

REPORT TO: TAYSIDE VALUATION JOINT BOARD – 11 JUNE 2012

REPORT ON: SERVICE PLAN 2012-2015

REPORT BY: ASSESSOR

REPORT NO: TVJB 11 2012

1 PURPOSE OF REPORT

1.1 The purpose of this report is to present to the Board the Assessor's Service Plan for the years 2012-2015.

2 RECOMMENDATIONS

2.1 It is recommended that the Board approves the content of this report and the Service Plan contained in the appendix.

3 FINANCIAL IMPLICATIONS

3.1 None.

4 POLICY IMPLICATIONS

4.1 This report has been screened for any policy implications in respect of Sustainability, Strategic Environment Assessment, Anti-Poverty and Equality Impact Assessment. There are no major issues.

5 BACKGROUND

5.1 At the meeting on 12 May 2008 the Board approved the Assessor's Service Plan for the years 2008-2013 and noted that it would be monitored by the Assessor during that period and would be reviewed when required.

5.2 An updated Service Plan has now been prepared to cover the years 2012-2015 and is contained in the appendix to this report.

5.3 The Service Plan will be monitored by the Assessor and will be reviewed and updated annually.

5.4 The Service Plan will be made available for inspection at the Assessor's offices and on the Board's website at www.tayside-vjb.gov.uk.

6 CONSULTATIONS

6.1 The Clerk and Treasurer to the Board have been consulted in the preparation of this report.

7 BACKGROUND PAPERS

7.1 None.

John M Galbraith FRICS
Assessor

June 2012

TAYSIDE VALUATION JOINT BOARD



SERVICE PLAN 2012 - 2015

SERVICE MISSION & VISION

Tayside Valuation Joint Board's **mission** is to ensure best value and provide equitable, customer focussed, high quality, professional valuation and electoral services for all its stakeholders.

Our **vision** is to provide valuation and electoral services in accordance with statute and in a manner that is exemplary.

AIMS & OBJECTIVES

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.
- Take individual and collective responsibility for the services provided.
- 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.
- Build on our achievements to date.

Key corporate objectives

- 1 To ensure timeous publication and maintenance of the **Valuation Roll**
- 2 To ensure timeous publication and maintenance of the **Council Tax Valuation List**
- 3 To ensure timeous publication and maintenance of the **Register of Electors**
- 4 To continue to maintain, improve and develop **Information Technology systems** to assist in delivering services
- 5 To set standards and undertake improvement in **service delivery**
- 6 To review roles, **responsibilities and procedures** to ensure effective balance of power and authority
- 7 To review, monitor and maintain **risk management** and internal controls
- 8 To develop, adopt and review formal documentation and put in place appropriate systems to ensure **compliance** to legislation and standards of conduct
- 9 To plan and deliver an **organisational development strategy** to ensure efficiency and quality of service delivery
- 10 To ensure the **Health & Safety** of staff and visitors
- 11 To publish information to ensure improved **customer focus**
- 12 To engage in **key partnership working** to ensure the delivery of efficient government

INTRODUCTION

This Service Plan relates to the services provided by the Assessor for Tayside Valuation Joint Board to the three constituent Councils of Angus, Dundee City and Perth & Kinross.

It is considered that the needs of the department are best served by having a plan in place to cover a 3 year period, and consequently this plan covers the period from 1 April 2012 to 31 March 2015. However, the plan will be kept under review so that it, or sections of it, can be amended to reflect changing circumstances. The plan will be reviewed and updated annually.

The Plan comprises the following sections:-

- 1 Purpose and Scope of Services
- 2 Service Issues
- 3 Core Objectives
- 4 Result Areas
- 5 Key Targets and Performance Measures
- 6 Service Implications of the Core Objectives
- 7 Essential Partnerships
- 8 Corporate Plan – Key Corporate Objectives
- 9 Service Plan – Aims & Objectives

1 PURPOSE AND SCOPE OF SERVICES

1.1 Introduction

The statutory duties allocated to the Assessor for Tayside Valuation Joint Board are the maintenance of the non-domestic Valuation Roll and the Council Tax Valuation List for the valuation areas of Angus, Dundee City and Perth & Kinross Councils.

In addition, both Angus and Perth & Kinross Councils have appointed the Assessor as Electoral Registration Officer for their respective Council areas.

1.2 Valuation Roll

The Valuation Roll, which is updated weekly and reprinted annually, is a register of all non-domestic lands and heritages. The Roll includes an entry for all properties subject to non-domestic rates and each entry contains details of the properties' ownership, occupation and rateable value.

In addition to the regular maintenance of the Roll, the Assessor is required to carry out a quinquennial revaluation of all subjects, the latest having come into force on 1 April 2010.

As at 1 April 2012, there were for all 3 Council areas a total of 18,679 subjects on the roll, and the total rateable value at that date was approximately £418.8 million.

1.3 Valuation List

The Valuation List is also updated on a weekly basis and is a register of all domestic properties which are subject to banding for Council Tax purposes. The List also includes subjects such as domestic lock-up garages and domestic stores which are regarded as "exempt dwellings".

Each dwelling is placed in one of eight valuation bands according to its estimated capital value as at 1 April 1991. The List contains address information together with the band ascribed to each individual dwelling.

At 1 April 2012 there were 197,660 dwellings subject to Council Tax on the List for Tayside, together with a further 7,511 exempt dwellings.

1.4 Register of Electors

The Assessor, having been appointed as Electoral Registration Officer for Angus and Perth & Kinross Councils, also produces the Register of Electors for these areas. The Register is published annually by 1 December and contains the names of all persons resident in the areas and eligible to vote at Parliamentary, Local or European Elections. An annual canvass of electors is carried out in order to update the Register prior to its publication. Outwith the canvass period of September to November the Register is updated on a monthly basis.

At 1 December 2011 the Register for Angus Council area contained 85,504 electors, and the Register for Perth & Kinross area contained 109,941 electors.

2 SERVICE ISSUES

2.1 General

- 2.1.1 As the functions of the department are statutory in nature, the resources of the department are directed by the need to meet the statutory timetables associated with each of its functions.
- 2.1.2 The Board's Best Value submission indicates that provision of the services should comply with the essential elements of sound governance and sound strategic, operational and financial management. The overall objectives of the service are to meet all its statutory requirements, achieve the highest possible quality of Valuation and Electoral Registration services to stakeholders and achieve such quality in the most cost effective manner.
- 2.1.3 During the currency of this plan, the Board's corporate governance, business continuity and risk management arrangements will continue to be monitored and updated as appropriate.

2.2 Valuation Roll

- 2.2.1 The next statutory quinquennial revaluation of all non-domestic subjects will take effect from 1 April 2015. Staff resources will be channelled towards producing new valuations for each subject on the Valuation Roll, in accordance with timetables agreed with external partners such as the Scottish Government and the Scottish Assessors' Association, leading to the issue of Valuation Notices to all ratepayers in early 2015.
- 2.2.2 The current Valuation Roll will continue to be monitored and updated up to 31 March 2015.
- 2.2.3 Non-domestic appeals arising will be dealt with in accordance with the statutory timetable. Professional staff will discuss appeals with ratepayers and their agents. Where settlement is not achieved, appeal cases will be prepared for presentation before Valuation Appeal Committees, the Lands Tribunal for Scotland and the Lands Valuation Appeal Court as required.

2.3 Valuation List

- 2.3.1 The Valuation List has been in place since April 1993.
- 2.3.2 The Valuation List will continue to be updated as required by current legislation to reflect changes, new entries and deletions.
- 2.3.3 Proposals and appeals in relation to Council Tax Bandings will continue to be addressed and cleared by professional and technical staff, in accordance with the statutory timetable.

2.4 Electoral Register

- 2.4.1 The Register of Electors will be published annually by 1 December each year. This will follow a period of canvass of all households, conducted during the period September to November each year. The Register will reflect the position at 15 October each year.

- 2.4.2 The Register will be updated monthly outwith the canvass period in accordance with current Electoral Legislation. Clerical staff will process forms from electors to allow registration at new/changed addresses.
- 2.4.3 A new system of individual electoral registration will be introduced during the currency of this plan. Systems and procedures will be reviewed once the legislative arrangements have been finalised.
- 2.4.4 Current legislation requires the Registration Officer to compile and keep two versions of the Register; the Full Register which contains the details of everyone who is entitled to vote and to which access, sale and supply is restricted; and the Edited Register which omits the names of electors who have asked to be excluded from this version for which there are no restrictions on access, sale and supply. Clerical staff will monitor and process requests as appropriate.
- 2.4.5 Elections will be held during the currency of this plan. Registers, statutory lists and Poll Cards will require to be prepared and provided in accordance with current regulations. Staff will work together with Returning Officers and their staff to ensure effective delivery of election services.

2.5 Information Technology

- 2.5.1 The continuing effective delivery of the department's services is dependent on its IT Section. The major task of the IT Development Manager and his staff is to continue to maintain existing systems and to develop and provide new and altered systems to meet the needs of the department.
- 2.5.2 The Assessor contributes to the Scottish Assessors' Portal, a national website which was developed as part of the Modernising Government programme. The Portal provides a fully searchable national dataset of Non-Domestic Rating and Council Tax information, together with on-line interactive services available to all stakeholders.

IT resources are required to upload data regularly to provide the most up to date information, and to contribute to new developments and initiatives. This will continue during the currency of this plan.
- 2.5.3 An external provider supplies an Electoral Registration system to Tayside Valuation Joint Board. Constant liaison is required to ensure successful delivery of the service.
- 2.5.4 Local Authorities maintain Corporate Address Gazetteers in association with the One Scotland Gazetteer, an address database made up of all 32 local authority gazetteers. Assessors' primary databases are an important source of information in this development. IT resources require to be allocated to ensure the regular exchange of up-to-date data in a nationally compliant format.
- 2.5.5 The Finance departments of the three constituent authorities are currently advised of changes to the Valuation Roll and Valuation List by interface reports to allow manual update of the authorities' billing and collection systems. Consideration of options for an automated interface is required, through consultation with the constituent authorities.

3 CORE OBJECTIVES

3.1 Valuation Roll

- 3.1.1 To maintain the non-domestic Valuation Roll, following the procedures which have been developed within the department, to take account of new properties, properties which should no longer be entered on the roll, altered properties, appeal settlements and ownership/occupation details.
- 3.1.2 To issue notices to ratepayers as required and advise the Directors of Finance of all changes.
- 3.1.3 To carry out the 2015 Statutory Revaluation. IT systems will be reviewed and adapted as appropriate. Professional staff will collate and analyse rent, cost and value information; prepare schemes of valuations; carry out and check valuations. Information will be provided to the Scottish Government and local authorities as required. Data on the Assessors' Portal will be updated accordingly. Valuation Notices will be issued to proprietors, tenants and occupiers in early 2015.
- 3.1.4 To resolve all appeals arising from both the 2010 Revaluation and the ongoing maintenance of the Valuation Roll. The statutory disposal date for appeals arising from the 2010 Revaluation is 31 December 2013.

3.2 Valuation List

- 3.2.1 To continue the maintenance of the Council Tax Valuation List, ensuring that all new entries, deletions, and banding changes are reported timeously to the Local Authorities and appropriate notices are issued to taxpayers.
- 3.2.2 To continue with the clearance of proposals and appeals in respect of Council Tax bandings in as expeditious a manner as resources permit.
- 3.2.3 To continue to obtain all relevant domestic sales information.
- 3.2.4 To continue to inspect domestic properties which have been subject to alterations, extensions or changes in order to maintain updated records for possible future re-banding purposes.

3.3 Register of Electors

- 3.3.1 To maintain the two versions of the Register, and to implement rolling registration. Monitor the operations concerned in production of the Register and review them as necessary.
- 3.3.2 To publish the Register including separate lists of overseas electors. Maintain an up-to-date list of all absent voters, including collection of personal identifiers.
- 3.3.3 To produce and make available copies of the Register in accordance with current legislation.
- 3.3.4 To issue appropriate forms and notices to electors advising of changes made to the Register.

- 3.3.5 To carry out an annual canvass, and to take all necessary steps to maximise the accuracy of the Register.
- 3.3.6 To prepare and produce all required documents in relation to any Election called during the period covered by this plan.
- 3.3.7 To implement changes to electoral boundaries.
- 3.3.8 To develop appropriate procedures for the introduction of individual electoral registration.

3.4 Information Technology

- 3.4.1 To continue to maintain, improve and develop systems to assist in delivering the Assessor's services in terms of statutory requirements.
- 3.4.2 To maintain the systems which allow the uploading of all Non-Domestic and Council Tax data to the Scottish Assessors' Portal, and the transfer of data to Councils for Gazetteer purposes.
- 3.4.3 To consider the provision of automated updates of Valuation Roll and Valuation List amendments to the constituent authorities.
- 3.4.4 To liaise with the external electoral registration software provider, and provide back-up as required.

4 RESULT AREAS

4.1 Valuation Roll

- 4.1.1 Completion of the 2015 Revaluation and uploading data to the Scottish Assessors' Portal.
- 4.1.2 Clearance of valuation appeals, including the defence of valuations through Valuation Appeal Committee, Lands Tribunal for Scotland and Lands Valuation Appeal Court should this be necessary.
- 4.1.3 Survey and valuation of all new and altered lands and heritages, and the notification of values to the Local Authorities.
- 4.1.4 Issue of valuation notices to proprietors, tenants and occupiers as required.
- 4.1.5 Annual issue of lands valuation returns (for the return of changes in ownership, tenancy or occupation, etc) and processing returned data to the Valuation Roll.

4.2 Valuation List

- 4.2.1 Survey and banding of all new buildings.
- 4.2.2 Survey and re-banding of altered domestic subjects, with particular emphasis on those which have been sold following alterations.
- 4.2.3 Notification of bandings to the Local Authorities and Council Tax payers.
- 4.2.4 Negotiation and settlement of proposals and appeals against entries on the Valuation List, including their defence, as necessary, before the Valuation Appeal Committee.

4.3 Register of Electors

- 4.3.1 Annual canvass of all households, and the subsequent input of data and publication of Registers.
- 4.3.2 Monthly update of Register including amendments, additions and deletions.
- 4.3.3 Implementation of individual electoral registration.
- 4.3.4 Collation of the information required for the production of special lists such as those of Absent Voters, Service Electors, Overseas Electors.
- 4.3.5 Provision of Registers to candidates, political parties and others as directed by legislation. Provision of necessary lists to Returning Officer in relation to any election occurring within the currency of the Register, provision of data for production of Poll Cards.

5 KEY TARGETS AND PERFORMANCE MEASURES

5.1 The principal measure of performance is the ability to deliver all services effectively and within the various statutory timetables. In addition, the Scottish Assessors' Association has agreed with the Accounts Commission a range of Key Performance Indicators for the Valuation Roll and Council Tax Valuation List.

5.1.1 Valuation Roll

- (i) Total number of entries in the Valuation Roll.
- (ii) Total Rateable Value
- (iii) Number of amendments carried out within specified time ranges
- (iv) Percentage adjustment of total Rateable Value arising from appeal settlements.
- (v) Movement in total Rateable Values year on year

5.1.2 Valuation List

- (i) Total number of entries
- (ii) Number of entries adjusted to Band D equivalent
- (iii) Number of new entries made within specified time ranges.

5.2 Register of Electors

A range of performance standards have been developed nationally through the Electoral Commission, who monitor, audit and report on annual returns from all Electoral Registration Officers. These cover the Electoral Registration Officer's activities in relation to the following:-

- 1) Using information sources to verify entries on the register of electors.
- 2) Maintaining the property database.
- 3) House-to-house enquiries.
- 4) Maintaining the integrity of registration and absent vote applications.
- 5) Supply and security of the register and absent vote lists.
- 6) Public awareness strategy.
- 7) Working with partners.
- 8) Accessibility and communication of information.
- 9) Planning and organisation.
- 10) Training.

Separate financial information is also provided to the Electoral Commission in relation to the following:-

- 1) Expenditure analysis.
- 2) Funding.

5.3 General

The Assessor is represented at the Scottish Assessors' Association Governance Committee. This Committee considers and advises on all governance issues affecting Assessors. Through this medium, performance information from all Scottish Assessors is provided to the Scottish Government on a regular basis. This provides benchmarking of services with other similar service providers and is an important factor in the Best Value regime.

6 SERVICE IMPLICATIONS OF THE CORE OBJECTIVES

- 6.1 The department's Management Team, chaired by the Assessor, oversees the running of the department.
- 6.2 In-house Working Groups have been formed to oversee various aspects of the service provision and to report to the Management Team. Established Working Groups are Council Tax Group, Non-domestic Rating Group, Electoral Registration Group, Governance Group, Information Technology Group and Health & Safety Group. A Revaluation Group will be established to oversee matters relating to the 2015 Revaluation.
- 6.3 The staff of the department are its major resource, and the department's success depends on their knowledge, experience and ability. Professional staff must meet the continuous professional development (CPD) requirements of their professional bodies, and are encouraged and assisted, so far as resources permit, to meet these requirements. The department operates a Staff Development Review scheme designed to formulate training plans for each individual staff member.

The Assessor is also aware of the need for the training of all staff in the operation of the department's IT systems. General training is also required in relation to external IT systems, packages and general PC use. Budgetary arrangements have been put in place to allow the necessary training courses to be set up.

- 6.4 Procedures and practices, some of which are of long standing, will be reviewed to ensure that service delivery proceeds in the most effective manner.

In this context, the Board's Internal Auditors prepare Audit Needs Assessments, Strategic Plans and Individual Audit Reports designed to ensure best practice is achieved across all service areas.

- 6.5 Operationally, staff will continue to be advised and updated on the service delivery. The department's Intranet contains the Board's Guidelines, Policies, and operational instructions. These will be monitored and updated as required.

7 ESSENTIAL PARTNERSHIPS

- 7.1 The relationship which exists between the Assessor and the Finance departments of the three constituent authorities ensures the exchange of information in respect of ownership, tenancy and occupation of properties in the respective areas.
- 7.2 Information in respect of building operations is obtained from the Planning and Building Control departments of the constituent authorities, and, as far as is permitted by statute, data is exchanged with them on an ongoing basis.
- 7.3 Exchange of data with the three constituent authorities is crucial to the formation of the local Corporate Address Gazetteers and the One Scotland Gazetteer. Regular discussion amongst relevant officers is essential in this regard.
- 7.4 Service Level agreements are in place with the Board's constituent authorities to ensure the provision of Information Technology, Personnel, Legal and Financial advice and support. Close contact is required to ensure the most efficient delivery of the core services.
- 7.5 A close working relationship between the Assessor, the Board and the Board's officers is crucial to the operation of the department and the provision of the Core Services. The presentation of relevant reports to the Board on a quarterly basis, either for approval or noting, together with contact between officers on a regular basis is essential.
- 7.6 The main liaison outwith the Local Authorities is with the Scottish Assessors' Association. Through the Association there is large scale exchange of information and views, with the aim of ensuring consistency of approach and harmonisation of valuation levels. Participation within the Association and its sub-committees places a heavy burden on the staff involved, particularly in the run-up to a revaluation. All members of the Assessor's Management Team participate in the work of the Association and its various committees.
- 7.7 Liaison with the external provider of the Electoral Registration computer system is essential for the provision of this service to Angus and Perth & Kinross Councils. Equally, close contact with the Returning Officer for each Authority is required to ensure the smooth operation of the entire electoral process.
- 7.8 Communication with the general body of Council Tax payers, ratepayers and electors, throughout the valuation areas, their agents and representatives, local Councillors, MPs and MSPs is of prime importance. The actions of the department directly affect these stakeholders and the provision of good quality information on all aspects of the service is essential.

8 CORPORATE PLAN – KEY CORPORATE OBJECTIVES

The following are the key objectives of the service, for which the Assessor's Management Team has overall responsibility.

No	Task	Start Date	End Date	Performance Measures
1	To ensure timeous publication and maintenance of the Valuation Roll	April 2012	March 2015	<ol style="list-style-type: none"> 1 Prepare and publish 2015 Revaluation Roll. 2 Maintain Valuation Roll in line with statutory requirements. 3 Dispose of appeals within statutory timescale. 4 Audit processes, procedures and values. 5 Develop IT systems and applications as required 6 Improve performance.
2	To ensure timeous publication and maintenance of the Council Tax Valuation List	April 2012	March 2015	<ol style="list-style-type: none"> 1 Publish Valuation List yearly. 2 Maintain Valuation List in line with statutory requirements. 3 Deal with proposals and appeals. 4 Audit processes, procedures and bands. 5 Develop IT systems and applications as required. 6 Improve performance.
3	To ensure timeous publication and maintenance of the Registers of Electors	April 2012	March 2015	<ol style="list-style-type: none"> 1 Prepare and publish Register of Electors on 1 December. 2 Update Register on a monthly basis outwith canvass period. 3 Deal with appeals. 4 Audit processes, procedures and accuracy. 5 Consider development of IT systems. 6 Provide election services as required. 7 Improve performance. 8 Prepare for Individual Electoral Registration.
4	To continue to maintain, improve and develop Information Technology Systems to assist in delivering services	April 2012	March 2015	<ol style="list-style-type: none"> 1 Maintain, improve and develop systems and applications as required. 2 Maintain systems for transferring data to and from the Scottish Assessors' Portal. 3 Maintain and improve systems for exchanging data with constituent authorities. 4 Consider Electoral Registration software requirements. Review and update Disaster Recovery Plan.
5	To set standards and undertake improvement in service delivery	April 2012	March 2015	<ol style="list-style-type: none"> 1 Monitor and improve Valuation Roll performance. 2 Monitor and improve Council Tax performance. 3 Monitor and improve Electoral Registration performance.

8 CORPORATE PLAN – KEY CORPORATE OBJECTIVES continued

No	Task	Start Date	End Date	Performance Measures
6	To review roles, responsibilities and procedures to ensure effective balance of power and authority	April 2012	March 2015	<ol style="list-style-type: none"> 1 Review Standing Orders, Scheme of Delegation and Financial Regulations (3 yearly or as required). 2 Review staff structure and responsibilities with staff changes and new tasks.
7	To review, monitor and maintain organisational risk management and internal controls	April 2012	March 2015	<ol style="list-style-type: none"> 1 Identify risks. 2 Mitigate risks. 3 Monitor and review risks. 4 Report risks and review risk strategy framework.
8	To develop and review formal documentation and put in place appropriate procedures to ensure compliance with legislation and standards of conduct	April 2012	March 2015	<ol style="list-style-type: none"> 1 Monitor compliance to legislation and TVJB policies and procedures. 2 Monitor and review compliance to Freedom of Information, Data Protection, Equalities legislation, etc.
9	To plan and deliver an organisational development strategy to ensure efficiency and quality of service delivery	April 2012	March 2015	<ol style="list-style-type: none"> 1 Maintain and review 3-year service plan. 2 Comply with corporate mission, vision, aims and objectives. 3 Deliver corporate improvement.
10	To develop, prepare and publish reports to ensure improved customer focus	April 2012	March 2015	<ol style="list-style-type: none"> 1 Prepare and publish statutory reports. 2 Prepare and present reports to Tayside Valuation Joint Board. 3 Review customer targeted policies. 4 Improve websites.
11	To ensure the Health & Safety of staff and visitors	April 2012	April 2015	<ol style="list-style-type: none"> 1 Monitor and review compliance with Health & Safety regulations.
12	To engage in key partnership working to ensure the delivery of efficient government	April 2012	March 2015	<ol style="list-style-type: none"> 1 Encourage partnership working with constituent authorities. 2 Encourage partnership working with public authorities e.g. Scottish Assessors' Association, Valuation Office Agency, Scottish Executive, Electoral Commission. 3 Review partnership working with external professional bodies e.g. Royal Institution of Chartered Surveyors, Institute of Revenues Rating and Valuation, Association of Electoral Administrators.

9 SERVICE PLAN – AIMS & OBJECTIVES 1 VALUATION ROLL

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
1.1	Prepare and publish 2015 Revaluation Roll (5 yearly)	Obtain and analyse rents, costs, turnover and other relevant information	1/4/12	Ongoing	1/4/13	Assessor
		Establish Revaluation Working Group	1/9/12	Ongoing	1/4/13	Assessor
		Review and develop IT systems and applications	1/9/12	Ongoing	1/4/13	Depute Assessor
		Prepare and publish valuation practice notes and guidance	1/4/13	1/9/14	1/4/14	Assessor
		Publish Revaluation Roll in electronic format and paper format	1/4/13	31/3/15	1/4/14	Assessor
		Prepare and finalise valuations	1/9/13	1/9/14	1/4/14	Depute Assessor
		Liaise with constituent authorities and notify values	1/4/14	31/3/15	1/9/14	Assessor
		Prepare and issue Valuation Notices	1/4/14	31/3/15	1/9/14	Assessor
1.2	Maintain Valuation Roll in line with statutory requirements	Maintain and update property records	1/4/12	Ongoing	1/4/13	Depute Assessor
		Prepare and update valuations as required	1/4/12	Ongoing	1/4/13	Depute Assessor
		Update Valuation Roll and issue Valuation Notices weekly.	1/4/12	Ongoing	1/4/13	Depute Assessor
		Provide updates to constituent authorities weekly	1/4/12	Ongoing	1/4/13	Depute Assessor
1.3	Dispose of appeals within statutory timescale	Correspond with appellants and their agents in accordance with legal requirements	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor progress of appeals and allocation to Valuation Appeal Committee dates	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor logging of appeals and processing of settlements.	1/4/12	Ongoing	1/4/13	Depute Assessor
		Prepare appeal statistics	1/4/12	Ongoing	1/4/13	Depute Assessor
1.4	Audit processes, procedures and values	Audit procedures, processes and values	1/4/12	Ongoing	1/4/13	Depute Assessor
		Consider reports from Internal and External Audit	1/4/12	Ongoing	1/4/13	Depute Assessor
1.5	Develop IT systems and applications as required	Develop IT systems and applications as required	1/4/12	Ongoing	1/4/13	Depute Assessor
1.6	Improve performance	Seek to improve efficiency in survey procedures	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor quality of valuations by reference to appeal loss	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor and seek to improve performance in terms of key performance indicators	1/4/12	Ongoing	1/4/13	Assessor

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
2.1	Publish Council Tax Valuation List yearly	Publish Valuation List in electronic format and paper format	1/4/12	Ongoing	1/4/13	Assessor
		Provide data to constituent authorities	1/4/12	Ongoing	1/4/13	Assessor
2.2	Maintain Valuation List in line with statutory requirements	Maintain and update property records	1/4/12	Ongoing	1/4/13	Depute Assessor
		Obtain and analyse sales information	1/4/12	Ongoing	1/4/13	Depute Assessor
		Prepare bandings for new and altered houses as required	1/4/12	Ongoing	1/4/13	Depute Assessor
		Update Valuation List and issue Notices weekly.	1/4/12	Ongoing	1/4/13	Depute Assessor
		Provide updates to constituent authorities weekly	1/4/12	Ongoing	1/4/13	Depute Assessor
2.3	Dispose of appeals within statutory timescale	Correspond with appellants and their agents in accordance with legal requirements	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor progress of proposals and appeals, and allocation to Valuation Appeal Committee dates	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor logging of proposals and appeals, and processing of settlements.	1/4/12	Ongoing	1/4/13	Depute Assessor
		Prepare appeal statistics	1/4/12	Ongoing	1/4/13	Depute Assessor
2.4	Audit processes, procedures and bands	Audit procedures, processes and bands applied	1/4/12	Ongoing	1/4/13	Depute Assessor
		Consider reports from Internal and External Audit	1/4/12	Ongoing	1/4/13	Depute Assessor
2.5	Consider development of IT systems	Consider development of IT systems as required	1/4/12	Ongoing	1/4/13	Depute Assessor
2.6	Improve performance	Seek to improve efficiency in survey procedures	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor quality of bandings by reference to band reductions on appeal	1/4/12	Ongoing	1/4/13	Depute Assessor
		Monitor and seek to improve performance in terms of key performance indicators	1/4/12	Ongoing	1/4/13	Assessor

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
3.1	To ensure timeous publication and maintenance of the Register of Electors	Publish Register of Electors in paper format and electronic format on 1 December each year, or as required by legislation	1/4/12	Ongoing	1/4/13	Depute Assessor
		Make arrangements for and carry out postal and door to door canvass	1/4/12	Ongoing	1/4/13	Depute Assessor
		Check electoral records against records obtained from other sources	1/4/12	Ongoing	1/4/13	Depute Assessor
		Formulate public awareness strategy	1/4/12	Ongoing	1/4/13	Depute Assessor
		Liase with external contractors	1/4/12	Ongoing	1/4/13	Depute Assessor
		Consider and mitigate risks	1/4/12	Ongoing	1/4/13	Depute Assessor
3.2	Update Register on a monthly basis outwith canvass period	Update Register of Electors monthly from 1 January to 1 September, or as required by legislation	1/4/12	Ongoing	1/4/13	Depute Assessor
		Issue notices in accordance with statutory requirements	1/4/12	Ongoing	1/4/13	Depute Assessor
		Refresh Personal Identifiers as required	1/4/13	Ongoing	1/9/13	Depute Assessor
		Consider and review measures for ongoing canvass of electors and updating of records	1/4/12	Ongoing	1/4/13	Depute Assessor
3.3	Deal with appeals	Correspond with appellants in accordance with statutory requirements	1/4/12	Ongoing	1/4/13	Depute Assessor
		Ensure that hearings are arranged timeously	1/4/12	Ongoing	1/4/13	Depute Assessor
3.4	Audit processes, procedures and accuracy	Develop procedures for monitoring the accuracy of the register	1/4/12	Ongoing	1/4/13	Depute Assessor
		Audit Personal Identifiers with canvass signatures	1/4/12	Ongoing	1/4/13	Depute Assessor
		Audit name changes to ensure accuracy	1/4/12	Ongoing	1/4/13	Depute Assessor
3.5	Develop IT systems and applications as required	Develop IT systems and applications as required	1/4/12	Ongoing	1/4/13	Depute Assessor
		Review the capability of obtaining statistics for statutory returns	1/4/12	Ongoing	1/4/13	Depute Assessor
3.6	Provide election services as required	Provide Election Register, Absent Voters lists, and Proxy lists as required for elections.	1/4/12	Ongoing	1/4/13	Depute Assessor
		Obtain and maintain absent vote personal identifiers	1/4/12	Ongoing	1/4/13	Depute Assessor
		Ensure delivery of data and identifiers to Returning Officers at elections.	1/4/12	Ongoing	1/4/13	Depute Assessor
		In conjunction with the Returning Officers, arrange the printing and delivery of poll cards	1/4/12	Ongoing	1/4/13	Depute Assessor
3.7	Improve performance	Seek to improve efficiency in canvass procedures	1/4/12	Ongoing	1/4/13	Depute Assessor
		Deliver performance standards to the Electoral Commission	30/6/12	Yearly	31/12/12	Depute Assessor
3.8	Prepare for Individual Electoral Registration	Monitor developments in the introduction of legislation for and procedures for Individual Electoral Registration	1/4/12	Ongoing	1/9/12	Assessor

9 SERVICE PLAN – AIMS & OBJECTIVES 4 INFORMATION TECHNOLOGY

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
4.1	Maintain, improve and develop systems and applications as required	Review systems and applications and consider whether improvements are required	1/4/12	Ongoing	1/4/13	IT Working Group
		Review all system documentation	1/4/12	Ongoing	1/4/13	IT Development Manager
		Set priorities for system development	1/4/12	Ongoing	1/4/13	IT Working Group
		Consider hardware and software requirements	1/4/12	Ongoing	1/4/13	IT Working Group
4.2	Maintain systems for transferring data to and from the Scottish Assessors' Portal	Review systems and consider any improvements required	1/4/12	Ongoing	1/4/13	IT Development Manager
4.3	Maintain and improve systems for exchanging data with constituent authorities	Review systems and consider any improvements required	1/4/12	Ongoing	1/4/13	IT Working Group
4.4	Consider Electoral Registration software requirements	Consider requirements for improvements to Electoral registration systems	1/4/12	Ongoing	1/4/13	Electoral Registration WG
		Liaise with external software provider	1/4/13	Ongoing	1/4/14	Depute Assessor IT Administrator
		Apply updates to Electoral Registration software	1/4/12	Ongoing	1/4/13	IT Administrator
		Maintain back-up facilities as required	1/4/12	Ongoing	1/4/13	IT Administrator
4.5	Review Disaster Recovery Plan	Review and update Disaster Recovery Plan	1/4/12	Ongoing	1/4/13	IT Working Group
		Test Disaster Recovery Plan	1/4/12	Ongoing	1/4/13	Governance WG

9 SERVICE PLAN – AIMS & OBJECTIVES 5 SERVICE DELIVERY

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
5.1	Monitor and improve Valuation Roll performance indicators	Agree and set Valuation Roll key performance indicators	1/4/12	Ongoing	1/4/13	Management Team
		Monitor and report on performance to Management Team monthly	1/4/12	Ongoing	1/4/13	Assistant Assessors
5.2	Monitor and improve Council Tax performance indicators	Agree and set Council Tax key performance indicators	1/4/12	Ongoing	1/4/13	Management Team
		Monitor and report on performance to Management Team monthly	1/4/12	Ongoing	1/4/13	Assistant Assessors
5.3	Monitor and improve Electoral Registration performance indicators	Agree procedures for meeting and seeking to improve Electoral Registration performance standards	1/4/12	Ongoing	1/4/13	Management Team
		Deliver performance standards to the Electoral Commission as required	1/7/12	Yearly	31/12/12	Depute Assessor
		Produce and deliver statistical information as required	1/12/12	Yearly	31/12/12	Depute Assessor

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
5.1	Review Standing Orders, Scheme of Delegation and Financial Regulations (3 yearly or as required).	Review contents of Standing Orders 3 yearly	1/4/12	Ongoing	1/4/15	Assessor/Clerk/ TVJB
		Review contents of Scheme of Delegation 3 yearly	1/4/12	Ongoing	1/4/15	Assessor/Clerk/ TVJB
		Review contents of Financial Regulations 3 yearly	1/4/12	Ongoing	1/4/15	Assessor/ Treasurer/TVJB
5.2	Review staff structure and responsibilities with staff changes and new tasks.	Review staff structure and responsibilities when staff leave or alter hours of work	1/4/12	Ongoing	1/4/13	Management Team
		Review staff structure and responsibilities when new tasks are introduced	1/4/12	Ongoing	1/4/13	Management Team

9 SERVICE PLAN – AIMS & OBJECTIVES 7 RISK MANAGEMENT

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
7.1	Identify Risks	Consider new risks for addition to Risk Register at all meetings of the Governance Working Group	1/4/12	Ongoing	1/4/13	Governance WG
7.2	Mitigate Risks	Implement mitigation decisions effectively	1/4/12	Ongoing	1/4/13	Management Team
		Review mitigation strategy regularly and as required	1/4/12	Ongoing	1/4/13	Governance WG
7.3	Monitor and review risks	Review Budget Monitoring Reports at Management Team meetings	1/4/12	Ongoing	1/4/13	Management Team
		Monitor Action Plans arising from audit reports at Management Team meetings	1/4/12	Ongoing	1/4/13	Management Team
7.4	Report risks and review risk strategy framework	Present 3-monthly Budget Monitoring Reports to the Board	1/4/12	Ongoing	1/4/13	Treasurer
		Submit External Auditor and Internal Auditor reports to the Board	11/6/12	Ongoing	1/4/13	Assessor/ Treasurer
		Submit Risk Management annual report to the Board and updates as required	1/1/12	Ongoing	1/1/14	Assessor
		Review and monitor risk management policy	1/4/12	Ongoing	1/1/14	Management Team

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
8.1	Monitor compliance to legislation and TVJB policies and procedures	Review policies and procedures as required	1/4/12	Ongoing	1/4/13	Management Team
		Monitor compliance with policies, procedures and instructions on an ongoing basis	1/4/12	Ongoing	1/4/13	Management Team
8.2	Monitor and review compliance to Freedom of Information, Data Protection, Equalities legislation, etc.	Ensure compliance with legislation	1/4/12	Ongoing	1/4/13	Management Team
		Submit annual report to the Board on Freedom of information and Data protection issues	11/6/12	Yearly	1/4/13	Assessor
		Submit annual report to the Board on Equalities issues, including monitoring statistics	1/1/13	Yearly	1/1/14	Assessor

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
9.1	Maintain and review service plan	Review 2008-2013 Service Plan and submit revised Service Plan (2012-2015) to the Board	1/4/12	Ongoing	11/6/12	Assessor
		Review 3-year Service Plan annually	1/4/13	Yearly	1/4/14	Assessor
		Ensure staff awareness of service plan	1/4/12	Ongoing	1/4/13	Management Team
9.2	Comply with corporate mission, vision, aims and objectives	Review corporate aims and objectives	1/4/12	Ongoing	1/4/13	Management Team
		Ensure staff awareness of corporate aims and objectives	1/4/12	Ongoing	1/4/13	Management Team
		Communicate and monitor adherence to mission, vision, aims and objectives	1/4/12	Ongoing	1/4/13	Management Team
9.3	Deliver corporate improvement	Monitor performance and report at Management Team meetings	1/4/12	Ongoing	1/4/13	Management Team
		Submit annual performance report to the Board	27/8/2012	Yearly	1/8/13	Assessor
		Monitor customer satisfaction questionnaires	1/4/12	Ongoing	1/4/13	Management Team
		Submit annual Customer Satisfaction Report to the Board	27/8/12	Yearly	1/8/13	Management Team
		Discuss and develop corporate improvement strategies at Management Team meetings	1/4/12	Ongoing	1/4/13	Management Team
		Discuss and develop staff training strategy	1/4/12	Ongoing	1/4/13	Management Team

9 SERVICE PLAN – AIMS & OBJECTIVES 10 CUSTOMER FOCUS

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
10.1	Prepare and publish statutory reports	Annual public performance report to Board	11/6/12	Yearly	1/6/13	Assessor
		Report Treasurer's un-audited statement of accounts to GP Sub-Committee	25/6/12	Yearly	1/6/13	Treasurer
		Annual financial reports to Board	1/11/12	Yearly	1/11/13	Treasurer
		Publish reports on website	1/4/12	Ongoing	1/4/13	Assessor
10.2	Prepare and present reports to Tayside Valuation Joint Board	Prepare and present established annual reports to the Board	1/4/12	Ongoing	1/4/13	Assessor
		Prepare and submit other reports as required	1/4/12	Ongoing	1/4/13	Assessor
		Publish agendas and minutes of Board meetings on the website	1/4/12	Ongoing	1/4/13	Assessor
10.3	Review customer targeted policies	Review and reconsider public participation measures	1/4/12	Ongoing	1/4/13	Management Team
		Monitor and analyse customer satisfaction questionnaires	1/4/12	Ongoing	1/4/13	Management Team
		Submit annual Customer Satisfaction Report to the Board	27/8/12	Yearly	1/8/13	Management Team
10.4	Improve websites	Review content of TVJB internet website	1/4/12	Ongoing	1/4/13	Management Team
		Review content of TVJB intranet site	1/4/12	Ongoing	1/4/13	Management Team
10.5	Consider further key partnership working	Continue existing relationships with constituent Local Authorities, Government departments, Scottish Assessors' Association, Association of Electoral Administrators, etc	1/4/12	Ongoing	1/4/13	Management Team
		Consider how to improve partnership working	1/4/12	Ongoing	1/4/13	Management Team

9 SERVICE PLAN – AIMS & OBJECTIVES 11 HEALTH AND SAFETY

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
11.1	Monitor and review compliance with Health & Safety regulations	Review Health & Safety issues at Management Team meetings	1/4/12	Ongoing	1/4/13	Management Team
		Health and Safety Working Group to meet at least twice a year to review Health & Safety policies	1/4/12	Ongoing	1/4/13	Health & Safety WG
		Conduct Health & Safety checks as required	1/4/12	Ongoing	1/4/13	Health & Safety WG
		Submit annual Health & Safety report to the Board	1/8/13	Yearly	1/8/14	Assessor

9 SERVICE PLAN – AIMS & OBJECTIVES 12 PARTNERSHIP WORKING

No	Performance Measures	Aims and Objectives	Start	End	Review	Task Owner
12.1	Encourage partnership working with constituent authorities	Discuss and develop partnership working with the Finance departments of the constituent Local Authorities	1/4/12	Ongoing	1/4/13	Management Team
		Discuss and develop partnership working with the Returning Officers of the constituent Local Authorities	1/4/12	Ongoing	1/4/13	Management Team
		Discuss and develop partnership working with the Planning and Building Control departments of the constituent Local Authorities	1/4/12	Ongoing	1/4/13	Management Team
		Discuss and develop partnership working with the Officers of Tayside Valuation Joint Board	1/4/12	Ongoing	1/4/13	Management Team
12.2	Encourage partnership working with public authorities e.g., Scottish Assessors' Association, Valuation Office Agency, Scottish Executive, Electoral Commission	Consider how to encourage and improve partnership working with public organisations	1/4/12	Ongoing	1/4/13	Management Team
12.3	Review partnership working with external professional bodies e.g. Royal Institution of Chartered Surveyors, Institute of Revenues Rating and Valuation, Association of Electoral Administrators	Consider how to encourage and improve partnership working with external professional organisations	1/4/12	Ongoing	1/4/13	Management Team