

ASSESSOR'S PROGRESS REPORT TO THE Lothian VALUATION JOINT BOARD

7th February 2022

1.0 PURPOSE

- 1.1 To provide members with an overview of current service delivery, priorities, risks and future direction.
- 1.2 It should be noted that the majority of staff remain working at home. However, since the 1st February staff have been allowed to return to South Gyle on a limited basis. There is a strict rota system in place and appropriate mitigations to lesson any ongoing risk in relation to Covid 19.

2.0 ELECTORAL REGISTRATION – MAINTENANCE

- 2.1 Since the last progress report to the Board in October 2021 all maintenance tasks supporting the registration process have continued.
- 2.2 Key processing volumes reflecting the period from 1st December 2021 until 5th January 2022 are shown below.

	<u>Additions</u>	<u>Deletions</u>	<u>Modifications</u>
<u>City of Edinburgh</u>	1837	2333	47
Edinburgh East	359	506	6
Edinburgh North and Leith	567	724	13
Edinburgh South	271	311	6
Edinburgh South West	405	543	12
Edinburgh West	235	249	10
<u>East Lothian</u>	185	240	2
<u>Midlothian</u>	194	170	4
<u>West Lothian</u>	315	504	6
Linlithgow and East Falkirk	92	149	1
Livingston County	223	355	6

2.3 During the period 1st December 2021 to 19th January 2022 26,094 Invitation to Register forms have been issued, a breakdown of the numbers is shown below.

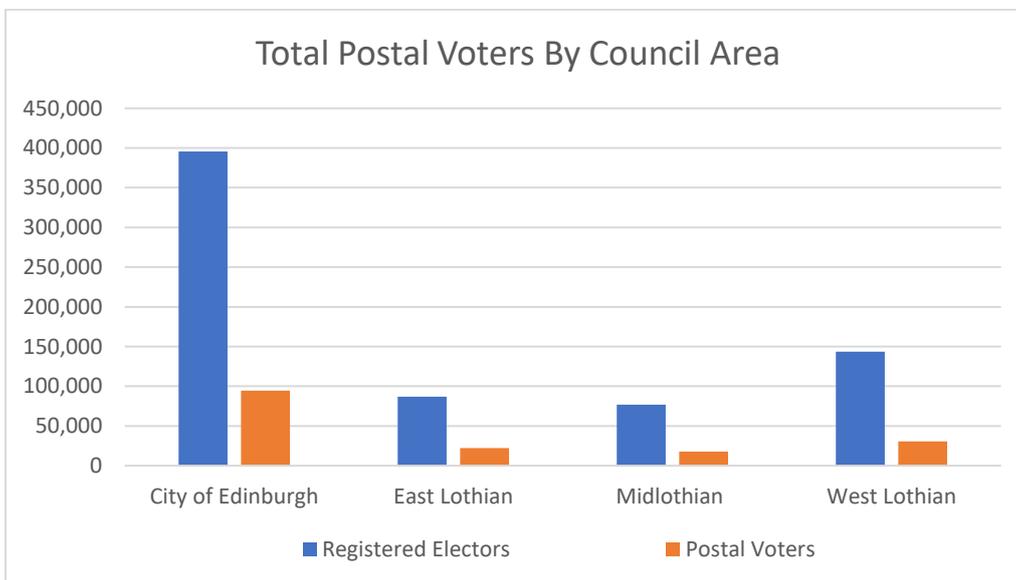
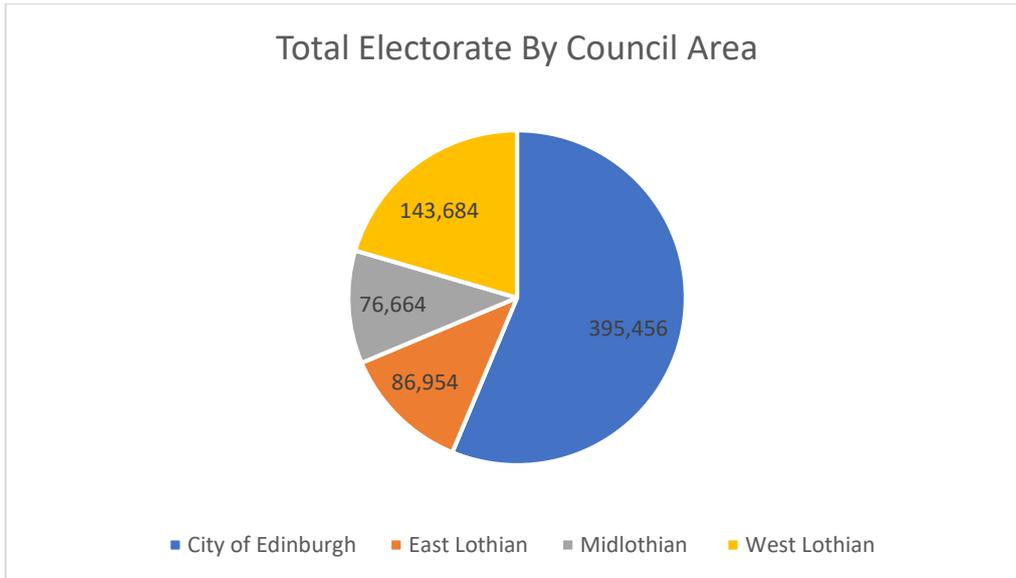
<u>Date Issued</u>	<u>ITRs</u>	<u>ITR Reminders</u>	<u>ITR Second Reminders</u>	<u>Total ITRs (inc. reminders)</u>	<u>Postal Packs</u>
01.12.2021	394	492	166	1052	90
08.12.2021	2572	421	698	3691	542
15.12.2021	3017	542	777	4336	305
23.12.2021	3375	259	423	4057	317
05.01.2022	373	2369	596	3338	292
12.01.2022	2882	2424	438	5744	482
19.01.2022	1048	2617	211	3876	530
Total	13661	9124	3309	26094	2558

2.4 Circa 16,000 Postal Vote refresh communications were issued in January.

3.0 ELECTORAL REGISTRATION – HOUSEHOLD CANVASS 2021

3.1 The updated register was published on the 1st December 2021. Some statistics are shown below.

	<u>Registered Electors</u>	<u>Postal Voters</u>	<u>Proxy Voters</u>	<u>Overseas Electors</u>
<u>City of Edinburgh</u>	395,456	94,489	499	1,683
Edinburgh East	77,571	15,625	87	314
Edinburgh North and Leith	90,176	20,145	143	516
Edinburgh South	71,285	18,890	85	360
Edinburgh South West	80,152	18,891	94	301
Edinburgh West	76,272	21,938	90	192
<u>East Lothian</u>	86,954	22,163	77	151
<u>Midlothian</u>	76,664	17,719	43	97
<u>West Lothian</u>	143,684	30,675	86	193
Linlithgow & East Falkirk	54,681	11,896	38	83
Livingston County	89,003	18,779	48	110
<u>Total - All Areas</u>	702,758	165,046	708	2,124



4.0 ELECTORAL REGISTRATION – LEGISLATION

- 4.1 The Westminster elections bill is still progressing through the Westminster Parliament. It has passed through the commons and is now at the House of Lords. It is anticipated that the bill will pass into law before the end of this financial year.
- 4.2 As I have mentioned in a previous report one of the main implications for the Board is the additional impact of photo ID for Westminster elections and additional funding to cover this. I am led to believe that funding will be forthcoming along with further details surrounding the issuing of photo IDs themselves. I will update the Board as and when I receive anything further.

5.0 ELECTORAL LEGISLATION – ELECTIONS

- 5.1 The scheduled by-election in East Lothian took place on the 20th January 2022. Everything has gone smoothly.
- 5.2 The Local Government Elections are scheduled to take place on the 5th May 2022. I am sending out approximately 55,000 House Notification Letters (HNL) to properties in route 2, that is properties where there was no national or local data match and where I have had no return from earlier communications, or where the property is showing as being void, basically vacant. The cost will be covered by unspent monies received from last year's Scottish Parliamentary Elections.
- 5.3 As part of national engagement plans a TV advert will be running on STV between Monday the 31st January and Sunday the 13th February. The cost is being shared on a pro rata basis between all ERO's and again this will be covered by unspent monies received for last year's Scottish Parliamentary Elections.

6.0 ELECTORAL REGISTRATION ENGAGEMENT

- 6.1 Whilst electoral registration engagement is a process that continues throughout the year, elections such as the Local Government elections in May this year provide a useful focal point for engaging with electors, increasing the rate of voter registration and generally promoting the functions of the Electoral Registration Office.
- 6.2 **16-17 Year Olds**
- 6.3 Despite ongoing covid related restrictions, and renewed anxieties around the Omicron variant, engagement opportunities and resources have continued to be developed in partnership with outside organisations and constituent council's Communications Departments. Elections related engagement is aimed at the electoral population in general with a particular focus on reaching under-represented groups such as 16–17-year-olds, students, and eligible foreign nationals as outlined below.
- 6.4 Schools Lists data mined to issue 'Invitation to Register' (ITR) forms to all eligible school pupils not already registered or added during canvass – approx. 3,000 ITRs issued to those eligible to vote in the Local Government elections.
- 6.4 A further 9,000 ITR forms issued to 14-15-year-olds that are eligible to register but not able to vote in the May elections.
- 6.5 Promotion of the Electoral Commission's 'Welcome to Your Vote' week running from 24-30 January through the LVJB website and social media channels.
- 6.6 Dissemination of curriculum linked political literacy resources produced by the Electoral Commission, including lesson plans, shorter interactive activities, and an assembly plan to all schools within the Lothians.

- 6.7 Working in partnership with West Lothian CLD Youth Services and MSYPs to produce a video encouraging voter registration and political engagement – to be made available to schools.
- 6.8 Final mailshot to all school pupils eligible to vote in the May elections that have been through the ITR Chasing Cycle but have not yet registered, encouraging registration through the Gov.uk website – to be issued mid-late March.

6.9 **Students**

Whilst spaces at most University Freshers Fairs were limited, we were able to run a voter registration stall at Queen Margaret University's fair in September 2021 and ran an advertisement in their Fresher's Guide.

Email to be issued to all students on lists provided by the four Universities and Edinburgh College, increasing awareness that students can register at both term-time and home addresses and inviting those not yet registered to do so through the Gov.uk website.

Work in partnership and provide support to Universities and Student associations to develop voter registration campaigns through their web and social media channels if in-person events remain unavailable.

6.10 **Foreign Nationals**

Promotion of the Electoral Commission's 'Welcome to Your Vote' day for foreign nationals eligible to register to vote – 10 March.

Distribute the Electoral Commission's political literacy resources to local groups such as ReAct Scotland, ELREC and constituent councils Refugee and Migration teams.

Working in partnership with ReAct Scotland to build on resources produced ahead of last year's Scottish Parliament Election, including a video and a factsheet translated into Arabic explaining how to register, the different voting methods and the voting system used in Local Government elections.

Drop-in voter registration sessions to be organised with ReAct Scotland to coincide with the 'Welcome to Your Vote' campaign.

6.11 **Prisoners**

Prisoner ITRs to be issued to all eligible prisoners with postal and proxy forms included.

6.12 **Members of the Armed Forces**

Advertisement space on back page of the Royal Highland Fusiliers Journal taken advising of voter registration options for service personnel and of the registration deadline at the Local Government elections.

In discussion with the Royal Regiment of Scotland’s Communications department on possibility of a similarly focussed advertisement in their Journal and/or production of an article for their newsletter.

6.13 General Public

Data mining of new council taxpayer lists provided by each of the four constituent councils to identify home movers, and issue ITRs to any not already registered to vote – approx. 4,000 issued since register publication with data mining to continue until the registration deadline.

Household Notification Letter (HNL) issued to households that did not respond to 2021 canvass communications, confirming the names and current voting method of registered electors at the property – 27,527 issued.

HNL issued to all care homes confirming names and voting method of residents.

Empty property letter issued to households with no registered electors, encouraging residents to register to vote ahead of the Local Government elections registration deadline – 27,441 issued.

Voter registration drop-in sessions organised in partnership with the City of Edinburgh Council as part of their Polling Station Roadshow initiative taking place in early April.

Continued promotion of the Gov.uk online voter registration website and registration deadlines via the LVJB website, news blog and social media channels with increased activity around key dates.

7.0 VALUATION ROLL – MAINTENANCE

7.1 Since the last report to the Board 495 alterations, covering the period 19th October 2021 to 27th January 2022, have been made to the valuation roll with respect to running roll activities. These changes comprised 107 amendments to existing entries, 191 deletions, 197 inserts and 1,440 name changes. For the period from 1st April 2021 to 27th January 2022 the total number of changes to the valuation roll are running at 83.7% of pre-Covid levels. (1,933 changes as against 2,307)

	Edinburgh	Midlothian	W. Lothian	E. Lothian	Total
Inserts	110	18	44	25	197
Deletions	138	13	28	12	191
Amendments	63	18	15	11	107

8.0 VALUATION ROLL – APPEALS

- 8.1 All appeals with a statutory resolution date of 31st December 2021 were resolved timeously.
- 8.2 Valuation Appeal Committee hearing dates have been agreed with the secretary of the VAC for the early part of 2022. Physical hearings are taking place and this helped greatly with the disposal of appeals up to the 31st December last year.
- 8.3 To date LVJB have received in the region of 17,000 NDR appeals lodged on the basis of Covid 19. c. 10,000 were lodged towards the end of March 2020 and a further 7,000 lodged towards the end of March 2021. It should be noted however that those received in March 2021 didn't specifically mention Covid as the reason for the appeal but instead used the generic Material Change of Circumstances (MCC) as the reason. This was a potentially protective measure as it was thought that the SG would legislate to make Covid an invalid ground of appeal.
- 8.4 The SG passed new legislation in relation to non-domestic rating one part of which was to change the definition of an MCC. This change became effective from the 2nd April 2020, and crucially, that is after the Covid pandemic "started", that is, when the first lockdown began which seems to generally be taken as 17th March 2020.
- 8.5 Moving forward it has transpired that the SG decided to legislate against Covid being a valid MCC and that legislation is moving through the parliamentary process. But the legislation as it currently stands still allows Covid to be valid right of appeal for a period of 14 days, that is the 17th March to the 1st April 2020.
- 8.6 This legislation is unlikely to become law before the spring. Whether there are any further amendments made to the draft legislation is unknown at this time.
- 8.7 As the appeal timetable currently stands, the VAC will have to cite all 17,000 of these appeals on or before the 30th June 2022 for disposal before the 31st December 2022. To put this into perspective the VAC would normally cite between 4,000 to 5,000 appeals in any one year and these would be spread over the course of 12 months. As the legislation has not been passed as yet, this means I will have to deal, potentially, with 17,000 appeals over a period of 4 months. This assumes the Local Valuation Appeal Committee would be willing, or in fact able, to deal with this level of appeals which is unrealistic. The 2023 Revaluation work will take up the majority of staff resources this year and if this transpires it will be extremely challenging to carry out both tasks this year.

What this means in practice is that there is the potential for a significant number of valuation changes, made in relation to these appeals, for a short period of perhaps 14 days. This would be both a reduction and then a subsequent reinstatement of the original value.

It may yet transpire that a further change to the appeal timetable is forthcoming which would mitigate this issue for this year however that is uncertain. I will keep the Board updated as to how this situation develops.

9.0 COUNCIL TAX – MAINTENANCE

- 9.1 Over the period 1st April 2021 to 28th Jan 2022, 5,179 new houses have been added to the list, this compares to 5,038 for the same period in 2019/20 prior to the Covid pandemic.

Band	Edinburgh	Midlothian	West Lothian	East Lothian	Total
A	300	2	4	2	308
B	337	37	26	37	437
C	376	83	41	82	582
D	577	53	114	106	850
E	551	163	121	184	1,019
F	296	237	288	210	1,031
G	407	133	112	218	870
H	60	2	4	16	82
Total	2,904	710	710	855	5,179

- 9.2 There are currently c.200 outstanding Council Tax appeals. A number of cases have been cited for hearing before the VAC in February with another batch to be cited for hearing in May.

10.0 COVID – UPDATE

- 10.1 Staff continue to follow Government advice and are in the main working from home. From 1st February I have allowed staff to attend the office in line with Government guidelines. In the run up to the Local Government Elections more staff will be required to attend the office on a daily basis. As we move forward, I intend to follow a hybrid approach of working from home and working at South Gyle. I have created a draft policy for hybrid working and I intend to discuss this further with staff representatives before presenting it to the Board for approval.

11.0 GOVERNANCE STRATEGY GROUP

- 11.1 The latest Governance Strategy Group meeting was held on the 25th January 2022. In attendance were myself, LVJB Head of Governance, Councillors Key, Findlay and Russell. Topics discussed were the upcoming Local Government election, the outstanding Covid MCC appeals in relation to non-domestic rating.

12.0 REVENUE BUDGET 2022/23 REPORT

- 12.1 I note the content of the Treasurer’s budget report. The budget for this financial year is on course to show an underspend. The forecasted budgets for the following 3 years do predict a shortfall, to be made up by the use of the unallocated general reserve. Though reassuring that the budget can be balanced for the next 3 years it doesn’t deal with the underlying budget issues, predominantly caused by inescapable rising employee costs.
- 12.2 I would like to think that later this year more detailed discussions can begin in order to find a sustainable solution to the known issues. I am currently reviewing the 2020-23 Business Strategy paper, that was previously submitted, with a view to creating a 2022/23 to 2027/28 strategy with the anticipation that this can be discussed in more detail after the upcoming LG Elections.

13.0 CORPORATE AND SERVICE PLAN

- 13.1 I have shown at appendix 1 my corporate and service plans for 22/23.
- 13.2 As previously I have consolidated our longstanding Corporate and Service plans and updated them to enable clearer identification of operational objectives against the strategic aims required to achieve optimal performance of our service delivery.

14.0 RECOMMENDATION

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

Gary Elliott
ASSESSOR & ERO

Attached:
Appendix 1 2022-2023 Corporate & Service Plan

Corporate & Service Plan



MISSION & VISION

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

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

In order that we fulfil our Mission and achieve our Vision we will:-

Ensure that our services are delivered in accordance with all statutory requirements

Plan service development and delivery in accordance with the principles of Best Value.

Take individual and collective responsibility for the services provided by LVJB.

Monitor and report performance levels to stakeholders.

Integrate Equalities issues into all aspects of our service provision.

Conduct our business in accordance with the principles of the CIPFA/SOLACE framework Delivering Good Governance in Local Government.

Create an environment of continual improvement.

Strategic Aims

1. To ensure timeous publication and maintenance of the **Valuation Roll**.
2. To ensure timeous publication and maintenance of the **Council Tax List**.
3. To ensure timeous publication and maintenance of the **Electoral Register** and registration services at elections.
4. To develop, prepare and publish reports to improve customer knowledge and ensure attainment of good **Community Focus**.
5. To set standards and undertake corporate improvement in **Service Delivery Arrangements** and review the performance management and planning framework to ensure continuous improvement.
6. To deliver changes and improvements identified under the Transformation Programme and through the ongoing process of **Structure and Process** review.
7. To review, monitor and maintain organisational **Risk Management and Internal Controls** to ensure efficient and effective delivery of service.
8. To develop, adopt and review formal documentation and systems to ensure **Standards of Conduct** are adhered to.
9. To plan and deliver an **organisational development strategy** considering corporate initiatives to ensure efficiency and quality of service delivery.
10. To engage in **key partnership working** to ensure the integrated delivery of efficient government.
11. To review, develop and support the **Health, Safety, and Wellbeing** of all LVJB employees, creating an environment that enhances job satisfaction through investment in staff development, HR policies, systems and leadership.

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

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

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 2022.	Carry out postal and door to door canvass in line with recent legislation and to maximise registration.	Head of Electoral Services
		Ensure appropriate advertising/publicity initiatives are in place in conjunction with EC public engagement strategy.	Head of Electoral Services
		Action all postal vote applications received during and outside the canvass period.	
		Distribute the register in requested format to persons as defined by statute.	
		Continue to actively encourage recipients to accept the register in electronic format to reduce costs	
		Liaise with external contractors and manage/mitigate risks.	
	Maintain ER for statutory updates each month.	Update ER monthly updates per legislative requirements	Head of Electoral Services
		Issue Notices in line with statutory requirements	
		Improve contact with hard to reach groups through partnership working initiatives.	
		Identify and improve appropriate advertising/publicity channels re registration.	
	Dispose of any registration appeals.	Correspond with appellants in line with statutory requirements.	Electoral Registration Officer (ERO)/Head of Electoral Services
		Ensure hearings are set up and conducted timeously.	
	Prepare for and ensure effective management of registration duties for any elections or referendums called during the year.	Ensure all applications for registration are processed accurately and timeously.	Head of Electoral Services
		Ensure all AVPI applications for registration are processed accurately and timeously.	
Prepare and maintain all necessary timetables including the identification of all key risks and related mitigation associated with election preparation requirements.			
Undertake engagement activities and ensure staff are trained and available to answer all incoming enquiries.			
Ensure staffing resource in place at all peak periods and as required during polling hours.			
Audit processes, procedures and accuracy to ensure quality registration delivery.	Develop and monitor audit reports for ER updates.	Head of Electoral Services/Governance Team	
	Audit personal identifiers with canvass signatures.		

			Audit name changes to ensure accuracy.	
			Consider all audit reports for appropriate actions.	
		Further develop IT systems, applications and communications.	Implement and review the effectiveness of recently implemented mobile door to door canvass system	Head of Electoral Services
			Deliver electorate statistics to NRoS. (RPF 29)	
			Review and continue to maximise UPRN matching to electoral address data base.	
		Prepare for refresh of AV personal identifiers in January 2023	Identify quantities and additional required expenditure.	Head of Electoral Services
			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 Electoral Services
			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 to LVJB and staff re service planning, performance & target setting.	Assessor
			Annual treasurer's un-audited accounts.	Treasurer
			Annual Audit reports to LVJB.	Head of Governance
			Annual proposed Revenue Report to LVJB.	Treasurer
		Prepare and present reports to LVJB.	Quarterly progress report to LVJB.	Assessor
			LVJB Business Strategy	
			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
			Quarterly progress report to LVJB.	Assessor
			Ensure a robust public engagement strategy is in place for general registration and focused electoral events.	Head of Electoral Services
		Maintain and develop appropriate public engagement schemes.	Liaise with universities, further education establishments and schools to maximise student registration	Head of Electoral Services
			Liaise with care homes to maximise registration for residents	

			Maintain and update the internet site to ensure currency and accuracy especially at key events.	Corporate Leadership Team
			Continue to identify, implement and evaluate stakeholder engagement activities in respect of VR and CT.	Assistant Assessor
		Maintain, update and improve digital communication channels	Maintain and update the internal and public facing websites	Corporate Leadership Team
			Continue to Integrate Sharepoint to improve records management	
			Continue to develop use of social media	
5	To set standards and undertake corporate improvement in Service Delivery Arrangements and review the performance management and planning framework to ensure continuous improvement.	Maintain VR key and internal performance indicators.	Agree and set KPIs for VR.	Assessor/Assistant Assessor
			Agree and set a suite of internal indicators for VR performance.	
			Monitor, analyse and report on VR performance quarterly.	
		Maintain CT key and internal performance indicators.	Agree and set KPIs for CT.	Assessor/Assistant Assessor
			Agree and set a suite of internal indicators for CT performance.	
			Monitor, analyse and report on CT performance quarterly.	
		Maintain new Electoral performance indicators set by the Electoral Commission.	Agree and set Internal PIs for ER.	Electoral Registration Officer (ERO)/Head of Electoral Services
			Produce and submit targets for ER performance to Electoral Commission.	
			Produce and submit statistical monitoring & indicators for ER performance to Electoral commission.	
			Monitor, analyse and report on ER performance monthly.	
Prepare, implement, monitor and review of Corporate and Service Plan.	Monitor Corporate and Service Plans.	Assessor/Corporate Leadership Team		
	Ensure adherence to Service Plan and Performance Indicators.			
	Review Performance & Development procedure to meet organisational requirements.			
6	To review roles, responsibilities, Structures and Processes to ensure effective balance of	Adhere to Standing Orders, Scheme of Delegation and Financial Regulations; 5 yearly.	Report to LVJB re review of contents of Standing Orders 5 yearly.	Assessor
			Report to LVJB re review of contents of Scheme of Delegation 5 yearly.	
			Report to LVJB re review of contents of Financial Regs 5 yearly.	
		Implement and progress the objectives of the Transformation Programme and future Business Strategy	Continue to review process and procedures seeking efficiencies and improvements.	Corporate Leadership Team
			Continue to develop and implement a strategic training policy and continue with cultural change identified under the Transformation Programme.	Principal Surveyor/ Corporate Leadership Team

	responsibility and authority.		Continue to develop and implement a Performance Framework across the organisation, seeking efficiencies and effective delivery of services.	HR Manager/ Corporate Leadership Team	
			Review ongoing progress of future Business Strategy	Assessor/LVJB	
7	To review, monitor and maintain organisational 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	
		Adhere to LVJB Risk Management Cycle	Identify	Consider new risks for addition to Corporate, Project or Service risk registers at all Corporate Leadership and Governance Committee meetings.	Corporate Leadership/ Governance Team
				Review presentational aspects of risks registers including effectiveness of providing accurate information of “progress on mitigation and status of risk”	Governance Team
				Consider risks within each service delivery planning timetable on an ongoing basis.	Corporate Leadership Team
				Consider risks as legislative changes are introduced.	
			Assess	Consider likelihood v impact and apply appropriate red, amber or green rating	Corporate Leadership Team
			Mitigate	Ensure mitigation strategies are considered timeously.	Corporate Leadership/ Governance Committee
				Plan, implement and review mitigation decisions effectively.	
			Monitor	Monitor budget spend and variances and include in quarterly progress report.	Assessor
				Monitor identified actions resulting from Governance Committee reviews of audit reports at Corporate Leadership Team meetings.	Corporate Leadership/ Governance Committee
				Liaise with the treasurer to the Board to ensure appropriate monitoring and accounting.	Assessor
		Review risk registers at Governance Committee meetings and report relevant matters of risk to the Corporate Leadership Team		Corporate Leadership/ Governance Committee	
Report risks to LVJB and review Risk Management Cycle as required.	Report to Board on identified key risks on quarterly basis as part of progress report.	Assessor			

			Report to Board on budget variances, past and proposed, on quarterly basis as part of progress report.	Assessor/Treasurer
			Provide Board with Annual Governance Report	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	
			Ensure Records management policy and procedures meet required standards	
		Report on Whistle Blowing.	Ensure the policy and procedures are reviewed as appropriate to ensure staff concerns are addressed.	Assessor/Head of Governance
			Report on items raised as appropriate.	
		Provide management, guidance and support timeously.	Ensure that policies are reviewed regularly, advised to the Board and staff briefed	Corporate Leadership Team
			Monitor adherence to Policy review timetable and encourage Unison input and agreement	
Ensure that appropriate guidance is developed and training given for new tasks introduced				
Ensure that policies are available, preferably on the LVJB intranet				
			Ensure an appropriate support structure is in place for all employees	Assessor
9		Continue the implementation and development of the Transformation	Undertake continued review of organisational processes & procedures and progress the implementation of the Valuation Services Team	Corporate Leadership Team

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

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