# DABVJB Logo

# **ASSESSOR AND ELECTORAL REGISTRATION OFFICER**

### SERVICE PLAN 2018-2021

**April 2019 Update**

**Background**

Dunbartonshire and Argyll & Bute Valuation Joint Board is committed to a three-year Service Planning Schedule. The most recent Service Plan approved by the Joint Board covers the period 2018-2021.

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 3-year Plan. **It should therefore be read along with the main 2018-21Service Plan.** Other than where new sections have been added, all references and numberings contained within this document refer back to the original Plan.

The Annual Calendar for 2019-20 will reflect the changes included in this Update.

**PART ONE – SERVICE FUNCTION**

**1.0 Introduction**

As at 1 April 2019, the staffing complement stands at 49.02 FTE, though a recruitment process was underway to fill one vacancy.

A number of issues referred to in the 2018-21 Service Plan have moved on and updates on the various topics are included below.

In particular, the Scottish Government has moved forward since the Barclay Report was published, having completed a formal consultation on elements of the Barclay recommendations during 2018 and published a Non-Domestic Rates Reform Bill in March 2019. This commits the government to a 3-yearly Revaluation cycle and an overhaul of the appeals system, both from 2022.

The Bill which provides the primary legislative framework, is expected to pass through its various stages in Parliament during 2019/20 with the aim of being enacted by April 2020 and implemented in a phased fashion from then. At time of writing, no timetable is known for the raft of secondary legislation which will be required to implement the full extent of change proposed.

A number of the ‘Barclay’ recommendations will be delivered without specific legislative provision.

In passing its 2019/20 budget, the Scottish Government committed to a review of local government funding. Specifically, it will commence a review of the Council Tax system prior to the next Scottish Parliamentary elections. This may have implications for new activities during the currency of this Service Plan.

The Cabinet Office’s (CO) Moderation Programme now has a firm commitment to canvass reform with a target for implementation in autumn of 2020. This will introduce data matching as part of the annual canvass process and allow canvass activities to be better aligned with local requirement. Planning and testing for the change will take place during 2019/20.

The UK and/or Scottish Governments are currently considering or consulting on further electoral change, such as extending the franchise to (some) prisoners and, for Scottish Parliamentary and Local Government elections, to all residents of Scotland. It is also probable that overseas voting will be extended to a lifelong right. None of these initiatives have firm timetables, so for much of 2019/20 it is likely that a watching brief will be required.

At its meeting in March 2019, the Valuation Joint Board approved the establishment of a short-life working group to address the Board’s funding gap. The group, which will comprise of the Members of the Board’s Finance Sub-Committee, representatives of the three constituent Councils’ finance departments and the Assessor & ERO, will report to the Joint Board in September 2019 in order that its findings and recommendations can be considered in setting the budgets for 2020/21 and beyond.

* 1. **Valuation Roll**

The total rateable value of 14,997 subjects in the Dunbartonshire and Argyll & Bute Valuation rolls at 1st April 2019 is £368,996,344.

As at April 2019, 1,408 2017 Revaluation appeals remain outstanding and their disposal will remain a priority going forward. Running Roll appeals will be scheduled for disposal largely in parallel with Revaluation appeals.

An internal NDR Reform Project Team has been established and, during 2019/20, it will establish a Project Plan and Risk Register(s) for delivery of 3-yearly Revaluations, appeals system reform and all Barclay recommendations that are taken forward. Reporting to the Management Team, the Project Team will make recommendations in relation to process, operations and ICT development requirements. The Management Team will, however, retain responsibility for all decisions in relation to ICT procurement and people resources.

The Project Plan will, initially at least, need to be fairly high level but, as the NDR Reform Bill proceeds towards enactment and the required secondary legislation becomes known, the plan will increase in detail. ICT development will be critical in delivering the required reforms.

Funding for the forthcoming change has been incorporated into the 2019/20 budget approved by the Board and consideration will be given to the appropriate posts to be created/filled, taking account of the available training provision for surveyors, which is understood to be under review, and the government’s level of commitment to funding beyond the current year.

* 1. **Valuation List**

At 1st April 2019 there were 145, 266 properties in the Council Tax Valuation List for the Joint Board area. Proposals and appeals continue to be received and these will be disposed of as resources allow.

* 1. **Electoral Register**

At publication of registers on 1st December 2018, the total electorate for the Joint Board area was 219,637.

At time of writing there is significant uncertainty around the UK’s departure from the EU, resulting in the possibility that elections to the European Parliament may, after all, require to be held. The developing situation is being watched closely and contingency preparations for this, or any other ‘snap’, electoral event have taken place, and will continue into 2019/20.

Planning for the 2020 canvass reform will take place during 2019. Local data matching tests will take place between July and December 2019 and national data matching via the Government Digital Service (GCD) will take place in January 2020. More detailed plans will be established when CO have made their intentions clearer.

In 2017 the Joint Board outsourced the majority of its print and mail requirement under a contract which, having exercised the available extension clause, will persist until May 2020. Procurement activities to seek tenders and agree a new contract will commence during 2019, on a timetable to be agreed with WDC’s procurement service.

* 1. **Other Functions**

See above regarding the establishment of a short-life working group to review the Joint Board’s funding model.

In accordance with the Board’s Equalities Duties, a Mainstreaming and Outcomes Report will be published in April 2019, along with information on the gender pay gap.

**PART TWO – CORE OBJECTIVES**

**2.1 Valuation Roll**

2.1.5 The VOA has indicated that it has commenced engagement with ratepayers and their representatives in respect of their 2021 Revaluation of Gas Utility Subjects. Although there will be a disparity in the valuation and effective dates of Revaluations between Scotland and England, there remains a strong case for harmonisation of approach so the Assessor will retain a watching brief over developments during 2019/20 and attend such meetings as are appropriate.

2.1.8 See ‘Part One’ above re the remit and activities of the internal NDR Reform Project Team. More detail of these will crystallise as detailed requirements emerge.

**2.2 Council Tax List**

2.2.4 It is more likely that the Council Tax system will be subject to complete review than Revaluation. At this stage a watching brief will be kept on developments at governmental level and any consultations etc. will be responded to.

**2.3 Electoral Register**

2.3.3 The current political situation means that there is a risk of a ‘snap’ electoral event at almost any and all times. A state of readiness will be maintained and specific timetables implemented immediately following any announcement of any election or referendum.

2.3.6 See ‘Part One’ regarding canvass reform. Data matching tests will be planned provisionally as above though a watching brief of CO plans will be maintained.

2.3.7 The 2018 review of UK Parliamentary Boundaries will be implemented in advance of any UK Parliamentary General Election.

**2.4 Corporate Governance**

2.4.2 See above regarding the short life working group established to address the Joint Board’s funding gap. Once representatives from the finance departments are known an initial meeting will be held and more detailed plans will be laid out thereafter.

2.4.9 The new internal NDR Reform Project Team has a similar remit and authority as the existing Working Groups and will report to the Management Team on a regular basis.

**2.5 Accountability**

All as per the 2018-21 Service Plan. The scope, content and timing of any audit will be agreed with the relevant audit team.

**2.6 Best Value**

2.6.1 The Electoral Commission are known to be reviewing the performance regime which will apply following canvass reform. A watching brief will be adopted and input to the development of relevant metrics will be made, if the opportunity arises. Any clear indication of requirements will be planned for and implemented as required.

2.6.4 Following a review of the Customer Satisfaction process which was implemented in April 2018, it was agreed that we would return to an approach whereby a sample of recent users of service would be invited to make a return. The success of this, along with a new internal process for recording returns will be kept under review.

**2.7 Equal Opportunities**

2.7.3 An Equalities Mainstreaming and Outcomes Report will be published in April 2019, along with information on the gender pay gap

**2.8 Staffing and Personnel Matters**

2.8.3 Staffing levels and structures will be reviewed to balance the competing issues of the move the 3-yearly Revaluations and the need to address future budget gap.

**2.9 Finance and Budgeting**

2.9.2 The Member/officer short-life working group referred to above will meet early in 2019/20 and as required to ensure that conclusions are reached and recommendations made to the Joint Board in September 2019. The budget process for future years will take account of such changes as are approved by the Joint Board.

2.9.3 The procurement process to award a new print and mail contract in the spring of 2020 will commence during 2019, on a timetable to be agreed with WDC’s procurement service.

2.9.5 Training in financial procedures and systems shall be provided, as are required, to the newly appointed Principal Admin Officer.

**2.10 Information Technology**

2.10.2 A review of the Joint Board’s network structure and systems is under way. Following the conclusion of this process, new servers will be procured and installed in line with the provision made in the approved capital budget.

2.10.3 The .PSN secure network is being superseded in 2019 and the Board, under the direction and advice of WDC’s ICT service, will need to implement such alternative security systems as are required.

2.10.4 The DSAs which are in place with the education authorities for provision of ‘attainer’ information will be reviewed early in 2019/20.

2.10.6 The Assessor’s ‘Progress’ system is likely to form the main database upon which the required developments to deliver 3-yearly Revaluations and appeal system changes will be carried out. More detail on the proposed approach will be laid out as the legislative requirements become clearer.

2.10.8 The Halarose/Idox EROS system will be developed to comply with canvass reform (including data matching tests) and other proposed electoral registration reforms. Suppliers are currently working with governments in relation these reforms and it is expected that updates to the system will be delivered in time for implementation.

**2.11 Freedom of Information**

All as per the 2018-21 Service Plan.

**2.12 Key Partnerships**

2.12.4 During 2018 the SAA revised its consultative framework to respond to the recommendations in the Barclay Report. This framework now includes the Scottish Ratepayers Forum, the Scottish Rating Surveyors Forum and the Scottish Business Rating Group, all of which have slightly different scope and remit.

2.12.7 The Cabinet Office will lead on the Canvass Reform Project and many of the changes will be delivered through development of electoral management systems (EMS) so close ties with the CO and EMS suppliers will be maintained.

**2.13 Records Management**

All as per the 2018-21 Service Plan.

**2.14 Miscellaneous**

2.14.3 In early 2019 Internal Audit issued a report on the Joint Board’s compliance with Data Protection and Freedom of Information legislation. In line with the agreed Action Plan the Joint Board’s Information Asset Register and Business Classification & Retention of Documents document will now be reviewed annually.

**PART THREE**

**KEY ACTIVITIES AND OUTCOMES**

**Key To Business Objectives**

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

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

**3.1 THE VALUATION ROLL**

Where there is no narrative in this section please see original 2018-21 Service Plan.

**3.1.1 Maintenance of the Valuation Roll**

**3.1.2 2017 Revaluation Appeals/3.1.3 Running Roll Appeals (to include 3.1.5 Gas Utility)**

See separate schedules of VAC Hearing dates for 2019

**3.1.4 Valuation Appeal Committee Hearings**

See separate schedules of VAC Hearing dates for 2019

**3.1.6 Revaluation 2005 and 2010 – Lands Tribunal Appeals**

**3.1.7 Valuation Evidence – General**

**3.1.8 The Barclay Review and NDR Reform (including preparation for Revaluation 2022)**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (h) | Prepare for and implement the new ’70-day letting rule’ for self-catering subjects in line with forthcoming legislation (**no longer expected before 2020**) | 4,5,9,10,12,13 | Assessor | Dependent on legislation |
| (i) | Prepare for and enter currently exempt commercial subjects situated in public parks into the valuation roll **(No longer expected before 2020)** | 4,5,9,10,12,13 | Assessor | Dependent on legislation |
| (j) | Hold NDR Reform Project Team meetings | 1,4,8,9,11,12,13 | Depute Assessor | TBC |
| (k) | Create Project Plan with timetables, resources, milestones etc, in line with SAA Project Plan | 1,4,8,9,11,12,13 | NDR Reform Project Team | Summer 2019 |
| (l) | Create and maintain Project Risk Registers including any actions required | 1,4,8,9,11,12,13 | NDR Reform Project Team | Summer 2019 |
| (m) | Develop specifications required for ICT development | 1,4,8,9,11,12,13 | NDR Reform Project Team | Various timescales |
| (n) | Develop ICT systems as required by specifications | 1,4,8,9,11,12,13 | Analyst/Programmer | Various timescales |
| (o) | Test and implement ICT system developments in accordance with relevant test plans | 1,4,8,9,11,12,13 | NDR Reform Project Team/all staff | Various timescales |
| (p) | Report progress to Management Team | 1,4,8,9,11,12,13 | Depute Assessor | See MTM cycle |

**3.2 THE COUNCIL TAX VALUATION LIST**

A watching brief will be maintained on developments at government level – no specific update or actions known at this time.

**3.3 THE ELECTORAL REGISTER**

**3.3.1 Annual Register of Electors**

The publication of new registers takes place by 1st December based on an annual canvass which extends from July– November. For planning purposes, a working start date of 1st July will be adopted. Note that 1st December falls on a Sunday which may require overtime or other arrangements to be required to allow publication on that day.

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (y)  | A copy of the register will be taken at the start of the canvass to allow data matching tests to be completed | 3,6,7,9,11,13 | ERO/PAO | June 2019 |

**3.3.2 Maintenance of Register of Electors**

**3.3.3 Elections/Electoral Events**

Contingency planning has commenced for the possibility of a European Parliamentary election on 23 May 2019, though it is not clear if this will proceed. This has included revision of template letters, testing data to be merged with letters to European electors, poll card data etc. Any actions required in the 2019/20 year, including interim publications, provision of registers to ROs etc will be detailed in a separate election timetable/plan should the need to conduct this, or any other, election/electoral event come to fruition.

**3.3.6 Modernising Electoral Registration Programme/ Canvass Reform**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (e) | A copy of the register will be taken at the start of the canvass to allow data matching tests to be completed | 3,6,7,9,11,13 | ERO/PAO | June 2019 |
| (f) | Arrange for receipt of consolidated local data sets (Including Council Tax), ensure file formats are appropriate and up-load to Tellus | 3,6,7,9,11,13 | PAO | By June 2019 |
| (g) | Carry out local data matching tests as required | 3,6,7,9,11,13 | PAO | July – November Details TBC |
| (h) | Carry out national data matching tests in accordance with CO requirements and timetable | 3,6,7,9,11,13 | PAO | January 2020 |
| (i) | Use results of above tests to plan approach to 2020 canvass. | 3,6,7,9,11,13 | ERO/PAO | January – June 2020 |
| (j) | Use results of above tests to estimate costs of 2020 canvass | 3,6,7,9,11,13 | ERO/PAO | February 2020 |

**3.3.7 Boundary Changes**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (b) | Implement the outcomes of the 2018 review of UK Parliamentary constituencies | 3,6,7,9,13 | ERO/PAO | As required by any ‘snap’ UKPE |
| (b) | Implement Review of Polling Districts and Places in EDC | 3,6,7,9,13 | ERO/PAO | December 2019 or before if required |

**3.4 CORPORATE GOVERNANCE**

**3.4.1/3.4.2 Valuation Joint Board Meetings**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (a) | Agree timetable for Valuation Joint Board Meetings (which incorporates meeting to receive and approve the audited financial statements before their final certification and submission to the Accounts Commission) | 7,12,13 | Assessor/Board/ Clerk to DAB VJB | Provisionally 28 June 2019  |
| (b)(f) | Current Convenor prefers not to have Agenda meetings | 7,13 | No action |  |
| (h) | Confirm Constituent Councils’ Finance Officer representation on funding Short-Life Working Group. | 1-6,7,9,11,12,13 | Treasurer | April 2019 |
| (i) | Initiate meeting of funding Short-Life Working Group. | 1-6,7,9,11,12,13 | Treasurer/Assessor | Early 2019/20 |
| (j) | Consider options to address budget gap and make recommendations to Valuation Joint Board | 1-6,7,9,11,12,13 | Short-Life Working Group. | September Board meeting |
| (k) | Take cognisance of SLWG recommendations and Joint Board decisions in respect of budget gap in preparing 2020/21 et seq budget estimates | 1-6,7,9,11,12,13 | Treasurer/Assessor | September 2019 – February 2020 |

**3.4.3 Probity and Propriety**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (d) | Review Codes of Conduct for officers of the Valuation Joint Board. (Amended March 2019) | 7,12,14 | Assessor | Annually in March |

**3.4.8 Performance Management, Planning & Reporting**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (i) | Maintain an awareness of developments in relation to EC Performance regime for Canvass reform. Input into any consultation and plan for implementation | 3,6,7,9,10,11,12,13 | ERO/PAO | As required |
| (n) | Collate and submit statistics for SAA Annual Report | 7,9,10,11,12,14 | Assessor/ERO | April annually |

**3.4.9 Internal Working Groups**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (i) | Plan for and deliver NDR Reform including the 2022 Revaluation and appeal reform | 1,3,7,8,9,11,12,13 | NDR Reform Project Team | As required |

**3.5 ACCOUNTABILITY**

All as per the 2018-21 Service Plan.

**3.6 BEST VALUE**

All as per the 2018-21 Service Plan, but note above re the development of a new EC Performance Regime for the reformed canvass.

**3.7 EQUALITIES**

All as per the 2018-21 Service Plan, but note the following

**3.7.1 Encouraging Equal Opportunities and Ensuring Compliance and 3.7.3 Equalities Reporting**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (g) | Report/Publish progress against ‘stated ‘Outcomes’, mainstreaming of equalities actions and gender pay-gap information  | 8,11 | Depute | April 2019 and every 2 years |

**3.8 STAFFING AND PERSONNEL MATTERS**

**3.8.1 Development and Review of Personnel Policies**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (e) | Review Health and Safety Policy (last reviewed April 2018) | 7,8,10,11,14 | H & S Committees | Annually in April |

**3.8.3 Staffing Review**

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| --- | --- | --- | --- | --- |
| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (h) | Review staffing in light of changing external factors – specifically review staffing structures to balance the competing issues of the move to 3-yearly Revaluations and the need to address future Budget gap | 7,9,11,12,13 | Management Team  | Continually, but specifically after SLWG has reported. |
| (i) | Recruit to fill vacant post(s), specifically to fill vacant Admin Officer post in Campbeltown  | 1,2,4,5,8,13 | Management Team | Commence in April 2019 |
| (j) | Review staff complement in WDC’s HR system (add new and remove obsolete and unfunded posts) | 7,9,13 | Depute Assessor | Annually in March |

**3.8.5 Health & Safety Policy**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (a) | Review of Health and Safety Policy (last reviewed April 2018) | 7,8, 10,11,14 | Depute/H&S Committees | Annually in April |
| (f) | Complete and implement Stress Risk Assessments | 7,8,11,13,14 | H & S Committees | Only as appropriate/ necessary |

**3.9 FINANCE AND BUDGETING**

**3.9.2 Budget Preparation**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (a) | Review of probable out-turn along with operational, staffing, training and all other requirements will be extended to include a consideration of the recommendations of the Short-Life Working Group and the subsequent decisions of the Joint Board | 8,9,11,12,13 | Assessor/Depute/ PAO | Annually in November - January |

**3.9.3 Financial Procedures**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (c) | Review List of Approved Signatories to reflect change of PAO | 12 | Assessor | April 2019 and annually or at any change of signatories |
| (e) | Ensure that all instances of procurement comply with Procurement Procedures. **Specifically** that the preparations for the renewal of the **print & mail contract** commence in accordance with WDC procurement timetables (up to 9 months notice required) and agreed procedures | 9,10,11,12,13 | Assessor | From August 2019 |

**3.9.5 Training**

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| --- | --- | --- | --- | --- |
| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (b) | Identify any training requirements resulting from changes to procedures or personnel. **Specifically in relation to change in PAO.** | 7,8,9,11,12,13 | Assessor/ Depute | April 2019 and as required |
| (c) | Provide, arrange or facilitate training and instruction as identified above. | 7,8,11,12,13,14 | Assessor/ Depute | ASAP following April 2019 and as required |

**3.10 INFORMATION TECHNOLOGY**

**3.10.1 Business Systems Support**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (g) | Liaise with WDC regarding any specific projects where their input is required. Specifically for 19/20:-Upgrade operating systems from Windows 7 to Windows 10, andImplement new GIS software roll-out | 7,8,9,11,12,13 | Depute Assessor/ Systems Officers | As requiredVarious - TBC with WDCQuarter 1, 19/20 - TBC with WDC |

**3.10.2 ICT Asset Management**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (a)(b)(e)(g) | Complete review of network structure and performance prior to procuring servers and hardware in line with the 2019/20 capital budget approval. This to include a consideration of the contingency arrangements for the EMS. | 1-6,7,8,9,11,12,13 | Depute Assessor/ WDC ICT | Summer 2019 |
| (h) | Procure and install new flexi-time system including new server (if required) | 7,9,11,12,13 | Depute Assessor | During 2019/20 |

**3.10.3 PSN (Accreditation)**

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| --- | --- | --- | --- | --- |
| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (a) | Confirm any requirements of the replacement to the existing .PSN network service and implement as appropriate | 1-6,7,9 | Depute Assessor / as directed by WDC | Spring 2019 |

**3.10.4 Data Protection**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (d) | Revise DSAs with constituent Council Education Departments for provision of ‘attainer’ data. | 3,6,7,9,12 | ERO/PAO | Spring 2019 |

**3.10.6/3.10.7 Assessors Progress System**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (c) | Maintain and further develop system to meet agreed business requirements of internal working groups and Management Team. **Specifically** to develop the system to meet the requirements of **NDR Reform, Barclay recommendations** and appeal reform in accordance with specifications provided by NDR Reform Project Team | 1,2,4,5,7,8,9,11,13 | Depute, Systems Officer, Analyst/Programmer | OngoingAs agreed by Project Team |
| (d) | Maintain and further develop system outputs to enable delivery of agreed data to SAA Portal – particularly in respect of changes required for **NDR Reform, Barclay recommendations**, appeal reform and widened provision of **Summary Valuations** | 1.2.4.5.7,8,9,11,12, 13 | Depute, Systems Officers, Analyst/Programmer | As per Portal project plans |

**3.10.8 EROS II Electoral System**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (d) | (Where appropriate, test and) Implement upgraded versions of EROS, **specifically to implement data matching test**, canvass reform and other electoral registration reforms  | 3,6,8,9,10,11,13 | PAO/Systems Officers | Normally ASAP on receipt. Enhancements are likely in advance of data match tests July 2019 and Jan 2020  |
| (f) | Provide training for changes to system and processes – particularly in line with above (d) changes | 3,6,7,8,9,10,11,13 | PAO | As required |

**3.10.9 Satellite Systems**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (a) | A review of the use and functionality of Rental Questionnaire databases and the management of Revaluation Returns of Information will be part of the scope of the NDR Reform Project Team’s considerations | 1,4,7,8,9,11,13 | DAs to lead on any change required | During 2019 |

**3.10.10 Assessors Portal Project**

See 3.10.6/3.10.7 (d) above regarding changes likely to be necessary to deliver NDR Reform and Barclay requirements.

**3.11 FREEDOM OF INFORMATION**

All as per the 2018-21 Service Plan.

**3.12 KEY PARTNERSHIPS**

**3.12.1 Support Services West Dunbartonshire Council**

No change from Service Plan but note the following commitment:-

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (m) | Review Service Level Agreement in liaison with Treasurer and service delivery representatives | 7,9,10,11,13,14 | Assessor | By February 2020 |

**3.12.3 Scottish Assessors Association**

As per Service Plan but note that from 23 May 2019 the Assessor will no longer be a member of the SAA Executive Committee. 3.12.3(c) “Attend Executive Committee meetings” will therefore no longer apply.

**3.12.4 Scottish Assessors Association Partners**

In light of the comment at 3.12.3, above, reference to the Assessor attending Harmonisation meetings at 3.12.4(a) will no longer apply. Similarly, the Assessor will not personally attend meetings referred to at (c) Scottish Government Departments, (i) Ratepayers Forum and (j) Scottish Business Rating Group.

**3.12.7 Cabinet Office**

There is little substantive change to the Service Plan but the impending canvass reforms merely raise the need to ensure that liaison is maintained with CO and that all CO publications and project updates are read, understood and, where necessary, acted upon.

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (g) | Attend specific Canvass Reform Event in Birmingham  | 3,6,7,8,9,10,11,12,13 | PAO | September 2019 |

**3.12.9 External Suppliers**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (a)  | Procure new contract for printing and mailing of mail, including canvass stationery.  | 3,10,11,12,13 | Assessor/ PAO/ WDC Procurement | Start ~August 2019 to ensure contract awarded in time for May 2020 |
| (f) | Liaise with EROS II Customer Account Manager and Idox/Halarose staff to ensure delivery of change required for implementing canvass reform and other legislative changes.  | 3,6,7,8,9,10,11,13 | PAO/Admin Manager | Ongoing/ As Required |

**3.13 RECORDS MANAGEMENT**

As per Service Plan 2018-21.

**3.14 MISCELLANEOUS**

**3.14.1 Consultations**

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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (b) | Provide input/responses to any Cabinet Office consultation or request during development of Canvass Reform plans | 3,6,7,9,11,12,13 | ERO/PAO | As required |
| (c) | Provide feedback, through the SAA where appropriate, on the draft NDR Reform Bill and the related secondary legislation. | 4,7,11,12,13 | SAA/Assessor | April 2019 – March 2020 (and beyond for secondary legislation) |

**3.14.3 Data Protection**

|  |  |  |  |  |
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| **Item** | **Description** | **Objective(s)** | **Ownership** | **Date/Recurrence** |
| (f) | Review Information Asset Register and Business Classification & Retention of Documents document | 1-6,7,9,12,13 | Depute Assessor | Annually in April |