

BUDGET REPORT

2017 - 2018



1 INTRODUCTION

The proposed budget provision for the year 2017/18 has been agreed with the Treasurer and his report reflects expected costs, income and risk to the Board.

I will endeavour to manage the services within the organisation to meet appropriate performance standards while making every effort to maximise the efficient use of resources. I attach the 2017-2018 Corporate and Service Plans which outline the key activities that shall be undertaken across the service delivery areas.

In particular, emphasis shall be on responding to enquiries following the release of Revaluation Notices and the subsequent administration and disposal of Revaluation Appeals. As regards Electoral Registration focus is on the 4th May Local Government elections, the ongoing chase of non-returned ITR's, and the 2017 annual canvass of all households which shall commence during August.

2 PROPOSED BUDGET 2017/18

The proposed budget for 2017/18 represents a flat-cash settlement of £6.118 million. This reflects unavoidable growth of £69k offset by minor reductions across a range of expenditure heads such as premises, transport, supplies and services and 3rd party payments.

3 POSSIBLE BUDGET RISKS

3.1 Individual Electoral Registration

Previous reports to the Board have highlighted the ongoing issue with additional costs associated with Individual Electoral Registration.

The Treasurers Financial Planning report to the Board dated 28th November 2016 indicated an annual additional expenditure requirement of £468k.

This additional requirement is funded currently by annual grants from the Cabinet Office. The UK Government has indicated that it shall continue to provide funding until the end of the current government term in 2020.

Clearly this position represents a long term risk to the financial arrangements of the Board and its ability to continue to deliver the IER service.

In an attempt to address this matter the Cabinet Office has initiated pilot schemes. The aim of which is to create amendments to the current prescriptive legislative requirements that shall reduce costs while maintaining completeness and accuracy of the registration process.

In addition to this the internal processes, procedures and organisational changes adopted within the organisation in order to provide the IER service shall be reviewed. This shall seek to contribute to the cost savings requirement.

3.2 Valuation Roll

Draft Revaluation 2017 values were published on the Scottish Assessor's Association web portal on the 15th December 2016. This coincided with the Scottish Government's budget announcements which included information on business rates relief. The draft values shall become live with effect from 1st April 2017 with Revaluation Notices being issued to all proprietors, tenants and occupiers of lands and heritages that appear in the Revaluation Roll around 15th March 2017. A high level of initial enquiry from ratepayers can be expected in conjunction with those ratepayers who lodge appeals either directly or via appointed agents. Ratepayers have until the 30th September 2017 to lodge appeals against entries in the Revaluation Roll. Dealing with enquiries and the disposal of appeals is a very resource intensive activity and considerable pressure shall be upon the staff resources at this time.

The Barclay Review of Business Rates in Scotland is ongoing with an initial report to ministers during July 2017. The Scottish Assessors Association has been involved with the consultation process and continues to provide information on request.

The Land Reform (Scotland) Bill has been passed by Parliament and there is now a requirement to enter shootings and deer forests in the Revaluation Roll. While a relatively limited number of entries can be expected in Lothian, especially in comparison to other areas, this work is proving time consuming.

3.3 Council Tax

From the 1st April 2017 the payment ratios between Council Tax Band D and the higher bands E, F, G, and H shall alter. It is likely that some council tax payers in those higher bands may seek to lodge appeals in an attempt to reduce payments. Should large numbers of enquiries and appeals be lodged this shall place considerable strain on staff resources.

The adjustments to band payment ratios has been indicated by the Scottish Government as the first element of a journey to reform Council Tax. This position shall be closely followed in order for any future changes to be impact assessed at the earliest opportunity.

4 BUDGET RESERVE

A reserve fund was established a number of years ago in order to meet the one-off costs associated with the operation of the Board's policies on Voluntary Early Release. More recently the Board has approved that the fund could be used to support, in the short term, the additional funding requirement for IER in the event Cabinet Office funding is unexpectedly withdrawn.

To date the fund has been utilised to a very limited extent, and as a result the reserve has reached a level that is in excess of anticipated future requirements.

The recommendation by the Treasurer to reduce the current reserve fund level is supported.

During presentation of the 2016/17 final accounts the Board shall be able to give consideration to any under spent budgetary allocation and whether this can be placed to the reserve fund.

5 FUTURE FINANCIAL SUSTAINABILITY

Financial sustainability is a key priority for any local authority organisation.

The requirement for the Board to establish a sustainable fiscal position has been identified by both the Treasurer and recent Audit Scotland reports. Audit organisations define financial sustainability in the following terms. "Financial sustainability looks forward to the medium and longer term to consider whether the organisation is planning effectively to continue to deliver its services or the way in which they should be delivered."

The current policy of strict vacancy control has allowed the Board to deliver services within budget allocation. While this approach has been successful in terms of providing the required year on year financial outcome it is fundamentally a short term strategy. Such an approach does not allow scope or opportunity for operational reappraisal which shall allow the proper alignment of service priorities and workloads to the resources available.

To ensure services can be delivered in the medium to longer term it is necessary to investigate and test the current business model in order to establish how effectively the organisation is performing and identify where any realignment is required in order to meet future needs.

It is intended therefore that a programme of investigation shall be commenced following the 4th May 2017 Local Government election. In accordance with the existing Board policy on the Conduct of Reviews the Assessor shall in the period prior to 4th May 2017 engage with the Trade Union to consult on and establish the terms upon which the programme shall be conducted.

It is important to manage expectations as regards possible outcomes. It is of primary and essential importance that the statutory functions which the Assessor and his staff are

responsible for discharging are not in any way compromised. As the staffing resource of the Board has been repeatedly targeted under the policy of vacancy control the scope to create significant financial savings from this area of expenditure may be limited.

Further reports shall be provided to the Board as the terms of engagement and the project management framework that shall support the process, are developed.

6 KEY PERFORMANCE INDICATORS FOR THE WORK OF ASSESSORS

Key Performance Indicators for the work of Assessors are in place for Valuation Roll and Council Tax performance.

6.1 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 improve the cash flow to the rating pool.

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
2009/10	3,792	1,056,910,140	1,068,384,758	80	78.1	15	11.1	5	10.8
2010/11	3,476	1,259,913,732	1,274,347,293	82	78.02	14	13.55	4	8.43
2011/12	3,114	1,274,347,293	1,277,889,313	80	71.77	15	15.35	5	12.88
2012/13	3,188	1,277,889,313	1,275,905,939	75	74.09	13	12.30	12	13.61
2013/14	3,275	1,275,905,939	1,269,386,086	75	74.32	15	13.07	10	12.61
2014/15	3,489	1,269,386,086	1,277,094,790	78	75.78	12	13.44	10	10.78
2015/16	3,578	1,277,094,790	1,269,782,464	75	72.11	13	15.36	12	12.52
2016/17				50		25		25	

The performance achieved during 2015/16 and the target set for 2016/17 reflect the impact on tasks associated with ongoing maintenance of the Valuation Roll during the period when resources are required to be diverted to undertake work associated with a Revaluation.

6.2 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. Cash flow to the authority, arising from insertions of new entries is also affected by how quickly entries are made on the Valuation List.

Valuation List	No of Dwellings added	0 – 3 months %		3 – 6 months %		Over 6 months %	
		Target	Actual	Target	Actual	Target	Actual
2009/10	3,984	92	95.3	6	2.5	2	2.2
2010/11	3,768	94	94.98	4	4.06	2	0.96
2011/12	3,410	94	96.72	4	2.35	2	0.94
2012/13	3,171	95	95.52	3	3.09	2	1.39
2013/14	4,315	96	94.9	3	3.01	1	2.09
2014/15	4,049	96	95.73	3	2.77	1	1.50
2015/16	4,860	95	96.46	3	2.98	2	0.56
2016/17		95		3		2	

The performance achieved for 2015/16 surpassed the target set.

7 PERFORMANCE STANDARDS FOR THE WORK OF ELECTORAL REGISTRATION OFFICERS

Performance standards for the work of EROs are monitored by the Electoral Commission. Following the introduction of IER the Electoral Commission have designed two overarching performance standards that encapsulate electoral activities over an annual period. Work is ongoing to ensure material is available that provides assurance that the standards are being met. The Board shall be provided with further information on the Performance Standards at future Board meetings.

8 CONCLUSION

Subject to the risks outlined I have a reasonable level of confidence that current levels of service delivery can be maintained throughout 2017/18 and within the proposed budget allocation. During 2017/18 Budget Projection Reports and Assessor's Performance Reports shall provide the basis upon which this position can be monitored. Looking forward I have outlined the requirement of establishing a longer term financially sustainable position for the Board and the steps I intend to take in that regard.

9 RECOMMENDATION

The Board is asked to note the content of this report.

Graeme Strachan
Interim Assessor and Electoral Registration Officer

Strategic Aims & Operational Objectives 1

To ensure statutory duties are carried out for maintenance of the **Valuation Roll** and ensure timeous publication of the 2017 Revaluation Roll.

Performance Measures		Strategic Aims / Operational Objectives	
1.1	Maintain Valuation Roll in line with statutory requirements.	Maintain and update survey records in line with relevant guidance and practice.	Head of Valuation
		Consider planning and building warrants and take appropriate action to maintain records	Head of Valuation
		Prepare valuations in line with practice notes and 'tone' evidence.	Head of Valuation
		Update VR daily, issue Valuation Notices daily; provide update to constituent authorities Finance weekly.	Head of Valuation
		Continue to update rental, cost and turnover analysis to ensure accuracy of the Roll	Head of Valuation
1.2	Dispose of appeals within statutory time frame including LTS & LVAC appeals.	Correspond with appellants in line with legal requirements and LVJB standards.	Head of Valuation
		Ensure appeals are allocated to appropriate number of court dates.	Head of Valuation
		Monitor loss on appeal and reasons for loss.	Head of Valuation
		Monitor and ensure amendments are processed timeously.	Head of Valuation
		Ensure compliance with LTS and quality preparation of cases	Head of Valuation
1.3	2017 Revaluation Roll.	Ensure Revaluation Notices are issued timeously and that all necessary data files are passed to Directors of Finance.	Head of Valuation
		Provide an effective engagement service with ratepayers seeking information and discussion regarding the Revaluation.	Head of Valuation
		Administer properly all Revaluation appeals lodged within statutory time limits and commence the process of timetabled disposal in association with the Valuation Appeal Committee.	Head of Valuation
1.4	Audit processes, procedures and values.	Audit valuation processes procedures and issued values.	Audit Manager
		Audit appeal processes, procedures and outcomes.	Audit Manager

		Consider presented audit reports.	Executive
1.5	Further develop IT systems, applications and communications	Review and further develop valuation applications.	Head of Valuation/Head of ICT
		Develop new classes of information for summary valuation purposes.	Head of Valuation/Head of ICT
1.6	Maintain performance.	Maintain efficiency in survey procedures.	Head of Valuation
		Maintain quality of valuations by reference to appeal loss.	Head of Valuation
		Maintain performance in terms of KPIs and internal indicators.	Head of Valuation

Strategic Aims & Operational Objectives 2

To ensure statutory maintenance of the **Council Tax List**.

2.1	Maintain CT List in line with statutory requirements	Ingather and analyse sales evidence.	Head of Valuation
		Maintain and update survey records.	Head of Valuation
		Prepare reviewed bandings and amend for sold houses.	Head of Valuation
		Ensure accuracy of all amended and new bands.	Head of Valuation
		Update CT daily, issue band change notices daily and notify councils weekly.	Head of Valuation
2.2	Dispose of proposals & appeals	Correspond with appellants in line with legal requirements and LVJB standards.	Head of Valuation
		Administer properly all proposals and appeals and commence the process of timetabled disposal in association with the Valuation Appeal Committee.	Head of Valuation
		Monitor band reductions.	Head of Valuation
		Ensure amendments are processed timeously.	Head of Valuation
2.3	Audit processes, procedures and Bands	Audit banding processes, procedures and issued bands	Audit Manager
		Audit appeal processes, procedures and outcomes.	Audit Manager
		Consider presented audit reports.	Executive
2.4	Further develop IT systems, applications and communications	Consider workflow and work improvements	Head of Valuation
		Ensure all new and altered records are saved in electronic format	Head of Valuation
2.5	Maintain performance	Maintain efficiency in survey procedures.	Head of Valuation
		Maintain quality of bandings by reference to band reductions on appeal.	Head of Valuation
		Maintain performance in terms of KPIs and internal indicators.	Head of Valuation

Strategic Aims & Operational Objectives 3

To ensure timeous publication and maintenance of the **Electoral Register** through full Individual Electoral Registration.

Performance Measures		Strategic Aims / Operational Objectives	
3.1	Prepare and publish ER by 1 st December 2017 and annually thereafter	Publish Electoral Register in paper format and electronic format by 1 st December 2017 and each year thereafter.	Assessor
		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.	Head of Administration
		Distribute register in requested format to persons as defined by statute	Head of Administration
		Actively encourage recipients to accept the register in electronic format to reduce costs	Head of Administration
		Liaise with external contractors and manage/mitigate risks	Head of Administration
3.2	Maintain ER for statutory updates each month.	Update ER monthly updates per legislative requirements	Head of Administration
		Issue Notices in line with statutory requirement	Head of Administration
		Improve contact with hard to reach groups through partnership working initiatives.	Head of Administration
		Identify and improve appropriate advertising/publicity channels re registration.	Head of Administration
		Refresh AVPIs as required in January 2017.	Head of Administration
3.3	Dispose of any registration appeals	Correspond with appellants in line with statutory requirements.	Head of Administration
		Ensure hearings are set up and conducted timeously.	Assessor/Head of Administration
3.4	Prepare for refresh of AV personal identifiers in January 2018	Identify quantities and additional required expenditure.	Head of Administration
		Establish required processes, timetable for collection and processing.	Head of Administration

		Provide reports as required to Executive and Board.	Head of Administration
3.5	Prepare for and ensure effective management of registration duties for LG Election 4 May 2017 and any other elections or referendums as required.	Ensure all applications for registration are processed accurately and timeously.	Head of Administration
		Ensure all AVPI applications for registration are processed accurately and timeously.	Head of Administration
		Prepare and maintain all necessary timetables including the identification of all key risks associated with election preparation requirements	Head of Administration
		Undertake engagement activities and ensure staff are trained and available to answer all telephone and email enquiries.	Head of Administration
		Ensure staffing resource in place at all peak periods and as required during polling hours.	Head of Administration
3.6	Audit processes, procedures and accuracy to ensure quality registration delivery.	Develop and monitor audit reports for ER updates.	Audit Manager
		Audit personal identifiers with canvass signatures.	Audit Manager
		Audit name changes to ensure accuracy.	Audit Manager
		Consider all audit reports for appropriate actions.	Executive
3.7	Further develop IT systems, applications and communications.	Improve address data management to maximise data matching.	Depute Assessor/Head of ICT
		Deliver electorate statistics to NRoS. (RPF 29)	Head of Administration
3.8	Maintain performance	Improve efficiency in the delivery of the canvass processes and procedures.	Head of Administration
		Review performance reports and consider new targets.	Head of Administration
		Deliver performance standards self-assessment and data returns to Electoral Commission.	Head of Administration

Strategic Aims & Operational Objectives 4

To systematically develop, prepare and publish reports to improve customer knowledge & ensure attainment of improved **Community Focus**

Performance Measures		Strategic Aims / Operational Objectives	
4.1	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.	Treasurer
		Report on equalities April 2017 and two yearly thereafter.	Depute Assessor
		Annual proposed Revenue Report to LVJB.	Treasurer
4.2	Prepare and present reports to LVJB	Quarterly progress report to LVJB.	Assessor
		Reports as required.	Executive
4.3	Develop and improve customer targeted policies	Oversee development of performance statistical analysis and monitoring.	Executive
		Monitor adherence to equality principles.	Senior Management Team
		Quarterly progress report to LVJB.	Assessor
		Liaise with the Electoral commission to ensure a robust public engagement strategy is in place for general registration and focused electoral events.	Assessor
4.4	Maintain appropriate public participation 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	Head of Administration
		Identify improvements to LVJB internet site and review contents.	Senior Management Team
		Maintain and update the internet site to ensure currency and accuracy especially at key electoral events during 2017.	Executive/Senior Management Team
		Identify improvements to LVJB intranet site and review contents.	Senior Management Team
4.5	Maintain, update and improve websites	Maintain and update the intranet site to ensure current and accurate	Senior Management Team
		Maintain and update the internet site to ensure current and accurate	Senior Management Team
		Integrate Sharepoint to improve records management	Senior Management Team

Strategic Aims & Operational Objectives 5

To set standards and undertake corporate improvement in **Service Delivery Arrangements** and review the performance management and planning framework to ensure continuous improvement

Performance Measures		Strategic Aims / Operational Objectives	
5.1	Maintain VR key and internal performance indicators	Agree and set KPIs for VR.	Assessor/ Head of Valuation
		Agree and set a suite of internal indicators for VR performance.	Assessor/ Head of Valuation
		Monitor, analyse and report on VR performance quarterly.	Assessor/ Head of Valuation
5.2	Maintain CT key and internal performance indicators	Agree and set KPIs for CT.	Assessor/ Head of Valuation
		Agree and set a suite of internal indicators for CT performance.	Assessor/ Head of Valuation
		Monitor, analyse and report on CT performance quarterly.	Assessor/ Head of Valuation
5.3	Meet new ER key and internal performance indicators	Agree and set Internal PIs for ER.	Executive/Head of Admin
		Produce and submit targets for ER performance to Electoral Commission.	Executive/Head of Admin
		Produce and submit statistical monitoring & indicators for ER performance to Electoral commission.	Executive/Head of Admin
		Monitor, analyse and report on ER performance monthly.	Executive/Head of Admin
5.4	Prepare, monitor and review service plan	Monitor Corporate and Service Plans.	Assessor/Senior Management Team
		Ensure adherence to Service Plan and Performance Indicators.	Assessor/Senior Management Team
		Review Performance & Development Review procedure to meet staff comments and meet organisational requirements.	Assessor/Senior Management Team

Strategic Aims & Operational Objectives 6

To review roles, responsibilities, **Structures and Processes** to ensure effective balance of responsibility and authority.

Performance Measures		Strategic Aims / Operational Objectives	
6.1	Review Standing Orders, Scheme of Delegation and Financial Regulations 5 yearly	Review contents of Standing Orders 5 yearly; Reviewed Feb 2016.	Assessor/LVJB
		Review contents of Scheme of Delegation 5 yearly; Reviewed Feb 2016.	Assessor/LVJB
		Review contents of Financial Regs 5 yearly; Reviewed Feb 2016.	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 5 yearly.	Assessor
		Report to LVJB re review of contents of Scheme of Delegation 5 yearly.	Assessor
		Report to LVJB re review of contents of Financial Regs 5 yearly.	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.	Executive
		Annually monitor through PRD, compliance with Standing Orders, Scheme of Delegation and Financial Regs for executive and managers.	Executive
		Review staffing and post requirements when staff leave, reduce hours or alter posts.	Executive

Strategic Aims & Operational Objectives 7

To review, monitor and maintain organisational **Risk Management and Internal Controls** to ensure efficient and effective delivery of service.

Performance Measures		Strategic Aims / Operational Objectives	
7.1	Identify risks	Consider new risks for addition to risk registers at all management meetings.	Executive
		Consider new risks to be added to the strategic business risk register on a 6 monthly basis at senior management meetings.	Executive
		Consider risks within each service delivery planning timetable on an ongoing basis.	Executive
		Consider risks as legislative changes are considered.	Executive
7.2	Mitigate risks	Ensure mitigation strategy is considered timeously.	Executive
		Implement mitigation decisions effectively.	Executive
7.3	Monitor & review risks	Monitor budget spend and variances quarterly at senior management meetings.	Depute Assessor
		Monitor budget spend and variances and include in quarterly progress report.	Executive
		Monitor actions resulting from audit reports at all management meetings.	Executive
		Liaise with the treasurer to the Board to ensure appropriate monitoring and accounting.	Executive
		Review strategic risk register at senior management meetings	Executive
7.4	Maintain task specific and strategic risk registers.	Maintain work timetables with corresponding risk management monitoring regularly at all relevant meetings.	Senior Management Team
		Consider new risks to be added to timetables/risk registers on an ongoing basis	Executive
		Mitigate all risks on timetables/risk registers on an ongoing basis	Executive

7.5	Report risks to LVJB and review risk strategy framework 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
		Submit external & internal auditors' reports and actions carried out resulting from recommendations to the Board.	Assessor

Strategic Aims & Operational Objectives 8

To develop, adopt and review formal documentation and put in place appropriate systems to ensure **Standards of Conduct** are adhered to.

Performance Measures		Strategic Aims / Operational Objectives	
8.1	Maintain a PRD process to monitor compliance to legislation and LVJB policies and procedures.	Review PRD scheme to monitor compliance with LVJB standards.	Executive
		Ensure compliance with LVJB employment legal requirements on a day to day basis and assess at annual PRD.	Managers
		Ensure compliance with LVJB policies on a day to day basis and assess at annual PRD.	Managers
8.2	Monitor and review compliance to Records Management, FOI, Data Protection 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 monthly management meetings.	Management Teams
		Ensure Complaints policy and procedure meet required standards	Executive
		Ensure Records management policy and procedures meet required standards	Executive
8.3	Report on Whistle Blowing	Ensure the policy and procedures are reviewed as appropriate to ensure staff concerns are addressed.	Assessor
		Report on items raised as appropriate.	Assessor
8.4	Provide management, guidance and support timeously	Ensure that policies are reviewed regularly, advised to the Board and staff briefed	Assessor
		Monitor adherence to Policy review timetable and encourage Unison input and agreement	Executive
		Ensure that appropriate guidance is developed and training given for new tasks introduced	Executive and Heads of Service
		Ensure that policies are available, preferably on the LVJB intranet	Executive
		Ensure an appropriate support structure is in place for all employees	Assessor

Strategic Aims & Operational Objectives 9

To plan and deliver an **organisational development strategy** considering corporate initiatives to ensure efficiency and quality of service delivery

Performance Measures		Strategic Aims / Operational Objectives	
9.1	Maintain annual service plan	Prepare annual service plan and present to LVJB.	Assessor
		Ensure staff awareness, guidance, monitoring and assessment of compliance procedures.	Executive & Heads of Service
		Monitor compliance with the service plan on a day to day basis and assess at senior management meeting.	Executive & Heads of Service
9.2	Deliver corporate improvement.	Develop & review a suite of internal performance indicators and update KPIs to ensure improvement.	Executive & Heads of Service
		Monitor performance improvement and report at management meetings & LVJB.	Executive & Heads of Service
		Monitor and report absence levels to measure improvement.	Depute Assessor
		Discuss & develop corporate improvement strategies at executive meetings.	Executive & Heads of Service
9.3	Comply with corporate goal, LVJB Mission, vision, aims & objectives	Review corporate goals at senior management meeting.	Executive & Heads of Service
		Ensure that corporate goal is communicated to all staff and included in PRD process.	Executive & Heads of Service
		Communicate and monitor adherence to Mission, vision, aims & objectives.	Executive & Heads of Service

Strategic Aims & Operational Objectives 10

To engage in **key partnership working** to ensure the delivery of efficient government.

Performance Measures		Strategic Aims / Operational Objectives	
10.1	Encourage partnership working with constituent authorities	Continue partnership working with Finance departments of the 4 authorities.	Executive & Heads of Service
		Continue partnership working with the Returning Officer staff of the 4 authorities.	Executive & Heads of Service
		Continue partnership working with the Treasurer to LVJB.	Executive
		Improve partnership working with Planning and Building departments of the 4 authorities.	Executive & Heads of Service
10.2	Encourage partnership working with public and civil servants e.g. VOA, SAA, Scottish Executive, Electoral Commission etc.	Continue partnership working with the SAA.	Executive
		Continue partnership working with the VOA.	Executive
		Continue partnership working with the National Register of Scotland.	Executive
10.3	Maintain partnership working with external professional bodies e.g. RICS, IRRV, AEA, etc.	Continue partnership working with the RICS, IRRV & AEA professional bodies.	Executive

SERVICE MISSION & VISION

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

Our **vision** is to provide valuation and electoral registration services in accordance with statute at levels of excellence which meet 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.
- 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.
- Ensure good governance in all aspects of our service provision.
- Build on our achievements to date.

Key goals of the service

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 review roles, responsibilities, **Structures and Processes** to ensure effective balance of responsibility and authority.
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.

EXECUTIVE RESPONSIBILITIES

No	Task/Project	Responsibility	Performance Measures
1	To ensure statutory duties are carried out for maintenance of the Valuation Roll and ensure timeous publication of the 2017 Revaluation Roll.	Executive	<ol style="list-style-type: none"> 1. Maintain Valuation Roll in line with statutory requirements. 2. Dispose of appeals within statutory time frame including LTS & LVAC appeals. 3. Delivery of the 2017 Revaluation Roll and associated activities. 4. Audit processes, procedures and values. 5. Further develop IT systems, applications and communications. 6. Maintain performance.
2	To ensure statutory maintenance of the Council Tax List .	Executive	<ol style="list-style-type: none"> 1. Maintain CT List in line with statutory requirements. 2. Dispose of proposals & appeals. 3. Audit processes, procedures and Bands. 4. Further develop IT systems, applications and communications. 5. Maintain performance.
3	To ensure timeous publication and maintenance of the Electoral Register and registration services at elections.	Executive	<ol style="list-style-type: none"> 1. Prepare and publish ER by 1st December 2017 and annually thereafter. 2. Maintain ER for update statutory date each month. 3. Dispose of any registration appeals. 4. Prepare and ensure refresh of AV personal identifiers in January 2018. 5. Prepare for and ensure effective management of registration duties for LG Election 4 May 2017 and any other elections or referendums as required. 6. Audit processes, procedures and accuracy to ensure quality registration delivery. 7. Further develop IT systems, applications and communications. 8. Maintain performance.
4	To develop, prepare and publish reports to improve customer knowledge and ensure attainment of good Community Focus .	Executive	<ol style="list-style-type: none"> 1. Prepare and publish statutory reports. 2. Prepare and present reports to LVJB. 3. Maintain customer targeted policies. 4. Maintain appropriate public participation schemes. 5. Maintain, update and improve website.

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	<ol style="list-style-type: none"> 1. Maintain VR key and internal performance indicators. 2. Maintain CT key and internal performance indicators. 3. Meet new Electoral performance indicators set by the Electoral Commission. 4. Preparation, monitoring and review of Service Planning.
6	To review roles, responsibilities, Structures and Processes to ensure effective balance of responsibility and authority.	Executive	<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 regularly.
7	To review, monitor and maintain organisational Risk Management and Internal Controls to ensure efficient and effective delivery of service.	Executive	<ol style="list-style-type: none"> 1. Identify risks. 2. Mitigate risks. 3. Monitor and review risks. 4. Maintain task specific, strategic and rolling risk registers. 5. Report risks to LVJB and review risk strategy framework as required.
8	To develop, adopt and review formal documentation and put in place appropriate systems to ensure Standards of Conduct are adhered to.	Executive	<ol style="list-style-type: none"> 1. Maintain a PRD process to monitor compliance to legislation and LVJB policies and procedures. 2. Monitor and review compliance to Records management, FOI, Data Protection and Equalities. 3. Report on Whistle Blowing. 4. Provide management, guidance and support timeously.
9	To plan and deliver an organisational development strategy considering corporate initiatives to ensure efficiency and quality of service delivery.	Executive	<ol style="list-style-type: none"> 1. Maintain annual service plan for each sector of the organisation. 2. Deliver corporate improvement. 3. Comply with corporate goal, LVJB mission, vision, aims & objectives.
10	To engage in key partnership working to ensure the integrated delivery of efficient government.	Executive	<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 Government, Electoral Commission, Cabinet Office, EMB etc. 3. Maintain partnership working with external professional bodies e.g. RICS, IRRV, AEA etc.