

# **RENFREWSHIRE VALUATION JOINT BOARD**



## **STRATEGIC SERVICE PLAN APRIL 2021 TO APRIL 2024**

**Annual Update – April 2022**

## **BACKGROUND**

Renfrewshire Valuation Joint Board (RVJB) is committed to a three-year Service Planning Schedule. The most recent Strategic Service Plan approved by the Joint Board covers the period 2021-2024.

As the environment in which the Board operates is constantly changing, there is a need to review the Service Plan annually. Rather than produce a fully revised Plan, however, this 'Update' includes such changes and new tasks as have occurred or been identified since approval of the main document. It should therefore be read along with the main 2021-24 Strategic Service Plan. All references and numberings contained within this document refer to the original Plan.

## **PART ONE – SERVICE FUNCTION**

### **1.0 INTRODUCTION**

The Assessor is responsible for the valuation of non-domestic properties (The Valuation Roll) and the valuation of domestic properties (The Valuation List) and also in their role as Electoral Registration Officer, the compilation of the Electoral Register.

The Assessor is normally required to complete a 5-yearly Revaluation of all non-domestic properties within the Valuation Roll. As a result of recommendations from the Barclay Review of Non-Domestic Rates, legislation has now been enacted by the Scottish Government to facilitate the move to 3 yearly revaluations from 1<sup>st</sup> April 2023.

### **1.1 VALUATION ROLL**

The total rateable value as at 31<sup>st</sup> March 2022 was approximately £382m and the total number of subjects in the Valuation Rolls for the Joint Board area was 14,312.

### **1.2 VALUATION LIST**

As at the 31<sup>st</sup> March 2022 there were 169,977 properties in the Council Tax Valuation Lists for the Joint Board area.

### **1.3 REGISTER OF ELECTORS**

The Revised Register is updated by a canvass of all households. As at 27<sup>th</sup> April 2022 the number of electors for Local Government Elections was 277,844.

## **PART TWO - CORE OBJECTIVES**

### **2.1 THE VALUATION ROLL**

- 2.1.1 The maintenance of the Valuation Roll, dealing with non-domestic appeals and preparing for the delivery of the 2023 Revaluation are the main tasks with the Valuation Roll
- 2.1.2 As at the 31<sup>st</sup> March 2022, we have disposed of 97.12% of the number of subjects under appeal from the 2017 Revaluation.
- 2.1.3 The Assessor continues to prepare and implement the various changes introduced by the Non-Domestic Rates (Scotland) Act 2020 and associated change Regulations.

## **2.2 THE VALUATION (COUNCIL TAX) LIST**

- 2.2.1 The maintenance of the Valuation List and dealing with council tax proposals and appeals are the main tasks with the Council Tax list.

## **2.3 THE REGISTER OF ELECTORS**

- 2.3.1 As at the 27<sup>th</sup> April 2022, the number of electors for Scottish or Local Government Elections is 277,844 over the three constituent authorities.
- 2.3.2 The Electoral Registration Officer has been preparing for the 2022 Annual Canvass
- 2.3.3 The Electoral Registration Officer will be preparing to implement the changes brought about by the Elections Act 2022.

## **2.4 CORPORATE GOVERNANCE**

- 2.4.1 A Corporate Risk Register is maintained and reviewed every 6 months and reported to the Board on a biannual basis. The revised Corporate Risk Register was presented to the Board Meetings held on the 17<sup>th</sup> September 2021 and 25<sup>th</sup> February 2022. Following feedback from members a review of the presentation of the Corporate Risk Register will take place in 2022.
- 2.4.2 With regard to RVJB's Records Management Plan (RMP), which was agreed by the Keeper of the Records of Scotland in January 2016, RVJB was invited to submit a Progress Update Review (PUR) in January 2022 in relation to the RMP. The PUR process is entirely voluntary and RVJB responded to the Keeper's Assessment Team to confirm RVJB would submit a PUR. The PUR was submitted on 7<sup>th</sup> April 2020, a response is awaited from the Keeper's Assessment Team.

## **2.5 EQUAL OPPORTUNITIES**

- 2.5.1 RVJB monitors Equalities in line with our Public Sector Equalities Duty and the report for 2021-23, was published on our website in April 2021 in accordance with legislation.

## **2.6 STAFFING AND PERSONNEL MATTERS**

- 2.6.1 Staff retention and recruitment has proven challenging for all VJB's in recent times with several rounds of recruitment taking place.

## **2.7 FINANCE AND BUDGETING**

- 2.7.1 Efficiency savings are continuously being sought through streamlining our services in conjunction with reviewing posts within RVJB's structure.

## **2.8 INFORMATION TECHNOLOGY**

- 2.8.1 A review of the telephony system has taken place and a suitable replacement has been identified, this is scheduled to go live during August / September 2022
- 2.8.2 A managed changeover of the servers operating systems is taking place to ensure that the versions used remain in support. PCs and Laptops will also be upgraded to Windows 11.

2.8.3 Due to the ending of the Public Services Network this part of the Service Plan has been renamed Cyber Security and tasks within the plan updated to reflect this.

## **2.9 INFORMATION MANAGEMENT**

2.9.1 In line with data protection legislation the Privacy Notices for both Joint Board staff and stakeholders were reviewed by RVJB's DPO and with regard to the Privacy Notice for stakeholders, published on our website.

2.9.2 Information Security Training tailored to the three functions of the Joint Board was delivered by RVJB's DPO.

2.9.3 To ensure continued compliance with data protection legislation, any new or amended data sharing agreements are reviewed by RVJB's Data Protection Officer prior to being signed by RVJB.

**PART THREE**  
**KEY ACTIVITIES AND OUTCOMES**

**Key To Business Objectives**

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

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

### **3.1 THE VALUATION ROLL**

**3.1.1 Maintenance of the 2017 Valuation Roll** – As per 2021 - 24 Service Plan

**3.1.2 Revaluation 2017 - Settlement of Appeals** – As per 2021 - 24 Service Plan

**3.1.3 Running Roll Appeals** – As per 2021 - 24 Service Plan

**3.1.4 Revaluation 2023 (to include Telecoms as designated assessor)**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Issue Assessor's Information Notices ( AIN's)	1,4,7,10,11,12,13,14	Divisional Assessors & Data Manager	As required
(b)	Manage returns of above in accordance with the RVJB procedures/clerical Instructions.	1,4,7,10,11,12,13,14	Data Manager	On return
(c)	Manage issuing of Civil Penalties for Non Return of information	1,4,7,10,11,12,13,14	Data Manager	As required
(d)	Inform RC of any non returns to allow pursuit of fees ( per agreed protocol)	1,4,7,10,11,12,13,14	Data Manager	As required
(e)	Analyse VORC returns and Bulk Upload returns to Portal	1,4,7,10,11,12,13,14	Divisional Assessors/All staff	As required
(f)	Analyse rentals of 'bulk class' subjects as agreed within established Working Groups and in accordance with SAA rental analysis guidance. Facilitate same, using Valuation System	1,4,10,11,12,13	Divisional Assessors	As required
(g)	Analyse local land sale information for use in contractor's valuations.	1,4,10,11,12,13	Divisional Assessors	As required
(h)	Draft Narratives and rates to be applied in valuations, where appropriate.	1,4,10,11,12,13,14	Divisional Assessors	As required
(i)	Approve Narratives and rates to be applied in valuations, where appropriate	1,4,10,11,12,13,14	Assessor / Assistant Assessors/Divisional Assessors	As required
(j)	Provide information as required to SAA Practice Note authors, working groups and Category Committees.	1,4,10,11,12,13	Assistant Assessors / Divisional Assessors	April 21 – May 22
(k)	Draft and present SAA Practice Notes for approval by Committees	1,4,10,11,12,13	SAA members	As required
(il)	Make comment on and provide input to draft/proposed Practice Notes.	1,4,10,11,12,13,14	Assistant Assessors/Divisional Assessors	As required
(mj)	Adopt and issue amended practice notes for use within RVJB (Make available through SAA on Web Portal)	1,4,7,10,11,12,13,14	Assistant Assessors/Divisional Assessors	As required
(n)	Value subjects for Revaluation purposes in accordance with local schemes of valuation, SAA Practice Notes and RVJB targets for completion.	1,10,11,12,13	Divisional Assessors	As required
(o)	Authorise proposed Rateable Values (RVs)	1,10,11,12,13	Assistant Assessors/Divisional Assessors	As required
(p)	Ensure proposed NAVs/ RVs shown correctly on Valuation System	1,10,11,12,13	Data Manager	As required

(q)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	1,4,10,11, 12, 13	Data Manager	Weekly
(r)	Export proposed NAVs/RVs (including summary valuation data where appropriate) to Assessors portal via Valuation System	1,4,10,11	Data Manager/IT Manager	Weekly from July 2022
(s)	Publish draft Revaluation Roll and Issue Draft Notices	1,4,7,10,12,	Assessor/ Assistant Assessor/ Divisional Assessors	November 2022

**3.1.6 Telecoms Valuations** - As per 2022 – 24 Service Plan

**3.1.7 Review of Tribunals System** - As per 2021 – 24 Service Plan

### **3.2 THE COUNCIL TAX VALUATION LIST**

**3.2.1 Maintenance of the Council Tax Lists** - As per 2021 – 24 Service Plan

**3.2.2 Amendments to Bands following Alteration and Subsequent Sale** - As per 2021 – 24 Service Plan

**3.2.3 Proposals and Appeals** - As per 2021-24 Service Plan

**3.2.4 Council Tax Revaluation** - As per 2021-24 Service Plan

### **3.3 THE ELECTORAL REGISTER**

**3.3.1 Annual Register of Electors** - As per 2021-24 Service Plan

**3.3.2 Maintenance of Register of Electors (Rolling Registration)** – As per 2021-24 Service Plan

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

**3.3.4 Absent Voters – Collection/Refresh of Personal Identifiers** – As per 2021 - 24 Service Plan

**3.3.5 Anonymous registration** - As per 2021 – 24 Service Plan

### **3.3.6 Changes in Legislation**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Actively participate in SAA and AEA Committees etc to maintain awareness of likely change	7,8,9,11,13	ERO/Assistant ERO's/ Senior Clerical Manager	Ongoing
(b)	Receive all relevant draft legislation and input to all relevant consultations	7,9,11,13	ERO/Assistant ERO's/ Senior Clerical Manager	Ongoing
(c)	Implement changes to practices and procedures	3,6,7,9,11,13	Senior Clerical Manager	As required
(d)	Prepare for the implementation of voter ID	6,7,9,10,11,13	ERO & Senior Clerical Manager	December 2022
(e)	Prepare for the changes to absent voting and overseas electors	6,7,9,10,11,13	ERO & Senior Clerical Manager	Possibly Quarter 2 2023

**3.3.7 Boundary Changes** - As per 2021-24 Service Plan

**3.3.8 ER Data Standards** – As per 2021-24 Service Plan



### **3.4 CORPORATE GOVERNANCE**

**3.4.1 Joint Board Meetings** - As per 2021 – 24 Service Plan

**3.4.2 Probity and Propriety** - As per 2021 – 24 Service Plan

**3.4.3 Service Plans** - As per 2021 – 24 Service Plan

**3.4.4 Corporate Governance, Defalcation Procedures and Fraud Prevention** - As per 2021 – 24 Service Plan

**3.4.5 Strategic Management** - As per 2021 – 24 Service Plan

**3.4.6 Performance Management, Planning & Reporting** - As per 2021 – 24 Service Plan

**3.4.7 Internal Working Groups** - As per 2021 – 24 Service Plan

**3.4.8 Personnel, Policies and Procedures** - As per 2021 – 24 Service Plan

**3.4.9 Internal and External Audit** - As per 2021 – 24 Service Plan

#### **3.4.10 Risk Management**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review Risk Management Strategy	1-6,9,11,12,13	Assessor /Assistant Assessors	During 2022
(b)	Implement and review Corporate Risk Register in accordance with the methodology contained in Policy	1-6,9,11,12,13	Management Team	Bi-Annually
(c)	Implement/Amend Risk Action Plan	1-6,9,11,12,13	Management Team	Annually in April
(d)	Monitor progress against Action Plan	11,13	Management Team	Monthly

(e)	Review Business Continuity/Disaster Recovery Plan	1-6,12,13	Assessor /Assistant Assessors	Annually
(f)	Liaise with RC Legal advisors to review all insurances	1-6,8,11,13	Assessor	Annually

### **3.5 ACCOUNTABILITY**

**3.5.1 Annual Accounts** - As per 2021 – 24 Service Plan

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

**3.5.3 Audit Plan** - As per 2021 – 24 Service Plan

**3.5.4 Performance Monitoring and Reporting** - As per 2021 – 24 Service Plan

**3.5.5 Management Team Meetings** - As per 2021 – 24 Service Plan

### **3.6 BEST VALUE**

**3.6.1 Performance Monitoring and Measurement** - As per 2021 – 24 Service Plan

**3.6.2 Trends and Comparisons** - As per 2021 – 24 Service Plan

**3.6.3 Public Performance Reporting** - As per 2021 – 24 Service Plan

**3.6.4 Stakeholder Consultation** - As per 2021 – 24 Service Plan

**3.6.5 Customer Complaints** - As per 2018 – 21 Service Plan

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

(c)	Review Customer Complaints Policy	7,9,11,12,13	Management Team	Annually
(d)	Publish Complaints information as required by policy	7,8,10,11,12,14	Assistant Assessor	Quarterly

### **3.7 EQUAL OPPORTUNITIES**

**3.7.1 Encouraging Equal Opportunities and Ensuring Compliance** - As per 2021 – 24 Service Plan

**3.7.2. Policy Review Timetable** - As per 2021 – 24 Service Plan

**3.7.3 Equalities Reporting to be summarised** - As per 2021 – 24 Service Plan

**3.7.4 Promotion and Training** - As per 2021 – 24 Service Plan

### **3.8 STAFFING AND PERSONNEL MATTERS**

**3.8.1 Development and Review of Personnel Policies** - As per 2021 – 24 Service Plan

**3.8.2 Training and Development Policy** - As per 2021 – 24 Service Plan

**3.8.3 Co-operation with Renfrewshire Council** - As per 2021 – 24 Service Plan

**3.8.4 Health and Safety Policy** - As per 2021 – 24 Service Plan

### **3.9 FINANCE AND BUDGETING**

**3.9.1 Financial Regulations and Standing Orders**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review Financial Regulations	12,14	Treasurer/Assessor	During 2022 then 3-yearly
(b)	Review Standing Orders	12,14	Clerk/Assessor	During 2022 then 3-yearly
(c)	Review procedural guidance to staff to reflect financial regulations	12,14	Assessor	During 2022 then 3-yearly

**3.9.2 Budget Preparation** - As per 2021 – 24 Service Plan

**3.9.3 Financial Procedures** - As per 2021 – 24 Service Plan

**3.9.4 Training** - As per 2021 – 24 Service Plan

**3.9.5 Financial Monitoring Reports** - As per 2021 – 24 Service Plan

**3.9.6 Annual Accounts** - As per 2021 – 24 Service Plan

**3.9.7 Payroll Checks** - As per 2021 – 24 Service Plan

### **3.10 INFORMATION TECHNOLOGY**

**3.10.1 Planning Forum** - As per 2021 – 24 Service Plan

**3.10.2 Business Systems Support** - As per 2021 – 24 Service Plan

**3.10.3 Public Services Network (PSN)** - Renamed Cyber Security

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Review IS Strategy and initiate relevant development project(s)	1-6,7,8,9,11,12,13	Assessor	Annually
(b)	Prepare Cyber Incident Response Plan	3,6,9,11,12,13	Assessor / Senior IT Manager	September 2022
(c)	Prepare and organise ITHC	3,6,9,11,12,13	Assessor / Senior IT Manager	Annually December
(d)	Implement Actions identified in ITHC	3,6,9,11,12,13	Assessor / Senior IT Manager	After ITHC

**3.10.4 Asset Refresh** - As per 2021 – 24 Service Plan

**3.10.5 Assessors 'Progress' System** - As per 2021 – 24 Service Plan

**3.10.6 Satellite Systems** - As per 2021 – 24 Service Plan

**3.10.7 Assessors Portal Project** - As per 2021 – 24 Service Plan

**3.10.8 Web Site** - As per 2021 – 24 Service Plan

**3.11 DATA PROTECTION** - As per 2021 – 24 Service Plan

**3.12 FREEDOM OF INFORMATION**

**3.12.1 Freedom of Information Policy** - As per 2021 – 24 Service Plan

**3.12.2 Freedom of Information functionality** - As per 2021 – 24 Service Plan

**3.12.3 Publication Scheme and Guide to Information** - As per 2021 – 24 Service Plan

**3.12.4 Freedom of Information Procedures** - As per 2021 – 24 Service Plan

**3.12.5 Codes of Practice** - As per 2021 – 24 Service Plan

### **3.13 KEY PARTNERSHIPS**

**3.13.1 Support Services – Renfrewshire Council** - As per 20121 – 24 Service Plan

**3.13.2 Constituent Councils - Recipients of Operational Outputs** - As per 2021 – 24 Service Plan

**3.13.3 Scottish Assessors Association** - As per 2021 – 24 Service Plan

**3.13.4 Scottish Assessors Association Partners** - As per 2021 – 24 Service Plan

**3.13.5 Association of Electoral Administrators** - As per 2021 – 24 Service Plan

**3.13.6 The Electoral Commission** - As per 2021 – 24 Service Plan

### **3.13.7 External Suppliers**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Liaison with canvass form printing and mailing contractor	3,7,9,10,11,13,14	Assistant EROs/Senior Clerical Manager	As required
(b)	Invite Tender Bids for printing of canvass stationery, printing and mailing	3,10,11,12,13	Assistant EROs	As per agreed contract
(c)	Meetings/Liaison with I Mail Services	3,6,7,10,11,13	Assistant Assessors/Senior Clerical Manager	As required
(d)	Meetings/Liaison with suppliers of fixtures and fittings, including photocopier, water supplies etc	7,11,13	Assistant Assessors	As required
(e)	Liaise with Laserfiche Account Manager	3,6,7,8,9,10,11,13	Assistant Assessors/ Senior IT Manager	Ongoing/As Required
(f)	Liaise with Democracy Counts Account Manager	3,7,9,10,11,12,13,14	Assistant EROs/Senior Clerical Manager/ IT Manager	Ongoing/As Required
(g)	Attend and contribute to Elector8 user group	3,6,7,9,10,11,13	Senior Clerical Manager / IT Manager	As scheduled
(h)	Attend and contribute to Elector8 Governance group	3,6,7,9,10,11,13	ERO	As scheduled

### **3.14 RECORDS MANAGEMENT**

<b>Item</b>	<b>Description</b>	<b>Objective(s)</b>	<b>Ownership</b>	<b>Date/Recurrence</b>
(a)	Submit Records Management Plan to National Registers of Scotland	1-6,7,8,9,11,12,13,14	Assistant Assessors	When called by the Keeper
(b)	Consider whether to submit annual PUR and do so if appropriate	1-6,7,8,9,11,12,13,14	Assistant Assessors	When offered by NRS, annually usually Quarter 1
(d)	Implement Plan locally, including data storage protocols, retention policies, destruction policies etc	1-6,7,8,9,11,12,13,14	Assistant Assessors	Ongoing
(e)	Staff Training for above	1-6,7,8,9,11,13,14	Assistant Assessors	Ongoing

### **3.15 MISCELLANEOUS**

**3.15.1 Consultations** - As per 2021 – 24 Service Plan

**3.15.2 Local Authority and Electoral Boundary Changes** - As per 2021 – 24 Service Plan

**3.15.3 Corporate Address Gazetteers** – As per 2021-24 Service Plan

## **RENFREWSHIRE VALUATION JOINT BOARD**

### **ASSESSOR AND ELECTORAL REGISTRATION OFFICER** **SERVICE PLAN APRIL 2018 - APRIL 2021**

#### **PART FOUR** **PERFORMANCE MANAGEMENT**

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

**1.1 THE VALUATION ROLL** - As per 2021 – 24 Service Plan

**1.2 THE (COUNCIL TAX) VALUATION LIST** As per 2021 – 24 Service Plan

**1.3 REGISTER OF ELECTORS** - As per 2021 – 24 Service Plan