

Assessment Managers

What are the roles and responsibilities of an Assessment Manager?

Purpose

This Fact Sheet aims to provide guidance to Accredited Professionals – Planning Level 1 who are appointed (or eligible to be appointed) as Assessment Managers under the *Planning, Development and Infrastructure Act 2016* (the PDI Act) regarding their personal obligations, as well as their role and responsibilities to the Assessment Panel to which they are appointed.

Background

- Accredited Professional – Planning Level 1 are eligible to be appointed as Assessment Managers under the PDI Act.
- An Assessment Manager must themselves comply with the Code of Conduct that is established to guide their decision making and exercise of their statutory functions, being the Accredited Professionals Scheme Code of Conduct.
- Assessment Managers also have a responsibility to manage the staff and operations of the Assessment Panel to which they are appointed, and to provide advice to that Assessment Panel (as appropriate).
- An Assessment Manager should be aware that all Assessment Panel Members have obligations under the Minister’s Code of Conduct for Assessment Panel Members established under the PDI Act. In addition to this:
 - Assessment Panel Members who are Accredited Professionals must also comply with their obligations under the Accredited Professionals Scheme Code of Conduct; and
 - Assessment Panel Members who are also current Elected Members from the relevant council have additional obligations under the Minister’s Code of Conduct under the *Local Government Act 1999*.

Roles and Responsibilities of Assessment Managers

Planning Level 1 Accredited Professionals are eligible to be appointed as Assessment Managers as follows, and as shown in Table 1 below:

- may be appointed by a local council, to a Council Assessment Panel; or
- may be appointed by the Chief Executive of the Attorney General’s Department to a Regional Assessment Panel; or
- may be appointed by a Joint Planning Board to an Assessment Panel appointed by the JPB.

Each Assessment Panel under the PDI Act must have an Assessment Manager appointed (a person may be appointed as the Assessment Manager for more than one Assessment Panel).

Development Assessment

Appointment as an Assessment Manager includes acting as a relevant authority for the purpose of development assessment, in the circumstances provided under the PDI Act. In exercising these functions, an Assessment Manager must act in their own professional capacity, and is not subject to the direction of an Assessment Panel or any other person.

Further information regarding the development assessment functions of an Assessment Manager (and a comparison with development assessment functions of the Assessment Panel) are provided in the [Relevant Authorities Flowchart](#) located on the PlanSA Website.

Management of Assessment Panels

In addition to undertaking development assessment functions, an Assessment Manager is also responsible for managing the staff and operations of the Assessment Panel to which they are appointed, and for providing advice to that Assessment Panel (as appropriate).

In order to fulfil these functions, an Assessment Manager may be required to provide advice and guidance to Assessment Panel Members in relation to governance and probity matters to ensure the proper exercise of the Assessment Panel's functions.

Assessment Panel	Panel Constituted By	Panel Members Appointed By	Assessment Manager Appointed By	Assessment Manager Reports To
Council Assessment Panel	Council	Council	Chief Executive of Council	Chief Executive of the Council
Regional Assessment Panel	Minister (at the request of the RAP Councils)	RAP Councils (under a scheme approved by the Minister)	Chief Executive of the Department (on advice of RAP Councils)	Chief Executive of the Department (to RAP Councils under scheme)
Joint Planning Board Assessment Panel	Joint Planning Board	Joint Planning Board	Joint Planning Board	Joint Planning Board

Table 1 – Assessment Panels and Assessment Managers Appointment and Reporting Arrangements

An Assessment Manager appointed to an Assessment Panel will report to the person who made their appointment, and will be responsible to that person for his or her performance.

In the case of Regional Assessment Panels, while the Assessment Manager will be appointed by the Chief Executive of the Attorney General's Department, the costs associated with the activities of a Regional Assessment Panel (and their Assessment Manager) will typically be shared between the councils for the areas in relation to which the Panel is constituted. The specific arrangements for the Regional Assessment Panel will be set out in a scheme approved and published in the gazette by the Minister at the time the Panel is constituted.

Codes of Conduct

Assessment Managers

Like all other Accredited Professionals, Assessment Managers are required to comply with the Accredited Professional Scheme Code of Conduct established by the Minister under Schedule 3 of the PDI Act.

Accredited Professionals on Assessment Panels

Assessment Panel Members who are Accredited Professionals are bound by both the Accredited Professional Scheme Code of Conduct and the Assessment Panel Member Code of Conduct established under PDI Act.

It is important for Assessment Managers to be aware of these obligations and how they relate to the functions of an Assessment Panel Member, so that the Assessment Manager can fulfil their functions of providing advice to the Panel (and its Members) as appropriate under the PDI Act.

Elected Members on Assessment Panels

Assessment Panels may include one current Elected Member from the relevant council. In addition to this, former Elected Members may also be appointed to a Council Assessment Panel where the entity appointing them is satisfied that the former Elected Member is appropriately qualified to act as a member of the Assessment Panel on account of their experience in local government. In both of these cases, the Elected Member (or former Elected Member) is not required to be an Accredited Professional under the PDI Act.

However, Assessment Panel Members who are also current Elected Members from a relevant council have additional obligations under the Minister's Code of Conduct under the *Local Government Act 1999*. Further information is available in the [Fact Sheet on Elected Members Assessment Panels](#) available on the PlanSA Website.

Similar to Accredited Professionals on Assessment Panels, it is important for Assessment Managers to inform themselves of the obligations of (current and former) Elected Members sitting on their Assessment Panel, so that the Assessment Manager can fulfil their functions of providing advice to the Panel (and its Members) as appropriate under the PDI Act.

Disclosures and Notices for Assessment Panel Members

The requirements for financial disclosures and notices of appointment by Assessment Panel Members under the PDI Act and the *Planning, Development and Infrastructure (General) Regulations 2017* are summarised in Table 2 below.

It is important for Assessment Managers to be aware of the obligations on Assessment Panel Members to disclose financial interests in accordance with the PDI Act, as Assessment Managers may be required to record and/or report that information, as part of their responsibilities to manage the staff and operations of the Panel. The recording and reporting requirements will differ depending on the type of Assessment Panel, as detailed in Table 2.

Assessment Panel	Primary and Ordinary Returns Submitted To	Notice of Appointment Submitted To
Council Assessment Panel	Chief Executive of the Council	Council
Regional Assessment Panel	Minister	Relevant Entity appointing or reappointing the Member (under a scheme approved by the Minister)
Joint Planning Board Assessment Panel	Minister	Minister

Table 2 – Assessment Panel Disclosure of Financial Interests and Notices of Appointment

Primary and Ordinary Returns

Under Schedule 1 of the PDI Act, Assessment Panel Members must disclose financial interests with the entity shown in Table 2 at the time of their appointment and also at the end of each financial year. As part of their role, Assessment Managers should ensure Assessment Panel Members comply with their obligations to submit returns and (where required) ensure that returns are maintained in a register as required under the PDI Act.

For Regional Assessment Panels a Register of Returns is required to be maintained by the Minister for Planning and Local Government. As a result, Assessment Managers should ensure that returns are provided to the Minister as soon as possible following the end of each financial year, or following the appointment of a new member to the Regional Assessment Panel.

Notices of Appointment

A Notice of Appointment form must be completed and returned by Assessment Panel Members before commencing their term as a member of the Assessment Panel. The Member must complete the form and return it to the entity responsible for appointment of the Member, as described in Table 2. For Regional Assessment Panels, the relevant entity appointing or reappointing a Member will be determined under the scheme approved and published in the gazette by the Minister.

The [Notice of Appointment](#) for Council Assessment Panels and Joint Planning Board Assessment Panels (appointed under section 83 of the PDI Act) is located on the PlanSA Website, as is the [Notice of Appointment](#) for Regional Assessment Panels (appointed under section 84 of the PDI Act).