



Minutes of Meeting of Assessor's Management Team **Wednesday 8 February 2017 at 9.30 a.m.**

Action
Req'd
by:

PRESENT

Assessor, Head of Valuation Services, Principal Admin. Officer, Divisional Assessor (AN&A), Divisional Assessor (AS&E) and Personal Assistant & Office Manager (Minutes).

1.0 APOLOGIES

There were no apologies.

2.0 MINUTES OF PREVIOUS MEETING

The minutes of the meeting held on 2 November 2016 were approved subject to minor amendments.

3.0 MATTERS ARISING

3.1 General (Item 4.1)

The Head of Valuation Services reported that Prudential visited the office on 22 November 2016 to discuss AVC's etc. with members of staff.

3.2 Valuation – Non-Domestic (Item 5.1)

It was noted that there was no requirement for the Head of Valuation Services (HOVS) to meet with the Divisional Assessor (Ayr North), Principal Valuer (Ayr North) and Senior Valuer (Ayr North) as this was superseded by contact between the Divisional Assessor and [REDACTED]

3.3 Council Tax – Valuation Hearings Update (Item 5.2)

The Council Tax Court due to be held in February 2017 was cancelled.

The Divisional Assessor (Ayr North) responded to the invalid proposal letter received in September.

3.4 Performance – NDR VR Alterations (Item 5.4.1)

It was reported that the outstanding list of NDR survey cards was placed on SharePoint.

3.5 Performance – NDR – VAC – Proposed Appeal Disposal (Item 5.4.2)

██████████ was cancelled as his services were not required.

3.6 SharePoint (Item 6.4)

The Business Support and Development Officer (BS&DO) has reviewed the SharePoint Management document and retention within it.

4.0 PERSONNEL

4.1 General

Discussion took place on the External and Internal Committees and Groups document which will be updated by the Divisional Assessor's on SharePoint.

DA's

Technical staff have been informed of the group changes which will take place after the cut-off.

The Head of Valuation Services reported that a Valuer has now left AVJB with effect from 8 January 2017 and an exit interview was carried out.

The Modern Apprentice based within the Technical Support Unit (TSU) left AVJB on 20 January 2017.

It was reported that technical staff overtime recommenced on 16 January 2017.

It was further reported that a member of clerical staff will be retiring on 2 April 2017 and thanks were given to them for their service.

The Scottish Government Joint Staffing Watch return for the 4th quarter was made with an FTE of 43.94.

Two members of staff have now returned from long term sickness absence and one member of staff has now commenced long term sickness absence and has subsequently been referred to SAC Occupational Health.

4.2 Absence Statistics

It was noted that absence statistics remain good.

4.3 Training

██████████ will be attending the Introduction to Management Course on 15 February 2017.

It was reported that clerical staff will be allocated one hours training per week on COAST.

South Ayrshire Council have notified AVJB of Pre-Retirement Courses for any interested member of staff.

Health and Safety Training is also available via the NHS for interested members of staff.

The ██████████ who is undertaking the Rating Diploma has completed their first assignment and has done well.

4.4 Personal Development Reviews

It was agreed that dates would be arranged with staff for their next PDR's.

DA's/
Sups/
SAO

5.0 REPORTS

5.1 Valuation

Non Domestic

General Issues

The Management Team will make comments on the "Treatment of Properties under Reconstruction or in a Shell state" Guidance document and the Assessor will finalise on SharePoint prior to the next Management Team Meeting.

MT

The Divisional Assessor's will make comments on the "2017 Revaluation of Valuation of Land" Guidance document within SharePoint prior to the next Management Team Meeting.

DA's

It was agreed that Valuation Guidance Notes would be discussed at the Valuation Forum prior to being discussed at Management Team meetings.

Val
Forum

The Divisional Assessor's will make comments on the [REDACTED] Guidance prior to next Management Team Meeting.

DA's

In preparation for the year end cut off on 1 March 2017, it was agreed that any issues should be prioritised and major issues dealt with.

DA's

Due to the year-end procedures and the start of the new valuation roll, there are complex issues which currently cannot be supplied under the South Ayrshire Council Service Level Agreement and accordingly this knowledge will have to be outsourced for a short period.

VAC Hearings Update

It was noted that there has been no Valuation Appeal Committee Hearing since 8 December 2016.

It was agreed that the Head of Valuation Services would contact [REDACTED] [REDACTED] regarding the Court List.

HOVS

It was further agreed that the Divisional Assessor's would update the Valuation Appeal Committee control document within SharePoint.

DA's

A Non Domestic Rates court will take place in May 2017 and a Council Tax court in June 2017.

Discussion took place on the citation letter wording.

Revaluation 2017

Discussion took place on the proposed Scheme for Licenced Premises. The Divisional Assessor (Ayr South) reported that she will be attending the Licenced Premises Working Group in Stirling on 9 February 2017 and will seek clarification on the scheme at this meeting.

DA (Ayr South)

The Divisional Assessor's will for the 2017 Revaluation review standard letters.

DA's

It was reported that [REDACTED] had emailed Assessors regarding a uniform approach on the Valuation Notice and is awaiting SAA approval.

5.2 Council Tax

General Issues

The Property Assistants were allocated 10 PI8's each which required to be complete by 30 December 2016. The Divisional Assessor (Ayr North) will ascertain if the system can now be updated for Ayr North.

DA (Ayr North)

Ten invalid proposals will be allocated to the Property Assistants to process and the agreed timetable followed.

DA's

VAC Hearings Update

It was noted that [REDACTED] has cited Invalids for March and April 2017. The Divisional Assessor (Ayr South) will deal with these.

DA (Ayr South)

The Divisional Assessor (Ayr South) will allocate the Council Tax courts for June and September 2017 and will then run a list of all proposals. The outstanding proposals will be allocated to the November 2017 court. Once completed the Divisional Assessor's will allocate valid proposals to the appropriate team members.

DA (Ayr South)

DA's

The Divisional Assessor's will update the acknowledgement letter and the Technical Support Unit are to ensure that the correct letter is issued.

**DA's
TSU**

It was noted that [REDACTED] did not offer a retainer for this year but he has been booked for non-domestic committees. The Head of Valuation Services to clarify.

HOVS

Discussion took place on Disabled Persons Apportionment Relief at NHS properties.

5.3 Scottish Assessors' Association

The Assessor attended the Assessors' Committee Meeting on 19 January 2017. Bullet/Action Points have been placed on SharePoint.

It was reported that the Assessor and the Principal Administrative Officer attended the Electoral Registration Committee Meeting on 20 January 2017.

The Principal Administrative Officer will be attending the Portal Management Meeting on 9 February 2017.

The Divisional Assessor (Ayr South) will be attending the SAA Licensed Working Group Meeting on 9 February 2017.

5.4 Performance

5.4.1 NDR VR Alterations

It was noted that the 12 month target had slipped as staff continue to 'catch up' with NDR RR.

5.4.2 NDR VAC – Proposed Appeal Disposal

Nothing to report.

5.4.3 CT List – New Entries – KPI's

Council Tax KPI's are ahead of target. Thanks were given to the Council Tax Team.

5.4.4 CT VAC – Proposed Proposal/Appeal Disposal

Nothing to report.

5.4.5 CT – Point of Sale Band Alterations – Internal KPI's

Nothing to report.

5.4.6 Domestic Alterations

Nothing to report.

5.4.7 TSU Update – outstanding workload

It was noted that the workload within the TSU is up to date. Thanks were given to the TSU.

6.0 ICT

6.1 Electoral Management System

The May election will proceed using the current electoral system, and transition to the new electoral management system will commence after the election.

6.2 Core System Review

A Core System called [REDACTED] will be looked at after 1 April 2017. A group consisting of the Principal Administrative Officer, Supervisor (TSU), Technical Officer (Ayr North) and the Business Support & Development Officer will look at the [REDACTED] systems functionality.

- 6.3 AVJB Website
The Website Management Document will be reviewed within SharePoint by the MT. **MT**

It was noted that the AVJB website [REDACTED] contact will be [REDACTED] who will update the site when required.

- 6.4 SharePoint
The Business Support & Development Officer will commence implementing the retention schedule within SharePoint. **BS&DO**

7.0 ER Update

- 7.1 General
The Principal Administrative Officer reported that the Electoral Registers were run on the new wards. The changes were made to the Electoral Register due to the upcoming election. However, the Valuation Roll and Council Tax List are not currently showing the new ward changes.

After the election, files will be updated using the UPRN.

- 7.2 Elections
It was reported that there were no issues with the January by-election of Ward 4 East. It was noted that there was a 26.6% turnout.

Local Government Elections will take place in May 2017 and clerical staff have commenced work for this.

8.0 GOVERNANCE

- 8.1 Suggestions Box
Suggestion No. 399 – Turn Off Lights – This suggestion was agreed. If rooms are empty or vacated for any reasonable length of time then lights should be switched off.

Suggestion No. 340 – Secure copier printing – The current copiers have secure printing. The Business Support & Development Officer will produce a guidance note for staff on this process. **BS&DO**

Suggestion No. 341 – Household Enquiry Form – It was reported that this is a statutory form provided by the Electoral Commission and the section of the form referred to within the suggestion is not amendable. The Principal Administrative Officer will however give feedback on this issue to the Electoral Commission. **PAO**

Suggestion No. 342 – Self Catering Units – It was felt that it was worthwhile investigating this suggestion further and the suggestion has been referred to the OCD Group. **OCD Group**

Suggestion No. 343 – Agent v19 – Start-up sign in – This suggestion was referred to the Business Support & Development Officer to investigate further. **BS&DO**

- 8.2 Mail Logging
There were no outstanding mail log items.
- 8.3 Board Meetings/Reports
The next Board Meeting will take place on 14 March 2017. The Assessor will produce reports on Maximising Registration, 2017 Revaluation and Performance (going forward). The Principal Administrative Officer will produce a report on Electoral Registration and the Head of Valuation Services will produce a report on Staffing, Complaints and Equality Outcomes.
- 8.4 Budget
It was reported that a justification led bid was made to the Cabinet Office for approximately £11,000.
- The Treasurer to the Board will put forward a report on the 2017/18 budget at the next Board meeting.
- It was further reported that the current 2016/17 budget is on target for this financial year.
- 8.5 Audit – Internal/External
Internal Audit are requesting various pieces of information which have been supplied.
- It was noted that External Audit (Deloitte) were present at the last Board Meeting.
- 8.6 Records Management
- 8.6.1 Record Management Plans
The “AVJB File Removal Record” sheet was approved. This will be placed on SharePoint after the new wards have been implemented.
- The Head of Valuation Services will be attending training on 27 February 2017 on the Implementation and Review of Record Management Plans.
- 8.6.2 Retention Schedule
The Retention and Disposal Schedule will be reviewed for the next Management Team meeting. **HOVS**
- The Memorandum of Understanding will be finalised soon with the [REDACTED]. **HOVS**
- The Head of Valuation Services reported that he had completed a survey for a student who was producing a thesis on retention.
- 8.7 Corporate Plan
The Corporate Plan is on SharePoint for the Management Team to review. **MT**
- 8.8 Service Plan
The Service Plan is on SharePoint for the Management Team to review. The Service Plan will be presented to the Board after the May election. **MT**

- 8.9 Policies and Procedures – New/Review/Updates
The Management Team will update and review the Authorised Signatures document within SharePoint. **MT**
- The Credit Card Policy has been reviewed with no changes and updated on SharePoint.
- The Health and Safety Policy and Immigration & Illegal Working Guidance should be reviewed by the Management Team prior to the next Management Meeting. **MT**
- The Training and Development Policy will be referred to the Training Group for review.
- 8.10 Model Complaints Procedure – Update and Complaints Received
The Head of Valuation Services reported that two complaints have been received since last reported.
- It was noted that there has been no change to the Model Complaints Procedure.
- 8.11 Freedom of Information & Data Protection – Update and Requests
It was noted that no Data Protection enquiries have been received since last reported.
- Three FOI requests have been received since the last meeting.
- Assessors have agreed under Public Sector Regulations 2015 to make the public aware of documents that can be reused. [REDACTED] has produced a template which AVJB will utilise.
- 8.12 Equalities
The Shared Equality Outcomes have been agreed. The Head of Valuation Services will meet with the Equalities Group to discuss and report to the Assessor. **HOVS**
- 8.13 Health & Safety
The Head of Valuation Services reported that he met with the [REDACTED] on 7 February 2017 regarding premises entries. It was noted that information could be supplied which could be of benefit to the [REDACTED] and AVJB.
- It was noted that Health and Safety Group meetings have been arranged for the forthcoming year.
- A fire drill will take place shortly.
- The technical store cupboard floor tiles have been secured after a member of staff tripped.
- Staff have been emailed to request any PPE which they require.
- 8.14 Customer Questionnaire
The Customer Questionnaire Group has not met since last reported. Another issue of questionnaires will take place after the cut-off.

8.15 Elected Member Enquiries etc.

The Head of Valuation Services reported that 1 MP, 4 MSP and 8 Councillor enquiries have been received since last reported.

8.16 Property Matters

The loose plaster on the first floor stairwell of the front building has now been repaired.

A quote has been requested for replacing the boiler within the back building gents toilet due to consistent problems with the heating within the back stairwell and file rooms.

Asbestos specialists will visit the office to investigate the best way forward with regard to encapsulating or removing any asbestos on the pillars in the roof voids within the back building.

9.0 BUSINESS CONTINUITY

The Business Continuity Plan will be reviewed and copies issued to the Management Team once finalised.

HOVS

10.0 RISK REGISTER

The Risk Register will be reviewed and presented to the May Board Meeting. The Management Team should review their risks, and highlight any changes to the risks either up or down.

MT

11.0 A.O.C.B.

The Assessor reported on the following in connection with her chats with staff:

- Requirement for an Assessor Monthly Update - the Management Team felt that bullet points and minutes cover any issues/information.
- Continual ward changes - ward allocation should settle as staff split into the Non Domestic Rates or Council Tax groups and as we near completion of the 2017 Revaluation.
- Sold House Process – KPI – It was noted that the 3-4 month target was difficult to meet and is dependent on lawyers registering sales, AVJB receiving sales from Registers of Scotland and then the sale has to be attached to appropriate property and married up with domestic alteration card. There then follows a full investigation of the band which is reviewed if necessary.
- Survey Card Rationalisation – there should only be one survey card per property.
- Arc Mapping – Training will be rolled out to all staff on Arc Mapping.

**DA Ayr
(North)**

10.0 DATE OF NEXT MEETING

The next meeting will take place on 8 March 2017.