

## Corporate Governance

Openness and inclusivity, integrity and accountability are underlying principles of Corporate Governance and these are applied across all elements of the Board's business. These principles are supported by a Local Code of Corporate Governance that reflects the five dimensions of community focus, service delivery arrangements, structures and processes, risk management and internal control, and standards of conduct. Within the Board we actively seek to apply the principles of Corporate Governance and with the assistance of the City of Edinburgh Council's Internal Audit have been progressively moving towards this goal.

During 2006/07 we reviewed our Risk Management structure and introduced a formal Risk Management Strategy document. In addition, we revised our risk register to include information on existing controls and mitigation action, identification of any residual risks, allocation of responsibility and ownership of risk events,

and the identification of any further action required. Risk identification is now a formal element on all agendas of management meetings with mechanisms in place to have any new risks attached to the risk register.

Also during this period we have progressed the introduction of a Performance, Review and Development Policy within the Board. While originally a pilot scheme with the senior staff, this is currently being rolled out to all staff. This is an essential mechanism that sees strategic high level objectives translated into day on day objectives for each individual member of staff in a way that is relevant and understandable. Primarily performance related, the scheme affords the member of staff with the opportunity to talk privately with their line manager. This allows individual performance to be discussed openly with target setting and personal objectives

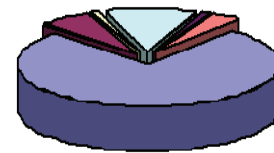
being agreed. In addition, training requirements can be identified and an agreed pathway and timetable established to achieve training needs.

Corporate and Service Plans are now produced reflecting a three year period and in accordance with Corporate Governance these provide information on our activities and objectives, at all levels, while linking in to performance and budget. We have been subject to an annual review on our Corporate Governance arrangements by the City of Edinburgh Council Internal Audit and in 2006 the Chief Internal Auditor stated, "I have noted the progress which has been made during the year to improve the control environment including the Board's formal approval of the 2006-2009 Corporate and Service Plan. Risk Management is now firmly embedded within the Board forming an integral part of the service planning process".

## Budget

Lothian Valuation Joint Board provides services to its four constituent councils. These are City of Edinburgh, East Lothian, West Lothian and Midlothian Councils, and it is from these that the Board receives its funding each year. The budget setting process commences in September of each year, progresses to the Assessor who creates a detailed service and corporate plan linked to budget requirement, and culminates with formal approval of the proposed budget by the Board members. The approved budget for 2006/7, after allowing for income, was £5.938 million. This is broken down into a number of service account headings and their proportions are displayed in the chart. From a budgetary aspect 2006/07 was a difficult year. This was brought about by the move to new premises during

December 2006, however preparations started well before this and budget adjustments were organised months beforehand. Thanks go to the Accounting Team of the City of Edinburgh Council who provided invaluable support and guidance throughout this period. As part of the lease agreement with our new landlord monies were made available to support the fit out and move to our new offices. This coupled with sums held in reserve and prudent housekeeping meant the move incurred no additional financial burden on the constituent councils. The final accounts for 2006/07 are still being prepared but shall be presented to the Board in September 2007. It is anticipated that a favourable outcome shall be reported.



- Employee Costs
- Premises Costs
- Transport Costs
- Supplies and Services
- Third Party Payments
- Support Services

## Contact Information

You can contact us at:-

The Assessor & Electoral Registration Officer  
Lothian Valuation Joint Board, 17A South Gyle Crescent, Edinburgh EH12 9FL  
Telephone (0131) 344 2500, Fax (0131) 344 2600  
E-mail enquiries@lothian-vjb.gov.uk

If you want information about Council Tax bandings or Rateable Values go to [www.saa.gov.uk](http://www.saa.gov.uk)

To check the Electoral Register, copies are available at most Libraries and here at the Board's own offices

If you want additional information about Electoral Registration or want to download forms, go to [www.lothian-vjb.gov.uk](http://www.lothian-vjb.gov.uk)

Should you wish to contact one of our constituent authorities, please see the information below:-

The City of Edinburgh Council, Telephone (0131) 200 2323 ([www.edinburgh.gov.uk](http://www.edinburgh.gov.uk))

East Lothian Council, Telephone 01620 827827 ([www.eastlothian.gov.uk](http://www.eastlothian.gov.uk))

Midlothian Council, Telephone (0131) 270 7500 ([www.midlothian.gov.uk](http://www.midlothian.gov.uk))

West Lothian Council, Telephone 01506 775000 ([www.westlothian.gov.uk](http://www.westlothian.gov.uk))



Working in partnership with City of Edinburgh,  
East Lothian, Midlothian & West Lothian Councils

## Assessor's Report

2006/07 has been a very significant year for Lothian Valuation Joint Board. We have moved office and are now located at 17A South Gyle Crescent, Edinburgh in modern purpose built accommodation. In light of increasing costs to remain at Chesser House we undertook a search for new premises during the summer and were moved into our new offices by December. We are now able to monitor and control building and occupation costs to a greater extent and I am confident that future savings shall be possible.

I would like to take this opportunity to thank those staff involved with the move, a measure of their success being the minimal time that the Board was "off air". We closed our operation at Chesser House on Thursday, 14 December and opened our doors at South Gyle on Monday, 18 December with our full public service available.

Everyone shall know that when talking about property, it's "location, location, location" which is seen as the key factor. However, during 2006/07, my

over-riding battle cry has been "performance, performance, performance!" I am very pleased to be able to intimate that 2006/07 has seen major improvements in performance measured activities within the Board, the detail of which is provided within this report. The Board's staff has responded to my challenges throughout the year and due to their hard work I am confident that we are now set on the path of continually providing best value and an efficient and effective service to all our stakeholders.

## Our New Location



We are now located at 17A South Gyle Crescent, Edinburgh, easily accessed by numerous local buses and situated close to Edinburgh Park and South Gyle railway stations. To contact us, please telephone (0131) 344 2500, fax (0131) 344 2600 or e-mail enquiries@lothian-vjb.gov.uk.

## PERFORMANCE, PERFORMANCE, PERFORMANCE

### Valuation Roll

YEAR	KEY PERFORMANCE INDICATOR		
	< 3 MONTHS	3 - 6 MONTHS	> 6 MONTHS
2004/5	43%	23%	9%
2005/6	64%	19.5%	16.5%
2006/7	75%	14%	11%

There has been impressive improvement in performance surrounding the Valuation Roll activities this year. 3,314 amendments have been made to the Roll during 2006/07 with nearly 10,000 property investigations being made. Across all three time bands of this key indicator, where the actual date of physical alteration is set against the date the Valuation Notice is issued, performance has improved which is very encouraging. It is important to identify the drivers behind improvement. Paper processes have been replaced with an IT solution using workflow and imaging technologies. This has reduced time on the administrative aspects of the process allowing more time to be spent on key activities. It has also provided more immediate and accurate information on workload distribution and performance, which allows effective remedial action to be taken if necessary. Of course, behind any improvement of this nature lies the sheer determination to provide a quality service, and having been presented with the challenge and given the tools to help meet it, the Joint Board staff have responded and come out on top.

An activity in relation to the Valuation Roll which is often overlooked is the disposal of Revaluation Appeals. Every five years there is a revaluation of all non-domestic properties where Assessors re-calculate rateable values to accord with rental market levels and trends. Arising from each revaluation is the right of appeal to the Assessor. If no agreement can be reached then recourse to the Valuation Appeal Committee is available. The table below shows the progress that is being made to dispose of the appeal workload.

Professional agents acting on behalf of the occupier or landlord of the property concerned lodge the vast majority of non-domestic appeals. Each individual appeal shall be cited to be heard by the Valuation Appeal Committee on a due date. Prior to that Joint Board staff shall meet with the appointed agent to discuss the valuation and seek to find agreement. This is often a very time consuming process with numerous

meetings taking place, which involve careful and skilful negotiation and the exchange and consideration of detailed information. On occasion additional site visits are required. Invariably, agreement is achieved with either the original assessment standing or an adjustment being made. On occasion when agreement is not reached it is necessary to proceed to go before the Valuation Appeal Committee. This is a Committee of lay persons with the full authority of a legal court. At the hearing pre-prepared material is lodged and spoken to and each party is given the opportunity to cross-examine the other. The Committee shall consider the evidence and opinions presented and come to a decision. Most hearings are completed within a day but some can continue for several. Out of the 3,940 appeals dealt with during 2006/07, 17 proceeded to be heard by the Committee.

Year	Appeals Lodged	Appeals Dealt With	Outstanding Appeals	RV of Appeal Subjects	RV Conceded from Val Roll
1 Oct 2005-31 Mar 2006	8,578	1,239	7,339	£130,729,989	N/A
2006 - 2007	8,578	3,940	3,399	£130,729,989	0.49%*

\* this is a cumulative figure including period 1 October 2005 to 31 March 2000

## Council Tax

YEAR	NUMBER OF INSERTS	KEY PERFORMANCE INDICATOR		
		< 3 MONTHS	3 TO 6 MONTHS	> 6 MONTHS
2004/5	4408	73%	18%	9%
2005/6	4288	81%	12.5%	6.5%
2006/7	5515	84.75%	11.31%	3.93%

Year on year there has been steady improvement in this key Council Tax performance indicator. In two years, performance has risen from 73% of houses being entered onto the Council Tax List within 3 months of occupation, to almost 85%. In addition, the number of houses entered onto the List has risen dramatically from

4,288 during 2005/06 to over 5,500 in 2006/07, reflecting the pace of house construction within the Lothian area. To have maintained and improved performance while this particular workload has risen by almost 30% is highly credible.

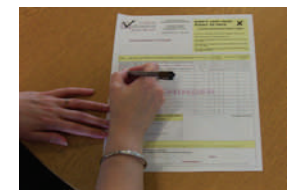
We are aiming to improve even more on this performance and during 2007/08 are set to introduce and integrate document imaging and workflow technology to our Council Tax processes. This technology shall minimise the amount of time spent on the administrative and repetitive aspects of the workload allowing more effort to be concentrated on the front line activities. It shall also make it far easier to assess ongoing and constantly shifting workloads

## Electoral Registration

The activities and workloads surrounding Electoral Registration have been increasing year on year and 2006/07 was no exception.

Elections, whether they are local council, Scottish Parliament, Westminster or European, come round on a regular basis and, as a result, Electoral Registration takes on a high profile.

You cannot vote if you are not on the Electoral Register and to ensure that you can, each year, we send out Electoral Registration forms to all households in the Lothians. During September, October and November in



2006/07 we issued an initial 372,000 forms, then a first reminder issue of 120,000 and finally a second reminder of 92,000

forms followed this. From this total issue of 584,000 forms we achieved a return rate of 80.4%. This compares with a return rate of 80% in 2005/06. There is no doubt that at any particular moment in time the public's interest in politics and governance shall have a bearing on not just the level of turnout at an election, but also their willingness to return their Electoral Registration form. While maintaining our return rate is a considerable achievement we are always looking for ways to engage further with the electorate and encourage registration. Our Information Stand has been out at a number of high profile locations during 2006/07 and it is encouraging how much interest is shown by the



public and how much information we are able to pass on. We also undertook a pilot exercise in respect of "door to door" canvass with a view to targeting "non returns". This exercise shall be repeated in the forthcoming year with a larger number of households included.

For a number of years "rolling registration" has been operational. This means that rather than wait until you receive your annual canvass form you can inform the Electoral Registration office at any time to have your name added to the Register or have amendments made to your existing entry. This is of particular benefit to those moving into the Lothians for the first time. During 2006/07 we processed 27,852 rolling registration applications and with further promotion and publicity expect this figure to rise.

Another major task for this year was in respect of local authority ward boundaries. In preparation for the elections in May 2007, which shall see the introduction of the single transferable vote system, "STV", to local council elections, all local authority electoral ward boundaries had to be redrawn.

allowing for more accurate monitoring and distribution amongst our work teams.

Throughout the year we ingather information concerning proposed alterations to domestic properties. It is essential that we keep our technical details as accurate as possible and this involves monitoring progress of any proposed changes. During 2006/07, we amended our records for 7,193 properties, which is slightly higher than the corresponding number last year.

Also, if a property undergoes a physical alteration and is subsequently sold there requires to be a banding re-assessment. This is called a Point of Sale investigation and, during 2006/07, we undertook 1,891 with 96 bandings requiring a resultant change.

While the creation of the new boundaries was a matter for each Council in conjunction with the Boundary Commission, the Electoral Register had to be amended to reflect these changes and show each elector in their new ward. The fact that the number of wards in the Lothian area dropped from 131 to 39 gives an indication of the scale of change and the amount of work required to make this happen.



One last item which is worth mentioning and which is gaining considerable momentum in terms of Registration is that

of postal, or absent, voting. While granting a postal vote was at one time subject to rigorous criteria, this is no longer the case and postal voting is now available on demand. Indeed a request for a postal vote can be made on the annual canvass form. From what was a relatively modest number, we have received an increasing number of applications for postal votes. Our current number stands at 69,000 which is up 13,000 from last year, and we anticipate this number to increase further towards May 2007 and the elections.

Electoral Registration is an exciting area of our work and with the possibility of anonymous registration, personal identifiers for postal voting and individual registration ahead of us, we are looking forward to the challenges and ensuring the provision of a quality Electoral Registration service to the electorate of the Lothians.

## Improving Service Delivery

Statistics are obviously important and are commonly taken as a benchmark for performance. However, another aspect of performance is the manner in which services are delivered and how accessible they are.

Mention has already been made of the Information Stand and how it is used to promote Electoral Registration and take the service direct to the public. Another example of this direct action, reflecting the modern age we live in, is the Scottish Assessors' Association Web Portal. The Portal, as it is commonly referred to, is funded through the Scottish Executive's "Customer First" initiative and while all Assessors have contributed, I am proud to say that Lothian Valuation Joint Board made a major contribution at its inception and continues to provide support as it grows from success to success. We currently hold the position of Portal Data Custodian dealing with requests for information and access, while ensuring the data itself is supplied timeously by each Assessor.

The Portal is a one-stop shop, on the web, to access information and a variety of on-line facilities. The Valuation Roll and Council Tax information from all fourteen Assessors in Scotland is available via a search facility that is based on address elements

and a total of over 2.7 million different addresses and their associated information can be accessed and viewed.

Ref No.	Description	Property Address	Occupier	Rateable Value	More Information
13MPO3 13A	UNLITEN	1401 MELVILLE STREET EDINBURGH EH9 1JF	CITY OF EDINBURGH-COUNCIL TRANSPORTATION ACCOUNTS CITY DEVELOPMENT PROPERTY MANAGEMENT 200 WILSON STREET EDINBURGH EH9 1JF	1,140	VIEW ON MAPS VIEW DETAILS VIEW CONTACTS
13MPO3 13B	UNLITEN	1402 MELVILLE STREET EDINBURGH EH9 1JF	CARDOXIE ROAD BURNHAY COMMERCIAL UNIT 10 EDINBURGH EH9 1JF	11,700	VIEW ON MAPS VIEW DETAILS VIEW CONTACTS
13MPO3 13C	UNLITEN	1403 MELVILLE STREET EDINBURGH EH9 1JF	EDINBURGH HOUSES 100 WILSON STREET EDINBURGH EH9 1JF	11,700	VIEW ON MAPS VIEW DETAILS VIEW CONTACTS
13MPO3 13D	UNLITEN	1404 MELVILLE STREET EDINBURGH EH9 1JF	100 WILSON STREET EDINBURGH EH9 1JF	11,700	VIEW ON MAPS VIEW DETAILS VIEW CONTACTS
13MPO3 13E	UNLITEN	1405 MELVILLE STREET EDINBURGH EH9 1JF	100 WILSON STREET EDINBURGH EH9 1JF	11,700	VIEW ON MAPS VIEW DETAILS VIEW CONTACTS

In addition, general information, FAQs, national statistics and on-line transactional facilities exist to assist with the lodging of both Valuation Roll and Council Tax appeals. On-line rent returns can be made, a feedback and enquiry facility exists, and valuation practice notes can be viewed and read.

The Portal goes further yet and while it presents itself with a public face, there exists two other sides to the Portal. Firstly, there is the "private" area where information is held and exchanged between Assessors offices. This is very useful and presents a time saving method of communicating between offices. Secondly, there is the

"government/local authority" area in which access is given to the Valuation Roll and Council Tax data in such a way as to allow bulk extraction and manipulation.

There are currently a total of 109 registered Government and Local Authority users throughout Scotland and their access to the portal data is used for such purposes as, statistical analysis of dwelling counts, housing stock analysis, validation of addresses, supporting call centre and CRM applications and local authority address and property information management.

Since the Portal's introduction it has received more than 15,000,000 page visits and in the first three months of 2007 use of the public site averaged 970,000 page requests per month.

The high usage levels and popularity reflect commitment to high performance, customer satisfaction and an emphasis on continuous improvement. From the outset of the Portal's inception and as part of a continuous process, consultation has been to the forefront with many groups and interested bodies regularly contributing to development programmes.

Further enhancements are under consideration which include design improvements to the public face of the Portal, provision of a bulk return facility targeted to business users with large property portfolios, a feasibility study on the introduction of summary valuations, and an investigation into the linkage between Assessors' data and Corporate Address Gazetteers.

The Portal is an exciting area of work for Assessors throughout Scotland and Lothian is proud to be playing a part in its continuing success.

## Absence

The Board operates a Policy for monitoring and reviewing sickness absence levels within the organisation. This table shows the marked improvement we have made over the last year. This has been achieved by increasing awareness of the

impact that absence has on the organisation and, through the Policy, by focusing on day to day contact between line manager and member of staff, improving consultation, communication and providing support as it is needed.

YEAR	DAYS LOST TO ABSENCE	DAYS LOST PER EMPLOYEE	DAYS LOST AS % OF TOTAL
2004	1575	12.30	5.6%
2005	1102	9.38	4.26%
2006	815	6.96	3.13%