

2022 -2023

## 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 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, develop and support the **Health, Safety, and Wellbeing** of all LVJB employees, creating an environment that enhances job satisfaction through investment in staff development, HR policies, systems and leadership.

No	Strategic Aim	Performance Measure	Operational Objective	Responsibility
1	To ensure statutory duties are carried out for maintenance of the <b>Valuation Roll</b> .	<b>Maintain Valuation Roll in line with statutory requirements.</b>	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 a programme to update rental, cost and turnover analysis ensuring the accuracy of the Roll and supporting the transition to 3 yearly revaluations.	
		<b>Dispose of Revaluation 2017 and running roll appeals within statutory time frames including LTS &amp; LVAC appeals.</b>	Correspond with appellants in line with legal requirements and LVJB standards.	Assistant Assessor/Principal Surveyors
			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.	
			Monitor and ensure amendments are processed timeously.	
		<b>Continue preparations for Revaluation 2023</b>	Ensure compliance with LTS and quality preparation of cases.	Assistant Assessor/Principal Surveyors
			Continue to develop all necessary timetable and implementation plans.	
			Ingather relevant information and where required use the Civil Penalty process.	
			Continue to review valuation practices and procedures.	
		<b>Audit processes, procedures and values.</b>	Continue to assess and improve communication and engagement protocols	Governance Team
Audit valuation processes, procedures and issued values.				
Audit appeal processes, procedures and outcomes.				
<b>Further develop IT systems, applications and communications.</b>	Consider presented audit report findings.	Corporate Leadership Team		
	Review and further develop valuation applications with particular attention to the successful delivery of 3 yearly revaluations.	Assistant Assessor/Principal Surveyors /ICT		
Consider new classes of subjects for summary valuation purposes.				

		<b>Continue with project planning and implementation in respect of changes required under the Barclay Review of NDR.</b>	Ensure the project management framework is observed to enable timeous implementation of key functionality and objectives	<b>Assessor/Project Management Board</b>	
		<b>Review and seek improved annual performance.</b>	Maintain efficiency in survey procedures. Maintain fairness and accuracy of valuations. Review and improve performance in terms of KPIs and internal indicators.	<b>Assistant Assessor</b>	
<b>2</b>	To ensure statutory maintenance of the <b>Council Tax List.</b>	<b>Maintain the Council Tax List in line with statutory requirements.</b>	Ingather and analyse sales evidence.	<b>Assistant Assessor/Principal Surveyors</b>	
			Maintain and update survey records as necessary.		
			Prepare reviewed bandings and amend for sold houses.		
			Ensure accuracy of all amended and new bands.		
				Update CT daily, issue band change notices daily and notify councils weekly.	
		<b>Dispose of proposals &amp; appeals.</b>	Correspond with appellants in line with legal requirements and LVJB standards.	<b>Assistant Assessor/Principal Surveyors</b>	
			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.		
		<b>Audit processes, procedures and Bands.</b>	Audit valuation processes procedures and issued values.	<b>Governance Team</b>	
			Audit appeal processes, procedures and outcomes.	<b>Corporate Leadership Team</b>	
			Consider presented audit report findings.		
<b>Further develop IT systems, applications and communications.</b>	Continue to review the processes associated with new housing entering the Council Tax list, with particular progression of the mobile survey function.	<b>Assistant Assessor/Principal Surveyors /ICT</b>			
	Ensure all new and amended information is recorded as electronic data.				
<b>Review &amp; maintain performance.</b>	Maintain and review efficiency in survey procedures.	<b>Assistant Assessor/Principal Surveyors</b>			
	Maintain quality of bandings by reference to band reductions on appeal.				
	Maintain performance in terms of KPIs and internal indicators.				

<b>3</b>	To ensure timeous publication and maintenance of the <b><i>Electoral Register</i></b> and registration services at elections.	<b>Prepare and publish the Electoral Register by 1<sup>st</sup> December 2022.</b>	Publish the Electoral Register in paper format and electronic format.	<b>Electoral Registration Officer (ERO)</b>
			Carry out postal and door to door canvass in line with recent legislation and to maximise registration.	<b>Head of Electoral Services</b>
			Ensure appropriate advertising/publicity initiatives are in place in conjunction with EC public engagement strategy.	<b>Head of Electoral Services</b>
			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.	
		<b>Maintain ER for statutory updates each month.</b>	Update ER monthly updates per legislative requirements	<b>Head of Electoral Services</b>
			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.	
		<b>Dispose of any registration appeals.</b>	Correspond with appellants in line with statutory requirements.	<b>Electoral Registration Officer (ERO)/Head of Electoral Services</b>
			Ensure hearings are set up and conducted timeously.	
		<b>Prepare for and ensure effective management of registration duties for any elections or referendums called during the year.</b>	Ensure all applications for registration are processed accurately and timeously.	<b>Head of Electoral Services</b>
			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 incoming enquiries.				
Ensure staffing resource in place at all peak periods and as required during polling hours.				

		<b>Audit processes, procedures and accuracy to ensure quality registration delivery.</b>	Develop and monitor audit reports for ER updates.	<b>Head of Electoral Services/Governance Team</b>		
			Audit personal identifiers with canvass signatures.			
			Audit name changes to ensure accuracy.			
			Consider all audit reports for appropriate actions.			
		<b>Further develop IT systems, applications and communications.</b>		Implement and review the effectiveness of recently implemented mobile door to door canvass system	<b>Head of Electoral Services</b>	
				Deliver electorate statistics to NRoS. (RPF 29)		
				Review and continue to maximise UPRN matching to electoral address data base.		
		<b>Prepare for refresh of AV personal identifiers in January 2023</b>		Identify quantities and additional required expenditure.	<b>Head of Electoral Services</b>	
				Establish required processes, timetable for collection and processing.		
				Provide reports as required to Corporate Leadership Team and Board.		
		<b>Review &amp; maintain performance.</b>		Improve efficiency in the delivery of the canvass processes and procedures.	<b>Head of Electoral Services</b>	
				Review performance reports and consider new targets.		
Deliver performance standards self-assessment and data returns to the Electoral Commission.						
<b>4</b>	To develop, prepare and publish reports to improve customer knowledge and ensure attainment of good <b>Community Focus</b> .	<b>Prepare and publish statutory reports.</b>	Annual assessor's report to LVJB and staff re service planning, performance & target setting.	<b>Assessor</b>		
			Annual treasurer's un-audited accounts.	<b>Treasurer</b>		
			Annual Audit reports to LVJB.	<b>Head of Governance</b>		
			Annual proposed Revenue Report to LVJB.	<b>Treasurer</b>		
		<b>Prepare and present reports to LVJB.</b>		Quarterly progress report to LVJB.	<b>Assessor</b>	
				LVJB Business Strategy		
				Annual Governance Report		<b>Head of Governance</b>
		<b>Develop and improve customer targeted policies</b>		Oversee development of performance statistical analysis and monitoring.	<b>Corporate Leadership Team</b>	
				Monitor adherence to equality principles.		<b>Head of Governance/HR Manager</b>
				Quarterly progress report to LVJB.		<b>Assessor</b>
				Ensure a robust public engagement strategy is in place for general registration and focused electoral events.		<b>Head of Electoral Services</b>
		<b>Maintain and develop appropriate public engagement schemes.</b>		Liaise with universities, further education establishments and schools to maximise student registration	<b>Head of Electoral Services</b>	

			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 internal and public facing websites	Corporate Leadership Team
			Continue to Integrate Sharepoint to improve records management	
			Continue to develop use of social media	
5	To set standards and undertake corporate improvement in <b>Service Delivery Arrangements</b> 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.	Electoral Registration Officer (ERO)/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.	
		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 procedure to meet organisational requirements.	
6	To review roles, responsibilities, <b>Structures and Processes</b> to ensure effective balance of	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.	
			Report to LVJB re review of contents of Financial Regs 5 yearly.	
	Implement and progress the objectives of the Transformation Programme and future Business Strategy	Continue to 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	

	responsibility and authority.		Continue to develop and implement a Performance Framework across the organisation, seeking efficiencies and effective delivery of services.	HR Manager/ Corporate Leadership Team		
			Review ongoing progress of future Business Strategy	Assessor/LVJB		
7	To review, monitor and maintain organisational <b>Risk Management and Internal Controls</b> 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 introduced.		
				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/ Governance Committee
					Plan, implement and review mitigation decisions effectively.	
				Monitor	Monitor budget spend and variances and include in quarterly progress report.	Assessor
					Monitor identified actions resulting from Governance Committee reviews of audit reports at Corporate Leadership Team meetings.	Corporate Leadership/ Governance Committee
					Liaise with the treasurer to the Board to ensure appropriate monitoring and accounting.	Assessor
					Review risk registers at Governance Committee meetings and report relevant matters of risk to the Corporate Leadership Team	Corporate Leadership/ Governance Committee
				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 Submit external & internal auditors' reports and actions carried out resulting from recommendations to the Board.	Head of Governance
		Maintain Quality Assurance audit activity and undertake joint working with internal and external audit.	Prepare monthly QA reports for Governance Committee 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 <b>Standards of Conduct</b> 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 Governance Committee meetings.	Head of Governance
			Ensure Complaints policy and procedures 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 <b>organisational</b>	Continue the implementation and development of the Transformation	Undertake continued review of organisational processes & procedures and progress the implementation of the Valuation Services Team	Corporate Leadership Team
			Review the execution of the Business Strategy	

	<b>development strategy</b> considering corporate initiatives to ensure efficiency and quality of service delivery.	<b>Programme objectives and future Business Strategy.</b>	Assess the impact of the COVID pandemic and re-evaluate the Business Strategy 2020/23	<b>Assessor/Head of Governance</b>
			Create an updated strategic plan reflecting the outcomes of the Business Strategy 2020/23 review.	
		<b>Implement, maintain and review the Corporate &amp; Service Plan</b>	Prepare annual Corporate & Service plan and present to LVJB.	<b>Assessor/Head of Governance</b>
			Ensure staff awareness of the Corporate & Service plan and their role.	
		<b>Deliver continued corporate improvement</b>	Monitor compliance with the Corporate & Service plan on a continual basis and assess at Corporate Leadership Team meetings.	<b>Corporate Leadership Team</b>
			Review internal performance indicators and update KPIs to ensure improvement.	
Monitor performance improvement and report at corporate meetings & LVJB.				
<b>10</b>	To engage in <b>key partnership working</b> to ensure the integrated delivery of efficient government.	<b>Encourage partnership working with constituent authorities.</b>	Continue partnership working with Finance departments of the 4 authorities.	<b>Corporate Leadership Team</b>
			Continue partnership working with the Returning Officer staff of the 4 authorities.	
			Continue partnership working with the Treasurer to LVJB.	
		<b>Encourage partnership working with public and civil servants.</b>	Improve partnership working with Planning and Building departments of the 4 authorities.	<b>Assistant Assessors</b>
			Continue partnership working with the VOA, SAA, Scottish Government, Electoral Commission, Cabinet Office, National Registers of Scotland, etc.	
			Continue partnership working with the RICS, IRRV & AEA professional bodies.	
<b>11</b>	To review, develop and support the <b>Health, Safety, and Wellbeing</b> of all LVJB	<b>Provide all necessary wellbeing advice and support to LVJB staff.</b>	To schedule regular Health & Safety Committee meetings.	<b>HR Manager</b>
			To consider Mental Health initiatives.	
		<b>Maintain &amp; develop all HR procedural documentation &amp; information</b>	Review HR Policies in accordance with an established timetable	

<p>employees, creating an environment that enhances job satisfaction through investment in staff development, HR policies, systems and leadership.</p>	<p><b>Participate in the Scottish Government consultation of the Public Sector Equality Duty in Scotland</b></p>	<p>Monitor and assess the implications of consultation exercise.</p>	
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