Draft 2017 Conference Guidelines

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Property NSW
Valuation Services
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Documentation and approvals

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Contents

FOUNDATION OFTHE PROCESS

These guidelines provide support and direction for staff during the conference process.
Some conferences will be the result of an objection to a land value, while others are associated with the compulsory acquisition process. However, there will be some conferences that are outside either process. The Joint Standing Committee recommended that we have a dispute resolution system across the valuation system.

1. Introduction to 2017 guidelines

The purpose of this document is to provide guidance on the conference process used in Valuation Services. The conference process has been in place since 2015 and a number of refinements have been made. This is based on feedback from customers and staff participating in the process.

You should read this document and *Our Approach to Valuation Review* in conjunction with each other. Our aim is to maximise our customers' experience, by affording them a fair hearing, providing transparency around valuation methods and to treat them with respect, dignity and fairness.

The conference process may be applied in a range of situations where a disagreement or misunderstanding needs to be resolved. In the case of Just Terms conferences, there may be more than one conference and conference type. However, it is likely that many cases may also be in the context of a land value or property information review where the customer will be a landholder.

Our main goals are:

- to help customers feel we have treated them with respect, dignity and fairness
- to help customers understand the valuation of their land
- to ensure that all the relevant information in respect of the compulsory acquisition of the property is appropriately considered
- to resolve customers' issues and concerns at the earliest possible opportunity, as efficiently as we can, using the simplest process
- to use customers' issues and concerns as an opportunity to obtain customer feedback and improve our processes and/or the quality of the Register of Land Values.

1.1. Definition of a Conference

The conference process was established following a report by the Joint Standing Committee on the Office of the Valuer General (the Committee). The Committee report defines a conference as 'an oral conversation between the landholder and the valuer in person, on the telephone or via some form of online oral communication system'.

A conference is a planned discussion with the most relevant staff and experts on the matter. It is an important opportunity to facilitate understanding between all the people through an open exchange of information and views.

The conference is focussed on a common purpose, including:

- making a decision
- solving a problem or query
- an exchange of information

- to discuss outstanding issues
- to clarify understanding
- a combination of these

They can be facilitated, but can also be informal.

1.2. What a conference is not

A conference is not an alternative to the Land and Environment Court or a place to negotiate land values or determinations of compensation. However, if the exchange of new information leads to a land value change or prevents a matter from going to Court, it will be considered successful. There will always be occasions where the customer will not be happy with the outcome. This does not mean the conference was not successful.

1.3. The principles of the process

The process was developed to support the six reform themes that the *Joint Standing Committee on the Office of the Valuer General (the Committee) defined*:

- **Procedural fairness:** we give customers full opportunity to present information, ask questions, have full information about the land valuation and review processes, and, see material that is adverse to their interests and respond to that material
- **Landholder engagement** we include customers in the process in ways that are, and that customers recognise are, meaningful and collaborative
- **Capability development** We have strong capacity for preventing and resolving issues, concerns and disputes
- **Cultural change** our approach to land valuation and review is not adversarial; it treats customers with dignity, respect and fairness
- **Decreased litigation** we will deal with customers' concerns and issues early, and offer robust alternatives to litigation for resolving any remaining issues.
- **Objectivity** our interactions with customers will help them to recognise the objectivity of our land valuation and review process.

The customer is at the centre of everything we do. It is crucial that Valuation Services (VS) staff understand their roles and responsibilities in our customer focused process.

The conference process plays an important part in the land acquisition process. This can be an emotional and stressful time for land owners. The aim of the conference process during land acquisition is to engage with the land owner, provide excellent customer service and provide appropriate responses to issues they raise. The acquiring authority is also afforded the same opportunity to exchange information and discuss aspects of the acquisition during the process.

The Valuation Review process provides an independent review of the valuation, based on information used to make the valuation. It is not intended to be an adversarial process. Engaging with the landholder, providing responses to the issues they raise and providing excellent customer service are critical. The review process is described in detail in the Objection Procedures Manual found here.

A preliminary report was trialled in the objection process, and was further refined through an extension of the pilot project in 2015. The advice to landholders about the outcome of their review is given prior to the objection being determined under s. 35C of the *Valuation of Land Act* 1916 (the Act). This formed part of the existing objection process rather than an additional avenue for review/appeal. An evaluation of this project was completed and the process will be implemented across the state for most objections.

Conferences were introduced across Valuation Services in 2015. Just Terms conferences have been introduced, and the process is detailed in these guidelines. Conferences are an important part of Valuation Services' processes, but are not limited to matters concerning objections. Conferences allow a customer to exchange information and discuss their concerns with an VS expert such as a valuer, or Valuation Information Services (VIS) Team Leader, the customer's VS Valuation Customer Services (VCS) coordinator and in some cases, a facilitator/qualified mediator.

Formal conferences are independently organised and can be facilitated by the Customer Relationship Manager (CRM).

Informal conferences can be conducted by the District, Senior Valuer or the Just Terms Coordinator.

In some cases, we may hold a conference that is facilitated by an independent third party who is an accredited mediator.

1.4. Expected outcomes

The main purpose of a conference is to have a productive and impartial discussion. The outcomes may be decision making, solving a problem or simply exchanging ideas and information.

The ideal outcome of a conference is resolution of the customer's issues or concerns. In reality some conflicts may never be resolved. The conference process will assist with moving complex correspondence and issues in a constructive direction and allow closure of the issue when appropriate.

2. What are the triggers for a conference?

The circumstances where a conference can be offered include:

- if the customer requests one
- the issue has not been resolved through the standard contact process
- you are unable to resolve the contact by yourself even after consultation with managers
- the customer is very dissatisfied or disputes the decision we have made
- to investigate or assist in determining an objection
- if further information is required on an issue to resolve it
- to help clarify issues or improve the customer's understanding of the decision, even if there is no possibility of changing the decision
- to assist in changing the customers perception of the valuation process or system
- to clarify the decision made in an objection determination, even though the land value cannot be amended once the determination has been issued.
- There are several conference opportunities throughout the Just Terms process.

For more information on what type of conference should be offered, please read the types of conferences section.

If you are unsure which path to take or if a conference is appropriate, you should discuss the matter with your manager and/or the Customer Relationship Manager. You can work through the matter with either one and there may be alternative solutions instead of, or as well as a conference.

2.1. Early intervention

A staged approach to conferences can lead to better customer service outcomes. In some circumstances it is preferable to hold a conference early in the objection or compensation process to address customer concerns rather than waiting until the matter has been finalised. This provides the opportunity prior to the report being issued to ensure that all of the issues are addressed for the customer.

There are a number of signals that could indicate when an early conference may be necessary, including:

- A customer makes repeated calls to the call centre over a short space of time. This pattern is usually escalated to the Manager Customer Service (MCS). A review of the nature of the contacts should be conducted by the MCS and Customer Relationship Manager and next steps agreed.
- A customer has had previous repeated contacts with VS in other years and it has been difficult to manage the issues.
- There has been a Ministerial on this property before and the customer expresses continued dissatisfaction with the process.

It may be possible to resolve the issue with a telephone conference in these situations; or the telephone conference may be the initial stage which moves to a face to face conference.

2.2. Conference triage process

Customer service is an important part of the conference process. Informal conferences have been introduced in 2017. There may be times when we need to determine whether an informal conference is going to produce the best result for both the customer and the Valuer General. The same may also be said of the formal conference process – there may be times when an informal conference will be the best option.

When a call or letter is received from a customer, the following assessment will be made:

- Is the call or letter fairly typical, is the customer asking for more information about the decision and is the VCS person comfortable with the nature of the query and/or the customer's demeanour?

  OR

- Is the call volatile or dealing with contentious issues; is there a history of volatility or contentious issues in the past, is there a previous pattern of escalation, is the VCS person uncomfortable with the customer's demeanour?

For the first category, the request for an informal conference will go straight to the District Valuer or Just Terms Coordinator

In the second category, the request will be referred to the Customer Relationship Manager to discuss with the District Valuer, Valuation Manager or Director Compensations. The discussion will aim to determine the best option for each situation.

2.3. Escalation points

The staged approach to conferences recognises that there are some conflicts which will not be resolved easily or at all. In these cases, they may need to be escalated to the next stage of the conference process.

This may include where a District Valuer, Senior Valuer or Just Terms Coordinator recognises that a customer is not satisfied with the preliminary report.

Another example is where the customer's queries are repeated and frequent, with little prospect of satisfying them. This may fall into the category of unreasonable complainant conduct (as defined by the NSW Ombudsman) and it is important to consult with senior management about the issue.

To escalate from one conference stage to the next, please discuss with your manager and the Customer Relationship Manager.

2.4. When is a conference held?

A conference may be held whenever a customer has raised concerns, if there are outstanding issues or where it is believed that an exchange of information may assist to resolve a query. Conferences are not limited to being part of the objection process and provide a staged approach to dealing with customer concerns. Refer to types of conferences

Although a conference is not a platform to negotiate land values or a determination of compensation, it may be an exchange of new information which results in a decision to amend the land value or prevents the matter going to Court unnecessarily.

2.5. Who can conduct a conference?

Informal conferences may be conducted by the District Valuer, Senior Valuer, Just Terms Coordinator or other relevant Valuation Operations staff member.

Formal conferences are usually facilitated by the Customer Relationship Manager but could also be facilitated by an external accredited mediator if required. Please refer to Section 8.1.1 Escalating to an independently facilitated conference.

Conferences may include other participants such as VS experts, Office of the Valuer General (OVG), and where necessary, contract valuers and/or other experts. The Customer Relationship Manager will determine appropriate formal conference participants in consultation with relevant managers and technical experts. For informal conferences, the participants will be determined by the person running the conference.

2.6. When a conference can be held

A conference can be held once an objection determination has been issued. We can amend a land value after an objection has been determined if there is an error of fact or process, or if there is significant new evidence. If none of these things apply, the customer will need to lodge an appeal in the Land and Environment Court to have the objection determination reconsidered. However, a conference can be held to clarify the decision for the customer. See Section 3.5 on post review conferences for more information.

2.7. When a conference cannot be held

A conference cannot be held if an appeal has been lodged with the Land and Environment Court of New South Wales. Once an appeal is lodged, the matter is considered to be 'before the Court'. Any further discussions would be part of the Land and Environment Court process which may or may not include mediation under s. 34 of the Land and Environment Court Act.

2.8. Roles and responsibilities

The roles and responsibilities of participants in a conference are outlined in Appendix 1.

3. Types of conference

3.1. Just Terms Conferences

Landholders who have been advised that their property is being acquired by a government agency will be part of the Just Terms Conference process.
There may be a number of types of conference associated with the compulsory acquisition process.

3.1.1. Information gathering conference

A contract valuer will be engaged to determine the compensation for the property being acquired.

The contract valuer is required to meet with the former owner or their representatives to capture their issues and concerns. This conference is a critical part of the Just Terms process.

During this conference, the valuer will try to determine all of the important information. The valuer will listen to the landholder's concerns and provide information and clarification about the process.

Each Just Terms matter has a coordinator who is responsible for all contact between the former owner and Valuation Services. This is a person who can be contacted by the owner or the acquiring authority, if they choose.

There is equal opportunity for both the former owner and the acquiring authority to provide and exchange information during the process. Decisions are based on input from both parties.

There may be many discussions, meetings and information exchanges during the determination of compensation process.

3.1.2. Preliminary valuation report conference

Prior to the final determination being issued, the landholder and acquiring authority will be supplied with a preliminary valuation report. Both parties are allowed 15 working days to review and provide feedback on the preliminary valuation report before the determination of compensation is finalised. The customer and the acquiring authority are provided with the coordinator's contact details and requested to respond in writing, preferably by email.

As a result of the preliminary valuation report, the customer may contact the coordinator and it may result in a conference.

During a conference, it is important to listen to the concerns raised and check that these have been taken into account where possible. If there is a decision that needs to be explained, this conference provides the opportunity to do so.

If there are changes required to the preliminary valuation report, the valuer will provide an estimated timeline to either the customer or the acquiring authority for the final report to issue.

3.1.3. Post determination conference

There may be circumstances where there is a need for post determination conferences and they will be available to landholders on request.

3.1.4. Facilitated conferences

There may be circumstances where an independent facilitator is required. These will be assessed if they arise.

3.2. Land value review conferences

In all cases, a conference request may be assessed using the conference triage process. Please refer to Section 2.2 for more information on the conference triage process.

3.2.1. Informal review conferences

Customers participate in a conference as part of their review at the inspection or investigation stage.

Review conferences are held to:

- assist in the investigation of an objection through discussion and the exchange of information
- inform an objection decision.

These conferences can be over the phone or face to face. The date and details of this conference is to be recorded with the conference type of review conference.

In the case of a land value review, the contractor or VS valuer contacts the customer to arrange a time to inspect the property and to discuss the customer's concerns. This conference can be over the phone or face to face.

In the case of a property information review, customers participate in a conference as part of their review when a Valuation Information Team staff member contacts the landholder to discuss the issues raised.

The date and details of these conferences are to be recorded in Valnet 2i with the contact resolution code of conference held.

3.2.2. Informal preliminary report conferences

In 2017 Preliminary reports will be issued to all landholders who have objected to their land value. A preliminary report will not be issued to a landholder who has lodged an objection to the property description or for strata objections.

For background, the program will operate in the following way:

We will send a preliminary report and advise the customer that they have 21 days to make further submissions or discuss other concerns. This additional time to make further submissions is part of the objection process and takes place before the objection is determined under s. 35C of the Act.

The preliminary report is sent with a covering letter outlining the decision of the valuer, a VCS coordinator contact and a time period to raise further queries regarding the review.

A contact from the objector could be just a simple question, dealt with quickly using the contact system and is not considered a conference. More complex enquiries will be referred to the District Valuer and recorded as a request for an informal conference.

Preliminary reports that are returned from the customer with concerns will initially be the subject of a review by the District Valuer. If the District Valuer deems it necessary, the report sent back to the contractor for amendment.

If the customer contacts us about their question, concern or issue within 28 days (this includes an additional 7 days to allow for postage) of the preliminary report being issued, the VCS coordinator:

- will discuss the customer's questions, concerns or issues with them
- use all the techniques in 'How we communicate and work with customers' in Our Approach to Valuation Review' (Page 8) listen, inform, acknowledge, invite input, clarify information and issues, enquire, support, discuss, explain and resolve where possible) to try to help resolve those questions, concerns or issues
- refer the questions to the relevant District Valuer to commence the preliminary report review process
- explain that the customer may participate in an informal conference with the District Valuer or senior valuer
- the informal conference would usually be conducted over the telephone, with the District Valuer or senior valuer making notes about the conference (stored in Valnet 2i as part of the conference contact)
- if necessary, a formal conference can be arranged if the customer's concerns cannot be addressed during the informal conference
- or take the matter to the Land and Environment Court, with relevant links or factsheets informing them about both options
- advise and consult with the Customer Relationship Manager and or District Valuer to determine the appropriate people to help address the concerns, questions or issues
- if suitable, arrange a conference between the customer and the nominated people.

If no contact was received within the 28 day period, VCS will close off the workflow and the objection will be deemed to have been determined.

3.2.3. Post review conferences

A post review conference can be used to clarify issues around the determination of an objection. In some circumstances, a conference may introduce information which identifies an error in the determination. Objections are determined as an administrative decision of government. There is an over-arching obligation to ensure procedural fairness.

An administrative decision making process on a review of a valuation is determined once the

Valuer General makes a decision to allow or disallow an objection under s. 35B. No other person or body can conduct a review of a determination except as provided by the Act.

However, this does not preclude the Valuer General revising a decision and correcting a determination if it is found that the decision was based on a substantive error of fact or process, or if significant new evidence is found.

There is some risk associated with objections that have not been part of the Valuation Services audit process. The preliminary report process will see objections audited where they meet the new audit parameters, for example the property is a benchmark or the recommended change in value differs by < or > 20%.

The Valuer General requires that Valuation Services checks that the objection has been determined correctly.

This may involve reading the objection report and checking the sales used on Valmap. This checking is not considered a 'review of the objection determination'.

If an error is discovered, the correction should take the form of an erratum. It is not intended to be a full redetermination of the objection decision or an opportunity for another full review. The process is limited to substantive errors of fact or process, or significant new evidence. Please refer to the policy here for full details.

3.3. General conferences

A customer may have queries or concerns about their property, a decision that we have made or an aspect of the valuation system that does not involve a land value review or property description review. Examples of this type of query include:

- Where a customer has requested a review and this request has been declined, for example because it is out of date and outside the Valuer General's Out of Date policy.
- Where the customer believes there is a problem with the valuation of their property and makes extensive requests for information. For example, a customer writes a lengthy letter requesting large volumes of information; it could be treated as a GIPA application or might be better resolved by having a conference with the customer.
- Where Valuation Services appears unable to resolve a customer's ongoing concerns about an issue. Repeated responses to requests for information don't appear to provide a satisfactory result for the customer or the customer has previously had poor service outcomes from the objection process.
- Where a customer has a complaint about a particular staff member or contractor. A conference may provide the opportunity to discover all the relevant information and provide an avenue to apologise and rectify the problem.

4. Choosing a conference method

4.1. Telephone conferences

The number of conferences may increase over time. To maximise efficiency and aim for the most cost effective outcomes, telephone conferences are to be considered as an option wherever possible.

There are both positives and negatives to telephone conferences.

Here are some of the positives:

- Some people find not being faced with the physical presence of another gives them confidence.
- Someone who has good telephone relationships can feel more at home on the phone.
- For very busy people, a telephone conference may be preferable.

There may be occasions when a telephone conference is not the most suitable option. These include:

- where there is evidence in the contact system or correspondence of unresolved complaints;
- if the situation is volatile or has been volatile; it can be challenging to work with emotional or volatile issues on the phone;
- if the conference is likely to take a long time to conduct;
- if the person's language skills or level of hearing are not good;
- If you believe that visual aids are necessary to help the customer understand something. This might include component maps, aerial photography or other charts/diagrams.

Wherever possible, if the above matters are accounted for, a telephone conference should be considered as an option.

There are a few factors which you may need to make adjustments for in a telephone conference:

- Poor telephone equipment can contribute to delays and interference.
- It can be more difficult to establish rapport and trust with the customer.
- The facilitator and other parties can't observe and react to the non-verbal communications of participants.
- Visual aids, such as maps, can't be used to focus attention on diagrams, facts and figures. These often help to separate the people from the problem.
- There is little scope for parties to exchange initial friendly information and ice breakers, such as 'where did you park?'

4.2. Face to face conferences

A face to face conference will often be facilitated by the Customer Relationship Manager. These conferences will be arranged when a conference by another method is not suitable. In many cases the best option is a face to face conference. There are a number of reasons to choose a face to face conference, including:

- The customer has specifically requested a face to face meeting.
- There are language or hearing difficulties which may make other methods difficult.
- Non-verbal communication, such as nodding, eye contact and posture can help establish rapport and trust.
- The situation is sensitive or there is a history of earlier conflict.
- There is a need for visual aids such as maps, diagrams etc that are essential to the discussion.

4.3. Use of email

An informal conference may be conducted by email or mail if the customer prefers, if the customer is outside NSW, in a remote location within the state or is otherwise unable to participate in a real-time conversation. The decision to hold a conference by email or mail will be made in consultation with your manager or the Customer Relationship Manager.

Email can be an efficient communication method and is of benefit for setting up conferences. Because of the limitations that may make email conferences difficult, using email for a conference should be carefully considered.

There are some guidelines for email conferences that you may want to consider:

- Quality is important. The fact-checking and quality assurance should be as rigorous as any other written communication.
- It is easy to make the communication too informal.
- Use plain English; even technical explanations can be made clear.
- Emails are quick. This can be a disadvantage. You respond to one set of questions and immediately receive a new list.
- You will need to attach every email to a contact. If there are a lot of emails, consider using a TRIM file and insert the TRIM reference into the contact.
- It will help if you copy the customer service coordinator in to the email.

4.4. Deciding which type of conference method is best

There are a number of circumstances where a face to face conference is not the best option and an alternative conference method should be considered. This includes where the landholder is geographically distant, where there is great urgency to resolve a situation or if there are health and safety concerns about a face to face meeting. Also, some customers may prefer not to meet face to face for a number of reasons.

THE CONFERENCE PROCESS

This section of the guidelines describes the steps to be taken, the records to be kept and provides some tips and tools for conference participants. These are drawn from the experiences of valuers and others in conferences since the process began.

5. Beginning a conference case

A conference may be initiated from a variety of sources. These include:

- the VCS coordinator
- District Valuer
- Valuation Manager
- VIS Team Leader
- Executive Director Valuation Services
- Directors
- Valuation Services operational managers
- Office of the Valuer General
- Customer Relationship Manager
- A customer
- A local Member of Parliament

Each time a conference is initiated, the request will be assessed through the conference triage process. Please see Section 2.2 for more information.

The person beginning the conference will ask the VCS coordinator or Customer Relationship Manager to create a new conference in the Conference Manager section of Valnet 2i and assign it to the Customer Relationship Manager or District Valuer. This will be linked to TRIM where details and documents from each conference will be stored. Just Terms conferences will be recorded in Just Terms Manager.

We should try to discover what the customer's concerns are by using active listening techniques, paraphrasing and asking clarification questions. This will prevent us placing the responsibility onto the customer to put their concerns in writing.

However, there may be circumstances where it is helpful to ask the customer to put their concerns in writing. For example where:

- the customer is challenging and/or the matter is confusing and difficult to understand;
- there are multiple, detailed issues.

6. Preparation for a conference

There is a section of this document that deals with preparing for a Just Terms conference. Please refer to section 7. Preparing for a Just Terms conference.

6.1. Informal preliminary report conference

When a customer makes contact with VCS about their preliminary report, they will make a note of the concerns and refer the contact to the District Valuer.

6.1.1. Review the preliminary report

Preliminary reports that are returned from the customer with concerns will initially be the subject of a review by the District Valuer. If the District Valuer deems it necessary, the report will be audited and sent back to the contractor for amendment.

6.1.2. Contact the customer

The District Valuer will contact the customer to discuss the concerns and advise them of the next steps. If the preliminary report is to be returned to the contractor, the District Valuer will let the customer know the approximate time frame and make a time to call them when the report is re-issued.

During this conversation the District Valuer will:

- ask questions which will help to establish the customer's main concerns;
- ask questions which may indicate the customer's expectations from the conference;
- establish with the customer that there is no guarantee of a change in land value;
- provide a timeframe for the response and the informal conference;

6.2. Other informal conferences

Where the informal conference is part of a property inspection, the contractor or VS staff member will contact the customer to arrange an inspection and to discuss their concerns.

In the case of a property information review, customers participate in a conference as part of their review when a Valuation Information Team staff member contacts the landholder to discuss the issues raised.

The date and details of these conferences are to be recorded in Valnet 2i with the conference type of informal conference.

6.3. Formal conference

6.3.1. Notification of a new conference

The Customer Relationship Manager receives notification of a conference workflow via automated email notification and access the workflow through Valnet2i. The Customer Relationship Manager is to review the details of the workflow, including attachments and contact the customer to acknowledge the request for a conference. This is an opportunity to confirm the customer's concerns and seek dates and times that would be most suitable for a conference.

6.3.2. Reporting on potential conferences

If necessary, the Manager Customer Service is to notify the Customer Relationship Manager of a situation where an emerging issue may warrant a conference. This is done initially by a conversation about the issues and followed up by a contact.

6.3.3. Investigation of the issues

The Customer Relationship Manager is to investigate the concerns of the customer which may include discussions with the District Valuer, Valuation Information Services Team Leader, Rating and Taxing Contractor or panel contractor who completed the valuation review. Any further information gathered is to be recorded on the TRIM link in Conference Manager.

6.3.4. Pre-conference intake process

The Customer Relationship Manager is to contact the customer about the conference and discuss the conference process.
This conversation gives the opportunity to prepare customers for the conference process and manage their expectations. A conference will work best when the participants are well prepared and know what to expect.

During the pre-conference intake, the Customer Relationship Manager will:

- ask questions which will help to establish the customer's main concerns;
- ask questions which may indicate the customer's expectations from the conference;
- describe the process and the roles of each person;
- ask the customer to think about an opening statement that summarises their main concerns, ideally about two minutes;
- establish with the customer that there is no guarantee of a change in land value;
- confirm that they understand this;
- follow up the conversation with an email that provides information about the venue, the time, the attendees and the expected outcomes;
- the customer will also be advised that they can bring someone if they would like to.

A sample email is shown here, but please modify as appropriate:
Thank you for your time on the phone yesterday and just now.

This email is to confirm our meeting on [Insert day and time] at [INSERT VENUE]. [INSERT NAME], the District Valuer for your area will also attend. Please feel free to bring someone along if you would like to.

At the conference, we aim to fully explore and discuss the issues that concern you. My role is to facilitate an open exchange of information and views.

Yesterday, you raised a few matters including the views enjoyed by the properties used in the objection report and how the added value of improvements is calculated.

At our meeting we will set an agenda that will ensure we adequately cover the issues you have raised.

As I explained yesterday, the purpose of our meeting is to make sure that all of the relevant information is considered. There is no guarantee that your land value will change as a result of the conference, but it does provide an opportunity to check the facts and, if there is an error, to take steps to rectify it.

I look forward to seeing you on [INSERT DAY]. If you need to contact me in the meantime, my contact details are shown below.

[YOUR EMAIL SIGNATURE, INCLUDING EMAIL AND MOBILE NUMBER]

6.3.5. Timeframes

At this stage, if the timeframes are unlikely to be met, the Customer Relationship Manager is to contact the VCS coordinator to establish new timeframes for the research and conference. These are to be confirmed after discussions with the customer and updates are to be made to the Conference Manager workflow by the VCS coordinator.

If a conference is to be held after the objection determination to help the customer understand it, we need to make sure the customer is aware of their right to appeal to the Court and the timeframe for doing so. Care must be taken to ensure that conference scheduling doesn't impact on this.

6.3.6. Conference scheduling during busy periods

During the annual values program, it may be necessary to allow extra time before the conference to account for the workload of the valuer. In an ideal situation, it is desirable to limit the number of conferences assigned to an individual valuer to one per week. It's important to explain the reasons behind this to the customer. However, if it is not possible to meet this ideal situation, the situation will be referred to the relevant Valuation Manager for advice.

6.3.7. Pre conference meeting with VS staff

The Customer Relationship Manager is to arrange a pre-conference meeting with the relevant VS expert to discuss the issues raised by the customer. This is to ensure that the VS staff member understands the concerns, has completed a thorough investigation and to allow the consideration of what might be included in the conference agenda. This is also to ensure that the Customer Relationship Manager is aware of what the expert advice and opinion of the VS staff member is in these circumstances. The steps for the conference are to be discussed as well as potential issues, for example previous behavioural issues or language difficulties. The conference agenda is set during the initial part of the conference. This is to ensure that the areas the customer considers most important are appropriately covered.

6.3.8. Conference preparation checklist

Preparation for a conference is important, but over-preparation is not necessary and can overcomplicate things. A checklist that defines standard set of material for a conference will be used. This may include any or all of the following:

- Aerial photo of the subject property
- Map showing sales used by objection contractor or researched by VS valuer
- Aerial photo of the component
- Relevant VG fact sheets
- Relevant copies of policies – eg heritage, contamination, out of date objections

6.3.9. Proposed conference dates

If the proposed dates are unsuitable, the Customer Relationship Manager is to renegotiate a new date and time to conduct the conference with the customer, in consultation with the District Valuer if appropriate. The Customer Relationship Manager is to also identify the preferred method for the conference, if there are any special needs, for example access, language barriers, support person requirements and if a support person will be present. The method of conducting the conference is to take into account the location of the customer and other conference participants. If necessary, the conference can be undertaken using Skype® or similar electronic real time facility.

Agreed timeframes including the date for the conference are recorded within the workflows tab of Valnet2 with the Property Details screen, Objection Manager and Contact System so that all Valuation Services staff can be made aware of an outstanding conference.

7. Preparation for a Just Terms conference

7.1. Preliminary valuation report conference

Customers are requested to supply written feedback to the preliminary report to Just_Terms@property.nsw.gov.au and contact the coordinator with any issues or concerns. When a customer makes contact about their preliminary valuation report, the coordinator will make a note of the concerns and consider the information. It is expected that contract valuers will be an integral part of this preliminary valuation report process. Their knowledge of the individual matter will be an important contribution to our credibility at any conference or discussion.

7.1.1. Review the preliminary valuation report

Preliminary valuation reports that are returned from the customer with concerns will be reviewed by the coordinator who also may engage with the external expert(s) as necessary, for example town planning or valuation

7.1.2. Contact the customer

The coordinator or contractor may contact the customer to discuss any new concerns raised or provide further clarity to matters previously discussed. The coordinator will advise them of the next steps. If there is further discussion with the acquiring authority or the contractor, the coordinator will need to let the customer know the approximate time frame and make a time to call them when there is further progress.

During this conversation the coordinator may:

- ask questions which will help to clarify the customer's main concerns if required;
- provide a response to issues already made in writing and advise the customer of the next steps. It may be that this response is an 'agree to disagree' discussion and that there are no further discussions before the report is issued.
- If there are issues that have not been considered before, and it is necessary to meet to discuss these, then there will be a conference.

7.1.3. Pre-conference intake process

The coordinator is to contact the customer or acquiring authority about the proposed conference and discuss the process involved.

During the pre-conference intake, the coordinator will:

- ask questions which will help to clarify the customer's or acquiring authority's main concerns;
- ask questions which may indicate the customer's or acquiring authority's expectations from the conference;
- establish with the customer or acquiring authority that there is no guarantee of a change in the compensation determination and confirm an understanding of this;
- follow up the conversation with an email that provides information about the venue, the time and the attendees;
- advise the customer that they can bring someone if they would like to. It is assumed that an acquiring authority would bring an expert to any conference.

7.1.4. Timeframes

At any stage, if the timeframes are unlikely to be met, the coordinator is to contact the customer or acquiring authority to establish new timeframes for the research and conference.

The Valuer General has made it clear that sufficient time to discuss concerns and clarify or exchange information must be provided to all parties.

If a conference is to be held after the determination of compensation has been issued to help the customer understand it, we need to make sure the customer is aware of their right to appeal to the Court and the timeframe for doing so. Care must be taken to ensure that conference scheduling doesn't impact on this.

7.1.5. Pre conference meeting with VS representatives

The coordinator is to arrange a pre-conference meeting with the relevant VS representatives to discuss the issues raised by the customer or acquiring authority. This is to ensure that VS participants are familiar with all issues and a consistent message is delivered. The conference agenda is set at this meeting to ensure that the areas the customer or acquiring authority considers most important are appropriately covered.

7.1.6. Conference preparation checklist

Preparation for a conference is important, but over-preparation is not necessary and can overcomplicate things. A checklist that defines a standard set of material for a just terms conference may be used and could include -

- relevant VS expert reports
- relevant owner or acquiring authority information or submissions
- supporting legal precedents
- pre prepared response and associated evidence to issues raised prior to conference
- copy of relevant legislation
- relevant VG fact sheets
- relevant copies of policies or other supporting information.

7.1.7. Proposed conference dates

If the proposed dates are unsuitable, the coordinator is to renegotiate a new date and time to conduct the conference with the customer or acquiring authority.

8. Running a conference – informal and formal

This section applies to all conferences, regardless of whether they are for the land acquisition process, land value reviews or other issues. An informal conference will mostly follow the same steps but is likely to be shorter in length. During the conference itself, it is important to work together. This means looking for cues, following the process, listening carefully to the customer and being open to new information.

The person running the conference (including an external facilitator - see Section 4.4 on facilitated conferences) follows this conference process:

8.1.1. Open the conference

- 'Open' the conference, welcoming participants
- introduce all the participants, outlining their roles and asking them to give a short opening statement
- remind people of the conference purpose (to facilitate understanding and negotiation between all the parties through an open exchange of information and views)
- outline the conference process (described here)
- establish a 'safe' environment that encourages respectful and open communication by all participants (for example, discuss the expectations of fair and appropriate behaviour by all parties)
- discuss 'housekeeping' such as phones on silent, taking breaks when useful, etc
- explain that any agreement made in a conference does not remove the customer's right to pursue legal proceedings.

8.1.2. Hear and discuss the customer's concerns and issues

- give the customer the opportunity to explain their concerns and issues
- the Customer Relationship Manager or valuer is to help explore and clarify the customer's concerns and issues
- agree with the customer about what is important to the customer and develop the agenda for discussion
- discuss and explore those concerns and issues, one at a time, allowing the customer to discuss their concerns and then provide any information in response.

8.1.3. Agenda setting

Setting the agenda during the early stages of the conference allows the customer to agree to the matters to be discussed and to add any extra topics. This also provides the opportunity to manage the conversation and timing of the conference. Using the meeting to tease out the items to be discussed and defining them in the conference has a number of advantages.

These are:

- The topics can be written on a whiteboard or on paper, blue tacked to the wall.
- The language should be neutral and mutual – this separates the people from the problem to be solved.

- The topics can be phrased in a way that doesn't seek to blame or attribute responsibility. This is particularly important where the issue being discussed is a complaint.
- The customer can be offered the choice of which topic to start on, allowing them to choose what is most important to them. However, it can depend on the type of issues to be discussed. It is relatively easy to re-arrange the order if specific issues need to be discussed in a particular order.

8.1.4. Share and discuss VS's information and reasons for the valuation

- explain and clarify the recommendation or decision and how it was reached
- provide any documents to the customer if it will help them to understand this
- provide and clarify all relevant information.

Each point of issue is to be well discussed to ensure the customer understands either the VS response or to agree to further investigate their concerns.

8.1.5. Try to reach understanding and agreement if possible

- try to find mutually agreeable options to resolve the concerns and issues effectively
- where possible, reach agreement
- if necessary, acknowledge those concerns and issues which have not been resolved
- if further information or investigation is required agree on the next steps and set a time for a follow-up conference.

Where a legitimate reason emerges for some action that the person is not authorised to perform at the conference (such as substantially changing a valuation without the required delegation), they are to commit to seeking appropriate approval. If possible, the approval to do so should be obtained prior to the conclusion of the conference.

8.1.6. Record keeping

The Customer Relationship Manager or valuer is to document and report important aspects of the conference, such as the issues discussed and outcomes reached. No audio/video recordings are to be made unless both parties agree. If the customer requests to record the conference, agreement must be made (and recorded) about the purpose of the recording and its use.

8.1.7. Conclude the conference

- Once all the issues in the agenda have been discussed, confirm with the customer if there are any further issues for discussion or if they require clarification of any answers provided.
- Once completed, outline any further matters requiring investigation and a timeframe for completion. If no further investigation is required, tell the customer that a letter outlining the conference and its outcomes will be completed in 5 business days and sent to the customer.
- Thank all participants for their involvement and close the conference.

- If an informal conference has not resolved the issues for the customer, you may need to offer a formal conference to the customer. Please refer Section 2.3 Escalation points.

8.2. General etiquette

Allow sufficient time to ensure all parties have uninterrupted time to put forward the reasoning for their key issues and to give their responses.

If the conference begins to show any signs of agitation or aggression, consider suspending the conference and reminding people about what is acceptable behaviour. If required, a short break may be a good opportunity to manage this behaviour.

8.3. Frequently used explanations

There are many occasions when a similar issue or query needs to be explained to different customers at different conferences. Technical language can make a concept difficult for lay people to understand. A set of explanations that are used regularly will be developed and updated as required. This will prompt valuers to use plain English explanations in the right situation in a conference.

8.4. Timeframes for finalising a conference

For land value reviews, the Key Performance Indicators (KPIs) of the conference process are the same as the Customer Service KPIs of the Service Level Agreement for 2016/17 Where timeframes are not going to be met due to complexity or difficulty obtaining information, the Customer Relationship Manager is to keep the Manager Customers and Stakeholders informed of progress.

- 90% of telephone calls are to be responded to within three business days and finalised within 10 business days
- 80% of written enquiries are to be responded to within 10 business days.

From the receipt of correspondence from a customer requesting a conference to a conference being held should be within 15 business days. At the conclusion of the conference, the notes taken by the Customer Relationship Manager in response to the agenda items and/or agreed outstanding enquiries are to be provided to the VCS coordinator within two business days to allow the creation of a letter to the customer. The VCS coordinator may use notes from the conference to assist in this process.

A draft copy of the letter is to be peer reviewed by the relevant VS expert and Customer Relationship Manager before finalisation within five business days.

9. Externally facilitated conferences

Either party may propose to have an external independently facilitated conference, but both parties must agree.

The external facilitator closely follows the conference process described below.

9.1.1. Escalating to an externally facilitated conference

Where a conference has resulted in a poor outcome or the circumstances require a facilitator, the matter is to be escalated by the Customer Relationship Manager or Director Just Terms to the Executive Director Valuation Services for advice as to whether a facilitated conference should be considered. Examples of when escalation to a facilitated conference may be required are:

- the customer still has issues or concerns after the conference described above
- the conference breaks down
- the customer or staff member feels intimidated or unsafe
- the customer is experiencing serious anxiety, tension or distress that is a serious obstruction to resolving their concerns and issues
- the customer is using aggressive, manipulative or otherwise difficult behaviour, or
- there are particularly complex circumstances, requiring the valuer to focus on the valuation methodology and information, and so requiring a separate skilled person to guide the process of the discussion.

9.1.2. When an externally facilitated conference should be the first choice

In other cases it may be appropriate to progress directly to an independently facilitated conference. This may occur where the customer or VS proposes an independently facilitated conference, but must always be approved by the Executive Director Valuation Services. Situations where this may apply are:

- the customer or staff feels intimidated or unsafe
- the customer is experiencing serious anxiety, tension or distress that is a serious obstruction to resolving their concerns and issues
- if either party is using aggressive, manipulative or otherwise difficult behaviour

9.1.3. The roles at the externally facilitated conference

The Customer Relationship Manager or Director Compensation:

- unless the customer doesn't want them there, attends the independently facilitated conference to support the customer and ensure good customer experience
- explains to the customer the purpose of the independently facilitated conference: to facilitate understanding between all the people involved through an open exchange of information and views
- describes the independently facilitated conference process to the customer, provides a factsheet, and checks the customer's understanding and level of comfort with the Facilitated Conference Process

- negotiates and confirms with the customer, the people who will be participating in the facilitated conference:
    - The customer may include one or a small number of support people in the conference. This may be a partner, a family member or friend, an interpreter or other professional such as a lawyer or a valuer engaged by the customer
    - We send the internal VS person who performed or evaluated the review and perhaps the VCS coordinator, specialists and/or staff as appropriate to the situation. We do not typically send an external valuer.
    - We seek an appropriate balance in the number of people at the conference, and try to ensure the customer does not feel intimidated by the number of people we send.
    - documents and reports important aspects of the facilitated conference, such as the issues discussed and outcomes reached. No audio/video recordings are made unless both parties agree. If the customer requests to record the conference, agreement must be made (and recorded) about the purpose of the recording and its use.

In these circumstances we will select a suitable independent mediator who:

- is accredited under the National Mediator Accreditation System
- has the required attitudes and skills
- has been trained and accredited in our facilitated conference process above.

9.2. Finalising the conference

The VCS coordinator, Just Terms administration officer or relevant person confirms in writing the outcome of the conference, addressing in plain English all the customer's issues and concerns that were discussed.

If the facilitated conference is a Just Terms conference, the final outcome will be discussed with the Director Compensation and, subject to approval, an amended determination will be issued.

We seek customer feedback to help improve the approach and to measure our performance against our Success Indicators (Page 7 in Our Approach to Valuation Review) .

10.Land and Environment Court

Any agreement made in a conference or facilitated conference does not remove the customer's right to pursue legal proceedings.

If the conference relates to a land value review, property details review or determination of compensation, we explain to customers that they are entitled to pursue legal proceedings through the Land and Environment Court. This aims to achieve finality to the resolution of any remaining concerns and issues the customer may have.

We help the customer understand the process of pursuing legal proceedings, including the benefits of the court-mediated conference, facilitated by an officer of the court. This helps define the remaining points of difference between the parties and attempts to resolve as many as possible. At the conclusion of the court-directed conference, if not all points are resolved, the parties may ask the officer of the court to adjudicate the matter.

While the decisions and agreements from a conference or facilitated conference are not binding on the customer, we aim to reduce their perceived need to litigate at the Land and Environment Court, and narrow the range of concerns and issues which would need to be considered by the court.

11. Time recording and reporting

All conference activities are to be recorded against the appropriate time allocation code in SAP. This will allow evaluation of the time taken for conferences and whether there are any cost implications.

There are general conference activity codes for each Valuation Services cost centre. These are to be used for conference-related activities that don’t relate to a specific property or local government area. Times recorded under these codes are general administration, reporting or similar activities.

Times for specific conferences are to be recorded by cost centre against a specific conference code for the relevant cost centre. This provides effective conference reporting across Valuation Services.

Annex A. Tips and tools – lessons learned by our valuers

It doesn't matter what type of conference you are considering, there are some techniques you could use that may make it easier and more successful. Here are some ideas which may help you when planning for a conference. These are collated from valuers who have been involved in the conference process.

Even an informal telephone conference will benefit from planning.

A.1 Preparation

A balance between over-preparing and under-preparing is important. Ideally, you will have a little background on what the customer's concerns are, but you may not.

- It is helpful if there is an initial conversation and information gathering. This could be done by the coordinator, but you may find it beneficial to do this yourself.
- Prepare for a structured conversation. You may find it helpful to have a conversation outline in front of you.
- Explain your role clearly and the aim of making sure there are no errors, looking for any new information that we may not have considered and to clarify information.
- Ask the customer, 'what would you like to get from this conversation?'
- Ask open questions
- Prepare to listen carefully – sometimes the real issue is hidden behind other information
- Consider ways of dealing with predictable problems – use the 'frequently used explanations' where they are relevant.
- If possible use headphones in a phone conference. This can be a better option than using the phone on speaker, as it will reduce echo.

A.2 Tips and tools

You may find some or all of these useful in a conference

- Frequently used explanations
- Organise your papers so you aren't shuffling papers
- Focus on a few items
- Paired sales tables
- Maps of sales in component
- Keep it short –lengthy explanations can be difficult to follow.
- Test out your explanations on a non-valuer
- Email clearly labelled documents through so that the customer can see written information.
- If the person doesn't have email, consider delaying the conference to allow time for documents to be posted.

Appendix 1 Roles and Responsibilities

All staff

All staff, including Executive Director, Directors, Managers and OVG staff have responsibilities around identifying potential issues, acting as an expert if required, escalating issues or potential conferences, making decisions regarding escalation or facilitated conferences where appropriate. All staff need to listen to the customer and be skilled at resolving conflict and managing difficult conversations. It is important to work together during the conference process – this includes looking for cues, practicing active listening techniques, being open to new information and following the process.

Customer Relationship Manager or Director Compensation

The Customer Relationship Manager reports to the Manager Customers and Stakeholders. The Customer Relationship Manager is responsible for managing the objection and general conference process and the change management that it involves. The Director Compensation has some similar functions within the compensation area.

The role includes:

- Maintaining (and where necessary, regaining) a reasonable level of trust and rapport with the customer.
- Explaining the outcomes of the review clearly, discussing and clarifying the evidence that explains our decisions, where relevant.
- Researching and investigating issues raised by the customer with the assistance of VS staff and contractors.
- Identifying and clarifying any unresolved issues and refer to appropriate skilled or qualified officer.
- Informing the relevant VCS or Just Terms coordinator of the outcomes of the conference.
- Determining whether an external facilitator should be considered.
- Informing the VCS coordinator or Just Terms coordinator and providing advice about the outcomes of the conference.
- Confirming that the information is correct in the written outcomes of the conference, and help refine the draft.
- Using an appropriate level of formality to match the customer's or acquiring authority's needs and expectations.
- Document and report important aspects of the conference, such as the issues discussed and outcomes reached. No audio/video recordings are made unless both parties agree. If the customer requests to record the conference, agreement must be made (and recorded) about the purpose of the recording and its use.
- Running conferences in line with guidelines.
- Documenting conferences and making notes of the issues raised, resolutions as well as any outstanding actions.
- Consulting with the District Valuer or Just Terms Coordinator to reach agreement at the conference. Where necessary this may involve changing values or a decision made in accordance with the District Valuer's delegations. If reaching agreement

requires a more substantial change, the District Valuer is to seek the appropriate approval.

- The Director Compensation may need to seek approval to change a determination of compensation.
- Following up any outstanding action items and provide responses to the VCS or Just Terms coordinator.
- Recording the outcome of matters raised and result of the conference within Conference Manager or Just Terms Manager, as appropriate.
- Ensuring timeliness in outstanding actions and responses.

VCS Team Leader

- Provide guidance to VCS coordinators as required and assist with matters which are escalated.
- Escalate matters to the Manager Customer Service if required.

VCS coordinator

- Is a dedicated customer service officer.
- Coordinates responses from other areas of Valuation Services to ensure that all their concerns are addressed.
- Acts as the contact point for the customer throughout the process.
- Liaises with the District Valuer and ensure all communications are conducted correctly.
- Keeps the customer informed of any significant delay in the process, most likely by phone and recorded as an additional activity within Conference Manager.
- May be involved in conferences with landholders as either a participant or observer where required.
- May be requested to take minutes in the conferences, to assist with record keeping.

Note: to ensure ease of communication with the VCS coordinator and in line with other VS customer facing units, first and last names are to be used on all letters. During the peak period, seasonal staff are to list their permanent staff mentor as the VCS coordinator on any correspondence that they process and inform their staff mentor.

Just Terms coordinator

- Is a valuer in the Compensation team.
- Coordinates responses from other areas of Valuation Services to ensure that all their concerns are addressed.
- Acts as the contact point for the customer and acquiring authority throughout the process.
- Liaises with the valuation contractor and ensure all communications are conducted correctly.
- Keeps the customer and acquiring authority informed of any significant delay in the process, most likely by phone and recorded as an additional activity within Just Terms Manager
- May be involved in conferences with landholders as either a participant or observer where required.

Valuation Customer Service Officer

- Organising the conference with the District Valuer or Senior Valuer and customer.
- Updating new correspondence and conference activities within the Conference Manager, where appropriate.
- Helping to describe the outcomes of the review clearly, discussing and clarifying the evidence that explains our decisions.
- Explaining complex and technical issues in simple language, in writing and verbally.
- Identifying and clarifying any unresolved issues and refer to appropriate skilled or qualified officer.
- Providing support in the conference if requested to by the customer.
- Making notes of the issues raised and resolutions as well as any outstanding actions.
- Obtaining notes from the valuer and creating the final response letter.
- Coordinating any responses received after the conference.
- Ensuring timeliness in outstanding actions and responses.
- Knowing and being able to explain in detail what happens during the Conference.
- Ensuring the pre-established conference process is followed.
- Supporting the person running the conference process to make it effective.
- Writing the draft of the outcome of the conference in plain English, addressing all the customer's issues and concerns that were discussed.
- Refining that draft in consultation with other staff who participated (e.g. VIS and Valuers).
- 'Closing off' contact with the customer when issues have been resolved, or where we have not been able to resolve them after reasonable effort.
- Acknowledging the resolution of the customer's questions, concerns and issues.
- Documenting the outcome (e.g. 'Customer accepted the outcome of the review' or 'Not able to resolve after reasonable effort').
- Seeking feedback from the customer and recording it in a form that we will use to help improve our approach to valuation review and measure our performance against the success indicators.
- Helping the customer understand the process of pursuing legal proceedings, including the court-mediated conference.

Objection Contractor

- The valuer will be involved from the point when an objection batch is awarded to them.
- Ringing promptly to make an appointment to see the property.
- Be skilled at resolving conflict and managing difficult conversations.
- Listening to customers' concerns and the information they provide.
- Recording customers issues, concerns and information.
- Explaining the valuation process they will be using.
- Dealing with any aspects of our approach to valuation review that are unclear or concerning to the customer.
- Performing and finalising reviews promptly. The valuer, like all Valuation Services roles involved, must adapt their communication style to the needs of the customer, ring promptly to make appointments and attend appointments to see the property. They must also demonstrate to the customer their experience, expertise and local

knowledge, perform the review promptly, anticipate and overcome delays and inform the Manager Customer Service or Team Leader Objections of any delays.

Just Terms valuation contractor

- The valuer will be involved from the point when an compensation matter is awarded to them.
- Ringing promptly to make an appointment to see the property.
- Be skilled at resolving conflict and managing difficult conversations.
- Listening to customers' or acquiring authority's concerns and the information they provide.
- Recording customers or acquiring authority's issues, concerns and information.
- Explaining the valuation process they will be using.
- Dealing with any aspects of the compensation process that are unclear or concerning to the customer.
- Performing and finalising valuations promptly. The valuer, like all Valuation Services roles involved, must adapt their communication style to the needs of the customer or acquiring authority, ring promptly to make appointments and attend appointments to see the property or discuss information. They must also demonstrate to the customer their experience, expertise and local knowledge, perform the review promptly, anticipate and overcome delays and inform the Just Terms coordinator or Director Compensations of any delays.

District Valuer or Senior Valuer

The District Valuer or Senior Valuer is required to liaise with the VCS coordinator to ensure communications are carried out as appropriate.
Their role includes:

- Obtaining and sharing relevant local knowledge.
- Explaining complex and technical issues in simple language, in writing and verbally.
- Researching appropriate information.
- Confirming that the information is correct in the written outcomes of the Conference, and helping refine the draft.
- Abiding by relevant professional code of conduct of the Australia Property Institute, Department of Finance, Services and Innovation (DFSI) and the relevant Act(s)
- Consulting with the Customer Relationship Manager to reach agreement at the Conference. Where necessary this may involve changing values or a decision made in accordance with the VS Valuer's delegations. If reaching agreement requires a more substantial change, seek the appropriate approval.
- Investigate issues raised by the customer.
- Ensure timeliness in outstanding actions and responses.

VIS Team Leader or Data Specialist

- Explaining complex and technical issues in simple language, in writing and verbally.
- Researching appropriate information.

- Identifying and clarifying any unresolved issues and referring to appropriate skilled or qualified officer.
- Informing the relevant VCS coordinator of the outcomes of the Conference.
- Alerting the Customer Relationship Manager if an independent facilitator should be considered.
- Confirming that the information is correct in the written outcomes of the Conference, and help refine the draft.
- Providing technical knowledge to the Customer Relationship Manager for a conference.
- Participating in conference if advice is considered of a technical nature.

External Facilitator

- Guiding the process without making decisions about the outcome or advising or directing the participants.
- Recording any agreements or decisions made by the participants of the facilitated conference, obtain the participants' signature where possible, and then distributing to the participants.
- Documenting and reporting important aspects of the facilitated conference, such as the issues discussed and outcomes reached. No audio/video recordings are made unless both parties agree.
- Where a conference is externally facilitated, VS will use a suitable independent mediator who:
    - is accredited under the National Mediator Accreditation System;
    - has the required attitudes and skills;
    - has been trained and accredited in our facilitated conference process above.

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