DUNBARTONSHIRE AND ARGYLL & BUTE VALUATION JOINT BOARD ANNUAL SERVICE CALENDAR 2013-14

YEAR			2013																									
	Week beginning		APRIL					MAY				JUNE				JULY					AUGUST				SEPTEMBER				
Ref	Activity		1	8	15	22	29	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	2	9	16	23	30
3.1	**The Valuation Roll**																												
3.1.1(l)	Issue Returns of Information		Not to proceed in 2013																										
3.1.1(p)	Complete year-end procedures		▓	▓																									
3.1.1(q)	Reconciliation of Valuation Roll with billing department records															▓													
3.1.1(r)	Produce and circulate revised Valuation Rolls							▓	▓	▓	▓																		
3.1.2-3.1.4	Respond to Lands Tribunal applications													▓	▓	▓													
3.1.3/4(l)	Collate and submit VAC statistics to AJTC		As requested																										
3.1.7 (f)	Ingather all-Scotland connections data for IGTs							▓	▓	▓	▓																		
3.2	**Council Tax List**																												
3.2.1(m)	Complete year-end procedures		▓	▓																									
3.2.1 (n)	Reconciliation of CT Valuation List with billing department records															▓													
3.2.1 (o)	Produce and circulate revised Council Tax Lists							▓	▓	▓	▓																		
3.3	**Electoral Registration**																												
3.3.1(a)	Review canvass procedures, inc telephone, internet & door-to-door							░	░	░	░	░	░	░	░	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓				
3.3.1(b)	Tenders for canvass printing (and mailing?)																							▓	▓				
3.3.1(c)	Award contract for printing (and mailing) contract																								▓				
3.3.1(d)(1)	Agree and implement recruitment/payroll processes for canvassers																												
3.3.1(d)	Recruit door-to door canvassers																												
3.3.2(d)(2)	Recruit temporary office staff as required																												
3.3.1(e)	Train door-to door canvassers																												
3.3.1(f)	Prepare files for canvass, including telephone and internet																												
3.3.1(g)	Issue Canvass Forms and Reminders incl Young Persons																												
3.3.1(h)	Check all initial non-returns to Council Tax and other data sources																												
3.3.1(i)	Complete door-to-door canvass																												
3.3.1(j,k,m,n)	Record, scan, reference, process changes and audit changes																												
3.3.1(l)	Receive 'no-change' returns electronically & process as above																												
3.3.1(o)	Provide Senior Managers with canvass progress reports																												
3.3.1(p)	Check of 2-year non-returns and 'deadwood'																												
3.3.1(q)	Produce and publish 'Full' and 'Edited' Registers																												
3.3.1(r)	Supply of Registers to appropriate bodies/public display																												
3.3.1(v)	Performance self-assessment and statistics to EC (to be confirmed)																												
3.3.2 (a)-(m)	Maintenance of the Electoral Register		In accordance with Rolling Registration timetable issued annually																										▓
3.3.2 (n)	Triennial enquiry to proxy voters																									▓			
3.3.2(r)	Review Participation Strategy																						▓	▓				
3.3.3	Elections		See individual Timetables for each election																										
3.3.4 (i) and (ii)	Issue AV PI requests and reminders																					▓	▓	▓	▓	▓			
3.3.4 (iii)	Issue AV PI confirmations and rejection letter																							▓	▓				
3.3.6(a)	Attend Cabinet Office Implementation Project meetings		As scheduled																										
3.3.6(b)	Take part in, and contribute to, Halarose Development Group		As scheduled																										
3.3.6 (c)	Development and implementation of ICT security		▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓															
3.3.6(d)	Installation and testing of new version of EROS II		▓	▓	▓		▓	▓	▓	▓	▓	▓	▓	▓	▓														
3.3.6(e)	Full end-to-end connectivity test to IER Digital Service																												
3.3.6(f)	Confirmation Dry run - separate schedule to be provided															▓	▓	▓	▓	▓	▓	▓							
3.3.6 (g)	Analysis of results of matching and detailed planning for go-live																									▓	▓	▓	▓
3.3.6(h)	Ensure additional CO funding is transferred to VJB		▓	▓	▓	▓	And as required																						
3.3.6(i)	Assessment of readiness to implement IER																												

DUNBARTONSHIRE AND ARGYLL & BUTE VALUATION JOINT BOARD ANNUAL SERVICE CALENDAR 2013-14

YEAR		2013													2014											
	Week beginning	OCTOBER				NOVEMBER				DECEMBER					JANUARY				FEBRUARY				MARCH			
Ref	Activity	7	14	21	28	4	11	18	25	2	9	16	23	30	6	13	20	27	3	10	17	24	3	10	17	24	31
3.1	**The Valuation Roll**																										
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3.2	**Council Tax List**																										
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3.3.1(b)	Tenders for canvass printing (and mailing?)																										
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3.3.1(d)(1)	Agree and implement recruitment/payroll processes for canvassers	█	█	█	█																						
3.3.1(d)	Recruit door-to door canvassers	█	█	█	█	█	█	█																			
3.3.2(d)(2)	Recruit temporary office staff as required	█	█	█	█	█	█	█																			
3.3.1(e)	Train door-to door canvassers														█	█	█										
3.3.1(f)	Prepare files for canvass, including telephone and internet						█																				
3.3.1(g)	Issue Canvass Forms and Reminders incl Young Persons							█	█				█	█	█	█											
3.3.1(h)	Check all initial non-returns to Council Tax and other data sources									█	█		▒	▒	█									█			
3.3.1(i)	Complete door-to-door canvass																			█	█	█	█				
3.3.1(j,k,m,n)	Record, scan, reference, process changes and audit changes							▒	▒	█	█		▒	▒	█	█	█	█	█	█	█						
3.3.1(l)	Receive 'no-change' returns electronically & process as above							▒	▒	█	█		▒	▒													
3.3.1(o)	Provide Senior Managers with canvass progress reports							▒	▒																		
3.3.1(p)	Check of 2-year non-returns and 'deadwood'																										
3.3.1(q)	Produce and publish 'Full' and 'Edited' Registers																								█		
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3.3.1(v)	Performance self-assessment and statistics to EC (to be confirmed)																				█						
3.3.2 (a)-(m)	Maintenance of the Electoral Register	█	█	█	█	█	█	█	█																		
3.3.2 (n)	Triennial enquiry to proxy voters														█	█	█	█	█	█	█	█			█	█	
3.3.2(r)	Review Participation Strategy																										
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3.3.6(f)	Confirmation Dry run - separate schedule to be provided																										
3.3.6 (g)	Analysis of results of matching and detailed planning for go-live	█	█	█	█	█	█	█	█	█	█	█			█	█	█	█	█	█	█	█					
3.3.6(h)	Ensure additional CO funding is transferred to VJB																										
3.3.6(i)	Assessment of readiness to implement IER						█																				

Ref	Task	Notes
3.4	**Corporate Governance**	
3.4.1(a)	Invite nominations for Board membership	Not required in 2013
3.4.1(a)(g)	Arrange Joint Board meetings	14th
3.4.1(b)(f)	Arrange Agenda meetings	
3.4.1(c)	Appoint Office Bearers and Sub Committee members	Not required in 2013
3.4.1 (d)(e)	Appoint Authors and prepare Reports	
3.4.1(h)	Finance Sub-Committee meeting to approve financial statements	
3.4.3(a)	Prepare 3-year Service Plan (2014-2017)	Not required for 2013
3.4.3(b)	Prepare Annual Calendar	
3.4.4(a)	Review Corporate Governance Statement	
3.4.5	Management Team Meetings	To be timetabled as appropriate
3.4.5(b)	Review Mission and Vision Statements	
3.4.5(c) -(g)	Various Management Team Reviews and actions	As per above timetable
3.4.6	Performance Management, Planning and Reporting	See Management Team Meeting Schedules and Reporting Framework
3.4.6(l)	Present KPI targets to Joint Board for approval	
3.4.6(m)	Performance submissions/publications to public in Annual Report	
3.4.7	Internal Working Groups	To be scheduled quarterly or as required
3.4.8(b)(1)	Develop and Implement Attendance Management Policy	
3.4.9(a)	Present Annual Accounts for external audit	
3.4.10(b)	Review Risk Register and Action Plan	
3.4.10(d)	Monitor progress against Action Plan	As per MTM Timetable
3.4.10(e)	Review Business Continuity/Disaster Recovery Plan	
3.4.10(f)	Liaise with WDC Legal advisors to review all insurances	
3.4.10 (g)	Review various Electoral Risk Registers/Action Plans	Various - annually
3.4.10(h)	Review ICT systems Risk Registers/Action Plans	
3.5	**Accountability**	
3.5.1 (c)	Pass Accruals Forms to Creditors section, WDC Finance	By 5th April
3.5.1(e)(f)	Revenue Accounts and Financial Statements to be finalised	
3.5.1(g)	Annual Report Produced	
3.5.1(h)	First Public Inspection	
3.5.1(i)	Final Audit Reports and Audit Certificates to be received	
3.5.1(j)	Finance Sub-Committee to approve the audited financial statements	
3.5.1(k)	Submission of Annual Report and Accounts to Audit Commission	
3.5.1(l)	Final Public Inspection (including advers in local newspapers)	By arrangement of Treasurer
3.5.4(c)	Report KPIs to Scottish Government (via SAA))	
3.5.4(d)	Produce and publish Public Performance Reports	
3.5.4(e)	Produce and return CIPFA Rating Review Budget figures to WDC	
3.5.4(f)	Produce and report (RVAPP) to Scottish Government	
3.5.4 (h)	Produce and return COSLA Joint Staffing Watch Survey	
3.6	**Best Value**	
3.6.3(b)	Submit PPRs to Joint Board	
3.6.3 (c)(d)	Publish PPRs in DAB website etc	Website
3.6.4(b)	Review Customer Consultation questionnaires and procedures	
3.6.4(i)	Complete a Staff Satisfaction Survey	
3.6.4(j)	Complete door-to-door Canvasser survey	
3.6.4(k)	Complete Evaluation of Canvasser survey	
3.6.5(b)	Customer Comment and Complaints reports for Management Team	
3.6.5(d)	Implement Revised Customer Complaints Policy (in line with SPSO Model)	
3.6.6.(c)	Report Customer Service performance to Management Team	
3.7	**Equal Opportunities**	
3.7.1(a)	Review Equalities Policies and Action Plans	
3.7.1(h)	Produce and publish statutory Equality Reports	
3.7.1(i)	Publish agreed 'Outcomes' and 'Mainstreaming Report'	
3.7.2(f)	Review Equality Targets/Goals (superseded by 'Outcomes'?)	
3.7.3(e)	Include summaries of Equalities Reports in Public Performance Reports	
3.7.3(f)	Include summaries of Equalities Reports in Annual Reports	
3.7.4(a)	Train/brief staff in relation to new Specific Duties	As required
3.7.4(c)	Provide Language Line training, including refresher training	
3.7.4(e)	Review Equal Opportunities training requirements at T&D reviews	

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3.4.1(a)	Invite nominations for Board membership
3.4.1(a)(g)	Arrange Joint Board meetings
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3.4.1(c)	Appoint Office Bearers and Sub Committee members
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3.4.1(h)	Finance Sub-Committee meeting to approve financial statements
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3.4.5	Management Team Meetings
3.4.5(b)	Review Mission and Vision Statements
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3.4.10(d)	Monitor progress against Action Plan
3.4.10(e)	Review Business Continuity/Disaster Recovery Plan
3.4.10(f)	Liaise with WDC Legal advisors to review all insurances
3.4.10 (g)	Review various Electoral Risk Registers/Action Plans
3.4.10(h)	Review ICT systems Risk Registers/Action Plans
3.5	**Accountability**
3.5.1 (c)	Pass Accruals Forms to Creditors section, WDC Finance
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3.7.3(f)	Include summaries of Equalities Reports in Annual Reports
3.7.4(a)	Train/brief staff in relation to new Specific Duties
3.7.4(c)	Provide Language Line training, including refresher training — Electoral staff
3.7.4(e)	Review Equal Opportunities training requirements at T&D reviews

Ref	Task	Notes
3.8	**Staffing & Personnel Matters**	
3.8.1 (d)	Review Health and Safety Policy	
3.8.2(a)	Training and Development review meetings	
3.8.2 (e)	Revise budget provision for training	
3.8.2(f)	Review Training and Development policy	
3.8.3(a)	Issue, collect and analyse staff questionnaires	
3.8.3(b)	Follow up questionnaire results/outcomes where appropriate	
3.8.3(c)	Report outcomes to Management Team and agree actions	
3.8.3(d)	Consider budgetary implications of agreed actions	
3.8.3(e)	Report outcomes and actions to staff	
3.8.5(c)(d)	Revise Risk Assessments and Action Plans	
3.9	**Finance & Budgeting**	
3.9.1(a)(b)	Review Financial Regulations and Standing Orders	
3.9.1.(c)	Review guidance to staff arising from above review	
3.9.2(a)	Review probable out-turn and future requirements	
3.9.2(b)	Prepare and agree provisional Revenue Budget Bid	
3.9.2(c)	Prepare and agree provisional Capital Budget Bid	
3.9.2(d)	Seek approval for proposed budgets from Valuation Joint Board	
3.9.2(e)	Prepare detailed report on make up of Budget	
3.9.2(f)	Review of mail costs including TNT outsourcing ooption	
3.9.3(a)	Review & Implement procedures for Ordering, Invoicing and Payment	
3.9.6	Financial monitoring (internal)	Monthly on receipt and in accordance with MTM schedule - See Reporting Framework
3.9.7	Annual Accounts	See 3.5.1 above - to be complete by end May
3.10.	**Information Technology**	
3.10.1(g)	Prepare and implement ICT SLA	Superseded by general SLA being drafted for June 2013
3.10.2(a)	Review PCs etc for replacement	
3.10.2(a)(1)	Investigate Citrix, Juniper and Broadband issues in Campbeltown	
3.10.2(b)	Investigate options & costs for procurement via WDC ICT	
3.10.2(c)	Consider operational requirements and prioritise purchase plan	
3.10.2(d)	Complete Capital Budget Bid and Submit to Joint Board	
3.10.3(a)	Review Data Protection Notification to Information Commissioner	
3.10.4(a)	Review functionality of Freedom of Information logging system	
3.10.4(b)	Prepare reports on requests, refusals etc to Management Team	
3.10.5(c)(i)	Implement new valuation 'Data Hub'	
3.10.6(a)(c)	Attend EROS II User Group meetings/IER Development meetings	
3.10.6(d)(i)	Implement and test revised version of ERO II	
3.10.7(d)	Review use and functionality of Time Management System	
3.10.7(f)	Provide Management Team with Customer Satisfaction Reports	
3.10.7(g)	Review use and functionality of Customer Satisfaction Database	
3.10.7(i)	Refresh Mail Logging system and report performance	
3.10.9(b)(i)	Refresh website to reflect changes to Model Publication Schemes	
3.10.10(b)(c)	Develop Intranet site to include policy documents, revised access levels	
3.11	**Freedom of Information**	
3.11.2(a)	Review Freedom of Information Policy & Publication Schemes	
3.11.3	Review information Audit & Staff Guidance (to follow above)	
3.12	**Key Partnerships**	
	Most are subject to variable timetables or external agreement	
3.12.1(h)	Budget planning meetings with Treasurer/Accountants	
3.12.1 (p)	Draft and Implement a Service Level Agreement for WDC Services	
3.12.2 (b)	Provide reconcilliation files and follow-up meetings where required	
3.12.3(a)	Attend SAA Plenary Meetings	
3.12.4(a)	Harmonisation Meetings	
3.12.5(a)	AEA AGM and Conference	
3.12.5(b)	Plenary Meetings of Scottish Branch of AEA	
3.12.7(m)	Receive nominations and decide winner of 'Extra Mile Award'	At MTMs after each quarter

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3.8.1 (d)	Review Health and Safety Policy
3.8.2(a)	Training and Development review meetings
3.8.2 (e)	Revise budget provision for training
3.8.2(f)	Review Training and Development policy
3.8.3(a)	Issue, collect and analyse staff questionnaires
3.8.3(b)	Follow up questionnaire results/outcomes where appropriate
3.8.3(c)	Report outcomes to Management Team and agree actions
3.8.3(d)	Consider budgetary implications of agreed actions
3.8.3(e)	Report outcomes and actions to staff
3.8.5(c)(d)	Revise Risk Assessments and Action Plans
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3.9.1(a)(b)	Review Financial Regulations and Standing Orders
3.9.1.(c)	Review guidance to staff arising from above review
3.9.2(a)	Review probable out-turn and future requirements
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3.9.3(a)	Review & Implement procedures for Ordering, Invoicing and Payment
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3.9.7	Annual Accounts
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3.10.2(a)	Review PCs etc for replacement
3.10.2(a)(1)	Investigate Citrix, Juniper and Broadband issues in Campbeltown
3.10.2(b)	Investigate options & costs for procurement via WDC ICT
3.10.2(c)	Consider operational requirements and prioritise purchase plan
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3.10.4(a)	Review functionality of Freedom of Information logging system
3.10.4(b)	Prepare reports on requests, refusals etc to Management Team
3.10.5(c)(i)	Implement new valuation 'Data Hub'
3.10.6(a)(c)	Attend EROS II User Group meetings/IER Development meetings
3.10.6(d)(i)	Implement and test revised version of ERO II
3.10.7(d)	Review use and functionality of Time Management System
3.10.7(f)	Provide Management Team with Customer Satisfaction Reports
3.10.7(g)	Review use and functionality of Customer Satisfaction Database
3.10.7(i)	Refresh Mail Logging system and report performance
3.10.9(b)(i)	Refresh website to reflect changes to Model Publication Schemes
3.10.10(b)(c)	Develop Intranet site to include policy documents, revised access levels
3.11	**Freedom of Information**
3.11.2(a)	Review Freedom of Information Policy & Publication Schemes
3.11.3	Review information Audit & Staff Guidance (to follow above)
3.12	**Key Partnerships**
	Most are subject to variable timetables or external agreement
3.12.1(h)	Budget planning meetings with Treasurer/Accountants
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3.12.5(a)	AEA AGM and Conference
3.12.5(b)	Plenary Meetings of Scottish Branch of AEA
3.12.7(m)	Receive nominations and decide winner of 'Extra Mile Award'