

2023 -2024

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 attract, retain and reward quality staff by valuing them through a structure of **HR strategies**.
12. To lead the necessary policies and interventions to support the **Health, Safety, and Wellbeing** 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 updates to constituent authorities Finance Departments weekly.	
			Continue a programme to update rental, cost and turnover analysis ensuring the accuracy of the Roll supporting 3 yearly revaluations.	
		Dispose of Revaluation, running roll and COVID appeals within statutory time frames including LTS & LVAC appeals.	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.	
		Continue preparations for Revaluation 2026	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.	
			Continue to assess and improve communication and engagement protocols	
		Audit processes, procedures, and values.	Develop new appeals system and procedures to enable the transition to the tribunal service	Governance Team
Audit valuation processes, procedures and issued values.				
Audit appeal processes, procedures and outcomes.				
Further develop IT systems, applications, and communications.	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		

		Continue with project planning and implementation in respect of changes required under legislative or procedural change.	Ensure the 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, internal indicators and MyPath objectives.	Assistant Assessor/Wider Leadership Team		
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/Valuation Services Team Manager		
			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 constituent authorities Finance Departments weekly.	Assistant Assessor/Principal Surveyors/ Valuation Services Team Manager
			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 report findings.		
			Further develop IT systems, applications, and communications.	Continue to review the processes associated with new housing entering the Council Tax list, with continued development of the mobile survey function.	Assistant Assessor/Principal Surveyors / Valuation Services Team Manager/ICT	
				Ensure all new and amended information is recorded as electronic data.		
			Review & maintain performance.	Maintain and review efficiency in survey procedures.	Assistant Assessor/Principal Surveyors/ Valuation Services Team Manager	
	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 maintenance of the Electoral Register and registration services at elections.	Prepare and publish the Electoral Register by 1st December 2023.	Publish the Electoral Register in paper format and electronic format.	Electoral Registration Officer (ERO)
			Carry out postal and door to door canvass in line with legislation and to maximise registration.	Head of Electoral Services
			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.	
			Review and implement UK Parliamentary Boundary changes to the published register.	
			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.	Electoral Registration Officer (ERO)/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 incoming 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. Audit name changes to ensure accuracy. Consider all audit reports for appropriate actions.	Head of Electoral Services/Governance Team
		Further develop IT systems, applications and communications.	Evaluate the effectiveness of the mobile door to door canvass system Deliver electorate statistics to NRoS. (RPF 29) Review and continue to maximise UPRN matching to electoral address data base. Ensure all systems and processes are in place to enable the provision of Voter Authority Certificates	Head of Electoral Services
		Prepare for refresh of AV personal identifiers in January 2024	Identify quantities and additional required expenditure. Establish required processes, timetable for collection and processing. Provide reports as required to Corporate Leadership Team and Board.	Head of Electoral Services
		Review & maintain performance.	Improve efficiency in the delivery of the canvass processes and procedures. Review performance reports and consider new targets. Deliver performance standards self-assessment and data returns to the Electoral Commission.	Head of Electoral Services
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
			LVJB Transformation & Business Strategy	Head of Governance
			Annual Governance Report	Corporate Leadership Team
		Develop and improve customer targeted policies	Oversee development of performance statistical analysis and monitoring.	Head of Governance/HR Manager
			Monitor adherence to equality principles.	Head of Governance/HR Manager
			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 internal and public facing websites	Corporate Leadership Team
			Continue to develop M365 to improve records management oversight	
			Continue to develop the 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 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.	
			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 procedure to meet organisational requirements.				
6	To review roles, responsibilities, Structures and	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.	
			Continue to review process and procedures seeking efficiencies and improvements.	Corporate Leadership Team

	Processes to ensure effective balance of responsibility and authority.	Implement and progress the objectives of the Transformation Programme and future Business Strategy	Continue to develop and implement a strategic training policy and continue with cultural change identified under the Transformation Programme.		Principal Surveyor/ Corporate Leadership Team	
			Use the MyPath performance management system across the organisation, to enable objective delivery and efficient deployment of services.		HR Manager/ Corporate Leadership Team	
			Develop the future Business Strategy and Transformation Phase 3		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 introduced and those derived from budget and other organisational challenges.		
			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 a quarterly basis as part of progress report.	Assessor
			Report to Board on budget variances on a 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 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 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 Governance Committee meetings.	Head of Governance
			Ensure Complaints policy and procedures meet required standards and all complaints are monitored, reviewed and acted upon where necessary.	
			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	
9	To plan and deliver an organisational development strategy considering corporate initiatives to ensure efficiency and quality of service delivery.	Continue the implementation and development of the Transformation Programme objectives and future Business Strategy.	Undertake continued development of Phase 3 of the LVJB Transformation Programme and progress the function of the Valuation Services Team	Corporate Leadership Team
			Further development of the Business Strategy	
		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 within it.	Corporate Leadership Team
		Deliver continued corporate improvement	Monitor compliance with the Corporate & Service plan on a continual basis and assess at Corporate Leadership Team meetings.	
			Review internal performance indicators and update KPIs to ensure improvement.	Corporate Leadership Team
Monitor performance improvement and report at corporate meetings & LVJB.				
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.	
		Continue 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.	Corporate Leadership Team
Maintain partnership working with external professional bodies.	Continue partnership working with the RICS, IRRV & AEA professional bodies.			
11	To attract, retain and reward good	Motivated, effective, confident, engaged, and inspiring staff workforce.	To plan and resource the organisation with a flexible, agile, and sustainable workforce through the development of a core staffing structure and recruitment strategies.	

	<p>staff by valuing them through a structure of HR strategies.</p>		<p>To strive to be an employer of choice and ensure LVJB has a reputable and sought-after employee value proposition to attract, recruit and retain ambitious, confident, and inspiring staff.</p> <p>To strive to embed performance management and enhancement through MyPaTH and to move towards and sustain a culture of high performance supported by clear objectives for achieving optimum performance of all staff.</p> <p>To nurture, develop and retain employee talent by providing relevant and aspirational training and development opportunities.</p> <p>To create a culture of mutual trust and respect between senior management, HR, and all staff, ensuring that we all work together as efficiently and respectfully as possible, through a suite of robust, fair, and equitable HR policies and procedure and via staff consultation and communication channels.</p>	<p>HR Manager/ Corporate Leadership Team</p>
<p>12</p>	<p>To lead the necessary policies and interventions to support the Health, Safety, and Wellbeing of all LVJB employees.</p>	<p>Provide all necessary health, safety and wellbeing advice and support to LVJB staff.</p> <p>Maintain & develop all HR procedural documentation & information</p>	<p>To schedule and chair regular Health & Safety Committee meetings and take ownership of associated actions.</p> <p>To consider Mental Health initiatives.</p> <p>Review all Health and Safety policies, procedures, and practices in accordance with legislation and best practice.</p>	<p>HR Manager</p>