

2021 -2022

Corporate & Service Plan



MISSION & VISION

Lothian Valuation Joint Board's **mission** is to ensure best value and provide professional valuation and electoral registration services for all its stakeholders.

Our **vision** is to provide valuation and electoral registration services in accordance with statute at levels of excellence which exceed expectations.

In order that we fulfil our Mission and achieve our Vision we will:-

Ensure that our services are delivered in accordance with all statutory requirements

Plan service development and delivery in accordance with the principles of Best Value.

Take individual and collective responsibility for the services provided by LVJB.

Monitor and report performance levels to stakeholders.

Integrate Equalities issues into all aspects of our service provision.

Conduct our business in accordance with the principles of the CIPFA/SOLACE framework Delivering Good Governance in Local Government.

Create an environment of continual improvement.

Strategic Aims

1. To ensure timeous publication and maintenance of the **Valuation Roll**.
2. To ensure timeous publication and maintenance of the **Council Tax List**.
3. To ensure timeous publication and maintenance of the **Electoral Register** and registration services at elections.
4. To develop, prepare and publish reports to improve customer knowledge and ensure attainment of good **Community Focus**.
5. To set standards and undertake corporate improvement in **Service Delivery Arrangements** and review the performance management and planning framework to ensure continuous improvement.
6. To deliver changes and improvements identified under the Transformation Programme and through the ongoing process of **Structure and Process** review.
7. To review, monitor and maintain organisational **Risk Management and Internal Controls** to ensure efficient and effective delivery of service.
8. To develop, adopt and review formal documentation and systems to ensure **Standards of Conduct** are adhered to.
9. To plan and deliver an **organisational development strategy** considering corporate initiatives to ensure efficiency and quality of service delivery.
10. To engage in **key partnership working** to ensure the integrated delivery of efficient government.
11. To review and develop the necessary policies to support the **Health, Safety and Welfare** of all LVJB employees.

No	Strategic Aim	Performance Measure	Operational Objective	Responsibility
1	To ensure statutory duties are carried out for maintenance of the Valuation Roll .	Maintain Valuation Roll in line with statutory requirements.	Maintain and update survey records in line with relevant guidance and practice.	Assistant Assessor/Principal Surveyors
			Consider planning and building warrants and take appropriate action to maintain records	
			Prepare valuations in line with practice notes and 'tone' evidence.	
			Update VR daily, issue Valuation Notices daily; provide update to constituent authorities Finance weekly. Continue to develop processes to support the introduction of the BGA.	
		Dispose of Revaluation 2017 and running roll appeals within statutory time frames including LTS & LVAC appeals.	Commence a rolling programme to update rental, cost and turnover analysis to ensure accuracy of the Roll and support the move to 3 yearly revaluations.	Assistant Assessor/Principal Surveyors
			Correspond with appellants in line with legal requirements and LVJB standards.	
			Create, maintain and review an appeal disposal timetable and ensure appeals are allocated to appropriate number of court dates.	
			Monitor disposal progress, reduction levels and reasons for reduction.	
		Continue preparations for Revaluation 2023	Monitor and ensure amendments are processed timeously.	Assistant Assessor/Principal Surveyors
			Ensure compliance with LTS and quality preparation of cases.	
			Continue to develop all necessary timetable and implementation plans.	
			Ingather relevant information and implement the Civil Penalty process.	
		Audit processes, procedures and values.	Continue to review valuation practices and procedures.	Governance Team
			Continue to assess and improve communication and engagement protocols	
			Audit valuation processes procedures and issued values.	
		Further develop IT systems, applications and communications.	Audit appeal processes, procedures and outcomes.	Corporate Leadership Team
Consider presented audit reports.				
Review and further develop valuation applications with particular attention to the successful delivery of 3 yearly revaluations.				
	Consider new classes of subjects for summary valuation purposes.	Assistant Assessor/Principal Surveyors /ICT		

		Continue with project planning and implementation in respect of changes required under the Barclay Review of NDR.	Ensure project management framework is observed to enable timeous implementation of key functionality and objectives	Assessor/Project Management Board
		Review and seek improved annual performance.	Maintain efficiency in survey procedures. Maintain fairness and accuracy of valuations. Review and improve performance in terms of KPIs and internal indicators.	Assistant Assessor
2	To ensure statutory maintenance of the Council Tax List.	Maintain the Council Tax List in line with statutory requirements.	Ingather and analyse sales evidence.	Assistant Assessor/Principal Surveyors
			Maintain and update survey records as necessary.	
			Prepare reviewed bandings and amend for sold houses.	
			Ensure accuracy of all amended and new bands.	
		Dispose of proposals & appeals.	Update CT daily, issue band change notices daily and notify councils weekly.	Assistant Assessor/Principal Surveyors
			Correspond with appellants in line with legal requirements and LVJB standards.	
			Administer properly all proposals and appeals and commence the process of timetabled disposal in association with the Valuation Appeal Committee.	
			Monitor band reductions. Ensure amendments are processed timeously.	
		Audit processes, procedures and Bands.	Audit valuation processes procedures and issued values.	Governance Team
			Audit appeal processes, procedures and outcomes.	Corporate Leadership Team
			Consider presented audit reports.	
		Further develop IT systems, applications and communications.	Continue to review the processes associated with new housing entering the Council Tax list, with particular progression of the mobile survey function	Assistant Assessor/Principal Surveyors /ICT
Ensure all new and amended information is recorded as electronic data				
Review & maintain performance.	Maintain efficiency in survey procedures.	Assistant Assessor/Principal Surveyors		
	Maintain quality of bandings by reference to band reductions on appeal.			
	Maintain performance in terms of KPIs and internal indicators.			
3	To ensure timeous publication and	Prepare and publish the Electoral Register by 1st December 2021.	Publish the Electoral Register in paper format and electronic format.	Assessor
			Carry out postal and door to door canvass in line with recent legislation and to maximise registration.	Head of Electoral Services

maintenance of the Electoral Register and registration services at elections.		Ensure appropriate advertising/publicity initiatives are in place in conjunction with EC public engagement strategy.	Head of Electoral Services	
		Action all postal vote applications received during and outside the canvass period.		
		Distribute the register in requested format to persons as defined by statute.		
		Continue to actively encourage recipients to accept the register in electronic format to reduce costs		
		Liaise with external contractors and manage/mitigate risks.		
		Maintain ER for statutory updates each month.	Update ER monthly updates per legislative requirements	Head of Electoral Services
			Issue Notices in line with statutory requirements	
			Improve contact with hard to reach groups through partnership working initiatives.	
			Identify and improve appropriate advertising/publicity channels re registration.	
		Dispose of any registration appeals.	Correspond with appellants in line with statutory requirements.	Assessor/Head of Electoral Services
			Ensure hearings are set up and conducted timeously.	
		Prepare for and ensure effective management of registration duties for any elections or referendums called during the year.	Ensure all applications for registration are processed accurately and timeously.	Head of Electoral Services
			Ensure all AVPI applications for registration are processed accurately and timeously.	
			Prepare and maintain all necessary timetables including the identification of all key risks and related mitigation associated with election preparation requirements.	
			Undertake engagement activities and ensure staff are trained and available to answer all telephone and email enquiries.	
			Ensure staffing resource in place at all peak periods and as required during polling hours.	
	Audit processes, procedures and accuracy to ensure quality registration delivery.	Develop and monitor audit reports for ER updates.	Head of Electoral Services	
		Audit personal identifiers with canvass signatures.		
		Audit name changes to ensure accuracy.		
		Consider all audit reports for appropriate actions.		
	Further develop IT systems, applications and communications.	Assess and implement new scanning processes for postal votes	Head of Electoral Services	
		Deliver electorate statistics to NRoS. (RPF 29)		

			Review and continue to maximise UPRN matching process to electoral address data base.	
		Prepare for refresh of AV personal identifiers in January 2022	Identify quantities and additional required expenditure.	Head of Electoral Services
			Establish required processes, timetable for collection and processing. Provide reports as required to Corporate Leadership Team and Board.	
		Review & maintain performance.	Improve efficiency in the delivery of the canvass processes and procedures.	Head of Electoral Services
			Review performance reports and consider new targets.	
			Deliver performance standards self-assessment and data returns to the Electoral Commission.	
4	To develop, prepare and publish reports to improve customer knowledge and ensure attainment of good Community Focus .	Prepare and publish statutory reports.	Annual assessor's report to LVJB and staff re service planning, performance & target setting.	Assessor
			Annual treasurer's un-audited accounts.	Treasurer
			Annual Audit reports to LVJB.	Head of Governance
			Annual proposed Revenue Report to LVJB.	Treasurer
		Prepare and present reports to LVJB.	Quarterly progress report to LVJB.	Assessor
			2021/22 LVJB Business Strategy	
			Annual Governance Report	Head of Governance
			Reports as required.	Corporate Leadership Team
		Develop and improve customer targeted policies	Oversee development of performance statistical analysis and monitoring.	Corporate Leadership Team
			Monitor adherence to equality principles.	
			Quarterly progress report to LVJB.	Assessor
			Ensure a robust public engagement strategy is in place for general registration and focused electoral events.	Head of Electoral Services
		Maintain and develop appropriate public engagement schemes.	Liaise with universities, further education establishments and schools to maximise student registration	Head of Electoral Services
			Liaise with care homes to maximise registration for residents	
			Maintain and update the internet site to ensure currency and accuracy especially at key events.	Corporate Leadership Team
			Continue to identify, implement and evaluate stakeholder engagement activities in respect of VR and CT.	Assistant Assessor
		Maintain, update and improve digital communication channels	Maintain and update the intranet site	Corporate Leadership Team
Maintain and update the internet site				

			Continue to Integrate Sharepoint to improve records management	
			Continue to develop use of social media	
5	To set standards and undertake corporate improvement in Service Delivery Arrangements and review the performance management and planning framework to ensure continuous improvement.	Maintain VR key and internal performance indicators.	Agree and set KPIs for VR.	Assessor/Assistant Assessor
			Agree and set a suite of internal indicators for VR performance.	
			Monitor, analyse and report on VR performance quarterly.	
		Maintain CT key and internal performance indicators.	Agree and set KPIs for CT.	Assessor/Assistant Assessor
			Agree and set a suite of internal indicators for CT performance.	
			Monitor, analyse and report on CT performance quarterly.	
		Maintain new Electoral performance indicators set by the Electoral Commission.	Agree and set Internal PIs for ER.	Assessor/Head of Electoral Services
			Produce and submit targets for ER performance to Electoral Commission.	
			Produce and submit statistical monitoring & indicators for ER performance to Electoral commission.	
		Monitor, analyse and report on ER performance monthly.		
Prepare, implement, monitor and review of Corporate and Service Plan.	Monitor Corporate and Service Plans.	Assessor/Corporate Leadership Team		
	Ensure adherence to Service Plan and Performance Indicators.			
	Review Performance & Development Review procedure to meet organisational requirements.			
6	To review roles, responsibilities, Structures and Processes to ensure effective balance of responsibility and authority.	Review Standing Orders, Scheme of Delegation and Financial Regulations; 5 yearly.	Review contents of Standing Orders 5 yearly; due for review Feb 2021.	Assessor/LVJB
			Review contents of Scheme of Delegation 5 yearly; due for review Feb 2021.	
			Review contents of Financial Regs 5 yearly; due for review Feb 2021.	
		Adhere to Standing Orders, Scheme of Delegation and Financial Regulations; 5 yearly.	Report to LVJB re review of contents of Standing Orders 5 yearly.	Assessor
			Report to LVJB re review of contents of Scheme of Delegation 5 yearly.	Assessor/Treasurer
			Report to LVJB re review of contents of Financial Regs 5 yearly.	Assessor/Treasurer
		Implement and progress the objectives of the Transformation Programme and 20/23 Business Strategy	Review process and procedures seeking efficiencies and improvements.	Corporate Leadership Team
			Continue to develop and implement a strategic training policy and continue with cultural change identified under the Transformation programme.	Principal Surveyor/ Corporate Leadership Team
			Continue to develop and implement a Performance Framework across the organisation, seeking efficiencies and effective delivery of services.	Head of HR/ Corporate Leadership Team
			Review ongoing progress of 20/23 Business Strategy	Assessor/LVJB

7	To review, monitor and maintain organisational Risk Management and Internal Controls to ensure efficient and effective delivery of service.	Review the activities of the Governance Strategy Group (GSG)	Monitor progress of topics raised and discussed in the GSG		Assessor/GSG	
			Continue to undertake bi-monthly meetings to ensure areas of risk are reviewed			
		Adhere to LVJB Risk Management Cycle	Identify	Consider new risks for addition to Corporate, Project or Service risk registers at all Corporate Leadership and Governance Committee meetings.		Corporate Leadership/ Governance Team
				Review presentational aspects of risks registers including effectiveness of providing accurate information of “progress on mitigation and status of risk”		Governance Team
				Consider risks within each service delivery planning timetable on an ongoing basis.		Corporate Leadership Team
				Consider risks as legislative changes are considered.		
			Assess	Consider likelihood v impact and apply appropriate red, amber or green rating		Corporate Leadership Team
			Mitigate	Ensure mitigation strategies are considered timeously.		Corporate Leadership Team
				Plan, implement and review mitigation decisions effectively.		
			Monitor	Monitor budget spend and variances and include in quarterly progress report.		Assessor
				Monitor actions resulting from audit reports at all Corporate Leadership Team meetings.		Corporate Leadership Team
				Liaise with the treasurer to the Board to ensure appropriate monitoring and accounting.		Assessor
		Review risk registers at Corporate Leadership/ Governance Team meetings		Corporate Leadership/ Governance Team		
		Report risks to LVJB and review Risk Management Cycle as required.	Report to Board on identified key risks on quarterly basis as part of progress report.		Assessor	
			Report to Board on budget variances, past and proposed, on quarterly basis as part of progress report.		Assessor/Treasurer	
Provide Board with Annual Governance Report			Head of Governance			
Submit external & internal auditors’ reports and actions carried out resulting from recommendations to the Board.						

		Maintain Quality Assurance audit activity and undertake joint working with internal and external audit.	Prepare monthly QA reports for Corporate Leadership team review	Governance Team
			Undertake annual internal and external audit exercises to provide assurance to LVJB	LVJB/Internal/External Audit
8	To develop, adopt and review formal documentation and put in place appropriate systems to ensure Standards of Conduct are adhered to.	Maintain internal processes to monitor compliance to legislation and LVJB policies and procedures.	Review processes to monitor compliance with LVJB standards.	Corporate Leadership Team
			Ensure compliance with LVJB employment legal requirements on a day to day basis.	
			Ensure compliance with LVJB policies on a day to day basis.	
		Monitor and review compliance to GDPR, Records Management, FOI, and Equalities.	Ensure compliance with legal requirements e.g. Records management, FOI, Data Protection, Equal Opportunities etc. on a day to day basis and assess at Corporate Leadership Team meetings.	Head of Governance
			Ensure Complaints policy and procedure meet required standards	
			Ensure Records management policy and procedures meet required standards	
		Report on Whistle Blowing.	Ensure the policy and procedures are reviewed as appropriate to ensure staff concerns are addressed.	Assessor/Head of Governance
			Report on items raised as appropriate.	
		Provide management, guidance and support timeously.	Ensure that policies are reviewed regularly, advised to the Board and staff briefed	Corporate Leadership Team
			Monitor adherence to Policy review timetable and encourage Unison input and agreement	
Ensure that appropriate guidance is developed and training given for new tasks introduced				
Ensure that policies are available, preferably on the LVJB intranet				
Ensure an appropriate support structure is in place for all employees				
				Assessor
9	To plan and deliver an organisational development strategy considering corporate initiatives to ensure efficiency	Continue the implementation and development of the Transformation Programme objectives and ongoing Business Strategy.	Undertake continued review of organisational processes & procedures and progress the implementation of the Valuation Services Team	Corporate Leadership Team
			Review the execution of Phase 1 of the Business Strategy 2020/23	Assessor/Head of Governance
			Instigate Phase 2 of the Business Strategy 2020/23	
			Continue development of phase 3 of the Business Strategy 2020/23	
	Implement, maintain and review the Corporate & Service Plan	Prepare annual Corporate & Service plan and present to LVJB.	Assessor/Head of Governance	
		Ensure staff awareness of the Corporate & Service plan and their role.	Corporate Leadership Team	

	and quality of service delivery.		Monitor compliance with the Corporate & Service plan on a continual basis and assess at Corporate Leadership Team meetings.	
		Deliver continued corporate improvement	Review internal performance indicators and update KPIs to ensure improvement.	Corporate Leadership Team
			Monitor performance improvement and report at corporate meetings & LVJB.	
			Monitor and report absence levels to measure improvement.	
			Implement LVJB Business Strategy 2020/23	
10	To engage in key partnership working to ensure the integrated delivery of efficient government.	Encourage partnership working with constituent authorities.	Continue partnership working with Finance departments of the 4 authorities.	Corporate Leadership Team
			Continue partnership working with the Returning Officer staff of the 4 authorities.	
			Continue partnership working with the Treasurer to LVJB.	
			Improve partnership working with Planning and Building departments of the 4 authorities.	Assistant Assessors
			Encourage partnership working with public and civil servants.	Continue partnership working with the VOA, SAA, Scottish Government, Electoral Commission, Cabinet Office, National Registers of Scotland, etc.
	Maintain partnership working with external professional bodies.	Continue partnership working with the RICS, IRRV & AEA professional bodies.		
11	To review and develop the necessary policies to support the Health, Safety, and Wellbeing of all LVJB employees.	Provide all necessary wellbeing advice and support to LVJB staff.	To schedule regular Health & Safety Committee meetings.	HR Manager
			To consider Mental Health initiatives.	
	Maintain & develop all HR procedural documentation & information	Review HR Policies in accordance with an established timetable		