

2024 -2025

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 our **Continual Improvement 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 proposals and appeals. Deal with any outstanding COVID appeals within statutory time frames.	Engage with appellants and their representatives in line with legal requirements and LVJB standards.	Assistant Assessor/Principal Surveyors
			Monitor disposal progress, reduction levels and reasons for reduction.	
			Monitor and ensure amendments are processed timeously.	
		Continue preparations for Revaluation 2026	Ensure compliance with the Scottish Courts and Tribunals Service (SCTS) and maintain a high quality of service in the 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.	Further develop the proposals system and procedures to support tribunal service requirements	Governance Team
			Audit valuation processes, procedures and issued values.	
			Audit proposal processes, procedures and outcomes.	
		Further develop IT systems, applications and communications.	Consider and review 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 Programme Governance Group (PPGG)

		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. Hold a series of workshops to ensure consistent understanding and implementation of the LVJB Management of Capability Procedure to enable sustained levels of performance	Corporate/Wider Leadership Team
2	To ensure statutory maintenance of the <i>Council Tax List</i>.	Maintain the Council Tax List in line with statutory requirements.	Ingather and analyse sales evidence.	Principal Surveyors/Divisional Valuers
			Maintain and update survey records as necessary.	
			Review bandings of houses that have been extended and then sold.	
			Ensure accuracy of all amended and new bands.	
			Update CT daily, issue band change notices daily and notify constituent authorities Finance Departments weekly.	
		Dispose of proposals & appeals.	Correspond with appellants in line with legal requirements and LVJB standards.	Principal Surveyors/ Divisional Valuers
			Administer all proposals and appeals properly and commence the process of timetabled disposal in association with the SCTS	
			Monitor band reductions.	
			Ensure amendments are processed timeously.	
		Audit processes, procedures and Bands.	Audit valuation processes procedures and issued values.	Governance Team
			Audit proposal 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.	Principal Surveyors/ Divisional Valuers/ICT
			Ensure all new and amended information is recorded as electronic data.	
		Review & maintain performance.	Maintain and review efficiency in survey procedures.	Corporate/Wider Leadership Team
			Maintain quality of bandings by reference to band reductions on appeal.	
			Maintain performance in terms of KPIs and internal indicators.	
			Hold a series of workshops to ensure consistent understanding and implementation of the LVJB Management of Capability Procedure to enable sustained levels of performance	

3	To ensure timeous publication and maintenance of the <i>Electoral Register</i> and registration services at elections.	Prepare and publish the Electoral Register by 1st December 2024.	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 Administration
			Ensure appropriate advertising/publicity initiatives are in place in conjunction with EC public engagement strategy.	Head of Administration
			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 Administration
			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 Administration
			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 Administration
			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.	

		Audit processes, procedures and accuracy to ensure quality registration delivery.	Ensure staffing resource in place at all peak periods and as required during polling hours.	Head of Administration/Governance Team
			Develop and monitor audit reports for ER updates.	
			Audit name changes to ensure accuracy.	
		Further develop IT systems, applications and communications.	Consider all audit reports for appropriate actions.	Head of Administration
			Evaluate and ensure the continued 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	
			Ensure all necessary systems, procedures and processes are in place to handle forthcoming postal vote divergence challenges	
		Prepare for refresh of AV personal identifiers in January 2025	Identify quantities and additional required expenditure.	Head of Administration
			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 Administration
			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 on performance & target setting.	Assessor/Head of Governance
			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
			Continual Improvement Programme (CIP)	
			Annual Governance Report	Head of Governance
		Develop and improve customer targeted policies	Oversee development of performance statistical analysis and monitoring.	Corporate Leadership Team
			Monitor adherence to equality principles.	Head of Governance/HR Manager

5	To set standards and undertake corporate improvement in Service Delivery Arrangements and review the performance management and planning framework to ensure continuous improvement.		Ensure a robust public engagement strategy is in place for general registration and focused electoral events.	Head of Administration
		Maintain and develop appropriate public engagement schemes.	Liaise with universities, further education establishments and schools to maximise student registration	Head of Administration
			Liaise with care homes to maximise registration for residents	
			Maintain and update the LVJB website and social media channels to ensure currency and accuracy especially at key events.	Engagement 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	Engagement Team/Governance Team/ICT
			Continue to develop M365 to improve records management oversight	
			Continue to develop the use of social media	
		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 at Technical Management and Governance Committee meetings.	
6		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 at Technical Management and Governance Committee meetings.	
		Maintain Electoral performance indicators set by the Electoral Commission.	Agree and set Internal PIs for ER.	Electoral Registration Officer (ERO)/Head of Administration
			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 at Admin Management and Governance Committee meetings.	
		Prepare, implement, monitor and review of Corporate and Service Plan.	Monitor Corporate and Service Plans.	Corporate/Wider Leadership Team
			Ensure adherence to Service Plan and Performance Indicators.	
			Review the Management of Capability procedure to meet organisational requirements.	
		Adhere to Standing Orders, Scheme of Delegation and Financial Regulations;	Report to LVJB re review of contents of Standing Orders.	Assessor
			Report to LVJB re review of contents of Scheme of Delegation.	

	To review roles, responsibilities, Structures and Processes to ensure effective balance of responsibility and authority.	Undertake 5 yearly review.	Report to LVJB re review of contents of Financial Regulations.		Assessor/Treasurer
		Implement and progress the objectives of the Continual Improvement Programme	Continue to review process and procedures seeking efficiencies and improvements.		Corporate/Wider Leadership Team
			Continue to develop and implement the strategic direction of the organisation and realise required cultural change identified under CIP.		Corporate/Wider Leadership Team
			Use the MyPath performance management system across the organisation, to enable objective delivery and efficient deployment of services.		Corporate/Wider Leadership Team
			Continue to identify potential staffing and non-staffing cost savings, further develop strategic objectives, increased performance & sustained service delivery		Corporate/Wider Leadership Team /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 regular 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, Technical and Admin Management, and Governance Committee meetings.	Corporate/Wider Leadership Team/ 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/Wider 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/Wider 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.	Corporate Leadership Team

			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.	<p>Ensure that policies are reviewed regularly, advised to the Board and staff briefed.</p> <p>Monitor adherence to the Policy review timetable and encourage Unison input and agreement.</p> <p>Ensure that appropriate guidance is developed, and training given for new tasks introduced.</p> <p>Ensure that policies are available on the LVJB intranet</p> <p>Ensure an appropriate support structure is in place for all employees</p>	Corporate Leadership Team
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 CIP and future strategic objectives	Undertake the development of the Continual Improvement Programme and progress the implementation of agile working throughout the organisation	Corporate Leadership Team
			Further development of future strategic objectives	
		Implement, maintain and review the Corporate & Service Plan	Prepare the annual Corporate & Service plan and present to LVJB.	Corporate Leadership Team
			Ensure staff awareness of the Corporate & Service plan and their role within it.	
		Deliver continued corporate improvement	Monitor compliance with the Corporate & Service plan on a continual basis and assess at Corporate Leadership Team meetings.	Corporate Leadership Team
			Review internal performance indicators and update KPIs to ensure improvement.	
			Monitor performance improvement and report at corporate meetings & LVJB.	
			Monitor and report absence levels to measure improvement.	
10	To engage in key partnership working to ensure the integrated delivery	Encourage partnership working with constituent authorities.	Baseline CLT objectives against the Management of Capability Procedure to ensure organisational performance targets are met on a sustainable basis	Corporate/Wider Leadership Team
			Continue partnership working with Finance departments of the 4 authorities.	
			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.	

	of efficient government.	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 staff by valuing them through a structure of <i>HR strategies</i> .	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.	Corporate Leadership Team
			Following the highly successful initial implementation of staff contribution awards, continue to identify and acknowledge areas of sustained and single excellence throughout the year.	
			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.	
			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.	
			To nurture, develop and retain employee talent by providing relevant and aspirational training and development opportunities.	
			Engage a Modern Apprenticeship role within the organisation.	
12	To lead the necessary policies and interventions to support the <i>Health, Safety, and Wellbeing</i> of all LVJB employees.	Provide all necessary health, safety and wellbeing advice and support to LVJB staff.	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. This will be achieved through a suite of robust, fair, and equitable HR policies and procedures, established via staff and union representative consultation.	HR Manager
			To schedule and chair regular Health & Safety Committee meetings and take ownership of associated actions.	
		Maintain & develop all HR procedural documentation & information	To consider Mental Health initiatives.	
			Review all Health and Safety policies, procedures, and practices in accordance with legislation and best practice.	