



3 YEAR BUDGET REPORT 2010/11 – 2012/13

1.0 INTRODUCTION

The proposed budget provision for year 2010/11 has been agreed with the Treasurer and his report fairly reflects expected costs, income and risk to the Board.

As stated in previous reports I have agreed with my management team that the organisation can sustain the current staffing levels. I have advised staff that any further vacancies arising through retirements or resignations may not be filled or in some cases may be advertised as temporary posts. As intimated to the Board prior to the retirement of the Depute Assessor it remains my intention to advertise and appoint a new senior post that shall operate within the Technical/Professional area of the organisation. I intend to make a formal request for the filling of this post at the next Board meeting.

I will endeavour to manage the workload within the organisation to meet the proposed performance standards while making every effort to reduce costs and maximise efficiencies. In line with the proposed budget, anticipated staffing levels and expected workload I have prepared Corporate and Service plans and identified performance targets.

The following is a very brief overview of the main items within the budget with the Treasurer providing an in-depth report

2.0 PROPOSED BUDGET 2010/11

The proposed budget provision for the year 2010/11 is £6,373,717 which is a decrease of £53,789 (- 0.84%) from the 2009/10 budget allocation of £6,427,506.

The decrease is mainly due to the non-filling of vacancies and staff turnover which provides a saving of approximately £113,000 and also a reduction for pension and strain payments of approximately £106,000. Increases have been included for pay awards, estimated at 1%, expected increments, and an estimated increase for superannuation costs.

An additional sum of £20,000 is included for expected increased rates payment resulting from the 2010 Revaluation. I have allowed for increased postage costs of £60,000 for valuation appeal administration and election and registration duties.

All other budget items have been estimated in line with analysed projected expenditure expected.

3.0 INDICATIVE BUDGETS 2011/12 AND 2012/13

The proposed base budget proposed for 2011/12 is £6,417,265. This represents a minimal increase of £43,548 (0.68%) over the 2010/11 budget of £6,373,717.

Staffing costs are increased mainly due to budget provision for pay awards estimated at 1%, increased actuarial valuation for superannuation purposes and increments expected to be paid. I have however reduced the overall increase by estimating savings arising from non-filling of vacancies. An addition is included for anticipated rent increase expected to arise from a rent review due on 1st January 2011.

The proposed base budget proposed for 2012/13 is £6,580,091. This represents an increase of £162,826 (2.54%) over the 2011/12 budget of £6,417,265.

The increase is mainly due to budget provision for pay awards estimated at 2%, increased actuarial valuation for superannuation purposes and increments expected to be paid. I consider that due to staffing reductions made over the last few years I will have limited scope for further reductions in staff costs. An additional £37,500 payable as the first full year for anticipated rent increase expected on 1st January 2011 is included.

In line with the proposed budget, staffing levels and expected workload I have prepared Corporate and Service plans and identified performance targets.

4.0 CORPORATE AND SERVICE PLANS

Lothian Valuation Joint Board compiles and maintains the Valuation Roll, Council Tax List and a Register of Electors for each of the constituent Councils which are represented on the Board. Almost all the duties and responsibilities relating to the above are defined in statutory terms and require to be undertaken within strict statutory timetables.

I attach the 2010-2013 Corporate and Service Plans which will be used to ensure that management and monitoring systems are in place to make certain that all functions are carried out efficiently and effectively.

5.0 KEY PERFORMANCE INDICATORS FOR THE WORK OF ASSESSORS

Key Performance Indicators for the work of Assessors have been established following discussion between the Scottish Executive, The Scottish Assessors' Association and Audit Scotland.

5.1 Valuation Roll

The principal indicator in this area relates to the length of time taken to amend the Valuation Roll to reflect changes which have taken place. The number of amendments is shown and also the change in the total annual value of the Valuation Roll in each year.

In general terms, stakeholders prefer the Valuation Roll to be amended as quickly as possible after a change has taken place in order to facilitate stable financial planning and improving the cashflow to the rating pool. The KPIs show actual performance against estimated performance for 2004/5, 2005/6, 2006/7, 2007/8, 2008/9 and targets for 2009/10 and 2010/11.

Valuation Roll	No of changes	Rateable Value 1/4	Rateable Value 31/3	0 – 3 months		3 – 6 months		> 6 months	
				Target	Actual	Target	Actual	Target	Actual
2004/5	3221	885,498,164	903,178,666	52	42.5	26	24	22	33.5
2005/6	3531	903,178,666	1,042,428,524	52	62.8	26	19.1	22	18.2
2006/7	3314	1,042,428,524	1,050,213,188	57	74.9	28	13.9	15	11.2
2007/8	4206	1,050,213,188	1,058,508,620	65	83.26	25	11.63	10	5.11
2008/9	4258	1,058,508,620	1,056,910,140	70	80.77	20	11.53	10	7.7
2009/10		1,056,910,140		80		15		5	
2010/11				82		14		4	

I am very pleased to say that the Board has again greatly exceeded its target performance figures for 2008/9.

As can be seen from the above table we continue to target for improved performance and for 2010/11 the aim is to achieve 82% of all changes to the Valuation Roll to be actioned within 3 months of the date of change. Similarly the aim is for 14% to be within 3 to 6 months and only 4% to be over 6 months.

5.1.1 Appeal Settlements

For each of the relevant years the Assessor provides figures for the total amount of adjustment to net annual value arising from appeal settlements. This figure is expressed as a percentage of the total net annual value of the Valuation Roll as at 1 April in the relevant

year. This indicator allows the Scottish Government to estimate the financial implications arising from the settlement of rating appeals.

Valuation Year	No of Appeals Settled	Target Percentage	Actual Percentage
2002/3	5,970	3.5%	2.92%
2003/4	1,911	3.0%	2.81%
2004 /5	548	3.0%	0.81%
2005/6	1,239	1%	0.12%
2006/7	3,938	2%	0.365%
2007/8	3,641	1%	1.491%
2008/9	1625	1%	1.66%
2009/10	(500)	0.5%	
2010/11	(1,400)	1%	

It can be seen that for 2008/9 greater loss was incurred in the disposal of appeals. This greater than expected loss was due mainly to the losses incurred as a result of large reductions in the Telecoms valuations and tram work disruption. Unfortunately more appeals than I would have liked remain outstanding at this stage of the quinquennium.

5.2 Council Tax

The criteria used in establishing Council Tax indicators are derived in a similar way to those for the Valuation Roll.

Council Tax payers require notification of their banded valuation, and hence their financial liability, as soon as possible after they have taken occupation of the new property. Cashflow to the authority, arising from insertions of new entries is also affected by how quickly entries are made on the Valuation List.

The KPIs show estimated performance against actual performance for 2004/5, 2005/6, 2006/7, 2007/8 and 2008/9 and the performance targets for 2009/10 and 2010/11.

Valuation List	No of Dwellings added	0 – 3 months %		3 – 6 months %		over 6 months %	
		Target	Actual	Target	Actual	Target	Actual
2004/5	4,408	87	73	10	18	3	9
2005/6	4,288	87	81.2	10	12.4	3	6.4
2006/7	5,515	89	84.8	9	11.3	2	3.9
2007/8	5323	89	93.2	9	5.2	2	1.6
2008/9	4,345	89	94.13	9	4.53	2	1.33
2009/10		92		6		2	
2010/11		94		4		2	

I am delighted that we have managed not to meet but exceed the target of 89%. I am sure that the improvement is partially reflective of the recently developed electronic workflow system and the electronic package which holds the technical data required to assess Council Tax bands. The staff also deserve praise for their ability to adapt so well to the new systems and their hard work in attaining this excellent performance.

As can be seen from the above table we continue to target for improved performance and for 2010/11 the aim is to achieve 94% of all new dwellings to the Council Tax List to be actioned within 3 months of the date of entry. Similarly the aim is for 4% to be within 3 to 6 months and only 2% to be over 6 months

6 PERFORMANCE STANDARDS FOR THE WORK OF EROs

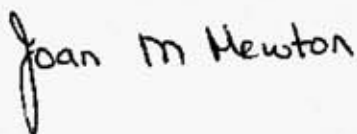
Performance standards for the work of EROs have been established following consultation between the Electoral Commission, The Scottish Assessors' Association, The Association of Electoral Administrators and interested parties.

The first submission of standards was made during January 2009 and I can report that we matched or exceeded the required performance standards. The Electoral Commission carried out a verification investigation on our assessment and no changes were made. The second assessment has recently been submitted and for the 10 performance standards I can indicate that in 6 instances the standard has been met and in 4 the required performance has been exceeded. We intend to carry out further analysis of the standards and associated data to help identify key areas for improvement.

8 BEST VALUE

Best Value is the fourth statutory duty of the Assessor and ERO. Since taking up the post in January 2005 I have worked with my senior management team to ensure that the organisation shows continued improvement in the performance of our statutory duties and also showed continued improvement in efficiencies by regularly reviewing staffing requirements and reducing property costs. The staff complement has reduced by 16.6%, 133.5 to 114.5, since I took up my post.

In anticipation of difficulties surrounding local government finance over the coming years and in the continuing pursuance of Best Value I will review current work practices focusing on creating efficiencies through improvements while at the same time seeking to identify possible savings through partnership working and alternative service models to back office activities. I would however ask that cognisance is taken of the significant steps I have undertaken to date.



Joan Hewton
ASSESSOR & ERO

CORPORATE & SERVICE PLAN 2010 - 2013

SERVICE MISSION & VISION

Lothian Valuation Joint Board's **mission** is to ensure best value and provide equitable, customer focussed, high quality, professional valuation and electoral services for all its stakeholders.

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

AIMS & OBJECTIVES

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 and continuous improvement.
- Take individual and collective responsibility for the services provided by LVJB.
- Encourage innovation and recognise achievement within the organisation.
- Monitor and report performance levels to stakeholders.
- Integrate Equalities issues into all aspects of our service provision.
- Build on our achievements to date.

Key goals of the service

- o To ensure timeous publication and maintenance of the **Valuation Roll**.
- o To ensure timeous publication and maintenance of the **Council Tax List**.
- o To ensure timeous publication and maintenance of the **Electoral Register**.
- o To systematically develop, prepare and publish reports to ensure attainment of improved **Community Focus**
- o To set standards and undertake corporate improvement in **Service Delivery Arrangements** and review the performance management and planning framework to ensure continuous improvement
- o To review roles, responsibilities, **Structures and Processes** to ensure effective balance of power and authority.
- o To review, monitor and maintain organisational **Risk Management and Internal Controls** to ensure efficient and effective delivery of service.
- o To develop, adopt and review formal documentation and put in place appropriate systems to ensure **Standards of Conduct** are adhered to.
- o To plan and deliver an **organisational development strategy** considering corporate initiatives to ensure efficiency and quality of service delivery
- o To engage in **key partnership working** to ensure the delivery of efficient government.

EXECUTIVE RESPONSIBILITIES

No	Task/Project	Responsibility	Start Date	End Date	Performance Measures
1	To ensure timeous publication and maintenance of the Valuation Roll.	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Prepare and publish 2010 Revaluation Roll 5 yearly 2. Maintain Valuation Roll in line with statutory requirements 3. Dispose of appeals within statutory time frame. 4. Audit processes, procedures and values. 5. Further develop IT systems, applications and communications. 6. Improve performance.
2	To ensure timeous publication and maintenance of the Council Tax List.	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Publish CT yearly 2. Maintain CT List in line with statutory requirements 3. Dispose of appeals. 4. Audit processes, procedures and Bands. 5. Further develop IT systems, applications and communications. 6. Improve performance.
3	To ensure timeous publication and maintenance of the Electoral Register.	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Prepare and publish ER on 1st December each year 2. Maintain ER for update on 1st of month outside canvass. 3. Dispose of appeals 4. Provide of election duties as required. 5. Audit processes, procedures and accuracy. 6. Further develop IT systems, applications and communications. 7. Improve performance
4	To systematically develop, prepare and publish reports to ensure attainment of improved Community Focus	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Prepare and publish statutory reports. 2. Prepare and present reports to LVJB. 3. Develop and improve customer targeted policies. 4. Extend and enhance public participation schemes 5. Improve websites 6. Consider further Key Partnership working.
5	To set standards and undertake corporate improvement in Service Delivery Arrangements and review the performance management and planning framework to ensure continuous improvement	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Improve VR key and internal performance indicators. 2. Improve CT key and internal performance indicators. 3. Improve Electoral key and internal performance indicators 4. Preparation, monitoring and review of Service Planning

EXECUTIVE RESPONSIBILITIES cont'd

No	Task/Project	Responsibility	Start Date	End Date	Performance Measures
6	To review roles, responsibilities, Structures and Processes to ensure effective balance of power and authority.	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Review Standing Orders, Scheme of Delegation and Financial Regulations 5 yearly 2. Adhere to Standing Orders, Scheme of Delegation and Financial Regulations 5 yearly 3. Consider structure and responsibilities with staff changes and new tasks..
7	To review, monitor and maintain organisational Risk Management and Internal Controls to ensure efficient and effective delivery of service.	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Identify risks 2. Mitigate risks 3. Monitor and review risks 4. Report risks and review risk strategy framework
8	To develop, adopt and review documentation and put in place appropriate systems to ensure Standards of Conduct are adhered to.	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Maintain PRD process to monitor compliance to legislation and LVJB policies and procedures. 2. Monitor and review compliance to FOI, Data Protection, Race Relations legislation, Equal Opportunities, Age Discrimination, Disability, and Equality etc. 3. Report on Whistle Blowing
9	To plan and deliver an organisational development strategy considering corporate initiatives to ensure efficiency and quality of service delivery	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Maintain 3-year service plan 2. Deliver corporate improvement. 3. Comply with corporate goal, LVJB Mission, vision, aims & objectives
10	To engage in key partnership working to ensure the delivery of efficient government	Executive	April 2010	March 2013	<ol style="list-style-type: none"> 1. Encourage partnership working with constituent authorities 2. Encourage partnership working with public and civil servants e.g. VOA, SAA, Scottish Executive, Electoral Commission etc. 3. Review partnership working with external professional bodies e.g. RICS, IRRV, AEA, etc.

LVJB SERVICE PLAN 2010 - 2013

Strategic Aims & Operational Objectives 1

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
1.1	Prepare and publish 2010 Revaluation Roll 5 yearly	Publish Revaluation Roll 5 yearly in electronic format and on web site and issue Notices	1/4/10	1/4/15	Annually	1/4/13	Assessor
		Ingather and analyse rents, costs, turnover and other relevant information	1/4/10	ongoing	Annually	1/4/13	Assessor
		Prepare and publish practice notes and guidance	1/4/10	1/4/16	Annually	1/4/13	Assessor
		Review and further develop IT applications and property information systems	1/4/10	ongoing	Annually	1/4/13	Assessor
1.2	Maintain Valuation Roll in line with statutory requirements	Maintain and update survey records in line with relevant guidance and practice	1/4/10	ongoing	Quarterly	1/4/12	Assessor
		Prepare valuations in line with practice notes and 'tone' evidence	1/4/10	ongoing	Quarterly	1/4/12	Assessor
		Update V R daily, issue Valuation Notices daily, provide update to constituent authorities Finance weekly	1/4/10	ongoing	Quarterly	1/4/12	Assessor
1.3	Dispose of appeals within statutory time frame.	Correspond with appellants in line with legal requirements and LVJB standards	1/4/10	ongoing	Quarterly	1/4/13	Assessor
		Ensure appeals are allocated to appropriate number of court dates	1/4/10	ongoing	Monthly	1/4/13	Assessor
		Monitor loss on appeal and reasons for loss	1/4/10	ongoing	Quarterly	1/4/13	Assessor
		Ensure amendments are processed timeously	1/4/10	ongoing	Quarterly	1/4/13	Assessor
1.4	Audit processes, procedures and values	Audit valuation processes procedures and issued values	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Audit appeal processes, procedures and outcomes	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Consider presented audit reports	1/4/10	ongoing	Quarterly	1/4/11	Assessor
1.5	Further develop IT systems, applications and communications.	Improve automation of appeals and bulk appeals receipt and acknowledgement	1/4/10	ongoing	Quarterly	1/4/11	Depute Assessor
		Review and further develop valuation applications	1/4/10	ongoing	Quarterly	1/4/11	Depute Assessor
		Develop new classes of information for summary valuation purposes	1/4/10	ongoing	Quarterly	1/4/11	Depute Assessor
1.6	Improve performance.	Improve efficiency in survey procedures	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Improve quality of valuations by reference to appeal loss	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Improve performance in terms of KPIs and internal indicators	1/4/10	ongoing	Quarterly	1/4/11	Assessor

Strategic Aims & Operational Objectives 2

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
2.1	1. Publish CT yearly	Publish Council Tax List in electronic format and on web site	1/4/10	ongoing	Annually	1/4/12	Assessor
		Provide CT File to constituent councils	1/4/10	ongoing	Annually	1/4/12	Assessor
2.2	Maintain CT List in line with statutory requirements	Ingather and analyse sales evidence	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Maintain and update survey records	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Prepare reviewed bandings and amend for sold houses	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Ensure accuracy of all amended and new bands	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Update CT daily, issue band change notices daily and notify councils weekly	1/4/10	ongoing	Quarterly	1/4/11	Assessor
2.3	Dispose of appeals	Correspond with appellants in line with legal requirements and LVJB standards	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Ensure appeals are allocated to appropriate number of court dates	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Monitor band reductions	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Ensure amendments are processed timeously	1/4/10	ongoing	Quarterly	1/4/11	Assessor
2.4	Audit processes, procedures and Bands	Audit banding processes, procedures and issued bands	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Audit appeal processes, procedures and outcomes	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Consider presented audit reports	1/4/10	ongoing	Quarterly	1/4/11	Assessor
2.5	Further develop IT systems, applications and communications	Improve addressing standards	1/4/10	ongoing	Quarterly	1/4/11	Depute Assessor
		Consider workflow improvements	1/4/10	ongoing	Quarterly	1/4/11	Depute Assessor
		Consider document scanning and retention	1/4/10	ongoing	Quarterly	1/4/11	Depute Assessor
2.6	Improve performance	Improve efficiency in survey procedures	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Improve quality of bandings by reference to band reductions on appeal	1/4/10	ongoing	Quarterly	1/4/11	Assessor
		Improve performance in terms of KPIs and internal indicators	1/4/10	ongoing	Quarterly	1/4/11	Assessor

Strategic Aims & Operational Objectives 3

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
3.1	Prepare and publish ER on 1 st December each year	Publish Electoral Register in paper format and electronic format on 1 st December each year	1/12/10	ongoing	Annually	1/4/11	Depute Assessor
		Carry out postal and door to door canvass to maximise registration	1/12/10	ongoing	Annually	1/4/11	Depute Assessor
		Ensure dead wooding is actioned prior to publication	1/12/10	ongoing	Annually	1/4/11	Depute Assessor
		Ensure appropriate advertising is in place	1/12/10	ongoing	Annually	1/4/11	Depute Assessor
		Liaise with external contractors and mitigate risks	1/12/10	ongoing	Annually	1/4/11	Depute Assessor
3.2	Maintain ER for update on 1 st of month outside canvass.	Update ER monthly from 1 st Jan – 1 st Sept &	1/04/10	ongoing	Monthly	1/4/11	Depute Assessor
		Issue Notices in line with statutory requirement	1/04/10	ongoing	Monthly	1/4/11	Depute Assessor
		Improve contact with hard to reach groups	1/04/10	ongoing	Monthly	1/4/11	Depute Assessor
		Identify and improve advertising re registration	1/04/10	ongoing	Monthly	1/4/13	Depute Assessor
		Refresh PIs as required and fully in 2013					Depute Assessor
Carry out targeted door to door canvass	1/04/10	ongoing	Monthly	1/4/11	Depute Assessor		
3.3	Dispose of appeals	Correspond with appellants in line with statutory requirements	1/04/10	ongoing	Quarterly	1/4/11	Depute Assessor
		Ensure hearings are set up timeously	1/04/10	ongoing	Quarterly	1/4/11	Depute Assessor
3.4	Provide of election duties as required.	Provide Election register, AV lists and proxy lists per statute at elections. Scheduled General election May 2010	1/04/10	ongoing	As required	1/4/11	Depute Assessor
		Collect and maintain absent vote personal identifiers.	1/04/10	ongoing	As required	1/4/11	Depute Assessor
		Ensure delivery of identifiers to Returning Officers at elections	1/04/10	ongoing	As required	1/4/11	Depute Assessor
		Ensure all amendments are actioned in line with statutory deadlines	1/04/10	ongoing	As required	1/4/11	Depute Assessor
3.5	Audit processes, procedures and accuracy	Develop and monitor audit reports for ER updates	1/04/10	ongoing	Monthly	1/4/11	Depute Assessor
		Audit personal identifiers with canvass signatures	1/04/10	ongoing	Monthly	1/4/11	Depute Assessor
		Audit name changes to ensure accuracy	1/04/10	ongoing	Monthly	1/4/11	Depute Assessor
3.6	Further develop IT systems, applications and communications	Ensure compliance with CORE	1/04/10	ongoing	Annually	1/4/11	Depute Assessor
		Review performance reports and improve on existing targets	1/04/10	ongoing	Annually	1/4/11	Depute Assessor
		Deliver performance standards to Electoral Commission	1/04/10	ongoing	Annually	1/4/11	Depute Assessor
3.7	Improve performance	Improve efficiency in the delivery of the canvass processes and procedures	1/04/10	ongoing	Annually	1/4/11	Depute Assessor
		Review performance reports and improve on existing targets	1/04/10	ongoing	Annually	1/4/11	Depute Assessor
		Deliver performance standards to Electoral Commission	1/04/10	ongoing	Annually	1/4/11	Depute Assessor

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Strategic Aims & Operational Objectives 4

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
4.1	Prepare and publish statutory reports	Annual publication of public performance report	1/6/10	ongoing	Annually	1/6/11	Depute Assessor
		Annual treasurer's un-audited accounts	1/6/10	ongoing	Annually	1/6/11	Treasurer
		Annual assessor's report to LVJB and staff re performance achieved	1/6/10	ongoing	Annually	1/6/11	Assessor
		Annual Audit reports to LVJB	1/8/10	ongoing	Annually	1/8/11	Treasurer
		Annual assessor's report to LVJB and staff re service plan & target setting	1/2/10	ongoing	Annually	1/2/11	Assessor
		Annual report on equalities	1/6/10	ongoing	Annually	1/6/11	Depute Assessor
		Annual proposed 3-yearly Revenue Report to LVJB	1/2/10	ongoing	Annually	1/2/11	Treasurer
4.2	Prepare and present reports to LVJB	Quarterly progress report to LVJB	1/4/10	ongoing	Quarterly	Annually	Assessor
		Annual Electoral report to LVJB	1/2/10	ongoing	Annually	Annually	Depute Assessor
		Additional reports as required or requested	1/4/10	ongoing	Annually	Annually	Assessor
4.3	Develop and improve customer targeted policies	Measure and report on LVJB customer care standards and policy	1/6/10	ongoing	Quarterly	Annually	Depute Assessor
		Oversee development of performance statistical analysis and monitoring	1/4/10	ongoing	Annually	Annually	Depute Assessor
		Produce annual report to be included in public performance report	1/6/10	ongoing	Annually	Annually	Depute Assessor
		Develop, measure and produce annual report on LVJB equality initiatives and standards achieved	1/6/10	ongoing	Annually	Annually	Depute Assessor
		Review Equalities policies and schemes 3 yearly	1/12/10	ongoing	Annually	1/12/13	Depute Assessor
		Monitor adherence to equality principles	1/4/10	ongoing	Annually	Annually	Depute Assessor
4.4	Extend and enhance public participation schemes	Quarterly progress report to LVJB	1/4/10	ongoing	Quarterly	Annually	Assessor
		Annual Electoral report to LVJB	1/2/10	ongoing	Annually	Annually	Depute Assessor
		Additional reports as required or requested	1/4/10	ongoing	Annually	Annually	Assessor
4.5	Improve websites	Identify improvements to LVJB internet site and review contents	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Identify improvements to LVJB intranet site and review contents	1/4/10	ongoing	Quarterly	1/4/11	Executive
4.6	Consider further key partnership working	Continue relationships with SAA, AEA, Scottish Government and constituent Revenue & Benefits departments	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Consider sharing of services with constituent councils and Assessors	1/4/10	ongoing	Annually	1/4/11	Executive

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Strategic Aims & Operational Objectives 5

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
5.1	Improve VR key and internal performance indicators	Agree and set KPIs for VR	1/2/10	ongoing	Quarterly	1/2/11	Executive
		Agree and set a suite of internal indicators for VR performance	1/2/10	ongoing	Quarterly	1/2/11	Executive
		Monitor, analyse and report on VR performance quarterly	1/4/10	ongoing	Quarterly	1/4/11	Executive
5.2	Improve CT key and internal performance indicators	Agree and set KPIs for CT	1/2/10	ongoing	Quarterly	1/2/11	Executive
		Agree and set a suite of internal indicators for CT performance	1/2/10	ongoing	Quarterly	1/2/11	Executive
		Monitor, analyse and report on CT performance quarterly	1/4/10	ongoing	Quarterly	1/4/11	Executive
5.3	Improve VR key and internal performance indicators	Agree and set Internal PIs for ER	1/2/10	ongoing	Monthly	1/2/11	Executive
		Produce and submit targets for ER performance to Electoral commission	15/1/10	ongoing	Annually	15/1/11	Executive
		Produce and submit statistical monitoring & indicators for ER performance to Electoral commission	15/1/10	ongoing	Annually	15/1/11	Executive
		Monitor, analyse and report on ER performance monthly	1/4/10	ongoing	Monthly	1/4/11	Executive
5.4	Prepare, monitor and review service plan	Develop and introduce 2010-13 Executive Service Plan	1/12/10	ongoing	Quarterly	1/2/11	Executive
		Monitor Performance & Development Review procedure to ensure adherence to Service Plan and Performance Indicators.	1/2/10	ongoing	6 monthly	1/2/11	Executive
		Review Performance & Development Review procedure to meet staff comments and meet organisational requirements	1/2/10	ongoing	6 monthly	1/2/11	Executive
		Review 3-yearly Service Plan annually	1/12/10	ongoing	Quarterly	1/12/11	Executive
		Review & monitor a timetable for reviewing and monitoring performance measurement and target setting.	1/2/10	ongoing	Quarterly	1/2/11	Executive

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Strategic Aims & Operational Objectives 6

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
6.1	Review Standing Orders, Scheme of Delegation and Financial Regulations 5 yearly	Review contents of Standing Orders annually	1/4/15	ongoing	Annually	1/4/20	Assessor/LVJB
		Review contents of Scheme of Delegation annually	1/4/15	ongoing	Annually	1/4/20	Assessor/LVJB
		Review contents of Financial Regs annually	1/4/15	ongoing	Annually	1/4/20	Assessor/Treasurer/LVJB
6.2	Adhere to Standing Orders, Scheme of Delegation and Financial Regulations	Report to LVJB re review of contents of Standing Orders annually	1/12/10	ongoing	Annually	1/4/15	Assessor
		Report to LVJB re review of contents of Scheme of Delegation annually	1/12/10	ongoing	Annually	1/4/15	Assessor
		Report to LVJB re review of contents of Financial Regs annually	1/12/10	ongoing	Annually	1/4/15	Assessor/Treasurer
6.3	Consider structure and responsibilities with staff changes and new tasks	Review PRD to ensure compliance with Standing Orders, Scheme of Delegation and Financial Regs for executive and managers	1/4/10	ongoing	Annually	1/4/11	Executive
		Annually monitor through PRD, compliance with Standing Orders, Scheme of Delegation and Financial Regs for executive and managers	1/4/10	ongoing	Annually	1/4/11	Executive
		Review staffing and post requirements when staff leave, reduce hours or alter posts	1/4/10	ongoing	Monthly	1/4/11	Executive

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Strategic Aims & Operational Objectives 7

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
7.1	Identify risks	Consider new risks for addition to rolling business risk register at all management meetings	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Consider new risks to be added to the strategic business risk register on a 6 monthly basis at senior management meetings	1/4/10	ongoing	6monthly	1/10/10	Executive
		Consider risks as legislative changes are considered	1/4/10	ongoing	quarterly	1/10/10	Executive
		Consider risks as statutory duties change	1/4/10	ongoing	quarterly	1/10/10	Executive
7.2	Mitigate risks	Ensure mitigation strategy is considered timeously	1/4/10	ongoing	quarterly	1/10/10	Executive
		Implement mitigation decisions effectively	1/4/10	ongoing	6Monthly	1/10/10	Executive
7.3	Monitor & review risks	Monitor budget spend and variances quarterly at management meetings	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Monitor budget spend and past and proposed variances on a quarterly basis at executive meetings	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Monitor budget spend and past and proposed variances and include in quarterly progress report	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Monitor actions resulting from audit reports at quarterly executive strategy meetings.	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Include monitoring of risks within PRD of appropriate staff	1/4/10	ongoing	Annually	1/4/11	Executive
		Liaise with the treasurer to the Board to ensure appropriate monitoring and accounting	1/4/10	ongoing	Quarterly	1/4/11	Executive
7.4	Report risks and review risk strategy	Report to Board on identified key risks on quarterly basis as part of progress report	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Report to Board on budget variances, past and proposed, on quarterly basis as part of progress report	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Submit external & internal auditors' reports and actions carried out resulting from recommendations to the Board.	1/8/10	ongoing	Annually	1/8/11	Executive
		Review & monitor risk management framework policy	1/4/11	ongoing	Annually	1/4/15	Executive

Strategic Aims & Operational Objectives 8

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
8.1	Maintain PRD process to monitor compliance to legislation and LVJB policies and procedures.	Further develop pilot PRD scheme to monitor compliance with LVJB standards.	1/4/10	ongoing	Annually	1/4/11	Executive
		Ensure compliance with LVJB employment legal requirements on a day to day basis and assess at annual PRD	1/4/10	ongoing	Annually	1/4/11	Managers
		Ensure compliance with LVJB policies on a day to day basis and assess at annual PRD	1/4/10	ongoing	Annually	1/4/11	Managers
		Ensure compliance with LVJB procedures on a day to day basis and assess at annual PRD	1/4/10	ongoing	Annually	1/4/11	Managers
		Ensure compliance with LVJB instructions on a day to day basis and assess at annual PRD	1/4/10	ongoing	Annually	1/4/11	Managers
8.2	Monitor and review compliance to FOI, Data Protection, Race Relations legislation, Equal Opportunities, Age Discrimination, Disability, and Equality etc.	Ensure compliance with legal requirements e.g. FOI, Data Protection, Race Relations, Equal Opportunities, Age Discrimination legislation, Disability equality etc. on a day to day basis and assess at monthly management meetings	1/4/10	ongoing	Quarterly	1/4/11	Management Team
		Ensure compliance with legal requirements e.g. FOI, Data Protection, Race Relations, Equal Opportunities, Age Discrimination legislation, Disability equality at quarterly strategy meetings	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Ensure compliance with legal requirements e.g. FOI, Data Protection, Race Relations, Equal Opportunities, Age Discrimination legislation, Disability equality etc. on a day to day basis and assess at annual PRD	1/4/10	ongoing	Annually	1/4/11	All Managers
		Report on compliance with legal requirements e.g. FOI, Data Protection, Race Relations, Equal Opportunities, Age Discrimination legislation, Disability equality etc. to LVJB	1/8/10	ongoing	Annually	1/8/11	Assessor
8.3	Report on Whistle Blowing	Ensure the policy and procedures are reviewed as appropriate to ensure staff concerns are addressed.	1/4/10	ongoing	Annually	1/4/14	Assessor
		Report on items raised as appropriate	1/4/10	ongoing	Annually	1/4/14	Assessor

Strategic Aims & Operational Objectives 9

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
9.1	Maintain 3-year service plan	Prepare a 3-year service plan and present to LVJB	1/2/10	ongoing	Annually	1/2/11	Assessor
		Review the service plan yearly and provide monitoring report to LVJB	1/10/10	ongoing	6 monthly	31/3/11	Assessor
		Ensure staff awareness, guidance, monitoring and assessment of compliance procedures	1/4/10	ongoing	Annually	1/4/11	Executive
		Monitor compliance with the service plan on a day to day basis and assess 6 monthly at management meeting	1/4/10	ongoing	Annually	1/4/11	All Managers
9.2	Deliver corporate improvement.	Develop & review a suite of internal performance indicators and update KPIs to ensure improvement	1/4/10	1/4/08	Annually	1/4/11	Executive
		Monitor performance improvement and report at quarterly management meetings	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Monitor improvement and report annually to LVJB	1/6/10	ongoing	Annually	1/6/11	Assessor
		Monitor improvement and report annually as a public performance report	1/6/10	ongoing	Annually	1/6/11	Depute Assessor
		Monitor customer care to measure improvement	1/4/10	ongoing	Annually	1/4/11	Executive
		Monitor and report absence levels to measure improvement.	1/4/10	ongoing	Monthly	1/4/11	Depute Assessor
		Discuss & develop corporate improvement strategies at executive meetings.	1/4/10	ongoing	Quarterly	1/4/11	Executive
9.3	Comply with corporate goal, LVJB Mission, vision, aims & objectives	Review corporate goals at executive meeting.	1/4/10	ongoing	Annually	1/4/11	Executive
		Ensure that corporate goal is communicated to all staff and included in PRD process	1/4/10	ongoing	Annually	1/4/11	Executive
		Report to staff on success of corporate goal.	1/4/10	ongoing	Quarterly	1/4/11	Executive
		Communicate and monitor adherence to Mission, vision, aims & objectives	1/4/10	ongoing	Annually	1/4/11	Executive

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Strategic Aims & Operational Objectives 10

No	Performance Measures	Strategic Aims / Operational Objectives	Start Date	End Date	Monitoring	Review	Key Task Owner(s)
10.1	Encourage partnership working with constituent authorities	Discuss and develop partnership working with Finance departments of the 4 authorities	1/4/10	ongoing	Annually	1/4/11	Executive
		Discuss and develop partnership working with the Returning Officer staff of the 4 authorities	1/4/10	ongoing	Annually	1/4/11	Executive
		Discuss and develop partnership working with Personnel department of the CEC	1/4/10	ongoing	Annually	1/4/11	Executive
		Discuss and develop partnership working with the Treasurer to LVJB	1/4/10	ongoing	Annually	1/4/11	Executive
		Discuss, develop and improve partnership working with Planning and Building departments of the 4 authorities	1/4/10	ongoing	Annually	1/4/11	Executive
10.2	Encourage partnership working with public and civil servants e.g. VOA, SAA, Scottish Executive, Electoral Commission etc.	Encourage partnership working with the SAA	1/4/10	ongoing	Annually	1/4/11	Executive
		Encourage partnership working with the VOA	1/4/10	ongoing	Annually	1/4/11	Executive
		Encourage partnership working with the SAA Portal Board	1/4/10	ongoing	Annually	1/4/11	Executive
		Encourage partnership working with the General Register of Scotland	1/4/10	ongoing	Annually	1/4/11	Executive
10.3	Review partnership working with external professional bodies e.g. RICS, IRRV, AEA, etc.	Encourage partnership working with the RICS	1/4/10	ongoing	Annually	1/4/11	Executive
		Encourage partnership working with the IRRV	1/4/10	ongoing	Annually	1/4/11	Executive
		Encourage partnership working with the AEA	1/4/10	ongoing	Annually	1/4/11	Executive