

# RENFREWSHIRE VALUATION JOINT BOARD



## STRATEGIC SERVICE PLAN APRIL 2018 TO APRIL 2021

<b>Title</b>	Service Plan – April 2018 to April 2021
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<b>Approved By</b>	Management Team
<b>Date of Approval</b>	21 <sup>st</sup> May 2018
<b>Reviewer</b>	Assessor
<b>Review Date</b>	Annually

### Review History

<b>Review No.</b>	<b>Details</b>	<b>Release Date</b>

## **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 2018 - APRIL 2021**

**PART ONE**  
**SERVICE FUNCTION**

## **1.0 INTRODUCTION**

Renfrewshire Valuation Joint Board (RVJB) 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 1<sup>st</sup> April 2017. The next Revaluation will be 2022, however following on from the Barclay Review of Non-Domestic Rates, published in August 2017, the Scottish Government has made a commitment to 3 yearly Revaluations from 2022, this will require a change in legislation.

The number of properties in the Valuation Rolls for the three council areas varies around 14,000 with a total Net Annual Value at revaluation of c. £401 million.

The Assessor for Renfrewshire is the designated Assessor for fixed line telecommunication subjects throughout Scotland as per the amended Non Domestic Rating (Valuation of Utilities) (Scotland) Order 2005 , this has added almost £82m 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 1<sup>st</sup> April 1991.

There are over 164,482 dwellings in the Valuation Lists for the Joint Board area.

## **1.3 REGISTER OF ELECTORS**

The Register of Electors contains the names of all person's 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 2018 is 264,134.

The Revised Register is updated by a canvass of all households, which is carried out during July - 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.

RVJB 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 RVJB 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. The plan for RVJB was submitted and approved by the Keeper in January 2016. We are currently sending an update of the Plan on any issues we had undertaken to address

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 2018 - APRIL 2021**

#### **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 RVJB'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 2017 Revaluation has taken place and all appeals have been received, the deadline for submitting Revaluation Appeals was 30<sup>th</sup> September 2017. We received 3,832 appeals which is slightly up on the numbers for the 2010 Revaluation. These appeals must be disposed of under the statutory timetable by 31<sup>st</sup> December 2020. To facilitate the timeous disposal of these appeals the Assessor, in conjunction with the Secretary and Chairperson of the local Valuation Appeal Panel for Renfrewshire has scheduled Valuation Appeal Committee Hearings, and staff will invest significant effort in achieving settlements.
- 2.1.5 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 her ongoing schedule of VAC Hearings in order that they are disposed of in accordance with their varying timetables.
- 2.1.6 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.
- 2.1.7 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.
- 2.1.8 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 also 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. Although it is expected during the lifetime of this Review these will all be settled and/or withdrawn from the Lands Tribunal Appeals List.

## **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 RVJB'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.

I am currently undertaking a review of the process of dealing with altered properties with subsequent sales.

- 2.2.2 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.

- 2.2.3 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 1<sup>st</sup> December in each year following a canvass carried out, as before, during July - 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 The Electoral Registration system in Great Britain changed in September 2014 from a household based collection of information, to one based on individuals being invited to apply to register. The traditional canvass form has been replaced by a Household Enquiry Form (HEF). Any new electors listed on this HEF form will be sent an Invitation To Register (ITR) which can be completed online using the Government Digital Service, by post or over the telephone..
- 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 14/15 year olds, this is to facilitate preparing a register for either of the aforementioned elections in Scotland which will contain young persons who are aged 16 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. The final version of this boundary review will be known during the life of this Service Plan and changes to Ward boundaries will require action to allow them to be processed timeously.
- 2.3.7 We will continue to work with the Electoral Commission through the Assessor's Association, Electoral Registration Committee and the Association of Electoral Administrators (AEA) to assist with formalising of policies or changes to Electoral Registration Legislation.
- 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. As Vice Chair for the SAA Electoral Registration Committee the Boards ERO is also a serving member of the EMB.



## **2.4 CORPORATE GOVERNANCE**

- 2.4.1 RVJB will ensure that the Assessor and Electoral Registration Officer is adequately resourced to perform her 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 RVJB 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 and written bullet points.
- 2.4.6 Effective performance management systems continue to be developed, with the 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 Management Team. The format, remit and membership of these groups will be reviewed on a regular basis.
- 2.4.8 RVJB 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 RVJB 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 RVJB.

## **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 RVJB's Publication Schemes.
- 2.5.2 The procedures and practices of RVJB 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'. RVJB 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 RVJB's 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 RVJB 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 RVJB'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 Listening to and working with our Stakeholders will be an ongoing process and any outcomes considered in the 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 RVJB 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 RVJB has no control and which may result in variations to the Service Plan.

## **2.7 EQUAL OPPORTUNITIES**

- 2.7.1 RVJB 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 RVJB 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 relevant to the Assessor & ERO these will be written and published on both the DMS 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 be able to 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 RVJB'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 RVJB'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 RVJB 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 RVJB. A detailed report on the makeup 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 Renfrewshire Council during the lifetime of this Service Plan is introducing Business World which is a new Personnel and Procurement system to replace Resourcelink. RVJB are working with Renfrewshire Council regarding the elements of Business World to be utilised.
- 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 RVJB 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. These checks will become part of the Business World facility already referred to at (2.9.6).
- 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. Including the Service Review which will be stated and hopefully completed during the life of this Service Plan.

## **2.10 INFORMATION TECHNOLOGY**

- 2.10.1 The provision and maintenance of Information Technology assets, systems and services are carried out in accordance with RVJB's Information Technology Strategy. As and when required IT Liaison meetings are held with Renfrewshire Council IT personnel to discuss any issues where RVJB and Renfrewshire Council share IT services.
- 2.10.2 The assets of RVJB will be refreshed in accordance with the IT Strategy.
- 2.10.3 RVJB adheres to the principles of Data Protection and has registered with the ICO as the Assessor, ERO and the Joint Board.
- 2.10.4 The Assessor's 'Progress' information technology system will require to be replaced during the life of this Service Plan. Investigations into the suitable replacement have already started and a decision made on 'Progress' replacement within the next year.
- 2.10.5 With the introduction of Individual Electoral Registration (IER), and given the fact that RVJB is currently using a bespoke system for Electoral Management, a procurement process will take place shortly for a suitable supplier to provide and "off the shelf" EMS. As we have adopted the policy of Privacy by design, the Data Protection Officer will be involved with the procurement process as well as ensuring our contract with the new provider is compliant with Data Protection Legislation. The new system will come into service during life time of this Service Plan.
- 2.10.6 A new Document Management System was introduced in the latter part of 2017, this has a dual purpose firstly to electronically scan and workflow mail and secondly to allow the screening of all RVJB's paper property files, some circa 167,000 house files and circa 14,000 non-domestic files. This will result in the Board being able to shrink its floorspace requirements in the coming months and sub-let floor space back to Renfrewshire Council.
- 2.10.7 RVJB will continue to commit resources to the Scottish Assessors Association Assessors Portal project.
- 2.10.8 The form and content of the RVJB Web Site will be reviewed on an on-going basis.
- 2.10.9 RVJB has moved from its Note's Internet Site to a Microsoft 365 solution. This 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 RVJB and this will be reviewed regularly.
- 2.11.2 A Model Publication Scheme has been compiled both for Scottish Assessors and on behalf of RVJB 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 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.
- 2.11.5 RVJB 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.
- 2.11.6 The General Data Protection Regulation comes into effect on the 25<sup>th</sup> May 2018. We have, in conjunction with the Scottish Assessors Association's Governance Committee, adopted Privacy Notices, Policies/Procedures and training to ensure the Assessor, the ERO and the Joint Board are GDPR compliant.
- 2.11.7 Under the GDPR it is mandatory for a public authority to appoint a Data Protection Officer (DPO) who is authorised to discharge this role, which includes autonomy in advising on all issues which involve the protection of personal and monitoring compliance. This will necessitate utilising Renfrewshire Council's expertise in providing a DPO, whilst a member of RVJB's Management Team has undertaken bespoke training to ensure RVJB has knowledge of these new regulations in house.
- 2.11.8 The Assessor, The ERO and the Joint Board are Data Controllers in terms of Data Protection Legislation and maintains a registration as such.
- 2.11.9 As Data Controllers, we 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 and the DPO will be consulted on any new and existing processes to ensure our compliance.

## **2.12 KEY PARTNERSHIPS**

- 2.12.3 The support services provided by Renfrewshire Council are essential to the operations of RVJB. 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), RVJB recognises its constituent Councils as key stakeholders, and will consult with these bodies in all areas relating to these matters.
- 2.12.5 RVJB 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 RVJB 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 RVJB 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, RVJB staff will continue to participate in the workings and proceedings of the Association of Electoral Administrators and the IRRV.
- 2.12.9 RVJB 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 RVJB 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 that listed public authorities submit Records Management Plans to the Keeper for approval and to hold and maintain records in accordance with the 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 RVJB.
- 2.13.2 RVJB 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 RVJB 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 RVJB 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 RVJB's **Mission, Vision and Commitments** Statements.

<b>Number</b>	<b>Business Objective</b>
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 2017 Valuation Roll**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Principal Surveyors / 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 Surveyors	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 Surveyors	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 Surveyors 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	Principal Surveyors	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 2017 - Settlement of Appeals**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assistant 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	Assistant 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	Principal Surveyors / VAC Secretary	As scheduled
(d)	Prepare VAC cases including rental analysis, valuations, photographs, plans and other productions	1,4,10,11,12,14	Principal Surveyors	As required
(e)	Produce 'on-the-day' VAC Lists and administer VAC Hearings	1,4,10,12,14	Principal Surveyors	As scheduled
f	Provide SAA with information as required to support LT preparation & Hearings	1,4,10,12,14	Assessor, Assistant Assessors / Principal Surveyors	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 Surveyors 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 Surveyors Audit Team	Weekly
i	Where appropriate, issue Valuation Notices to reflect appeal settlements.	1,4,10,11,12,14	Audit Team	Weekly
(j)	Compile and present Revaluation Appeal statistics to Management Team and Scottish Government.	11	Assistant Assessors & PAO	As required

### **3.1.3 Running Roll Appeals**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Record appeals received arising from amendments made to the 2017 Valuation Roll.	4,10,13	Principal Surveyors Data Manager	Continuous
(b)	Implement and maintain procedures to process appeals received via SAA Web Portal	4,7,9,10,11,12,14	Principal Surveyors 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 Surveyors 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. In addition negotiate and settle any outstanding 2005 and 2010 appeals referred to the Lands Tribunal	4,10,11,12	Principal Surveyors / Assistant Assessors	Continuous
(e)	Cite all outstanding Running Roll Appeals in accordance with the statutory timetable appropriate to each appeal.	4,10,11,12	Principal Surveyors / VAC Secretary	As scheduled
(f)	Prepare VAC cases including rental analysis, valuations, photographs, plans and other productions	4,10,11,12	Principal Surveyors	As required
(g)	Produce 'on-the-day' VAC Lists and administer VAC Hearings	4,10,11,12,14	Principal Surveyors	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	Principal Surveyors 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	Assistant Assessors	Monthly

### **3.1.4 Revaluation 2022 (to include Telecoms as designated assessor)**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(b)a	Issue rental, and other, questionnaires.	1,4,7,10,11,12,13,14	Principal Surveyors & Clerical Manager	Spring 2020 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	Principal Surveyors	As required
(d)	Analyse local land sale information for use in contractor's valuations.	1,4,10,11,12,13	Principal Surveyors	July 20 – Spring 21
(e)	Draft Narratives and rates to be applied in valuations, where appropriate.	1,4,10,11,12,13,14	Principal Surveyors	Sept 20 – Dec 21
(f)	Approve Narratives and rates to be applied in valuations, where appropriate	1,4,10,11,12,13,14	Assessor / Assistant Assessors / Principal Surveyors	Sept 20 – Dec 20
(g)	Provide information as required to SAA Practice Note authors, working groups and Category Committees.	1,4,10,11,12,13	Assistant Assessors / Principal Surveyors	April 20 – May 21
(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	Assistant Assessors / Principal Surveyors	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	Assistant Assessors / Principal Surveyors	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	Principal Surveyors	As required
(l)	Authorise proposed Rateable Values (RVs)	1,10,11,12,13	Assistant Assessors / Principal Surveyors	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	Weekly after September 2020

### **3.1.6 Telecoms Valuations**

Both the appeal procedures for 2010 revaluation and the 2017 Revaluation 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 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Senior Surveyors 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	Senior Surveyors Audit Team	Continuous
(c)	Valuation and banding of above in accordance with the statutory valuation assumptions and RVJB procedures.	2,5,10,11	Senior Surveyors, Audit Team	Continuous
(d)	Amend the Valuation List by input to the Assessors 'Live' computer system.	2,5,10,11	Senior Surveyors 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	Senior Surveyors 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	Assistant 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Senior Surveyors Audit Team	On receipt of notification
(b)	Where appropriate, survey amended properties.	2,5,10,11,12	Senior Surveyors Audit Team	Ongoing
(c)	Value and band the above in accordance with the statutory valuation assumptions and RVJB procedures.	2,5,10,11,12	Senior Surveyors Audit Team	Ongoing
(d)	Amend the Valuation List by input to the Assessors 'Live' computer system.	2,5,10,11,12	Senior Surveyors 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	Senior Surveyors 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Senior Surveyors 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	Senior Surveyors Audit Team	Ongoing
(c)	Facilitate the settlement of appeals by scheduling of VAC Hearings on an annually agreed basis.	5,10,11,12	Principal Surveyors VAC Secretary	Ongoing
(d)	Prepare VAC cases including sales analysis, valuations, photographs, plans and other productions	5,10,11,12	Senior Surveyors	As required
(e)	Produce 'on-the-day' VAC Lists and administer VAC Hearings	5,10,11,12	Senior Surveyors 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	Senior Surveyors 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	Senior Surveyors Audit Team	Continuous
(i)	Compile and present Council Tax Proposals and Appeal statistics to Management Team in accordance with Reporting Framework	11,	Assistant Assessors	Monthly

### **3.2.4 Council Tax Revaluation**

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

### **3.3 THE ELECTORAL REGISTER**

#### **3.3.1 Annual Register of Electors**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review canvass procedures, including telephone, Internet /SMS facility and door to door enquiries	3,7,9,10,11,12,13	Assistant Assessors, Principal Admin Officer (PAO)	Annually, May
(b)	Prepare file of properties to be canvassed.	3,9	PAO	Annually, July
(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 /Sept 2018
(e)	Recruit door-to-door canvassers and order resources	3,8,9,10,13	PAO/Clerical Manager & Admin Support	Annually, March - June
(f)	Train door-to-door canvassers and provide resources	3,8,10,11,13	PAO/Clerical Manager	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	Annually, July – October
(i)	Complete such door-to-door canvass in accordance with annually established timetables	3,7,9,10,11,13	PAO/Clerical Manager	Annually, July – 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, July – 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, July - November
(m)	Process changes on EMS	3,9,10,11,13	Clerical Team	Annually, July - November
(n)	Arrange auto audit changes to source images/documents.	3,9,10,11,13	Audit Team	Annually, July - 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 <sup>st</sup> 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)**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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)	Load scanned images into EMS	3,9,10,11,13	IT Support Officer	December - June
(d)	Issue Reminders to non-responses from the above	6, 7,10,11,12,13,14	Clerical Manager	As required
(e)	Arrange for door-to-door canvass for BAU non-responses to (d ) above	6, 7,10,11,12,13,14	Clerical Manager	As required
(f)	Record returns of these and receive applications via Government Digital Service	6, 7,10,11,12,13	Clerical Manager	As required
(g)	Maintain a list of Applications.	6, 10,12,13	Clerical Manager	As required
(h)	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
(i)	Issue, receive returns and process all Absent Voter Forms	6,7,10,12,14	Clerical Manager	As required
(j)	Check all changes to source document.	6,10,12,13	Clerical Manager	Monthly, Jan – Sept. As per timetable
(k)	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
(l)	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
(m)	Compile and present monthly update statistics to Management Team	11,13	PAO	Monthly
(n)	Answer all ad-hoc enquiries for supply of Electoral Registers	7,9,10,11,12,14	Audit Team	As requested
(o)	Answer all ad-hoc queries in line with RVJB working practices	7,9,10,11,12,14	All relevant staff	Continuous
(p)	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
(q)	Triennial enquiry to proxy voters in line with statutory regulations	6,10,11,12,13	Clerical Manager	Annually, April – Aug
(r)	Liaise with Establishments etc regarding new residents' applications to register and absent vote applications.	6,7,10,11,12,13	Clerical Manager	Regularly
(s)	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	PAO/Clerical Manager	Ongoing
(t)	Review Participation Strategy/Activities as shown in EC Planning documentation	3,6,7,9,10,11,12	PAO	At publication and then quarterly
(u)	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
(v)	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.

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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
(j)	Receive returns from (i) 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	PAO/Clerical Manager	Annually
(h)	Provide Electoral Commission with Absent Voter Statistics as requested	7,9,10,11,12,13	PAO	On request
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

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

### **3.3.8 Boundary Changes**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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/Assistant Assessors	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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review Corporate Governance Statement	12	Assessor	Annually
(b)	Review Defalcation procedures	12	Assessor	2015 and 3-yearly
(c)	Review Fraud Prevention procedures	12	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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assessor /Assistant Assessors	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	Assistant 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assessor, 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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 Polices 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review Risk Management Strategy	1-6,9,11,12,13	Assessor /Assistant Assessors	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	Assessor /Assistant Assessors	June 2010, annually
(f)	Liaise with RC Legal advisors to review all insurances	1-6,8,11,13	Assessor	Annually

### **3.5 ACCOUNTABILITY**

#### **3.5.1 Annual Accounts**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Process, authorise and pass all Invoices to Creditors and Debtors sections, RC Finance	9,12	Assessor /Assistant Assessors /PAO	Daily*
(b)	Pass Internal Charges to Creditors section, RC Finance	9,12	Assessor /Assistant Assessors PAO	As required*
(c)	Pass Accruals Forms to Creditors section, RC Finance	9,12	Assessor /Assistant Assessors/ PAO	Annually*
(d)	Pass Manual Journals to Creditors section, RC Finance	9,12	Assessor /Assistant Assessors /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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Identify priorities for audit including areas of RVJB management concern and internal audit priorities.	1-6,7,10,11,12,13	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	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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assessor	Annually
(c)	Report above KPIs to Scottish Government (via Scottish Assessors Association)	7,11,12	Assessor	Annually
(d)	Produce and publish Public Performance Reports	7,11,12	Assessor	Annually
(e)	Produce and return CIPFA Rating Review Budget figures to Renfrewshire Council	7	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/Assistant Assessors/PAO	Annually or as requested

### **3.5.5 Management Team Meetings**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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)	Approved MTM bullets emailed to staff	7,8,9,12,14	PAO	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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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, Assistant Assessors, PAO	Ongoing

#### **3.6.2 Trends and Comparisons**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Compile Public Performance Reports, including Annual Report	7,9,10,11,12,14	Assessor	Annually, after collation of KPIs
(b)	Submit PPRs to Joint Board	7,9,10,11,12,14	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	Assessor	Annually, as requested
(e)	Provide KPIs and PPRs to staff	7,8,9,10,11,12,14	Assistant Assessors	Monthly
(f)	Review format and content of PPRs	7,9,10,11,12,14	Assessor Assistant Assessors	Annually prior to compilation

### **3.6.4 Stakeholder Consultation**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Develop Public Performance Reports to encourage stakeholder feedback	7,9,10,11,12,14	Assessor Assistant Assessors	To concur with publications
(b)	Meet on regular basis with staff representative(s)	7,8	Assessor Assistant Assessors	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 form 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	Assessor IT Support Officer	Ongoing

### **3.6.5 Customer Complaints**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assessor	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	Assessor	As required

#### **3.7.2. Policy Review Timetable**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review Combined Equality Scheme	7,8,10,11,12,14	Assessor	3-yearly
Check dates(b)	Review Combined Equality Action Plan	7,8,10,11,12,14	Assessor	Annually
®	Maintain Staff Profile to record race, gender and ability	8,9,10,12	Assessor	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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Maintain Staff Profile to record protected characteristics	8,9,10,12	Assessor	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	Assessor	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	Assessor	Annually

### **3.7.4 Promotion and Training**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Train/Brief staff in relation to the Equalities Duties	8,10,11,13,14	Assessor Assistant Assessors	Ongoing
(b)	Include aspects of Equality in all Induction Procedures	8,10,11,13,14	Assistant Assessors All Managers	As required
(c)	Provide Accessibility training to web designers/managers	8,9,10,11,12,14	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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assistant Assessor & Training Team	Continually
(c)	Maintain record of training	8,10,13	Assistant Assessor & Training Team	Continually
(d)	Ensure training event appraisals are completed and collated	7,8,11,13	Assistant Assessor & Training Team	Continually
(e)	Revise budget provision for training	7,8,10,11,12,13	Assistant Assessor & Training Team	Annually
(f)	Provide training for trainee/graduate surveyors that meet RICS requirements	1,2,4,5,7,8,10,11,13	Principal Surveyors & Senior Surveyors	Continually
(g)	Provide training for staff towards AEA qualifications	3,6, 7,8,10,11,13	Assessor	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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Regular updates with RC personnel staff to review current issues and policy development	7,8,10	Assessor /Assistant Assessors / PAO	As required
(b)	Ad-hoc meetings with RC personnel staff to review current issues and policy development	7,8,10	Assessor / Assistant Assessors / 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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 makeup of Revenue Budget	8,9,11,12,13,14	Treasurer	Annually

#### **3.9.3 Financial Procedures**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assistant Assessors	As required
(c)	Provide, arrange or facilitate training and instruction as identified above.	7,8,11,12,13,14	Assistant Assessors	As required

### **3.9.5 Financial Monitoring Reports**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Receive, check and consider monitoring reports from RC Finance Department	11,12,13	Assessor / PAO	Monthly
(b)	Prepare Financial Monitoring Reports, including probable out-turn, reasons for variance, and proposed actions for Management Team	11,12,13	Assessor / 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 / Assessor	See VJB meeting schedule

### **3.9.6 Annual Accounts**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Complete procedures as at 3.5.1 above, and in RC Abstract of Accounts guidance notes	7,11,12,13	Assessor / PAO	Annually, April-May
(b)	Liaise with Treasurer/RC Accountants in preparation of Annual Accounts	7,11,12,13	Assessor / 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Agree format and procedures for reporting that payroll has been checked against staff lists.	7,11,12,13	Assistant Assessor / PAO	Monthly
(b)	Report any issues to Management Team	7,11,12,13	PAO	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	Assessor / PAO / IT Team	Monthly
(b)	Meetings to monitor IT projects and timetable	7,8,9,10,11,13	Assessor / PAO / IT Team	Monthly
(c)	Report to management team on progress	7,8,9,10,11,13	Assessor / 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	Assessor / PAO / IT Team	Ongoing
(f)	Review schedule of replacement for hardware and software licenses	7,8,9,11,13	Assessor / PAO / IT Team	Ongoing
(g)	Further develop Intranet to include all policy documents, guidance manuals etc	7,8,9,11,13,14	Assessor / PAO / IT Team	Ongoing
(h)	Further develop Intranet for use as a working tool	1-6, 7,8,9,11,13,14	Assessor / PAO / IT Team	Ongoing
(i)	Complete Review of IS Strategy and initiate relevant development project(s)	1-6,7,8,9,11,12,13	Assessor	Annually
(j)	Ensure all IT systems are functioning as required to meet Stakeholders changing needs	7,9,10,11,12,13	Assessor Assistant Assessors	Annually

#### **3.10.2 Business Systems Support**

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

### **3.10.3 Public Services Network (PSN)**

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

### **3.10.4 Asset Refresh**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assessor / PAO / IT Team	Annually, September
(d)	Complete Capital Budget Bid and Submit to Joint Board at budget planning meeting	1-6,11,12,13	Assessor / PAO	Annually, November

### **3.10.5 Assessors 'Progress' System**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assessor	Annually
(h)	Review use and functionality of Training database	7,8,9,11,13	Assistant Assessor / 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review general content and appearance of web site	7,8,9,10,11,12,14	IT Support Officer	Continually
(b)	Refresh to reflect changes to information in the Model Publication Scheme	7,8,9,10,11,12,14	IT Support Officer	At least annually
(c)	Refresh to reflect changes in policies and procedures	7,8,9,10,11,12,14	IT Support Officer	Annually
(d)	Update Public Performance Report	7,8,9,10,11,12,14	IT Support 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	IT Support Officer / PAO	As required

### **3.11 DATA PROTECTION**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Register with the Information Commissioner as Data Controller for the Assessor, the ERO and the Joint Board	10,12	Assessor /Assistant Assessor	Annually, in September
(b)	Liaise with Data Protection Officer on any new process or to renew existing processes to ensure compliance with Data Protection Legislation	7,9,10,13,14	Assistant Assessor	As required
(c)	As a result of GDPR review all Data Sharing Agreements with other Data Controllers to ensure compliance with Data Protection Legislation	9,12,13,14	AssessorAssistant Assessor	As required
(d)	Review Privacy Notices, forms and letters to comply with Data Protection Legislation	7,9,10,14	Assistant Assessor	As required
(e)	Review Data Processor Agreement with other data processors to ensure compliance with Data Protection Legislation	9,12,13,14	Assessor / Assistant Assessor / PAO	Annually

### **3.12 FREEDOM OF INFORMATION**

#### **3.12.1 Freedom of Information Policy**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assistant 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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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 / Assistant Assessors	As required

### **3.13 KEY PARTNERSHIPS**

#### **3.13.1 Support Services – Renfrewshire Council**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Liaise with representatives from RC HR & OD Service/Business Partner	7,8,11	Assessor / Assistant Assessors / PAO	as required
(b)	Ad-hoc meetings with representatives from RC HR & OD Service	7,8,11	Assessor / Assistant Assessors / PAO	as required
(c)	Regular 'ICT Liaison' Meetings with RC ICT Business Liason Officer	7,8,9,11,13	Assessor	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 / Assistant Assessors	As agreed
(f)	Liaison with RC Accountants	7,9,11,12,13	Assessor / Assistant Assessors / PAO	Monthly
(g)	Liaison with Treasurer to the Board	7,9,11,12,13	Assessor / Assistant Assessors	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 / Assistant Assessors / Office Manager	As required

### **3.13.2 Constituent Councils - Recipients of Operational Outputs**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Liaison with Finance (Billing) Departments of constituent Councils	1,2,4,5,7,9,10,11,13	Principal Surveyors	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 / Assistant Assessors / PAO	As required
(d)	Attend Election Management meetings with RO of relevant Councils	3,6, 7,9,10,11,13	ERO / Assistant Assessors /P.A.O.	Prior to Elections
(e)	Liaise with constituent Councils to promote Electoral Participation	3,6, 7,9,10,11,13	ERO / Assistant Assessors / P.A.O	Ongoing

### **3.13.3 Scottish Assessors Association**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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 / Assistant Assessors/PAO	As required

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

### **3.13.5 Association of Electoral Administrators**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	ERO / Assistant Assessors / PAO	Quarterly
(c)	Other meetings of Scottish Branch of AEA	3,6,7,8,9,11,13	ERO / Assistant Assessors / PAO	As required

### **3.13.6 The Electoral Commission**

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

### **3.13.7 External Suppliers**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Liaison with canvass form printing and mailing contractor	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	As per agreed contract
(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 Laserfiche Account Manager	3,6,7,8,9,10,11,13	Assistant Assessors/ 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, July - November

### **3.14 RECORDS MANAGEMENT**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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	Assistant Assessors	April 2014 – Oct 2015
(b)	Finalise Records Management Plan and submit to board for approval	1-6,7,8,9,11,12,13,14	Assistant Assessors	October 2015
(c)	Submit Records Management Plan to National Registers of Scotland	1-6,7,8,9,11,12,13,14	Assistant Assessors	October 2015
(d)	Implement Plan locally, including data storage protocols, retention policies, destruction policies etc	1-6,7,8,9,11,12,13,14	Assistant Assessors	January 2016 /Ongoing
(e)	Staff Training for above	1-6,7,8,9,11,13,14	Assistant Assessors	January 2016

### **3.15 MISCELLANEOUS**

### **3.15.1 Consultations**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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**

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

### **3.15.3 Corporate Address Gazetteers**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(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

<b>CORE OBJECTIVE REFERENCE</b>	<b>CORE OBJECTIVE DESCRIPTION</b>	<b>PLANNING (Including statutory timetables etc)</b>	<b>STANDARDS AND TARGETS</b>	<b>MONITORING (Nos. in brackets refer to Reporting Framework)</b>	<b>REPORTING</b>
1.1.1	Maintenance of the Valuation Roll	Section 2(2), Local Government (Scotland) Act 1975.	Changes generally must be effected in same financial year.	Principal Surveyors check and authorise. See KPIs below.	Monthly stats provided to staff.
		Valuation roll update schedule agreed at start of each year.	Weekly Updates	PAO responsibility	KPIs reported to Scottish Executive and included in Board, Annual and Public Performance Reports
		KPI targets agreed by MT at start of each year.	Ratio of changes made within 3, 6 and 9 months each year.	Monthly reports of progress re surveys and changes to Val Roll provided to Management Team.	
1.1.2	Preparations for Revaluation	Section 1 Local Government (Scotland) Act 1975.	Statutory req't to provide values to local authorities on 15 <sup>th</sup> March 2022	Weekly progress reports to MT once Reval project has commenced	Updates on progress provided to SAA and Scottish Government as required.
		Scottish Government requirement for 'final estimates'	Commitment to provide values to Scottish Government at a time to be agreed		Increase or adjustment factors use as checks on values.
		SAA schedules for PN production	Provide context for the planning and application of resources for valuation Valuation Notices to be issued circa March 2022		
1.1.3	Running Roll Appeals	As 1.1.2 above	Appeals to be disposed of by 31 <sup>st</sup> December 2020 unless received after 1 <sup>st</sup> April 2020	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

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

### 1.3 REGISTER OF ELECTORS

<b>CORE OBJECTIVE REFERENCE</b>	<b>CORE OBJECTIVE DESCRIPTION</b>	<b>PLANNING (Including statutory timetables etc)</b>	<b>STANDARDS AND TARGETS</b>	<b>MONITORING (Nos. in brackets refer to Reporting Framework)</b>	<b>REPORTING</b>
1.3.1	Compilation of Register of Electors	Representation of the People Act 2000	Registers to be published annually, prior to 1 <sup>st</sup> December.	Canvass Progress Stats (ER2) and HERA returns provided to Senior Managers weekly during canvass period	HEF return rate reported to Scottish Assessors 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			
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 - 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.			