assessor	By agreement with Auditors
(c)	Co-operate with internal and external auditors in completion of audit plans	7,12	Management Team	As audit plan
(d)	Co-ordinate actions arising from audit recommendations	1-6,7,10,11,12,13,14	Management Team	As required

3.5.4 Performance Monitoring and Reporting

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review suite of performance reports contained in existing Reporting Framework	1-6,7,9,11,13	Assessor	Continually
(b)	Collate established suite of Key Performance Indicators for valuation functions	7,11	Depute Assessor	Annually
(c)	Report above KPIs to Scottish Government (via Scottish Assessors Association)	7,11,12	Depute Assessor	Annually
(d)	Produce and publish Public Performance Reports	7,11,12	Depute Assessor	Annually
(e)	Produce and return CIPFA Rating Review Budget figures to Renfrewshire Council	7	Depute Assessor	Annually
(f)	Produce and report annual change in Appeal Statistics (RVAPP) to Scottish Government	7,11,12	PAO	Quarterly
(g)	Collate and submit Electoral Registration statistics (Form RPF 29) to Scotland Office	7,11,12	PAO	Annually, December (or on publication of Register)
(h)	Produce and return COSLA Joint Staffing Watch Survey	7,8,11,12	PAO	Quarterly: April, July, October and January
(i)	Collate and submit suite of KPIs and in-house performance statistics to Management Team	11,12,13	Data Manager	Monthly
(j)	Ad hoc reports	7,11,12,13	Various	As requested.
(k)	Prepare Annual Report for publication and presentation to Joint Board	7,11,12,14	Assessor	Annually in May/June
(l)	Report progress against Collated Audit Action Plan to Management Team	1-6,11,12,13	Assessor	Quarterly
(m)	Preview forthcoming tasks and report progress against Service Plans to Management Team	1-6,11,12,13	Assessor	6-8 weekly
(n)	Complete Electoral Commission performance self-assessment and compile quantitative statistics	3,6,7,9,10,11,12,13	ERO/PAO	Before/after canvass
(o)	Provide further information and take part in any follow-up verification work undertaken by Electoral Commission	3,6,7,9,10,11,12,13	ERO/PAO	Annually or as required
(p)	Compile Electoral Commission Financial Performance returns	3,6,7,9,10,11,12,13	ERO/Depute/PAO	Annually or as requested

3.5.5 Management Team Meetings

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Produce draft minutes of MTMs for consideration by Management Team	8,12,14	PAO.	ASAP following meetings
(b)	Approve minutes of previous Management Team meetings	8,12,14	Management Team	10 times per annum
(c)	Post approved MTM minutes to RVJB Intranet	7,8,9,12,14	Depute Assessor	ASAP after approval
(d)	Produce draft Working Group minutes for consideration by Group members	8,12,14	Working Group Chairs	ASAP following meetings
(e)	Post approved Working Group minutes to RVJB Intranet	7,8,9,12,14	Working Group Chairs	ASAP after approval

3.6 BEST VALUE

3.6.1 Performance Monitoring and Measurement

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	For generalities of suite of performance measurement, including KPIs, see 3.5.4 above.	1-6,7,11,12,13	Various	Various
(b)	Development and review of KPIs, including Electoral Registration Indicators, through SAA Electoral Registration Committee and Electoral Commission	1-6,7,9,11,12,13	ERO, Depute, PAO	Ongoing

3.6.2 Trends and Comparisons

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	General Comparisons with other Assessors and EROs	9,11,12,13	Management Team	Continuous
(b)	Trends updated and comparisons made.	9,11,12,13	Management Team	Immediately following SAA circulation of KPIs
(c)	Internal trends and comparisons	9,11,12,13	Management Team, Internal Forums	Monthly, in accordance with provision of stats.

3.6.3 Public Performance Reporting

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Compile Public Performance Reports, including Annual Report	7,9,10,11,12,14	Depute Assessor	Annually, after collation of KPIs
(b)	Submit PPRs to Joint Board	7,9,10,11,12,14	Depute Assessor	First meeting after collation
(c)	Publish PPRs to RVJB Web site	7,9,10,11,12,14	PAO / IT Support Officer	Annually, after collation of KPIs
(d)	Submit KPIs to Scottish Assessors' Association and through that body to the Scottish Government	7,11,12	Depute Assessor	Annually, as requested
(e)	Provide KPIs and PPRs to staff	7,8,9,10,11,12,14	Divisional Assessors	Monthly
(f)	Review format and content of PPRs	7,9,10,11,12,14	Assessor, Depute	Annually prior to compilation

3.6.4 Stakeholder Consultation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Develop Public Performance Reports to encourage stakeholder feedback	7,9,10,11,12,14	Assessor, Depute	To concur with publications
(b)	Meet on regular basis with staff representative(s)	7,8	Assessor/Depute	As required
(c)	Consider stakeholder requirements received by SAA from Scottish Government, Ratepayers Forum and Scottish Business Rating Surveyors Association	7,9,10,11,12	Management Team	In accordance with each schedule of quarterly meetings
(d)	Consider stakeholder requirements received by SAA Portal from User Group meetings	7,9,10,11,12	Management Team	As received
(e)	Consider stakeholder requirements received directly from SAA Portal	7,9,10,11,12	Management Team	As received
(f)	Further develop Web Site to encourage interaction, particularly in respect of interactive forms	1-6,7,9,10,11,12,14	Depute, IT Support Officer	Ongoing

3.6.5 Customer Complaints

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Issue Customer Complaints forms in accordance with reviewed policy	1-6,7,9,10,11,12,13,14	All staff	As required
(b)	Collate Customer Complaints responses and prepare reports for Management Team	1-6,7,9,10,11,12,13,14	PAO	Quarterly, Annually
(c)	Review Customer Complaints Policy	7,9,11,12,13	Management Team	Annually

3.7 EQUAL OPPORTUNITIES

3.7.1 Encouraging Equal Opportunities and Ensuring Compliance

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Provide multi-language assistance on regularly used documents	7,10,11,12	PAO	As required
(b)	Provide regularly used documents in variable formats	7,10,11,12	PAO	As required
(c)	Ensure compliance with accessibility requirements for all buildings	7,9,10,11,12,13	Management Team,	Continuous
(d)	Consider accessibility in web design	7,9,10,11,12	IT Support Officer	Ongoing
(e)	Attend Community Planning Multi-Agency Equalities Working Group	7,9,10,11,12	Depute	Per schedule of meetings
(f)	Produce and publish statutory Equality Reports including progress against stated 'outcomes' and in mainstreaming Equality actions.	7,9,10,11,12	Depute	As required

3.7.2. Policy Review Timetable

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Combined Equality Scheme	7,8,10,11,12,14	Depute	3-yearly
Check dates(b)	Review Combined Equality Action Plan	7,8,10,11,12,14	Depute	Annually
®	Maintain Staff Profile to record race, gender and ability	8,9,10,12	Depute	Ongoing
(d)	Complete Impact Assessments for all policies and procedures	7,8,9,10,11,12	Management Team	As required
(e)	Review Equality Targets/Goals/Outcomes	7,8,9,10,11,12	Management Team	Annually
(f)	Ensure that all Policies are compliant with principles of Equality Act 2010	7,8,9,10,11,12,13,14	Management Team	As implemented or revised
(g)	Ensure that pay grades and scales are compliant with equalities requirements through proper evaluation of all new/amended posts	7,8,10,11,12,14	Management Team	As required

3.7.3 Equalities Reporting to be summarised

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Maintain Staff Profile to record protected characteristics	8,9,10,12	Depute	Ongoing
(b)	Implement MTM Equalities Reporting in relation to Recruitment	8,9,10,11,12	PAO	As required
(c)	Implement MTM Equalities Reporting in relation to Training, Promotion, Grievances, Disciplinary Action etc.	8,9,10,11,12	PAO	Ongoing
(d)	Include summaries of Equalities Reports in Public Performance Reports	8,9,10,11,12,14	Depute	Ongoing
(e)	Include summaries of Equalities Reports in Annual Reports	8,9,10,11,12,14	Assessor	Ongoing
(f)	Report/Publish progress against 'stated 'Outcomes' and mainstreaming of equalities actions	8,11	Depute	Annually

3.7.4 Promotion and Training

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Train/Brief staff in relation to the Equalities Duties	8,10,11,13,14	Assessor/Depute	Ongoing
(b)	Include aspects of Equality in all Induction Procedures	8,10,11,13,14	Depute, all Managers	As required
(c)	Provide Accessibility training to web designers/managers	8,9,10,11,12,14	Depute Assessor	As required
(d)	Review Equal Opportunities training requirements at Training Team meetings	8,9,10,11,13	Relevant managers	As required
(e)	Attend relevant Conferences and Learning opportunities	7,8,9,10,11,12,13	All	As required

3.8 STAFFING AND PERSONNEL MATTERS

3.8.1 Development and Review of Personnel Policies

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review existing RC Personnel Policies for adoption and adaptation to VJB's specific requirements.	8,10,11,14	Assessor	Ongoing
(b)	Present suite of Policies to Joint Board for approval	8,10,12	Assessor	As required
(c)	Review all policies	7,8,10,11,14	Management Team	As required
(d)	Review Health and Safety Policy	7,8,10,11,14	H & S Committee	Annually.
(e)	Review relevant personnel policies to reflect Equalities requirements (see above)	7, 8,10,11,14	Management Team	As required

3.8.2 Training and Development Policy

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Agree training and development needs of all staff at Training Team meetings	1-6,7,8,10,11,13	Managers, all staff	Quarterly
(b)	Provide training as identified above, in accordance with the VJB objectives and within budget	1-6,8,10,11,13	Depute & Training Team	Continually
(c)	Maintain record of training	8,10,13	Depute & Training Team	Continually
(d)	Ensure training event appraisals are completed and collated	7,8,11,13	Depute & Training Team	Continually
(e)	Revise budget provision for training	7,8,10,11,12,13	Depute & Training Team	Annually
(f)	Provide training for trainee/graduate surveyors that meet RICS requirements	1,2,4,5,7,8,10,11,13	Divisional Assessors and Senior Valuers	Continually
(g)	Provide training for staff towards AEA qualifications	3,6, 7,8,10,11,13	Depute	As required
(h)	Provide training in preparation for new tasks, new systems, legislative and operational changes	1-6, 7,8,9,10,11,13	Various	As required
(i)	Provide IT training, including web accessibility training	7,8,9,10,11,13,14	Various	As required
(j)	Provide Equalities training (see 3.7.4(a) above)	7,8,9,10,11,13	Various	As required
(k)	Provide Induction training	7,8,9,10,11,13,14	Various	As required
(l)	Provide Health and Safety training	7,8,9,10,11,13,14	H & S Committees	As required

3.8.3 Co-operation with Renfrewshire Council

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Regular updates with RC personnel staff to review current issues and policy development	7,8,10	Assessor/Depute/ PAO	As required
(b)	Ad-hoc meetings with RC personnel staff to review current issues and policy development	7,8,10	Assessor/Depute/ PAO	Continual –As required
(c)	Implement information through team briefings and training events	7,8,10,11	Managers	As required

3.8.4 Health and Safety Policy

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review of Health and Safety Policy	7,8,11,13,14	Management Team	Ongoing
(b)	Hold Health and Safety Committee meetings	7,8,11,13	Chair of Health and Safety Committee	As required
(c)	Revise Risk Assessments as required	7,8,11,13,14	Health and Safety Committees	
(d)	Approve and Implement revised Risk Assessments	7,8,11,13,14	Management Team	

3.9 FINANCE AND BUDGETING

3.9.1 Financial Regulations and Standing Orders

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Financial Regulations	12,14	Treasurer/Assessor	3-yearly
(b)	Review Standing Orders	12,14	Clerk/Assessor	3-yearly
(c)	Review procedural guidance to staff to reflect financial regulations	12,14	Assessor	3-yearly

3.9.2 Budget Preparation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review probable out-turn along with operational, staffing, training and all other requirements	8,9,11,12,13	Assessor/PAO	Annually
(b)	Prepare and agree provisional Revenue Budget Bid with Treasurer	8,9,11,12,13	Assessor	Annually
(c)	Prepare and agree provisional Capital Budget Bid with Treasurer Accountants	8,9,11,12,13	Assessor	3 yearly
(d)	Seek approval for proposed budgets from Valuation Joint Board		Assessor	Annually
(e)	Prepare detailed report on make up of Revenue Budget	8,9,11,12,13,14	Treasurer	Annually

3.9.3 Financial Procedures

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review procedures for Ordering, Invoicing and Payment, and advice to relevant staff.	8,11,12,13	PAO	Annually
(b)	Review Financial Procedures to take account of Financial Regulations	8,11,12,13	Assessor/PAO	3-yearly or as required
(c)	Review List of Approved Signatories	12	Assessor	Annually or at any change of staff.
(d)	Review database which supports Ordering and Invoicing procedures	7,8,11,12,13	All users, relevant staff	Continually

3.9.4 Training

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Identify any training requirements arising from 3.9.3 and 3.9.4 at Training Team Meetings	7,8,11,12,13	Relevant managers	Annually
(b)	Identify any training requirements resulting from changes to procedures or personnel	7,8,9,11,12,13	Depute	As required
(c)	Provide, arrange or facilitate training and instruction as identified above.	7,8,11,12,13,14	Depute	As required

3.9.5 Financial Monitoring Reports

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Receive, check and consider monitoring reports from RC Finance Department	11,12,13	Depute /PAO	Monthly
(b)	Prepare Financial Monitoring Reports, including probable out-turn, reasons for variance, and proposed actions for Management Team	11,12,13	Depute /PAO	Monthly
(c)	Consider and implement any actions required arising from monthly reports	9, 11,12,13	Management Team	Monthly
(d)	Prepare Financial Monitoring Reports, including probable out-turn and reasons for variance, for Valuation Joint Board	11,12,13	Treasurer/Depute	See VJB meeting schedule

3.9.6 Annual Accounts

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Complete procedures as at 3.5.1 above, and in RC Abstract of Accounts guidance notes	7,11,12,13	Depute/ PAO	Annually, April-May
(b)	Liaise with Treasurer/RC Accountants in preparation of Annual Accounts	7,11,12,13	Depute/ PAO	Annually, April-June
(c)	Prepare provisional Annual Accounts for year	7,11,12,13	Treasurer	Annually
(d)	Submit Annual Accounts to Audit Scotland	7,11,12,13	Treasurer	Annually
(e)	Include Accounts in Annual Report and present to Valuation Joint Board	7,11,12,13,14	Assessor	Annually
(f)	Consider External Audit Report	7,11,12,13	Treasurer/Assessor	Annually
(g)	Implement any Actions from External Audit of Accounts	7,11,12,13	Treasurer/Assessor	Annually
(h)	Present Final Accounts and External Audit Report, including any Action Plan, to Valuation Joint Board	7,11,12,13	Treasurer/Assessor	Annually

3.9.7 Payroll Checks

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Agree format and procedures for reporting that payroll has been checked against staff lists.	7,11,12,13	Depute/ P.A.O.	Monthly
(b)	Report any issues to Management Team	7,11,12,13	P.A.O.	As required

3.10 INFORMATION TECHNOLOGY

3.10.1 Planning Forum

(a)	Create / Update IT strategy to meet business requirements	7,8,9,10,11,13	Depute /PAO/ IT Team	Monthly
(b)	Meetings to monitor IT projects and timetable	7,8,9,10,11,13	Depute /PAO/ IT Team	Monthly
(c)	Report to management team on progress	7,8,9,10,11,13	Depute /PAO/ IT Team	Continually
(d)	Review training requirements of IT Team in light of any new initiatives	7,8,9,10,11,13	IT Team	Monthly
(e)	Implement an Intranet Strategy	7,8,9,11,13,14	Depute /PAO/ IT Team	Ongoing
(f)	Review schedule of replacement for hardware and software licenses	7,8,9,11,13	Depute /PAO/ IT Team	Ongoing
(g)	Further develop Intranet to include all policy documents, guidance manuals etc	7,8,9,11,13,14	Depute /PAO/ IT Team	Ongoing
(h)	Further develop Intranet for use as a working tool	1-6, 7,8,9,11,13,14	Depute /PAO/ IT Team	Ongoing
(i)	Complete Review of IS Strategy and initiate relevant development project(s)	1-6,7,8,9,11,12,13	Depute	Annually
(j)	Ensure all IT systems are functioning as required to meet Stakeholders changing needs	7,9,10,11,12,13	Assessor/Depute	Annually

3.10.2 Business Systems Support

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaise with Renfrewshire Council appointed Business Manager	7,8,9,11,13	Depute /PAO/ IT Team	Quarterly or as scheduled
(b)	Liaise with Analyst programmer staff in RC	7,8,9,11,13	Depute /PAO/ IT Team	Continually
(c)	Liaise with RC IT Helpdesk	7,8,9,11,13	Depute /PAO/ IT Team	Continually

3.10.3 Public Services Network (PSN)

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review IS Strategy and initiate relevant development project(s)	1-6, 7, 8, 9, 11, 12, 13	Depute	Annually
(b)	Liaise with Co PSN team and implement any updates to policy	3, 6, 9, 11, 12, 13	Depute	Continually
(c)	Prepare and organise ITHC (prior to re submission to PSN)	3, 6, 9, 11, 12, 13	Depute	Annually/August
(d)	Submit re accreditation application for PSN	3, 6, 9, 11, 12, 13	Depute	Annually, September

3.10.4 Asset Refresh

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review PCs and other hardware which is faulty, obsolete, impeding performance or due (in terms of the IT Strategy) for replacement	1-6, 11, 12, 13	IT Team	Annually
(b)	Investigate options for procurement, costs of replacement etc, via RC Finance & IT	11, 12, 13	IT Team	Annually
(c)	Consider operational requirements, costs etc and prioritise purchase plan for equipment replacements	1-6, 11, 12, 13	Depute/PAO/ IT Team	Annually, September
(d)	Complete Capital Budget Bid and Submit to Joint Board at budget planning meeting	1-6, 11, 12, 13	Depute/PAO	Annually, November

3.10.5 Assessors 'Progress' System

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Maintain System to receive and utilise outputs from Corporate Address Gazetteers	7, 8, 9, 11, 13	IT Team/ Data Manager	Liaise with constituent authorities
(b)	Amend System to provide BS7666 compliant outputs to billing systems of constituent Councils	7, 8, 9, 11, 13	IT Team/Data Manager	Liaise with constituent authorities
(c)	Amend System to meet agreed business requirements of internal forums & working groups.	1-6, 7, 8, 9, 11, 13	IT Team/Data Manager	Liaise with constituent authorities
(d)	Monitor and adapt system outputs to enable delivery of agreed data to SAA Portal	7, 8, 9, 11, 12, 13	IT Working Group	See Portal Project Plans
(e)	Amend System to meet agreed business requirements of stakeholders, including billing departments of constituent councils	1-6, 7, 8, 9, 11, 13	IT Working Group	By agreement

3.10.6 Satellite Systems

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review use and functionality of Land Register/Sales databases	2,5,7,8,9,11,13	IT Working Group	Annually
(b)	Review use and functionality of Rental Questionnaire databases	1,4,7,8,9,11,13	IT Working Group	Annually
(c)	Review use and functionality of Workload Manager database	1,2,4,5,7,8,9,11,13	IT Working Group	Annually
(d)	Review use and functionality of Etarmis System	7,8,9,11,13	IT Working Group	Annually
(e)	Review use and functionality of Domino Document Management System	7,8,9,11,13	IT Working Group	Annually
(f)	Review use and functionality of Alpha 5 Valuation and Reporting databases	7,8,9,11,13	IT Working Group	Annually
(g)	Review use and functionality of Equalities database	7,8,9,11,13	Depute	Annually
(h)	Review use and functionality of Training database	7,8,9,11,13	Depute/PAO	Annually
(i)	Amend guidance to staff on use of satellite systems	7,8,9,13,14	Various	As required

3.10.7 Assessors Portal Project

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Attend Project Management Committee meetings in accordance with requirements of Project Strategy Document	7,8,9,11,12,13	Assessor	Monthly
(b)	Attend Project Team meetings in accordance with requirements of Project Strategy Document	7,8,9,11,12,13	Assessor	Monthly
(d)	Attend Portal Information Management Working Group Meetings	7,8,9,11,12,13	Assessor	Monthly
(e)	Prepare and implement data standards and conventions	7,8,9,11,12	Assessor	As required
(f)	System Upgrades and links with local council gazetteers and relevant business systems	7,8,9,11,12,13	Assessor	As required
(g)	Contribute to DNA-S Business Process Improvement Project	7,8,9,11,12,13	Assessor	As required
(h)	Prepare and implement Business Process Improvements	7,8,9,11,12,13	Assessor	As required
(i)	Provide regular data uploads to Portal	11,12	Data Manager	Weekly
(j)	Refresh Portal Content	7,8,9,11,12,13	Data Manager	Weekly

3.10.8 Web Site

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review general content and appearance of web site	7,8,9,10,11,12,14	ITSupport officer	Continually
(b)	Refresh to reflect changes to information in the Model Publication Scheme	7,8,9,10,11,12,14	ITSupport officer	At least annually
(c)	Refresh to reflect changes in policies and procedures	7,8,9,10,11,12,14	ITSupport officer	Annually
(d)	Update Public Performance Report	7,8,9,10,11,12,14	ITSupport officer	Annually in June
(e)	Provide information of elections and provide relevant forms for making applications	3,6,7,8,9,10,11,12,14	ITSupport officer/PAO	As required

3.11 DATA PROTECTION

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Data Protection Notification to Information Commissioner	10,12	Depute	Annually, in September
(b)	Review Forms to comply with Data Protection Requirements	7,9,10,14	Various	As required
(c)	Review Data Processor Agreement with other data handlers	12,13	Depute /PAO	Annually

3.12 FREEDOM OF INFORMATION

3.12.1 Freedom of Information Policy

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Freedom of Information Policy	7,9,10,11,12,13,14	Management Team	Annually
(b)	Review workloads created by FOI and procedures contained in Policy	7,8,9,11,13	Management Team	Ongoing

3.12.2 Freedom of Information functionality

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review functionality of Freedom of Information logging system	7,8,9,11,12,13	P.A.O.	Annually
(b)	Prepare reports on requests, refusals etc to Management Team	7,9,11,12,13	P.A.O.	Monthly-as required

3.12.3 Publication Scheme and Guide to Information

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Model Publication Scheme, including various costs, and Guide to Information	7,9,10,11,12,13,14	PAO	As required
(b)	Review Publication Scheme and submit to Information Commissioner.	7,9,10,11,12,13,14	PAO	As required
(c)	Review content of publications contained in Publication Schemes	7,9,10,11,12,13,14	PAO	At least annually

3.12.4 Freedom of Information Procedures

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Information Audit	7,9,10,11,12,13	PAO	Annually
(b)	Review Guidance to Staff on exempt categories	7,8,9,10,11,12,13,14	Divisional Assessors(PAO)	Annually or in light of cases.
(c)	Receive and reply to requests with guidance from RC where required	7,10,11,12,13,14	PAO	Continually
(d)	Receive and reply to requests for Review of decisions	7,10,11,12,13,14	Assessor	As required
(e)	Report Fol requests, refusals, referrals etc to Management Team	7,9,11,13	PAO	Monthly-as required
(f)	Review IT system used to log and report on Fol	7,8,9,11,12,13	PAO / IT Team	Annually

3.12.5 Codes of Practice

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Codes of Practice issued in respect of FOI	7,9,10,11,12,13,14	PAO	On receipt
(b)	Implement requirements of Codes of Practice	7,8,9,10,11,12,13	PAO	As required
(c)	Consider IC decisions and reports for changes to policy and procedures	7,8,9,10,11,12	Assessor/Depute	As required

3.13 KEY PARTNERSHIPS

3.13.1 Support Services – Renfrewshire Council

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaise with representatives from RC HR & OD Service/Business Partner	7,8,11	Assessor/Depute/ PAO	Quarterly or as agreed
(b)	Ad-hoc meetings with representatives from RC HR & OD Service	7,8,11	Assessor/Depute/ PAO	Throughout the year
(c)	Regular 'ICT Liaison' Meetings with RC ICT Business Liason Officer	7,8,9,11,13	Depute	Quarterly or as scheduled
(d)	Ad-hoc meetings, telephone contact with ICT Section Heads and other RC ICT personnel.	7,8,9,11,13	IT Managers	As required
(e)	Meetings and liaison with RC Internal Audit section	7,9,11,12,13	Assessor/Depute	As agreed
(f)	Liaison with RC Accountants	7,9,11,12,13	Assessor/Depute /PAO	Monthly
(g)	Liaison with Treasurer to the Board	7,9,11,12,13	Assessor/Depute	As required
(h)	Budget planning meetings with Treasurer/Accountants	7,9,11,12,13	Assessor	Annually, September –November
(i)	Liaison with Clerk to the Board	7,11,12,13	Assessor	As required
(k)	Meet with RC Property Maintenance Managers	7,11,13	Assessor/Depute/ Office Manager	As required

3.13.2 Constituent Councils - Recipients of Operational Outputs

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaison with Finance (Billing) Departments of constituent Councils	1,2,4,5,7,9,10,11,13	Divisional Assessors	At updates and as required
(b)	Liaison with Finance (Billing) Departments of constituent Councils	1,2,4,5,7,9,10,11,13	All staff	Throughout year daily basis
(c)	Liaison with Returning Officers of constituent Councils	3,6, 7,9,10,11,13	ERO/ Depute/ PAO	As required
(d)	Attend Election Management meetings with RO of relevant Councils	3,6, 7,9,10,11,13	ERO/Depute/P.A.O.	Prior to Elections
(e)	Liaise with constituent Councils to promote Electoral Participation	3,6, 7,9,10,11,13	Assessor/ Depute/P.A.O.	Ongoing

3.13.3 Scottish Assessors Association

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Attend Plenary Meetings	1-6, 7, 8, 9, 11, 13	All members	Quarterly; Dec, Feb, May, Sept
(b)	Attend Assessors Committee Meetings	1-6, 7, 8, 9, 11, 13	Assessor	Approx. monthly
(c)	Attend Category Committee Meetings	1-6, 7, 8, 9, 11, 13	Relevant members	In accordance with Committee Timetables
(d)	Attend Other Committee Meetings	1-6, 7, 8, 9, 11, 13	Relevant members	In accordance with Committee Timetables
(e)	Attend Working Group Meetings	1-6, 7, 8, 9, 11, 13	Relevant members	In accordance with relevant Timetable
(f)	Attend SAA Portal Project Management Committee	7, 8, 9, 11, 13	Assessor	Monthly
(g)	Attend SAA Portal Project Team Meetings	7, 8, 9, 11, 13	Assessor / Relevant Members	Monthly
(h)	Attend SAA Portal Working Group Meetings	7, 8, 9, 11, 13	Assessor / Relevant Members	Monthly
(i)	Attend Ad-hoc Meetings and Representations	1-6, 7, 8, 9, 11, 13	Relevant members	As required
(j)	Provide colleagues with update (bullet form) of all Committee and Working Group meetings	1-6, 7, 8, 9, 11, 13	Relevant members	Immediately following meetings
(k)	Provide information to working groups etc	1-6, 7, 8, 9, 11, 13	All members	As required
(l)	Review and comment on Practice Notes, Consultation responses etc	1-6, 7, 8, 9, 11, 13	All members	As required

3.13.4 Scottish Assessors Association Partners

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)*	Harmonisation Meetings with VOA, NI Valuation and Land Agency and Eire Valuation Office	1-6,7,8,9,11,13	SAA (Assessor)	Twice-yearly, (Annually)
(b)	Liaison with VOA	1-6,7,8,9,11,13	SAA Harmonisation Spokespersons and Category Committee Chairmen	As required
(c)	Receipt and circulation of Minutes of VOA Rating Group Leaders Meetings	1-6,7,8,9,11,13	Assessor	Monthly
(d)*	Formal Meetings with Scottish Government Departments	1-6,7,9,11,12,13	SAA	Quarterly
(e)	General liaison with Scottish Government Departments	1-6,7,9,11,12,13	SAA	As required
(f)	General liaison and working group involvement with Scotland Office	3,6,7,9,11,12,13	SAA	As required
(g)	General liaison and working group involvement with Cabinet Office	3,6,7,9,11,12,13	SAA	As required
(h)	Provision of statistical returns to Scottish Government	1-6,7,8,9,11,12,13	P.A.O.	Quarterly
(i)	Completion of statistical exercises for Scottish Government and their partners	1-6,7,8,9,11,12,13	All staff	As required
(j)*	Meetings of Ratepayers Forum	1,4,7,10,11,12	SAA	Approx. quarterly
(k)*	Meetings with Scottish Business Ratepayers Association	1,4,7,10,11,12	SAA	Approx. quarterly
(l)	Meetings of Portal Users Groups (Including Police and Fire Services, Registers of Scotland, Ordnance Survey, Scottish Executive, Local Authorities, NHS, Ratepayers Agents etc)	7,10,11,12	Portal Project Management Committee	As required
(m)	Liaison with Scottish Government, Scotland Office, Electoral Commission and Boundary Commission officials on electoral and related matters	3,6,7,8,9,11,12,13	ERO/ Depute/ PAO	As required

Note items marked* will be attended by Assessor up to May 2017

3.13.5 Association of Electoral Administrators

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	AEA AGM and Conference	3,6,7,8,9,11,13	Rota	Annually
(b)	Plenary Meetings of Scottish Branch of AEA	3,6,7,8,9,11,13	Depute / PAO	Quarterly
(c)	Other meetings of Scottish Branch of AEA	3,6,7,8,9,11,13	Depute / PAO	As required

3.13.6 The Electoral Commission

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Receipt of Electoral Commission Bulletins	3,6,7,9,11,13	ERO, Depute, PAO,	Regularly
(b)	Receipt of Electoral Commission Reports, Guidance and Consultations	3,6,7,9,11,13	ERO, Depute, PAO	Regularly
(c)	Attend Electoral Commission meetings , seminars and Working Groups	3,6,7,9,11,13	ERO, Depute, PAO	As required
(d)	Respond to Electoral Commission Consultations (possibly through SAA ER Committee)	3,6,7,9,11,13	ERO, Depute, PAO	Ad hoc

3.13.7 External Suppliers

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaison with canvass form printing and mailing agency	3,7,9,10,11,13,14	PAO,	As required
(b)	Invite Tender Bids for printing of canvass stationery, printing and mailing	3,10,11,12,13	PAO	3 yearly
(c)	Meetings/Liaison with I Mail Services	3,6,7,10,11,13	PAO,	As required
(d)	Meetings/Liaison with suppliers of fixtures and fittings, including photocopier, water supplies etc	7,11,13	PAO	As required
(e)	Liaise with Strand Customer Account Manager	3,6,7,8,9,10,11,13	Depute / IT Team	Ongoing/As Required
(f)	Liaison with telephone and internet canvass service providers (ERS) to implement and manage process	3,7,9,10,11,12,13,14	PAO	Annually, August - November

3.14 RECORDS MANAGEMENT

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Investigation into requirements of the Public Records (Scotland) Act and development of Records Management Plan (in partnership with SAA)	1-6,7,8,9,11,12,13,14	Depute	April 2014 – Oct 2015
(b)	Finalise Records Management Plan and submit to board for approval	1-6,7,8,9,11,12,13,14	Depute	October 2015
(c)	Submit Records Management Plan to National Registers of Scotland	1-6,7,8,9,11,12,13,14	Depute	October 2015
(d)	Implement Plan locally, including data storage protocols, retention policies, destruction policies etc	1-6,7,8,9,11,12,13,14	Depute	January 2016 /Ongoing
(e)	Staff Training for above	1-6,7,8,9,11,13,14	Depute	January 2016

3.15 MISCELLANEOUS

3.15.1 Consultations

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Electoral Commission consultations	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise
(b)	Review of Local Government Finance	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise
(c)	Scottish Government	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise
(d)	Cabinet office & Scotland Office	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise

3.15.2 Local Authority and Electoral Boundary Changes

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Input to and respond to future changes, drafts etc	7,12,13	Assessor & ERO	As required

3.15.3 Corporate Address Gazetteers

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Attend and participate in Corporate Address Gazetteer Team Meetings	7,8,9,11,13	Assessor	As timetabled
(b)	Continue to maintain data, cleanse and match data, to receive and utilise outputs from Corporate Address Gazetteers	7,8,9,11,13	Assessor	See Project Plans of constituent Councils
(c)	Amend System to provide BS7666 compliant outputs to billing systems of constituent Councils	7,8,9,11,13	Assessor	See Project Plans of constituent Councils
(d)	Continually review Business Processes to facilitate use of CAG data and contribute to the maintenance procedures of CAGs	8,9,11,13	Management Team	To align with CAG implementation

RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER **SERVICE PLAN APRIL 2015 - APRIL 2018**

PART FOUR **PERFORMANCE MANAGEMENT**

The following section sets out the statutory framework governing the core duties, services and areas of activity of the Valuation Joint Board, along with the approach to performance planning, establishment of standard, target setting, performance monitoring and performance reporting related to these tasks.

1.1 THE VALUATION ROLL

CORE OBJECTIVE REFERENCE	CORE OBJECTIVE DESCRIPTION	PLANNING (Including statutory timetables etc)	STANDARDS AND TARGETS	MONITORING (Nos. in brackets refer to Reporting Framework)	REPORTING
1.1.1	Maintenance of the Valuation Roll	Section 2(2), Local Government (Scotland) Act 1975. Valuation roll update schedule agreed at start of each year. KPI targets agreed by MT at start of each year.	Changes generally must be effected in same financial year. Weekly Updates Ratio of changes made within 3, 6 and 9 months each year.	Divisional Assessors check and authorise. See KPIs below. Principal Admin Officer responsibility Monthly reports of progress re surveys and changes to Val Roll provided to Management Team.	Monthly stats provided to staff. KPIs reported to Scottish Executive and included in Board, Annual and Public Performance Reports
1.1.2	Preparations for Revaluation	Section 1 Local Government (Scotland) Act 1975. Scottish Government requirement for 'final estimates' SAA schedules for PN production	Statutory req't to provide values to local authorities on 15 th March 2017 Commitment to provide values to Scottish Government at a time to be agreed Provide context for the planning and application of resources for valuation Valuation Notices to be issued circa March 2017	Weekly progress reports to MT once Reval project has commenced	Updates on progress provided to SAA and Scottish Government as required. Increase or adjustment factors use as checks on values.
1.1.3	Running Roll Appeals	As 1.1.2 above	Appeals to be disposed of by 31 st December in the year following submission, or 12 months after submission unless relating to 2010	As 1.1.2 above	As 1.1.2 above
1.1.4	Disposal of Telecoms Appeals	As 1.1.2 and 1.1.3 above			

1.2 THE (COUNCIL TAX) VALUATION LIST

CORE OBJECTIVE REFERENCE	CORE OBJECTIVE DESCRIPTION	PLANNING (Including statutory timetables etc)	STANDARDS AND TARGETS	MONITORING (Nos. in brackets refer to Reporting Framework)	REPORTING
1.2.1	Maintenance of the Valuation List	Section 84 of Local Government Finance Act. Valuation List update schedule agreed at start of each year. KPI targets agreed by MT at start of each year.	No set timetable/ requirement Weekly Updates Ratio of additions made within 3, 6 and 9 months each year.	P.A.O. responsibility Monthly reports of progress re surveys and additions to Val List provided to Management Team.	Monthly stats provided to staff. KPIs reported to Scottish Executive and included in Board, Annual and Public Performance Reports
1.2.3	Disposal of Council Tax Proposals/Appeals	The Council Tax (Alterations of Lists and Appeals) (Scotland) Regulations 1993 Schedules of Valuation Appeal Committee Hearings agreed in advance with VAC Secretary	No set timetable/ requirement for disposal. Establish various dates for dealing with cited appeals As required by workloads and by agreement with VAC Secretary	Monthly reports on appeals progress provided to Management Team	Progress in relation to appeal settlements reported in Annual and Public Performance Reports

1.3 REGISTER OF ELECTORS

CORE OBJECTIVE REFERENCE	CORE OBJECTIVE DESCRIPTION	PLANNING (Including statutory timetables etc)	STANDARDS AND TARGETS	MONITORING (Nos. in brackets refer to Reporting Framework)	REPORTING
1.3.1	Compilation of Register of Electors	Representation of the People Act 2000	Registers to be published annually, prior to 1 st December.	Canvass Progress Stats (ER2) and HERA returns provided to Senior Managers weekly during canvass period	HEF return rate reported to Scottish Assessors Association and included in Board, Annual and Public Performance Reports. Electoral Commission Performance Standards statistics submission
		Section 10 of Representation of the People Act 1983	Carry out an annual canvass (to allow publication of above). Aim for maximum return possible of HEF and ITR forms		
		Schedule of canvass form issue and reminder dates agreed in advance.			
		System of canvass return by telephone, internet or SMS established annually		System providers supply rates of return weekly. These returns are shown separately in ER2	These returns are shown separately in stats shared with SAA.
1.3.2	Maintenance of Register of Electors	The Representation of the People Regulations 2001	Monthly updates to be made to registers from Normally January to September each year but see changes for IER Implementation.	Update Statistics (ER1, ER3, and ER4) presented to Management Team monthly, between January and September.	Monthly changes included in Board and Annual Reports. Electoral Commission Performance Standards statistics submission
		Regulations set out a timetable to be followed each year. Amended for working days and local holiday variations etc at start of each year.			

