



SERVICE PLAN 2011-2015

MISSION

Lanarkshire Valuation Joint Board's mission is to provide independent, professional valuation and electoral services to the citizens and Councils of North & South Lanarkshire

VISION

Our vision is:

- **To compile and maintain the most Complete and Accurate Electoral Registers in Scotland.**
- **To compile and maintain the most Complete and Accurate Valuation Rolls in Scotland.**
- **To compile and maintain the most Complete and Accurate Valuation (Council Tax) Lists in Scotland.**

In order that we fulfil our Mission and achieve our Vision we will:-

- Ensure that our services are delivered in accordance with all statutory requirements
- Plan service development and delivery in accordance with the principles of Best Value and continuous improvement
- Consult our stakeholders about their needs and expectations
- Recognise our employees as both stakeholders and our most important asset
- Take individual and collective responsibility for the services provided by LVJB
- Encourage innovation and recognise achievement within the organisation
- Monitor and report performance levels to stakeholders
- Integrate Equalities issues into all aspects of our service provision
- Deliver our services in the way that is the most sustainable in accordance with the nature of those services and the character of our organisation
- Build on our achievements to date

LANARKSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER

SERVICE PLAN 2011-2015

PART ONE

SERVICE FUNCTION

Lanarkshire Valuation Joint Board was established as part of the 1996 reorganisation of local government in terms of The Valuation Joint Boards (Scotland) Order 1995 and is vested with the functions of the valuation authorities of North and South Lanarkshire Councils. With the agreement of the two Councils, the Board also has responsibility for the Electoral Registration function for Lanarkshire.

The Assessor is responsible for valuation for non-domestic rating (The Valuation Roll) and council tax banding (The Council Tax 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 Council Tax Valuation List and the preparation and publication of the Register of Electors.

The service currently has 65 full time equivalent permanent staff.

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 required to complete a 5-yearly Revaluation of all non-domestic properties within the Valuation Roll. The most recent of these was completed in accordance with the statutory timetable and came into effect on 1st April 2010. The next of these will be completed, by agreement with the Scottish Government, in advance of the required date of 1st April 2015.

At 1st April 2011 there are a total 18,548 properties in the Valuation Rolls for North and South Lanarkshire Council areas, with a total rateable value of £946,979,125.

1.2 VALUATION LIST

The 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 their estimated market value as at 1st April 1991.

At 1st April 2011 there are a total 292,847 properties in the Valuation Lists for the Lanarkshire area.

1.3 REGISTER OF ELECTORS

The Register of Electors contains the names of all persons resident within the area and eligible to vote at UK Parliamentary, Scottish Parliamentary, European and Local Elections. It is published annually, by 1st December, and updated regularly throughout the year.

Prior to publication, the Register is updated by a postal canvass of all households, which is carried out during August - November each year. A door to door canvass is also conducted under certain predetermined circumstances.

At 1st April 2011, the total electorate of Lanarkshire was 489,852.

1.4 OTHER FUNCTIONS

The Assessor carries out a range of functions in support of these primary services, and these will be dealt with at Part Two, Core Objectives, below.

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PART TWO

CORE OBJECTIVES

2.1 THE VALUATION ROLL

- 2.1.1 Maintenance of the Valuation Roll, including the addition of new subjects and the amendment of existing subjects, will continue, year-on-year, in accordance with the Joint Board's established procedures for completion within the statutory timescales and annual targets. Valuation Notices will be issued to all Proprietors, Tenants and Occupiers and all relevant changes will be notified to the billing authorities timeously.
- 2.1.2 7,494 appeals were submitted against entries made in the 2010 Revaluation Roll. The statutory timetable for settlement of these appeals is 31st December 2013. To facilitate the disposal of these, the Assessor and his staff will continue negotiations in an effort to achieving settlement.
- 2.1.3 As at 1st April 2011, over 3,500 running roll appeals remain outstanding. There has been an upsurge in the lodging of running roll appeals by ratepayers and professional agents citing the economic downturn as the main ground of appeal. In March 2011 alone over 3,000 such appeals were lodged. The Assessor will include such appeals in his ongoing schedule of VAC Hearings in order that they are disposed of in accordance with their varying timescales and plan for the additional workload with a view to minimising the impact of this resource intensive workload on other key business areas.
- 2.1.5 Factors which are either out with the control of the Assessor are appeals for a number of subjects referred to the Lands Tribunal for Scotland and/or the Lands Valuation Appeal Court. Referral effectively removes the timetabling of appeals from local control.
- 2.1.6 The Assessor is designated as being responsible for the conventional valuation of the Electricity Utilities for all of Scotland. This has had a significant impact on the functions and structure of the office.

2.2 THE VALUATION LIST

- 2.2.1 Maintenance of the Valuation List, in particular the addition of new subjects, will continue, year-on-year, in accordance with the Joint Board's established procedures for completion within annual targets. Banding Notices will be issued to all interested parties and all relevant changes will be notified to the billing authorities timeously.
- 2.2.2 Band changes following alteration and subsequent sale will continue in accordance with the Joint Board's established procedures for completion within annual targets.
- 2.2.3 Additional resources were previously allocated to dealing with the upsurge in proposals to change bands received by the Assessor over the last few years as a result of a media campaign and as a result outstanding proposals and appeals have returned to a more stable level. As at 1st April 2011, some 133 proposals and appeals remain outstanding and a strategy is in place to deal with their disposal as efficiently as possible.

2.3 REGISTER OF ELECTORS

- 2.3.1 The 'Full' Annual and 'Edited' Registers will be published by 1st December in each year following a canvass carried out, as before, during August - November and with reference to the qualifying date of 15th October. The objective of the canvass will be to ensure the maximum possible return of satisfactorily completed canvass forms and that the register accurately reflects the information contained on them.
- 2.3.2 The Register will be updated on a monthly basis between January and August by the production of Lists of 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 Administration Act 2006 introduced a number of duties on the Electoral Registration Officer, including a duty to maximise registration and to collect personal identifiers for electors wishing to vote by post or by proxy.
- 2.3.5 Individual registration is scheduled to be implemented in 2014/2015 and will form a major piece of work for LVJB over the coming years. There will be a requirement on the Electoral Registration Officer to collect personal identifiers for all electors in Lanarkshire and put in place systems and procedures which ensure that individual registration does not compromise the completeness and accuracy of the electoral register.
- 2.3.6 There will be a requirement, commencing in 2013, for the Electoral Registration Officer to begin a process of refreshing personal identifiers collected in relation to absent voting.

2.4 CORPORATE GOVERNANCE

- 2.4.1 The Valuation Joint Board will ensure that the Assessor and Electoral Registration Officer is adequately resourced to perform his statutory functions. It will meet to discuss and approve Budgets, Policies and Practices as is deemed necessary and the members will act in accordance with the Code of Conduct for Councillors.
- 2.4.2 The officers of the Valuation Joint Board will act in accordance with the relevant Schemes of Delegation, Financial Regulations, Standing Orders and Codes of Conduct. These will be reviewed in accordance with the timetables included in Part Three, Key Activities and Outcomes of the Service Plan. Further, reference will be made to such good practice and good governance guidance as is provided by Audit Scotland.
- 2.4.3 Strategic and detailed Annual Service Plans will be implemented, maintained and actioned. The Strategic Plan will cover a rolling three year period, whilst noting matters of relevance beyond that timescale. Annual Service Plans will be reviewed in a manner which integrates with budget planning.
- 2.4.4 Policies covering Corporate Governance, Defalcation Procedures and Fraud Prevention will be implemented and reviewed.
- 2.4.5 The strategic objectives will be laid down and monitored by the Strategic Management Team, whilst both strategic and operational matters will be considered by the

Assessor's Management Team. Actions will be communicated to staff by means of team briefings and written bullet notes.

- 2.4.6 Effective performance management systems have been implemented with the Assessor's Management Team being identified as the principle forum for matters relating to Performance Management, Planning and Reporting.
- 2.4.7 Specific operational matters will be within the remit of the various Forums set up to ensure that operational policies are reviewed, updated and implemented, and also that best practice is shared between working partners, such as parties responsible for Election Management issues and non domestic rates and council tax billing. Additional groups, such as The Health and Safety Working Group and Anite Assessors Focus Group will also contribute towards ensuring that appropriate procedures and processes are adhered to. These groups in turn will report to the Assessor's Management Team.
- 2.4.8 Senior management will liaise as and when required with staff representatives.
- 2.4.9 Where deemed appropriate the Valuation Joint Board will align its Personnel and other related policies with those of South Lanarkshire Council.
- 2.4.10 The financial management and operations of the Valuation Joint Board will be subject to internal and external audit (see later).
- 2.4.11 Lanarkshire Valuation Joint Board is fully committed to the principles and practice of Best Value.
- 2.4.12 It is anticipated that Corporate Governance will form an are for audit, to be carried out independently by South Lanarkshire Council's Internal Auditor, in order to seek assurance that the governance of LVJB is both standard compliant and at a satisfactory level.

2.5 ACCOUNTABILITY

- 2.5.1 Annual Accounts will be submitted for external audit and published in accordance with the requirements of Audit Scotland.
- 2.5.2 The procedures and practices of the Valuation Joint Board will also be subject to external audit.
- 2.5.3 A Service Level Agreement will be entered into with the Internal Audit Services of South Lanarkshire Council, and an audit strategy encompassing the requirements of the external and internal auditors will be devised.
- 2.5.4 Detailed Annual audit plans will, likewise, be agreed with Internal Audit Services of South Lanarkshire Council
- 2.5.5 The Valuation Joint Board is committed to the Performance and Management Planning self-assessment process as laid down by Audit Scotland.
- 2.5.6 Performance will be monitored and reported internally and externally. Accordingly, a schedule of performance reports have been developed and reported to at monthly management team meetings and also other Forums where deemed appropriate. In response to changing external requirements and management need, this schedule will be subject to continuous review.
- 2.5.7 Decisions of the Management Team will be minuted and available for inspection.

2.6 BEST VALUE

- 2.6.1 LVJB 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.
- 2.6.2 Performance will be planned and targeted. Key Performance Indicators have been agreed in conjunction with the Scottish Government and the Scottish Assessor's Association and reported to the Scottish Government and other key stakeholders annually. Targets will however have to be set mindful of the upsurge in any particular area of workload, such as the heightened activity in relation to running roll appeals (refer 2.1.3), and the current budgetary constraints which public local authority bodies are experiencing, including LVJB.
- 2.6.3 Performance Indicators will be used for year-on-year comparisons as well as comparisons with other bodies where deemed appropriate.
- 2.6.4 In accordance with Section 13 of The Local Government in Scotland Act 2003, the performance of LVJB 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 Stakeholder Consultations will be continually developed and implemented, and the outcomes taken account of in Service Planning. This consultation will include a Customer Care Policy and Customer Comments and Complaints procedures, together with initiatives co-ordinated via the Scottish Assessors Association such as consultation on future development of the SAA Portal (www.saa.gov.uk).
- 2.6.6 A Service Review Plan will be produced and regularly reviewed in light of changing priorities and external factors.
- 2.6.7 LVJB will give consideration to any guidance issued under the terms of Section 2(1)(b) of The Local Government in Scotland Act. This is an external factor over which the Joint Board has no control and which may result in variations to the Service Plan.
- 2.6.8 LVJB recognises its duty under the Government's 'Efficient Government' initiative and will prepare and monitor plans to ensure compliance.

2.7 EQUAL OPPORTUNITIES

- 2.7.1 LVJB recognises its duty, under Section 16(1) of The Local Government in Scotland Act 2003 and equalities legislation, to discharge its functions in a manner which encourages equal opportunities and the observance of equal opportunity requirements.
- 2.7.2 The Valuation Joint Board is committed to equality in respect of race, ethnicity, disability, age, gender, sexual orientation and religion or belief both in staffing and service provision. In pursuance of this it has published an Equal Opportunity Policy, and Race, Gender and Disability Equalities Schemes and will implement a range of associated policies, procedures and actions.
- 2.7.3 Staff will be adequately trained in matters relating to equalities.

2.8 STAFFING AND PERSONNEL MATTERS

- 2.8.1 Appropriate training will be provided to all members of staff in accordance with both Lanarkshire Valuation Joint Board's and staff training needs.
- 2.8.2 Staffing reviews will be carried out annually in order to facilitate the coming year's service delivery having regard to matters such as previous year's performance, anticipated workload, staffing levels, and budgetary constraints. Staff consultations will be undertaken as part of the annual service planning process where applicable.
- 2.8.3 The Valuation Joint Board has adopted The Competence Initiative Scheme, including an annual Performance and Development Review process. This encompasses a range of procedures for managing both organisational and employee performance and is a process which links the Joint Board's strategies and service objectives to tasks and employees. It provides a systematic approach to management which is based on setting objectives, assessing performance, appraising achievement and identifying ways to improve, through training and development, at both an organisational and individual level.
- 2.8.4 Regular liaison meetings will be held with South Lanarkshire Council's Personnel Services and LVJB staff representatives.
- 2.8.5 LVJB is an Equal Opportunities employer and complies with the "Double Tick" initiative.

2.9 FINANCE AND BUDGETING

- 2.9.1 The officers of the Valuation Joint Board will act in accordance with the relevant Financial Regulations and Standing Orders, which will be regularly reviewed.
- 2.9.2 In partnership with the Finance and IT Resources of South Lanarkshire Council, budgets will be prepared annually and approved by the Joint Board.
- 2.9.3 Appropriate procedures for procurement, authorisation and payment have been implemented and these will be subject to review.
- 2.9.4 Adequate training in respect of these procedures will be provided to relevant staff.
- 2.9.5 Financial monitoring reports are received and verified on a monthly basis with variations in expenditure being reported both to management and to the Joint Board.

2.10 INFORMATION TECHNOLOGY & INFORMATION MANAGEMENT

- 2.10.1 The provision of Information Technology assets, systems and services by South Lanarkshire Council will be managed through regular liaison with the Business Systems Manager and Project Manager allocated to LVJB.
- 2.10.2 Assets will be refreshed in accordance with the Service Level Agreement between SLC and their hardware suppliers.
- 2.10.3 LVJB adheres to the principles of Data Protection and regularly reviews its Notification to the Information Commissioner.

- 2.10.4 Policies to enable compliance with the requirements of the Freedom of Information (Scotland) Act 2002 will continue to be reviewed to ensure compliance.
- 2.10.5 Satellite systems to support primary functions and reporting requirements will be maintained and developed as required.
- 2.10.6 LVJB will play an active role in the development of the SAA Portal with a view to continuing the provision of this web based joined up service delivery initiative.
- 2.10.7 The LVJB Web Site will be reviewed with a view to remaining current and relevant to users.
- 2.10.8 Document imaging supply and support contracts will be reviewed annually in accordance with contract renewal timescales.
- 2.10.9 With advice from SLC, as appropriate, the PC Operating System and desktop applications currently in use will be reviewed.
- 2.10.10 Information Technology initiatives shall be continually considered by LVJB's Management Team and Forums/Groups in terms of their possible contribution to delivering services more efficiently and effectively.

2.11 KEY PARTNERSHIPS

- 2.11.1 The support services provided by South Lanarkshire Council will continue to be managed by regular liaison meetings with relevant persons in each of the supporting Resources.
- 2.11.2 Being the primary recipients of operational outputs (Valuation Rolls, Councils Tax Valuation Lists and Electoral Registers), LVJB recognises both North and South Lanarkshire councils as key stakeholders, and will consult with these bodies in all areas relating to these matters.
- 2.11.3 The Joint Board will both instigate and facilitate joint forums with key partners, such as a joint finance forum and joint electoral forum involving constituent authorities, with a view to both sharing and developing good practice with the overall objective of improving the service in terms of both quality and efficiency in key business areas to LVJB service users.
- 2.11.4 The Joint Board will continue to commit resources to the workings of the Scottish Assessors Association. In this respect, it will participate in Plenary, Committee and Working Group meetings and fully engage in the exchange of information, ideas and knowledge provided by this association with a view to continuing the process of sharing services where possible, and sharing best practice.
- 2.11.5 Through the SAA, LVJB will maintain liaison with bodies such as the Valuation Office Agency (England and Wales), the Valuation and Land Agency (Northern Ireland), the Eire Valuation Office, The Royal Institution of Chartered Surveyors and The Institute of Revenues, Rating and Valuation.
- 2.11.6 Similarly, Joint Board staff will continue to be represented and participate in the workings of the Association of Electoral Administrators.
- 2.11.7 LVJB recognises the role of, and support provided by, The Electoral Commission in respect of Electoral Registration matters.

2.11.8 Staff are recognised as both key assets of the Valuation Joint Board and primary stakeholders and will be consulted on matters such as improving service delivery both via team meetings and through representative organisations where appropriate.

2.11.9 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.

2.12 MISCELLANEOUS

2.12.1 The Valuation Joint Board is committed to various initiatives, not covered above but which have significant implications for Service Planning, priorities and actions. These tend to be of an ad-hoc nature and demand variable commitment.

2.12.2 LVJB will respond, either directly or through its' relevant associations, to pertinent legislative and other consultations.

2.12.3 Any future local authority boundary or electoral constituency changes will require resource allocation and planning.

2.12.4 LVJB is committed to the development and implementation of both North and South Lanarkshire Council's Corporate Property Gazetteer and Property Database, and through these initiatives the formation of a National Gazetteer and use of National Unique Property Reference Numbers.

2.12.5 LVJB, through the SAA, are involved in development initiatives with Registers of Scotland and Ordnance Survey, and provide information to bodies such as The Scottish Neighbourhood Statistics Surveys.

LANARKSHIRE VALUATION JOINT BOARD

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SERVICE PLAN 2011-2015

PART THREE
KEY ACTIVITIES

3.1 THE VALUATION ROLL

3.1.1 Maintenance of the 2010 Valuation Roll

Item	Description	Ownership	Date/Recurrence
(a)	Record all known development activities, including planning permission and building control warrant approvals, together with completion certificate information, in accordance with the LVJB Survey Card Instruction and within the agreed timescales.	Audit Team Leader	On receipt
(b)	Survey of all new, amended or demolished non-domestic properties in accordance with the LVJB Survey Card Instruction and the General Survey Instruction.	Valuers & Technical staff	As required to achieve KPIs
(c)	Valuation of above in accordance with the LVJB approved Valuation Instructions.	Valuers & Technical staff	As required to achieve KPIs
(d)	Valuation of specialist subject types including properties deemed to fall within the remit of the Lanarkshire Assessor under the Designated Assessors regime.	Specialist Valuation Unit	As required to achieve KPIs
(e)	Amend the Valuation Roll by input to the Assessors 'Live' computer system.	Valuers & Technical staff	As required to achieve KPIs
(f)	Auditing all such amendments in accordance with LVJB procedures, making changes or referring back as appropriate	Central Admin	As required to achieve KPIs
(g)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	Audit Team Leader	Weekly, on Fridays
(h)	Issue Valuation Notices to all interested parties as required by statute.	Central Admin	Weekly, on Fridays
(i)	Issue Owners Declarations and reminders (as appropriate) requesting information on ownership, tenancy and occupation of the property along with information relating to physical alterations and rental details.	Audit Team Leader	As directed by senior management
(j)	Answer all ad-hoc enquiries from current, past and potential ratepayers in accordance with the LVJB Expected Working Practices guidance manual.	All staff	Ongoing
(k)	Issue Customer Care questionnaires in accordance with the sampling methods and timetables within the LVJB Customer Care Policy.	Admin Manager	Monthly

(l)	Arrange for the issue of rental, and other, questionnaires in accordance with the LVJB Questionnaire Instruction	LVJB I.T. Group	As required
(m)	Develop workflows in relation to procedures involved in maintaining the Valuation Roll with a view to increasing organisational efficiency	LVJB's MT & appropriate Forums	Ongoing
(n)	Arrange for the regular upload of the Valuation Roll to the SAA Portal	Depute via IT Team	Weekly

3.1.2 Revaluation 2010 - Settlement of Appeals

Item	Description	Ownership	Date/Recurrence
(a)	Maintain records of appeals including their status in relation to citation to appear at VAC, referral to Lands Tribunal etc.	Valuation Forum members	On receipt
(b)	Negotiate and settle appeals with ratepayers and their agents, with recourse where necessary, to the Local Valuation Appeal Committee, Lands Tribunal or Lands Valuation Appeal Court.	Valuers & Technical staff	As required to meet statutory timetables
(c)	Cite all outstanding Revaluation Appeals, at least in accordance with the statutory timetable.	Divisional Assessors in consultation with Depute	Refer to Schedule of Hearings
(d)	Where appropriate, amend the Valuation Roll to reflect appeal settlements in accordance with procedures as above.	Valuers & Technical staff	As and when settled
(e)	Where appropriate, issue Valuation Notices to reflect appeal settlements	Central Admin	Weekly, on Fridays

3.1.3 Running Roll Appeals

Item	Description	Ownership	Date/Recurrence
(a)	Record appeals received arising from amendments made to the 2010 Valuation Roll.	Valuers	On receipt
(b)	Maintain records of appeals including their status in relation to citation to appear at VAC, referral to Lands Tribunal etc.	Valuation Forum members	As required
(c)	Discuss appeals with ratepayers and their agents, with recourse where necessary, to the Local Valuation Appeal Committee, Lands Tribunal or Lands Valuation Appeal Court.	Valuers & Technical staff	As requires to meet statutory timetables

(d)	Cite all outstanding Running Roll Appeals in accordance with the statutory timetable appropriate to each appeal.	Divisional Assessors in consultation with Depute	Refer to Schedule of Hearings
(e)	Where appropriate, amend the Valuation Roll to reflect appeal settlements in accordance with procedures as above.	Valuers & Technical staff	As and when settled
(f)	Where appropriate, issue Valuation Notices to reflect appeal settlements.	Central Admin	Weekly, on Fridays

3.1.4 Revaluation 2015

Item	Description	Ownership	Date/Recurrence
(a)	Ingather appropriate evidence, analyse and prepare schemes of valuation/practice notes for specific subject types	All Valuation staff	On direction from Line Managers
(b)	Update rental/cost analysis spreadsheets and databases and produce narratives in relation to information used for R2015.	All Valuation staff	Ongoing
(c)	Undertake surveys and update file information where deemed appropriate in preparation for R2015.	Valuers/Technicians/ Trainee Valuers/ Trainee Technicians	As required
(d)	Prepare valuations for the purpose of supplying values to the Scottish Government as part of the revaluation sample exercise.	Valuers	July – Sept. 2014
(e)	Prepare and check all valuations for publication	Divisional Assessor/ Divisional Valuers/ Valuers	On direction from Line Managers
(f)	Ensure summary valuations for identified subjects are capable of being displayed at the SAA Portal	Valuation Forum members co-ordinated by Depute	In accordance with SAA timescales
(g)	Prepare for the issue of R2015 Valuation Notices	Central Admin	On direction from Line Manager

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PART THREE
KEY ACTIVITIES

3.2 THE COUNCIL TAX LIST

3.2.1 Maintenance of the Council Tax Lists

Item	Description	Ownership	Date/Recurrence
(a)	Record all known development activities, including planning permission and building control warrant approvals together with completion certificate information, in accordance with the LVJB Survey Card Instruction and within the agreed timescales.	Audit Team Leader	On receipt
(b)	Survey of all new or demolished domestic properties in accordance with the LVJB Council Tax Guide.	Valuers & Technical staff	As required to achieve KPIs
(c)	Valuation and banding of above in accordance with the statutory valuation assumptions and the LVJB Council Tax Guide.	Valuers & Technical staff	As required to achieve KPIs
(d)	Amend the Valuation List by input to the Assessors 'Live' computer system.	Valuers & Technical staff	As required to achieve KPIs
(e)	Audit all such amendments in accordance with LVJB procedures, making changes or referring back as appropriate.	Central Admin	As required to achieve KPIs
(f)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	Audit Team Leader	Weekly, on Wednesday
(g)	Issue Banding Notices to all interested parties as required by statute.	Central Admin	Weekly, on Wednesday
(h)	Answer all ad-hoc enquiries from current, past and potential council taxpayers in accordance with the LVJB Expected Working Practices guidance manual.	All staff	Ongoing
(i)	Issue Customer Care questionnaires in accordance with the sampling methods and timetables within the LVJB Customer Care Policy.	Admin Manager	Monthly
(j)	Develop workflows in relation to procedures involved in maintaining the Valuation List with a view to increasing organisational efficiency	LVJB's MT & appropriate Forums	Ongoing
(k)	Arrange for the upload of the Valuation List for Council tax to the SAA Portal	Depute via IT Team	Weekly

3.2.2 Amendments to Bands following Alteration and Subsequent Sale

Item	Description	Ownership	Date/Recurrence
(a)	Receive and record all the sales of all domestic properties in Lanarkshire.	Audit Team Leader	On receipt
(b)	Check sales against survey records and match sales to properties	IT Team/Clerical Support staff	Monthly
(c)	Where appropriate, survey identified properties.	Valuers, Technicians, Trainees	As required to achieve KPIs
(d)	Value and band the above in accordance with the statutory valuation assumptions and the LVJB Council Tax Guide.	Valuers, Technicians, Trainees	As required to achieve KPIs
(e)	Amend the Valuation List by input to the Assessors 'Live' computer system.	Valuers, Technicians, Trainees	As required to achieve KPIs
(f)	Audit all such amendments in accordance with LVJB procedures, making changes or referring back as appropriate.	Central Admin	As required to achieve KPIs
(g)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	Audit Team Leader	Weekly, on Wednesday
(h)	Issue Banding Notices to all interested parties as required by statute.	Central Admin	Weekly, on Wednesday

3.2.3 Proposals and Appeals

Item	Description	Ownership	Date/Recurrence
(a)	Record proposals received in respect of entries in the Council Tax List and monitor their status through appeals to VAC or Court of Session.	Divisional Valuers	On receipt
(b)	Discuss proposals/appeals with council taxpayers and their agents, including defence, where appropriate, to Valuation Appeal Committee or Court of Session.	Valuers & Technical staff	As required to meet statutory timetables
(c)	Facilitate the settlement of appeals by scheduling of VAC Hearings on an annually agreed basis.	Divisional Valuers in consultation with Depute	As required
(d)	Where appropriate, amend the Valuation List to reflect appeal settlements in accordance with procedures as above.	Valuers & Technical staff	As and when settled

(e)	Where appropriate, issue Banding Notices to reflect settlement of proposals and appeals.	Central Admin	Weekly, on Wednesday
(f)	Review Customer Care policy and ensure questionnaires are updated in accordance with the sampling methods and timetables within the policy.	Admin Manager	Monthly

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PART THREE
KEY ACTIVITIES

3.3 THE REGISTER OF ELECTORS

3.3.1 Annual Register of Electors

Item	Description	Ownership	Date/Recurrence
(a)	Issue of Canvass forms and, where appropriate, reminders to all households in accordance with annually established timescale.	Clerical Support Manager	Aug-Oct/Annual
(b)	Record canvass returns and scan into workflow system in accordance with pre-set rules.	Clerical Support staff	Aug-Nov/Annual
(c)	Process changes, flags etc., including opt-outs, in Assessor's 'Live' computer system.	Clerical Support staff	Aug-Nov/Annual
(d)	Check all changes to source document or document image.	Clerical Support staff	Aug-Nov/Annual
(e)	Check all 'No Changes' to source document image.	Clerical Support staff	Aug-Nov/Annual
(f)	Issue postal vote applications requested as part of canvass.	Clerical Support Manager	Following canvass
(g)	Collect and maintain personal identifiers for postal voters.	Clerical Support Manager	Following canvass
(h)	Produce and publish 'Full' and 'Edited' Registers and Registers for sale to Credit Reference Agencies and Government Departments (Z'd) in accordance with statutory timetables.	Clerical Support Manager	Nov/Annual
(i)	Timeous provision of Registers to appropriate bodies and places, including places of public display, in accordance with statute.	Clerical Support Manager	Dec/Annual
(j)	Answer all ad-hoc enquiries from current, past and potential electors in accordance with the LVJB Expected Working Practices guidance manual.	Clerical Support staff	Ongoing
(k)	Maintain a record of sale and supply of Registers	Clerical Support Manager	On request

(l)	Production of Electoral Statistics to Scotland Office in line with statutory regulations	Clerical Support Manager	On request
(m)	Review annual canvass form in relation to maximising registration	LVJB's Electoral Forum	Annually – April/May
(n)	Arrange for upload of registers to Delta software application	Clerical Support Manager in consultation with IT Team	Annually following canvass project
(o)	Following annual canvass prepare for LVJB management team, statistical analysis of canvass outcomes including information on door canvass, details of returns by electronic means and general return information with a view to contributing towards future canvass plans	Admin Manager/Clerical Support Manager	Annually following canvass project

3.3.2 Maintenance of Register of Electors

Item	Description	Ownership	Date/Recurrence
(a)	Issue 'Voter Registration Forms', Absent Vote applications' and Personal Identifier collection forms timeously to all parties giving notice of such a requirement.	Clerical Support staff	Ongoing
(b)	Record returns of these, and process via Assessor's 'Live' system as above.	Clerical Support staff	On receipt
(c)	Check all changes to source document or document image.	Clerical Support staff	On Receipt
(d)	Timeous production of monthly 'Lists of Alterations' and 'Notices of Alteration to the Register of Electors.'	Clerical Support Manager	Per statutory timetable
(e)	Timeous supply of changes to appropriate persons and bodies Using Delta software functionality where possible.	Clerical Support Manager in consultation with IT Team	Monthly/as requested
(f)	Answer all ad-hoc enquiries for supply of Electoral Registers	Clerical Support Manager	As required
(g)	Answer all ad-hoc enquiries in accordance with the LVJB Expected Working Practices guidance manual.	Clerical Support staff	As required
(h)	Target new C/Tax charges payers by comparison to Finance databases	Clerical Support staff	Dec-July/Annually
(i)	Timeous check of 2 year non returns of annual canvass forms comparing to current council tax charge payers and to "deadwood" where appropriate.	Clerical Support Manager	Before publication in that year
(j)	Triennial enquiry to proxy voters in line with statutory regulations.	Clerical Support	3 yearly from

		Manager	receipt of application
(k)	Liaise with Establishments regarding residents applications to register and absent vote applications	Clerical Support staff	Ongoing
(l)	Carry out Customer Care Survey	Admin Manager	Monthly
(m)	Promote electoral registration with a view to maximising registration	All LVJB staff	Ongoing
(n)	Ensure that matters of equality and diversity are built into the electoral registration process	Admin Manager	Ongoing
(o)	Develop and maintain plans covering key business areas of electoral registration including Integrity Plan, Election Plan and Canvass Plan with a view to both maximising registration and ensuring completeness and accuracy of electoral register.	Admin Manager/ Clerical Support Manager	Review annually

3.3.3 Elections

Item	Description	Ownership	Date/Recurrence
(a)	In the event of an election (or elections/referenda), produce an Election Register and special lists of electors such as Overseas Electors, Absent Voters (Postal and Proxy Voter) lists, labels and letters in accordance with statute and by agreement with Returning Officers; and provide personal identifier data to Returning Officers for postal voters.	Clerical Support Manager	At an election
(b)	Liaise with Returning Officers re Polling Places and apply changes where appropriate.	Clerical Support Manager	As required
(c)	Provision of data to allow the printing of Poll Cards.	Clerical Support Manager	By agreement with Returning Officer
(d)	Production of 'Marked Copies' of the register for use by Returning Officers on polling day. (Registers are marked to show electors who have applied for a postal vote)	Clerical Support Manager	By agreement with Returning Officer
(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.	Clerical Support Manager	By agreement with Returning Officer

3.3.4 Boundary Changes

Item	Description	Ownership	Date/Recurrence
(a)	Adjustments to Register to accord with new ward or constituency boundaries as required by any boundary review.	Clerical Support Manager	As required
(b)	Assisting Councils by allocating streets to Polling Districts which will be used in the event of an election.	Clerical Support Manager	As required
(c)	Both technical and electoral registration divisions within LVJB to liaise on the issue of boundary changes to ensure consistency	Divisional Assessors/ Admin Manager/ Clerical Support Manager	As required

3.3.5 Refresh of Absent Vote Identifiers

Item	Description	Ownership	Date/Recurrence
(a)	Develop programme for refreshing identifiers for Absent Voters.	Clerical Support Manager	December 2012
(b)	Commence programme of refreshing identifiers for Absent Voters.	Clerical Support Manager	January 2013
(c)	Maintain programme of refreshing identifiers for Absent Voters.	Clerical Support Manager	As required

3.3.6 Individual registration

Item	Description	Ownership	Date/Recurrence
(a)	Commence scoping of work to be undertaken and resources required in preparation for individual registration together with risk assessment.	Admin Manager/ Clerical Support Manager	Scoping exercise complete by 2012
(b)	Advise and agree with LVJB management team project outline for managing the implementation of individual registration.	Admin Manager/ Clerical Support Manager	January 2013

(c)	Develop project plan for implementation of individual registration	Admin Manager/ Clerical Support Manager	July 2013
(d)	Implement project plan for individual registration	Admin Manager/ Clerical Support Manager	2014

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3.4 CORPORATE GOVERNANCE

3.4.1 Joint Board Meetings

Item	Description	Ownership	Date/Recurrence
(a)	Agree timetable for LVJB meetings	Clerk to LVJB	Quarterly/ Annually
(b)	Nominate report authors for LVJB meetings	Assessor	As required
(c)	Prepare papers for LVJB meetings	Assessor/ Depute	For quarterly Joint Board meetings
(d)	Attend Agenda meeting of LVJB	Assessor/ Depute	Quarterly
(e)	Attend meetings of LVJB	Assessor/ Depute	Quarterly

3.4.2 Annual Service Plans

Item	Description	Ownership	Date/Recurrence
(a)	Liaise with the Executive Director of Finance & IT, South Lanarkshire Council, in review of Financial Regulations for presentation to the Board for approval	Assessor	June yearly
(b)	Liaise with the Executive Director of Finance & IT, South Lanarkshire Council, in review of Standing Orders for presentation to the Board for approval	Assessor	June yearly
(c)	Liaise with the Chief Executive, South Lanarkshire Council, in review of Schemes of Delegation for presentation to the Board for approval	Assessor	June yearly

(d)	Liaise with the Chief Executive, South Lanarkshire Council, in review of Codes of Conduct for presentation to the Board for approval	Assessor	June yearly
(e)	Prepare and review internal procedural guides to ensure adherence to Schemes of Delegation, Financial Regulations, Standing Orders and Codes of Conduct	Assessor/ Depute	July yearly

3.4.3 Strategic and Annual Service Plans

Item	Description	Ownership	Date/Recurrence
(a)	Prepare and review 3 year Strategic Service Plan with note of large-scale actions required over 5 years.	Assessor/ Depute	March 2014
(b)	Prepare and review Annual Service Plan	Assessor	May annually

3.4.4 Corporate Governance, Defalcation Procedures and Fraud Prevention

Item	Description	Ownership	Date/Recurrence
(a)	Review Corporate Governance policy	Assessor/ Depute	April yearly
(b)	Review Defalcation Procedures	Assessor/ Depute	April yearly
(c)	Review Fraud Prevention procedures	Assessor/ Depute	April yearly
(d)	Review and adapt South Lanarkshire Policies to meet LVJB requirements	LVJB's MT	As received
(e)	Implement and review LVJB Policies and Procedures to meet changes in legislation and good working practices	LVJB's MT	As required

3.4.5 Strategy and Management Meetings

Item	Description	Ownership	Date/Recurrence
(a)	Consider and agree strategic objectives	Assessor/ Depute	Mar-May Annually
(b)	Consider and agree strategic objectives for LVJB	LVJB's MT	Mar-May Annually
(c)	Communicate strategic objectives to all staff at Team briefings, backed up with written bullet notes.	All Managers	Following MT meetings
(d)	Assess progress in relation to objectives.	All Managers	MTM monthly
(e)	Communicate progress and actions	All Managers	MTM monthly

3.4.6 Performance Management, Planning & Reporting

Item	Description	Ownership	Date/Recurrence
(a)	Consider agree Performance management, Planning and Reporting in line with Best Value principles and SAA considerations	LVJB's MT	Mar-May Annually
(b)	Consider and agree Performance Planning to ensure compliance with Best Value.	All Managers	Mar – May annually
(c)	Produce suite of performance statistics relevant to key activities	IT Team	MTM & Relevant Forums
(d)	Produce & publish public performance reports	Assessor/ Depute	June-Sept/Annually
(e)	Report performance to Scottish Government through SAA Executive.	Assessor/ Depute	Annually as requested.

3.4.7 Internal Working Group & Committee Reporting

Item	Description	Ownership	Date/Recurrence
(a)	Ensure compliance with the Health & Safety Policy and SLC Guidance procedures.	Appointed Divisional Assessor	Ongoing
(b)	Minute meetings, copy to all staff and note at Management meetings	Appointed Divisional Assessor	Ongoing
(c)	Represent LVJB at SLC Health & Safety Liaison Officers meeting and report back to Management meetings.	Appointed Divisional Assessor	Quarterly
(d)	Represent LVJB at Corporate Standards Working Group and report back to management meetings.	Admin Manager	As required
(e)	Represent LVJB at SLC Disability Liaison Officers meeting and report back to Management meetings.	Audit Team Leader	Quarterly
(f)	Represent LVJB at SLC Equality and Diversity Working Group meeting and report back to Admin Manager.	Admin Manager	Monthly

3.4.8 Staff Representatives

Item	Description	Ownership	Date/Recurrence
(a)	Meet with representatives from Unison and any other union represented within LVJB.	Assessor/ Depute	As and when required
(b)	Communicate notes of meetings to the management team where appropriate	Assessor/ Depute	As and when required

3.4.9 Policies and Procedures

Item	Description	Ownership	Date/Recurrence
(a)	Meet with SLC Personnel to ensure Personnel and other related policies and procedures are reviewed and adapted from SLC to LVJB format.	Assessor/ Depute/ Admin Manager	Quarterly
(b)	Review LVJB Policies and Procedures	LVJB's MT	3 yearly from approval and following SLC Reviews
(c)	Carry out Equality Impact Assessments of all LVJB policies and procedures.	LVJB Working Group	As required
(d)	Carry out Privacy Impact Assessments of all LVJB policies and procedures.	Admin Manager	As required

3.4.10 Internal and External Audit

Item	Description	Ownership	Date/Recurrence
(a)	Present annual accounts for audit	Treasurer to LVJB	Annually
(b)	Agree strategic audit plan with internal audit	Assessor/ Depute	Annually
(c)	Agree annual audit plan with internal audit	Assessor/ Depute	Annually
(d)	Co-operate with internal audit in completion of audit plans	Assessor/ Depute	As audit Plan
(e)	Co-operate with external audit in completion of audit plans	Assessor/ Depute	As audit Plan
(f)	Co-ordinate actions arising from audit recommendations	Assessor/ Depute	As required

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3.5 ACCOUNTABILITY

3.5.1 Annual Accounts

Item	Description	Ownership	Date/Recurrence
(a)	Process, authorise and pass all Invoices to Creditors section, SLC Finance and IT	Admin Manager/LVJB Secretaries	As required
(b)	Pass Internal Trading Charges to Creditors section, SLC Finance and IT	Central Admin	As required
(c)	Pass Accruals Forms to Creditors section, SLC Finance and IT	Admin Manager	As required
(d)	Pass Manual Journals to Creditors section, SLC Finance and IT	Admin Manager	As required
(e)	Undertake year end procedures in accordance with agreed timetable & complete HMRC tax return for LVJB employees	Admin Manager	April – May annually
(f)	All Revenue Accounts to be finalised	Treasurer/ SLC Finance and IT	May - annually
(g)	Consolidation of Abstract Accounts and completion of Financial Statements for Annual Report	Treasurer/ SLC Finance and IT	June - annually
(h)	Annual Report Printed	Treasurer/ SLC Finance and IT	June - annually
(i)	First Public Inspection	Treasurer/ SLC Finance and IT	July/Aug - annually
(j)	Final Audit Reports and Audit Certificates to be received	Treasurer/ SLC Finance and IT	September - annually
(k)	Submission of Annual Report and Accounts	Assessor and ERO	Aug/Sep annually
(l)	Submission of Annual Report and Accounts	Assessor and ERO	Aug/Sep annually

3.5.2 External Audit

The timetabling and resource allocation of External Audits are outwith the direct control of the Assessor and are subject to future agreement.

3.5.3 Internal Audit Strategy

Item	Description	Ownership	Date/Recurrence
(a)	Discuss areas to be audited with internal audit.	Assessor/ Depute	March annually
(b)	Identify priorities for audit including areas of LVJB management concern and internal audit priorities.	Assessor/ Depute	March annually
(c)	Complete and agree plan.	Assessor/ Depute	April annually

3.5.4 Internal Audit - Annual Plan

Item	Description	Ownership	Date/Recurrence
(a)	Agree actions for 'Electoral Register' to ensure the accuracy of the edited register	Internal Audit/Admin Manager/	June annually
(b)	Respond to draft audit and agree actions for 'Accommodation Charges'	Internal Audit	June annually
(c)	Respond to draft audit and agree actions for 'Corporate Governance Gap Analysis'	Assessor/ Depute/ Internal Audit	Annually
(d)	Provide report on audited SLC Finance systems for actions	Internal Audit	September & March annually
(e)	Consider 6-monthly report on audited SLC Finance systems for actions	Assessor/ Depute	September & March annually
(f)	Complete audit follow-up work to assure continuous improvement	Internal Audit	Annually
(g)	Complete audit in respect of Fraud prevention and risk	Internal Audit	Annually
(h)	Re-evaluate 'Strategic Risks'	LVJB's MT/Internal Audit	Annually
(i)	Revise annual audit plan	Assessor/ Depute/ Internal Audit	March annually

3.5.5 Performance Monitoring and Reporting

Item	Description	Ownership	Date/Recurrence
(a)	Collate/established suite of Key Performance Indicators	LVJB's MT	Annually in April
(b)	Report above KPIs to Scottish Government (via Scottish Assessors Association)	Depute Assessor & ERO	Annually as requested by SAA.
(c)	Produce and return CIPFA Rating Review Budget figures to South Lanarkshire Council	Admin Manager	Annually in April
(d)	Produce and report annual Rateable Values to Scottish Government (Form RV/ASS/ etc)	Audit Team Leader	Annually in June
(e)	Collate and submit Electoral Registration statistics (Form RPF 29) to Scotland Office	Clerical Support Manager	Annually, in December (or on other publication of Register)
(f)	Collate and submit E-Reg information on performance standards to the Electoral Commission.	Clerical Support Manager	Annually in December
(g)	Produce and report Appeals against Rateable Values figures to Scottish Government (Form RV/APP/etc)	Audit Team Leader	Quarterly in April, July, October and March
(h)	Produce and return COSLA Joint Staffing Watch Survey	Admin Manager	Quarterly in April, July, October and March
(i)	Produce and submit suite of KPI and in-house performance statistics to MT & Valuation Forum	IT Team	In accordance with the schedule of relevant meetings
(j)	Ad hoc reports	Various	As requested.

3.5.6 Management Team Meetings

The Minutes of these will usually be approved at the following meeting and made available immediately thereafter.

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3.6 BEST VALUE

3.6.1 Performance Monitoring and Measurement

Item	Description	Ownership	Date/Recurrence
(a)	Benchmark with other Assessors and EROs in terms of continuous improvement	LVJB's MT	Continuous
(b)	Update trends and make external comparisons.	LVJB's MT	Annually, immediately following SAA circulation of KPIs

3.6.2 Public Performance Reporting

Item	Description	Ownership	Date/Recurrence
(a)	Compile Public Performance Report	Depute Assessor & ERO	Annually, after collation of KPIs
(b)	Submit PPRs to Joint Board	Assessor/ Depute	First meeting after collation
(c)	Supply PPRs to Lanarkshire libraries	Depute Assessor & ERO	Annually, following Board meeting which report submitted to
(d)	Submit KPIs to Scottish Assessors' Association and through that body to the Scottish Government	Depute Assessor & ERO	Annually, as requested

(e)	Provide KPIs and PPRs to staff	Depute Assessor & ERO	Annually, following Board meeting which report submitted to
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3.6.3 Stakeholder Consultation

Item	Description	Ownership	Date/Recurrence
(a)	Include in Public Performance Reports details of methods of feedback from stakeholders	Depute Assessor & ERO	To concur with publications
(b)	Issue Customer Care questionnaires in accordance with the LVJB Customer Care Policy	Admin Manager	Monthly
(c)	Report on Customer Care and Complaints Policies to Management Team Meeting	Admin Manager	Annually
(d)	Revise Customer Care Policies and procedures to incorporate Equalities issues	Admin Manager	See section 3.7
(e)	Further develop Web Site to be to encourage interaction, particularly in respect of interactive forms	LVJB's MT	Ongoing
(f)	Present Suggestions from Staff Suggestions to Management Team meetings	Assessor/ Depute	Monthly
(g)	Hold scheduled and ad-hoc meetings with range of stakeholders	Various	See section 3.11

3.6.4 Service Review Plan

Item	Description	Ownership	Date/Recurrence
(a)	Monitor staffing structure in light of ongoing changes to business requirements, particularly in relation to envisaged budgetary constraints	Assessor/ Depute	Ongoing
(b)	Review Service Plan	LVJB's MT	Annually, in Sept/Oct

3.6.5 Best Value Guidance

The provision of such guidance is beyond the control of the Assessor and ERO.

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3.7 EQUAL OPPORTUNITIES

3.7.1 Encouraging Equal Opportunity and Ensuring Compliance

Item	Description	Ownership	Date/Recurrence
(a)	Include equality monitoring within the customer care procedures and report on responses	Admin Manager	Quarterly
(b)	Consider making regularly used documents available in other formats	Admin Manager	As requested
(c)	Subscribe to Language Line facilities	Admin Manager	Annually
(d)	Review Recruitment Policy.	Admin Manager	Annually
(e)	Attend SLC Equal Opportunities and Diversity Working Group and review Policies and Procedures in line with SLC	Admin Manager	Monthly

3.7.2 Implement Policy and Actions

Item	Description	Ownership	Date/Recurrence
(a)	Review LVJB's equal opportunities policies to meet changing requirements and legislation.	Admin Manager	Sept/Annually
(b)	Update and review equal opportunity policies in line with associated action plans.	Admin Manager	Quarterly

3.7.3 Promotion of Equality Opportunity

Item	Description	Ownership	Date/Recurrence
(a)	Ensure policies and procedures have due regard to equal opportunities as set out in Equalities legislation.	Admin Manager	Annually

3.7.3 Equality Opportunity Training

Item	Description	Ownership	Date/Recurrence
(a)	Training requirements for equal opportunities to be assessed at PDR (or induction)	Managers	April/Annually
(b)	Provide other equal opportunities training identified at (a) above	Managers	April/Annually

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3.8 STAFFING AND PERSONNEL MATTERS

3.8.1 Training

Item	Description	Ownership	Date/Recurrence
(a)	Agree training at annual PDR interviews and action within agreed time	Managers	Annual/April
(b)	Scope training for trainee valuers in relation to meeting RICS requirements	APC counsellors and supervisors	Annual
(c)	Provide training for Trainee Technicians via Glasgow College of Building or similar where required	Depute Assessor & ERO	Annual/August
(d)	Provide training for Electoral registration staff towards AEA qualification where required.	Depute Assessor & ERO	Annual/August
(e)	Scope management training as required.	Assessor/ Depute	Ongoing
(f)	Provide training in preparation for new tasks, new systems, legislative changes and operations.	LVJB's MT	Ongoing
(g)	Implement and review general staff training plan through PDR process	Line Managers	Twice yearly

3.8.2 Staffing Review

Item	Description	Ownership	Date/Recurrence
(a)	Carry out staffing review in order to plan service delivery having regard to anticipated workload and budgetary constraints	LVJB MT	Annually prior to setting of subsequent year's performance targets

(b)	Consult staff with regard to workload planning and potential reallocation of staffing resources having consideration to anticipated workload and budgetary constraints	Line Managers	Annually
(c)	Refer staff suggestions to management team	Assessor/ Depute	Monthly
(d)	Review staffing requirements at retirements, resignations etc.	Assessor/ Depute	Ongoing

3.8.3 Competence Initiative

Item	Description	Ownership	Date/Recurrence
(a)	Maintain and update Job Profiles & Grading Matrices	Assessor/ Depute/ Admin Manager	As required
(b)	Carry out PDR process	Managers	April/Annual
(c)	Carry out Interim PDR process	Managers	Oct/Annual
(d)	Agree performance targets	LVJB's MT	Annual/April
(e)	Review Aims and objectives	Assessor/ Depute	Annual/April

3.8.4 Liaison with SLC Personnel

Item	Description	Ownership	Date/Recurrence
(a)	Liaise with SLC personnel	Assessor/ Depute/ Admin Manager	Bi-monthly
(b)	Receive and convey to management team SLC management bulletins	Depute Assessor & ERO	Ongoing
(c)	Receive and convey to management team SLC personnel matters	Depute Assessor & ERO	Ongoing
(d)	Receive and convey to management team SLC personnel circulars	Depute Assessor & ERO	Ongoing
(e)	Receive, review and action SLC policies & procedures	LVJB's MT	Ongoing
(f)	Meet with Unison Representatives	Assessor/ Depute	As required

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3.9 FINANCE AND BUDGETING

3.9.1 Review of Financial Regulations and Standing Orders

Item	Description	Ownership	Date/Recurrence
(a)	Review Financial Regulations	Assessor	3 yearly
(b)	Review staff procedural guide to Financial Regulations	Admin Manager	3 yearly
(c)	Review Standing Orders	Assessor	3 yearly

3.9.2 Budget Preparation

Item	Description	Ownership	Date/Recurrence
(a)	Prepare proposed budget	Assessor/ Depute/ Admin Manager	Sept/Oct/ Annually
(b)	Agree proposed budget with Treasurer to Board	Assessor/ Depute	Oct /Annually
(c)	Attain approval for proposed budget from LVJB	Assessor	Nov /Annually
(d)	Liaise with the Treasurer in preparation of Revenue budget bid for next financial year, for presentation to the Board for approval.	Assessor/ Depute/ Admin Manager	Nov-Dec/Annually
(e)	Liaise with the Treasurer in preparation of Final Outturn for previous financial year, for presentation to the Board for approval.	Assessor/ Depute/ Admin Manager	Jun-Jul/Annually
(f)	Liaise with the Executive Director of Finance & IT, South Lanarkshire Council, in preparation of Annual Accounts for previous financial year, for presentation to the Board for approval.	Assessor/ Depute/ Admin Manager	Aug-Sep/Annually

3.9.3 Review of Financial Procedures

Item	Description	Ownership	Date/Recurrence
(a)	Produce and review procedures for procurement	Admin Manager	May /3yrly
(b)	Produce and review procedures for authorisation	Admin Manager	May /3yrly
(c)	Produce and review payment procedures	Admin Manager	May /3yrly

3.9.4 Training

Item	Description	Ownership	Date/Recurrence
(a)	Agree and arrange appropriate training for 3.9.3	Depute Assessor & ERO	April /as reviews require

3.9.5 Financial Monitoring Reports

Item	Description	Ownership	Date/Recurrence
(a)	Check and agree financial monitoring reports	Admin Manager	Monthly
(b)	Verify receipt of financial monitoring reports	Admin Manager	Monthly
(c)	Review Financial Monitoring reports and advise LVJB's management team	Admin Manager	Monthly
(d)	Review Quarterly Monitoring reports for presentation to the Board.	Assessor	LVJB/Quarterly

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3.10 INFORMATION TECHNOLOGY & INFORMATION MANAGEMENT

3.10.1 Business Systems Support

Item	Description	Ownership	Date/Recurrence
(a)	Meet regularly with SLC Business Systems Support Manager to monitor Service Plan and specific projects	Depute	Monthly
(b)	Liaise with SLC Project Manager	Depute	As and when required
(c)	Receive and verify Asset Lists from SLC	Depute/LVJB IT Team	Annually
(d)	Agree SLA with SLC IT Business Support and undertake reviews of same	Assessor/ Depute	Annually

3.10.2 Asset Refresh

Item	Description	Ownership	Date/Recurrence
(a)	To review LVJB's estate technology in consultation with the Business Systems Manager	Depute/LVJB IT Team	

3.10.3 Data Issues & Information Handling

Item	Description	Ownership	Date/Recurrence
(a)	Review Data Protection Notification to Information Commissioner	Admin Manager	Annually in April and as required
(b)	Review content of all forms issued by LVJB to comply with Data Protection Requirements	Assessor/ Depute/ Admin Manager	Annually

(c)	Review the Data Protection Agreement with SLC as Information Technology Suppliers	Assessor/ Depute/ Admin Manager	Annually.
(d)	Review information handling at LVJB.	Assessor/ Depute/ Admin Manager	Monthly via MT meetings
(e)	Undertake CAG integration and data matching with information from various sources with LVJB's core databases.	Central Admin Team/LVJB IT Team	Ongoing

3.10.4 Freedom of Information

Item	Description	Ownership	Date/Recurrence
(a)	Audit information held	LVJB's MT	Annually
(b)	Review Publication Scheme for LVJB	Admin Manager	Annually
(c)	Monitor and produce details of Freedom of Information requests to LVJB's Management Team	Admin Manager	Monthly at MT meetings
(d)	Provide staff training in relation to Freedom of Information legislation	Admin Manager	As and when required

3.10.5 SAA Portal

Item	Description	Ownership	Date/Recurrence
(a)	Attend ad hoc Portal related Business meetings	Depute/IT Group	As required
(b)	Attend Portal Project Team meetings	Depute/IT Group	As required
(c)	Attend Portal Management Committee meetings	Depute	As required
(d)	Attend Gazetteer Project meetings on interface with Assessors Portal	Depute/IT Group	As required
(e)	Procure Hardware in consultation with SLC IT & LVJB I.T. Team	Depute	As required
(f)	Prepare and implement data standards and conventions	Depute/IT Group	As required
(g)	Upgrade System and links with local gazetteers in consultation with appropriate stakeholders	Depute	As required

(h)	Implement Business Improvement Strategies arising from SAA Portal Development	Depute	As identified
(i)	Ensure SAA Portal DTF implemented within LVJB's core valuation software application	Depute	As required

3.10.6 LVJB Web Site

Item	Description	Ownership	Date/Recurrence
(a)	Review LVJB's Web versions of Equality schemes	Admin Manager	Annually
(b)	Maintain and review LVJB's web site contents in terms of accessibility and relevant standards	LVJB's IT Team	Ongoing
(c)	Update Public Performance Report on LVJB's web site	Depute	Annually

3.10.7 Review IT Contracts

Item	Description	Ownership	Date/Recurrence
(a)	Investigate terms of refreshing IT contracts	Assessor/ Depute	Annually
(b)	Investigate alternatives	Assessor/ Depute	Annually
(c)	Implement preferred option	Assessor/ Depute	Annually

3.10.8 Review PC Operating System

Item	Description	Ownership	Date/Recurrence
(a)	With support of SLC IT, make initial investigations into requirement to upgrade Operating System and Desktop applications	Depute	Annually
(b)	Implement Upgrades as required	Depute	As required

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3.11 KEY PARTNERSHIPS

3.11.1 South Lanarkshire Council Support Services

Item	Description	Ownership	Date/Recurrence
(a)	Liaise with representatives from SLC Personnel Department	LVJB's MT	As required
(b)	Meet with SLC Business Systems Support Manager	Assessor/ Depute	Monthly
(c)	Meet with SLC Project Manager	Assessor/ Depute	Monthly
(d)	Meet with Risk and Audit Manager and Senior Auditor for purposes of audit planning	Assessor/ Depute	Annually, approx February
(e)	Liaise with SLC Accountants	Assessor/ Depute/ Admin Manager	As required
(f)	Liaise with Treasurer to the Board	Assessor/ Depute	As required
(g)	Liaise with Clerk to the Board	Assessor/ Depute	As timetabled
(h)	Liaise with Board Administration Officer	Assessor/Depute/ VJB Secretaries	As required
(i)	Participate in SLC Corporate Property Initiatives	Depute	As required

3.11.2 Operational Matters

Item	Description	Ownership	Date/Recurrence
(a)	Organise and chair Joint Electoral Registration meetings	Depute	As deemed required

(b)	Organise and chair Joint Finance Forum meetings	Appointed Divisional Assessor	As deemed required
(c)	Meet with Returning Officers of NLC and SLC	Admin Manager/ Clerical Support Manager	As required
(d)	Attend SLC organised Health & Safety meetings	Appointed Divisional Assessor	As required

3.11.3 Scottish Assessors' Association

Item	Description	Ownership	Date/Recurrence
(a)	Attend Plenary Meetings	Assessor/ Depute	Dec, Feb, May, Sept of each year
(b)	Attend Assessors Committee Meetings	Assessor/ Depute	As required
(c)	Attend Category Committee Meetings	Relevant members	In accordance with Committee Timetables
(d)	Attend other Committee Meetings	Relevant members	In accordance with Committee Timetables
(e)	Attend Working Group Meetings	Relevant members	In accordance with relevant Timetable
(f)	Attend ad-hoc Meetings and Representations	Relevant members	As required
(g)	Attend meetings with Scottish Government on specific topic matters	Assessor/ Depute	As required

3.11.4 Scottish Assessors' Association Partners

Item	Description	Ownership	Date/Recurrence
(a)	Meet with VOA, Valuation and Land Agency and Eire Valuation Office for purposes of Harmonisation	SAA/Assessor	Twice-yearly

(b)	Liase with VOA	SAA Harmonisation Spokespersons and Category Committee Chairmen	As required
(c)	Receive and circulate Minutes of VOA Rating Group Leaders Meetings and circulate to interested parties	Assessor	Monthly
(d)	Meet formally with Scottish Government Departments	SAA/Assessor/ Depute	As required
(e)	Liase with Scottish Government Departments	SAA/Assessor/ Depute	As required
(f)	Provide statistical returns to Scottish Government	Audit Team Leader	Quarterly
(g)	Complete statistical exercises for Scottish Government and their partners	All staff	As required

3.11.5 Association of Electoral Administrators

Item	Description	Ownership	Date/Recurrence
(a)	Attend Association of Electoral Administrators AGM and Seminar	ERO, Depute ERO, Admin Manager, Clerical Support Manager	Annually, May
(b)	Attend Scottish Branch meetings of Association of Electoral Administrators	ERO, Depute ERO, Admin Manager, Clerical Support Manager	As required

3.11.6 The Electoral Commission

Item	Description	Ownership	Date/Recurrence
(a)	Receive Electoral Commission Circulars	ERO, Depute ERO, Admin Manager, Clerical Support Manager	Regularly
(b)	Attend Meetings and Working Groups	ERO, Depute ERO, Admin Manager, Clerical Support Manager	As required

3.11.7 LVJB Staff

Item	Description	Ownership	Date/Recurrence
(a)	Carry out PDR Interviews	All Line Managers	Twice -yearly
(b)	Liaise with Unison representatives	Assessor/ Depute	As required
(c)	Receive, consider and implement (where appropriate) Staff Suggestions	Assessor/ Depute	Monthly
(d)	Hold meetings of Health and Safety Committee	Appointed Divisional Assessor	Quarterly
(e)	Hold meetings with LVJB IT Business Manager & Team Leader	Depute	As required
(f)	Hold meetings of Internal Focus/Forum/Working Groups	Designated Chairs	As required
(g)	Liaise with staff	All Managers	Ad-hoc, on daily basis
(h)	Hold LVJB Management Team Meetings	Assessor/ Depute	Monthly
(i)	Hold Team Briefing Meetings	MT member or designated Line	Monthly, following MTM

		Managers where appropriate	
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3.11.8 External suppliers

Item	Description	Ownership	Date/Recurrence
(a)	Meet with DO	Admin Manager/ Clerical Support Manager	Prior to annual electoral canvass and as required
(b)	Review document imaging contract	LVJB's MT	Annually
(c)	Review core valuation software application contract	Assessor /Depute	Annually
(d)	Review core electoral registration software application contract	ERO/Depute ERO/Admin Manager/ Clerical support	Annually
(e)	Meet/Liaise with Royal Mail	Admin Manager/ Clerical Support Manager	As required
(f)	Meet/Liaise with suppliers of fixtures and fittings, including photocopier, water supplies etc	Audit Team Leader	As required