

ASSESSOR'S PROGRESS REPORT TO LOTHIAN VALUATION JOINT BOARD



16 September 2024

1.0 PURPOSE

1.1 To provide members with an overview of current service delivery, priorities, risks, and future direction.

2.0 ELECTORAL REGISTRATION – MAINTENANCE AND ELECTIONS

2.1 Since the last progress report to the Board in June, all maintenance tasks supporting the registration process have continued. This includes all tasks during the UK Parliamentary election in July 2024.

2.2 Processing volumes continue to be steady, with a significant upturn in numbers of applications received during the UK Parliamentary election. The number of additions/deletions by council area is shown as Appendix 1. Between the period 3 June to 2 September, a net increase of 22,293 electors was recorded to the Register.

2.3 The UK Parliamentary election on 4 July caused a significant increase in workload. The election was successfully delivered within the tight timescale thanks to enormous staff effort, including participation from non-electoral staff members. The election also was successfully delivered with a large number of staff working from home.

2.4 A by-election took place in West Lothian on 22 August 2024, following the death of Councillor Borrowman. Although additional work is generated by all by-elections, these are not of the same scale as a wider electoral event and are largely handled within the day-to-day business of the core electoral team.

2.5 As is the case with all by-elections, our Enquiry Agents made several visits to the by-election area in West Lothian to assist with voter registration and awareness.

3.0 POSTAL VOTES/PROXY VOTES

3.1 The number of electors currently choosing to vote by post remains largely consistent from previous reports, though there was a significant increase around the time of the UK Parliamentary elections. Many of these postal votes were for a single election which may have been generated due to the proximity of the election to the school holidays. See Appendix 2.

3.2 Prior to the UK Parliamentary election, we contacted all overseas electors without an absent vote in place to encourage them to register to vote by post or proxy. These communications also highlighted the postal timescales involved if postal votes were required to be sent significant distances overseas and highlighted the option of voting by proxy as an alternative.

4.0 ELECTORAL REGISTRATION ENGAGEMENT

- 4.1 We continue to engage with electors and promoting the functions of the Electoral Registration office to include home movers, prisoners and foreign nationals. This includes regularly attending British citizenship ceremonies.
- 4.2 We continue to issue application forms to students each academic year. Student data is gathered from universities and colleges within Lothian. Our engagement team will be visiting each of the four universities' Fresher's Fairs in order to facilitate student registration.
- 4.3 Discussions have been undertaken with the University of Edinburgh to make electoral registration part of the matriculation process. This is anticipated to begin in the 2025/2026 academic year. It is hoped that this can be extended to other educational institutions.

5.0 ELECTORAL REGISTRATION – VOTER AUTHORITY CERTIFICATES

- 5.1 Although additional Voter Authority Certificates were issued during the UK Parliamentary election, these have not reached significant numbers and do not represent an operational difficulty to the Board.

6.0 CANVASS

- 6.1 The announcement of the UK Parliamentary election on 4 July delayed the commencement of the annual canvass.
- 6.2 Following the national and local data matching process, 348,124 properties were allocated to Route 1; 96,244 properties were allocated to Route 2; and 12,753 properties were allocated to Route 3.
- 6.3 Our initial e-canvass generated a return from 92,339 properties from Route 1. The remainder will be issued with a paper canvass communication but are not required to respond unless the information has changed.
- 6.4 Our Enquiry Agents have been visiting properties from Route 3 where a single responsible person (SRP) is available, such as hotels and hostels.
- 6.5 Since the last progress report to the Board in **April** all maintenance tasks supporting the registration process have continued.
- 6.6 Processing volumes continue to be steady. The number of additions/deletions by council area is shown as Appendix 1. Between the period 1 April to 31 May, a net increase of 532 electors was recorded to the Register.
- 6.7 The sudden announcement of a UK Parliamentary election to be held on 4 July 2024 has caused a considerable increase in workload volumes. Recruitment and training has been undertaken prior to the announcement of the election, however the relatively quick and unexpected announcement has meant that training has had to be delivered more rapidly than anticipated.
- 6.8 A considerable amount of staff from the valuation teams have volunteered their services to work on electoral work during this period, and the numbers of our core team has been augmented with both temporary staff and volunteers from the valuation teams. These new members are providing critical support to our core team and have been invaluable.

7.0 VALUATION ROLL – MAINTENANCE

7.1 Since the last report to the Board, the cumulative total of key value changes made to the Valuation Roll for the period 1 April 2024 to 31 August 2024 was 625. The breakdown of those changes was as follows.

7.2

	Edinburgh	Midlothian	West Lothian	East Lothian	Total
Inserts	122	15	27	22	186
Deletions	218	18	24	40	300
Amendments	89	13	19	18	139
Totals	429	46	70	80	625

7.3 In terms of performance 51% of running Roll changes (which excludes any changes to the Valuation Roll made as result of an appeal/proposal) have been actioned within 3 months of them becoming effective.

7.4 The Assessor's 3-month KPI target for the 2024/25 valuation year stands at 50%. As we are only five months into the current valuation year that headline figure looks disappointing. As was signposted in the last Board report, that target will continue to be encumbered as a result annual audit of Self-Catering Units which sees properties being transferred from one valuation register to another. Any Self-Catering Units that no longer qualify as being excluded from the definition of a dwelling in accordance with regulations, must be removed from the Valuation Roll and entered on the Valuation List. The point on which that date becomes effective is guided by statute and will normally be beyond our primary KPI target of three months.

7.5 We are now currently more than halfway through the processing of changes as a result of the outcome of the audit and so these figures will continue to be affected. A further consequence of the audit process for any properties that are removed from the Roll and entered on the List for the year 2023/2024 due to their ineligibility is that those taxpayers are able reapply for those properties to be re-entered on the Valuation Roll during the currency of this valuation year 2024/2025. Providing they meet the qualifying requirements for that year, they will be subsequently removed from the List and then entered back on the Roll. As that too is likely to now be beyond any 3-month processing target from the point they became effective, it further compounds the challenge in meeting our headline Valuation Roll performance target, with the original deletion from the Roll for 23/24 and any subsequent re-entry in 24/25, both being beyond our primary 3-month target.

7.6 On that basis, I hereby provide the Valuation Roll stats excluding any changes made for self-catering properties. I believe this provides context and is a far fairer reflection of performance for changes that the Assessor is in greater control of. By doing that, the 3-month performance for all other key value changes increases to 70% which is clearly more encouraging than the all-inclusive headline figure of 51%. That disparity clearly highlights the impact of SCU's on office performance, notwithstanding the time and resources required to deal with that category of subject. It is somewhat disheartening to think that the office will likely spend more dedicated time dealing with these relatively low value subjects than any other subject type within our Roll.

8.0 COUNCIL TAX – MAINTENANCE

8.1 In terms of all activity to the Valuation List over the period from 01/04/2024 to 01/09/2024, the total inserts made to the list and the breakdown across all the constituent councils is as follows.

8.2

	Edinburgh	Midlothian	West Lothian	East Lothian	Total
Inserts	1251	291	433	422	2397
Deletions	69	4	13	30	116
Amendments	43	22	25	19	109
Totals	1363	317	471	471	2622

8.3 Of the 2622 inserts that have been made to the list, the distribution in terms of constituent council and valuation bands allocated are as follows.

Band	Council Authority				
	Edinburgh	Midlothian	West Lothian	East Lothian	Total
A	95	3	2	2	102
B	180	29	33	46	288
C	114	28	114	32	288
D	234	63	78	89	464
E	269	36	66	114	485
F	176	72	89	94	431
G	163	57	49	41	310
H	20	3	2	4	29
Total	1,251	291	433	422	2397

8.4 With respect to performance for the insertion of properties onto the List during the valuation year 2024/2025, this currently stands at 74% being processed within 3 months of them becoming effective on the list. Our office target for this year is 80%. The primary reason for a failure to keep in pace with that target is again largely a consequence of our annual Self-Catering audit and the number of changes we have had to make as a result of that. I refer to my comments above in respect of that in terms of why these changes are normally made late and why they not only affect the Valuation Roll but also the Valuation List.

In similar vein to what was done with the Valuation Roll figures in providing some context, when the inserts specifically for Self-Catering Units are removed from the above performance calculation for Council Tax, the 3-month KPI insert figure increases to 79%. It must be remembered, that for any changes deemed applicable as result of the audit, it negatively affects both the Valuation Roll and Valuation List as these properties must transfer from one register to another from the same date. As we have over 1000 of these properties to audit each year, we are at a comparative disadvantage to other Assessors and are impacted not only in terms of the staff resource but also in time spent assessing eligibility and processing numerous changes. When we do make changes, these as shown have a clear and measurable effect on performance targets as they count double as a result of the transferable nature of the change along with the processing time lag caused by the statutory process.

9.0 R2017 VALUATION ROLL APPEALS UPDATE

9.1 Progress continues to be made in reducing the number of outstanding Covid appeals with around 2,800 now outstanding, down from almost 3,800 at the time of the last report. This reflects the increase in the number of cases which are being withdrawn by professional agents, confirmation of which has now been received from the SCTS.

- 9.2 That leaves approximately 430 non Covid Revaluation 2017 appeals that must be disposed of by 31 December 2024. First Tier Tribunal hearings are set over the coming months in order to deal with these appeals and a staff operations team is working through the cases. It is our expectation that at least one of the remaining cases will proceed to formal hearing stage.
- 9.3 Additionally, the SAA Executive is continuing to engage with the Local Taxation Chamber with a view to them providing us, and other Assessors, with a final reconciliation of outstanding R17 appeals – when we are in receipt of this information, we will be able to further plan and allocate our resources accordingly.
- 9.4 In respect of the non-domestic R17 appeal case which proceeded to FTT Hearing on 16 May 2024, I am pleased to report that we were successful in this appeal.

10.0 2023 REVALUATION PROPOSAL UPDATE

- 10.1 In respect of the R23 Revaluation Proposals, we are continuing to work in accordance with the national timetable of Proposal Determination Dates (PDD's) which has been set by the Scottish Assessors Association and our own timetable in terms of those Proposals which can be dealt with on a local level. Aside from the proposals which were received as a result of the 2023 Revaluation, we now have around 540 Running Roll proposals in the system.
- 10.2 Having already dealt with and issued Decision Notices on Schools and Showhouses, Lothian has now issued Proposal Determination Date Notices (PDDN's) for the following categories, for which we are the national Practice Note leads – Supermarkets; Hotel & Accommodation Subjects; Distribution Warehouses and Clinics, Health Centres & Surgeries. We have been engaging with professional representatives in respect of each of these categories with Decision Notices due to be issued for each during October and November.
- 10.3 In addition to the above, we have also issued over 500 PDDN's in respect of Industrial properties which are valued by reference to a local Practice Note. Again, we are liaising with the professional agents involved with a view to resolving as many of these as possible prior to the determination date. Our intention is to issue PDDN's for another bulk category, Offices, shortly and we are also working through proposals which have yet to be issued with formal PDDN's such as Retail Warehouses.

11.0 COUNCIL TAX APPEALS

- 11.1 Council Tax appeal cases have continued to proceed before the First Tier Tribunal with several hearings having taken place June, July, and August. I am pleased to say that we have continued to be successful in each of the cases for which we have had the decisions up to this point. Of particular note, is a case which is proceeding before the Upper Tier Tribunal on 17 September and the outcome of this case will be relayed in a future Board report.

12.0 GOVERNANCE STRATEGY GROUP

- 12.1 The latest Governance Strategy Group (GSG) meeting was held on the 2 September 2024.
- 12.2 Following a series of recent successful staff group meetings, there was a high-level discussion over the Assessor's idea to extend the existing Joint Consultation Committee (JCC) within the organisation to include other staff member representation. The suggestion has already been raised with Unison for consideration with further dialog to take place at the next JCC on 9 October.

- 12.3 The Group were advised that LVJB have now entered the market to actively advertise a potential sublet of the 2nd floor space at 17A South Gyle Crescent. The Group agreed that although this is an admirable attempt to create a positive budget saving, the approach was not without risk ie adopting landlord liability for any new tenant. Further consideration should be given to a longer term, sustainable accommodation strategy that both accords with the LVJB's required office space requirements and provides the best platform for continued high quality service delivery. The letting particulars are attached at Appendix 7.
- 12.4 In Spring 2024, an LVJB Green Team was established to initiate, explore and investigate ways in which the organisation can reduce its carbon emissions and function in a more environmentally sustainable manner. The Green Team has encouraged suggestions from all staff and have worked to collate an action plan of workstreams and initiatives which will contribute to us reducing the energy we use, becoming more environmentally efficient and reducing our costs around energy usage and waste collections. The Action Plan and associated progress can be reviewed at Appendix 3.
- 12.5 After an extremely successful launch, this year's Contribution Awards are in the process of being arranged. Appendix 4 details our winners and describes a brief summary of their areas of contribution. Several other nominations were also highly commended. The submissions all clearly demonstrated the hard work, diligence, and enormous commitment of staff members. When the date is finalised, all Board members are actively encouraged to attend the ceremony if available.
- 12.6 A recent external audit clearance meeting with Audit Scotland identified a recommendation on LVJB around the review of risk registers. The issue was "Risk registers are not specifically reviewed by those charged with governance at Board level. There is a risk they do not adequately address the risks facing the organisation." Although risk is raised frequently in the Assessors update report it was agreed that a higher level of regular review, scrutiny and challenge is required. To enable this, it has been agreed that a full review of LVJB risk registers will take place at the next GSG on 21 October with a discussion around the best method of reporting and monitoring risk at Board level.

13.0 CONTINUAL IMPROVEMENT PROGRAMME

- 13.1 We continue to review, evaluate and modernise a range of internal job descriptions. This work is essential in ensuring clarity for staff over their roles and responsibilities and that it accurately reflects their functional position within the organisation. This is an increasingly important task as we further develop new ways of working and introduce leaner processes and procedures.
- 13.2 We have created a "Website Champion" group with an initial remit of ensuring all published content is current and accurate. We hope to further develop the team to begin to consider innovative new ways of how our engagement messaging can be tailored to deliver simple, readily understood communication with stakeholders of the services we provide and the way in which we deliver them.
- 13.3 Over the past couple of months, we have been looking at our project framework across the organisation and how we can improve our project management practices with simplification and standardisation a priority. The effort and time required by project managers and contributors has been a key part of the feedback received. It has also been recognised there are tools available that could support project managers in delivering projects as well as standardising status reporting. This has identified some key improvements in the following areas:
- Clearer definition of project types
 - Creation of working groups aligned to processes or tools
 - Introduction of Loop and Smartsheet as primary project management tools
 - Further work is ongoing in this area to ensure we continue to deliver projects effectively and timeously, supporting essential service delivery requirements.

14.0 HUMAN RESOURCES UPDATE

14.1 Menopause Policy (see Appendix 5)

14.1.1 Over 30% of our employees are females over the age of 45. We have recently drafted a new Menopause Policy to support our staff and managers. The Policy will seek to promote awareness, banish stigma and encourage open conversations in relation to how we may support staff by accommodating practical adjustments and being flexible to ease symptoms and enable staff to remain at work instead of sickness absence or resignation. Our staff must be treated with sensitivity, dignity and respect.

14.1.2 The Policy comprises general information about menopause, a menopause toolkit and template risk assessment to assist managers to support employees. There is also signposting to external help and guidance. Last year, we offered a menopause training course and this was extremely well attended by both female and male staff members and managers. Next steps will be to promote the Policy and toolkit to managers and staff and to seek volunteers willing to be “Menopause Mentors” within our organisation.

14.1.3 The Board are asked to approve this Policy.

14.2 Mental Health Action Plan (see Appendix 6)

14.2.1 A Mental Health Action Plan has been developed to cement our ongoing commitment to supporting mental wellbeing within our workforce. We have used the template provided by Mental Health at Work Programme, which is now run under the guardianship of the MIND charity. This template has enabled us to systematically evaluate our existing support mechanisms and establish where we can continue to enhance our provision in this area.

14.2.2 Next steps will be to communicate the plan effectively with all line managers and staff and to work towards completion of the action plan, in conjunction with signing up to the Mental Health at Work Commitment.

14.2.3 The Board are asked to note this action plan.

15.0 PERIOD 4 FINANCIAL STATEMENT

15.1 I note the content of the Treasurer’s Period 4 Financial Statement.

16.0 AND FINALLY....

I would like to thank the Convenor, Vice Convenor and all the Board members for their support over the last two years.

I would also like to record my thanks to my senior management team also and a special mention to Bernie and Hannah (a couple of stars).

I would also like to thank Myra and Fiona for all their help in putting my Board reports together.

17.0 RECOMMENDATION

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

Michael Wilkie
9 September 2024

Electoral Statistics

Table Registration Changes by month – 3 June 2024 to 2 September 2024 inclusive¹

Update Date	Council	Additions	Deletions
3.6.24	City of Edinburgh	5537	2635
7.6.24	City of Edinburgh	5523	3044
25.6.24	City of Edinburgh	8939	3550
27.6.24	City of Edinburgh	5575	1620
1.8.24	City of Edinburgh	2955	1622
2.9.24	City of Edinburgh	1516	1427
3.6.24	East Lothian	578	268
7.6.24	East Lothian	596	385
25.6.24	East Lothian	843	331
27.6.24	East Lothian	534	154
1.8.24	East Lothian	281	182
2.9.24	East Lothian	239	204
3.6.24	Midlothian	441	233
7.6.24	Midlothian	791	403
25.6.24	Midlothian	962	430
27.6.24	Midlothian	538	149
1.8.24	Midlothian	394	200
2.9.24	Midlothian	263	198
3.6.24	West Lothian	795	415
7.6.24	West Lothian	898	585
25.6.24	West Lothian	1576	727
27.6.24	West Lothian	925	260
19.7.24	West Lothian	52	22
30.7.24	West Lothian	17	15
1.8.24	West Lothian	718	382
15.8.24	West Lothian	82	13
2.9.24	West Lothian	560	381

¹ Statistics include monthly updates and election updates. West Lothian has additional election updates as both the UK Parliamentary election and the by-election held on 22 August 2024 generated updates

Postal Voters as at 2 September 2024

Council Area	Postal Voters
City of Edinburgh	94656
East Lothian	21997
Midlothian	17878
West Lothian	30578

LVJB GREEN TEAM – ACTION LIST

ID	Item	Task	Status – September 2024
1	Recycling	<p>Seek advice and guidance from ChangeWaste to increase and improve our recycling rates.</p> <p>Raise awareness of recycling facilities for cans, tins, glass, batteries, etc.</p> <p>Create a map of the building with recycling facilities clearly marked and circulate to staff.</p> <p>Use Friday Focus to promote.</p>	<p>In Progress</p> <p>Change Waste Recycling completed a walk round of the building with Hannah and Fiona in June 2024. A report has been received and we are currently working through options to improve and increase our recycling practices.</p>
2	Bathroom Lights	Put up laminated signs next to light switches in bathrooms asking staff to switch light off when leaving.	Complete
4	Plastic Cups	Reduce use of plastic cups at interviews. Use glasses.	Complete
5	Plastic Cups	Reduce use of plastic cups at staff meetings. Encourage staff to bring their own waterbottle/glass/cup.	<p>Complete</p> <p>Plastic cups removed from meeting rooms and replaced with glasses.</p> <p>Staff notified via Friday Focus.</p>
6	Printer Paper	<p>Investigate if we can increase the amount of recycled paper we use in the printers.</p> <p>Check with ICT Support regarding printer capabilities, i.e. use of different trays for different quality of paper.</p> <p>Check with Scott re purchasing of printer paper.</p>	<p>Complete</p> <p>Paper used is already FSC and PEFC certified which means it is sourced from well-managed forests that meet the highest standards of environmental and social responsibility. For example, forests where three to four trees are planted for every tree cut down. The paper type we use comes with a globally recognised environmental standard, involving working to stringent internal guidelines and processes, such as extensive measures to improve energy efficiency and minimise waste.</p>
7	Val notices	Email these instead of posting.	N/A. Hard copy val notices is legislative.
8	Consider electronic Pay Slips	Enable staff to receive electronic payslips instead of hard copy posted payslips.	Pending new CEC PayRoll system.

9	Use of iPads for plans	Annotating pdf plans on iPad rather than printing.	In Progress 5 styluses purchased to be trialled.
10	Remove paper towels in Bathrooms	Remove paper towels in Bathrooms. Staff can use hand dryers.	In Progress Move to Tork as recommended by Change Waste Recycling.
11	Water Heaters in Kitchens	Consider removing hot water urns in Kitchens and use kettles only instead.	In Progress
12	Paper towels in Kitchens	Consider removing paper towels in Kitchens.	Move to Tork as recommended by Change Waste. In Progress
13	Weekend Heating	Ensure heating is off over weekends. Timer to come back on Sunday evening.	In Progress
14	Surveys	Encourage staff to group surveys together to cut down on travel time. Car pooling. Encourage public transport.	In Progress
15	Reduce Fridge Use	Remove/switch off fridges which are surplus and not used.	In Progress First floor requires 2 x fridges. Second floor fridge use to be monitored.
16	Mitie	Liaise with Mitie for any advice and guidance on reducing our carbon footprint.	New arrangements from Change Waste Recycling will be communicated with Mitie.
17	Lightbulbs	Replace all lightbulbs with more environmentally friendly alternatives.	In Progress Quotes received for this work. To be considered.
18	Electrical Equipment Disposal	Identify an area where staff can drop off electrical items to be recycled.	In Progress via Stone 360
19	Edinburgh Climate Change Institute	Investigate Edinburgh Climate Change Institute (ECCI) (edinburghcentre.org) for additional ideas.	In Progress Emailed Judi Kilgallon for advice and guidance.
20	Encourage purchase and use of electric vehicles	Electric Vehicles Salary Sacrifice Scheme	In Progress via VIV UP or Octopus Energy.

LVJB CONTRIBUTION AWARDS

Award Level	Name	Summary of Contribution
= 1 st	Susan Grierson and Darren McQuade	<p>Susan and Darren have made an enormous contribution in bringing job evaluation in house to LVJB and they have been central to this transition being successful.</p> <p>They have consistently accommodated the immense workload involved alongside their existing roles, with attendance at job evaluation training, adapting and embedding the process in LVJB and willingly making themselves available to prioritise urgent job evaluation cases which were crucial to successful organisation change.</p> <p>Their organisational knowledge, ability to apply the job evaluation scheme consistently and methodically and consistently positive approach has been of enormous benefit to LVJB and will continue to deliver in the future.</p>
2 nd	Lily Hall	<p>Lily has made a number of positive contributions, including using her knowledge and experience to amend working practices and create easy to understand documentation, such as the Microsoft Teams Planner, Self-Catering flow chart, as well as contributions to CRE issue and Reval 26.</p> <p>Lily has also willingly been training new Property Assistants and created a step-by-step reference guide for use by all Property Assistants to support consistency and quality.</p> <p>Lily also worked tirelessly to assist the admin team in delivering the PGE, and thereafter efficiently transitioned back to her regular day to day activities.</p>
= 3 rd	Fiona Cameron	<p>Fiona makes an excellent contribution to LVJB, going above and beyond on a broad range of tasks, both within her own remit and through her willingness to cover for and assist colleagues whenever required.</p> <p>Over the last 12 months, Fiona has absorbed a vast additional workload in relation to supporting staff recruitment at LVJB, with a positive and flexible attitude, including proactively developing her IT skills to advertise vacancies timeously on our own website and creating recruitment videos on Powtoons to promote our vacancies on our Social Media channels.</p> <p>Fiona's contribution in supporting with the creation and review of HR policies and procedures has grown substantially over the past 12 months, alongside working tirelessly to ensure that Friday Focus is published every week to staff.</p>
= 3 rd	Rosaleen McIver	<p>Rosaleen is a conscientious, reliable, and hard-working member of staff who consistently sustains a high standard of work, willing to take on new tasks with positive and approachable enthusiasm.</p> <p>Rosaleen makes an enormous contribution to teamwork by making herself available to give support and advice to colleagues, always going above and beyond to ensure the success of the organisation.</p> <p>Rosaleen's insight has been invaluable in designing new processes to manage changes in legislation and has supported colleagues to Roll out new ways of working, with the elector's benefit at the forefront of her mind.</p>



MENOPAUSE POLICY

June 2024

MENOPAUSE POLICY

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1.0 INTRODUCTION

- 1.1 The menopause is a natural stage of life experienced by most women and will affect a significant proportion of LVJB's workforce at any time. This Policy refers to "women" throughout, however LVJB recognises and values its diversity and inclusive culture and is aware that menopausal symptoms can also be experienced by men, transgender, non-binary and intersex people. LVJB is committed to providing the right support and working environment to enable employees to better manage symptoms and to continue working well and productively throughout this time in their lives.

2.0 AIMS

- 2.1 The aims of this Policy are to make managers aware of LVJB's responsibility to understand the perimenopause, menopause and related issues and how they can affect employees, their partners, families and work colleagues by educating and informing managers about potential symptoms and how they can support individuals in the workplace. To further raise wider awareness and understanding amongst all employees and to outline support and reasonable adjustments that are available which subsequently could reduce perimenopause, menopause and related sickness by supporting employees to remain in work and retaining their valuable skills and experience (see Appendix 1 – Menopause Toolkit). It is hoped to create an environment in which open conversation about the perimenopause and menopause can be comfortably instigated and in which individuals feel confident in discussing symptoms and asking for support and adjustments in order to continue in their role within the organisation. Appendix 2 is a Checklist for Managers which can help facilitate improved working conditions.

3.0 MONITOR AND REVIEW

- 3.1 This Policy has been created and will be maintained in accordance with the LVJB Policy Approval Framework. It has been agreed by CLT (and the Board as required), in consultation with the Trade Union where appropriate.
- 3.2 Human Resources is responsible for monitoring the effectiveness of this Policy and supporting procedures and will conduct reviews at appropriate intervals.
- 3.3 Anyone who feels they have been unfairly treated or discriminated against should contact the HR Manager.

4.0 EQUAL OPPORTUNITIES

- 4.1 LVJB is committed to equality of opportunity for all its employees and the terms of this Policy and its supporting procedures and guidance notes are designed to ensure the fair and transparent treatment for all staff irrespective of age, race, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, sexual orientation, religion or belief, gender or contractual status. An Equality Impact Assessment is undertaken on this Policy each time it is reviewed and updated.

5.0 RESPONSIBILITY FOR THIS POLICY

- 5.1 Human Resources. Any changes to this Policy and supporting procedures will be made in consultation with appropriate bodies.
- 5.2 LVJB reserves the right to update HR Policies in line with new or updated employment legislation.

6.0 OBJECTIVES

6.1 Managers should:

- understand the organisation's Menopause Policy;
- be able to signpost further resources/education/support outside of the organisation;
- understand their individual role in the situation;
- understand the range of support available within the organisation;
- understand that effects of the perimenopause and menopause can vary widely and consequently, that the changes required to help support a worker can vary from person to person;
- be approachable and take time to make themselves available to those they manage;
- attempt to resolve issues raised fairly, consistently and in a timely manner;
- ensure employees are fully informed and communicated with regarding any issues they have raised.

6.2 Employees should:

- speak to someone at work, such as their line manager, a Menopause Mentor, trade union representative, HR or other appropriate colleague/s about their concerns;
- discuss concerns at the earliest opportunity with the appropriate manager;
- ask what support could be offered to help them manage their symptoms when doing their job;
- actively participate in any agreed process to attempt to manage the matter without delay.

6.3 Human Resources should:

- support managers and employees by providing advice on this Policy;
- ensure any processes undertaken comply with the Policy, so there is fairness and consistency;
- ensure medical information is taken into account when supporting managers with capability issues of their staff.

7.0 DEFINITIONS

7.1 Perimenopause

The perimenopause stage describes the period of hormonal change leading up to the menopause. It can often last for four to five years (though it may continue for many more years for some people, whilst lasting just a few months for others). During the perimenopause, the levels of hormones produced by the ovaries fluctuate. Changes in hormone levels (particularly oestrogen) can lead to symptoms which can have an adverse impact on personal and work life. Those experiencing the perimenopause may have a range of physical and psychological symptoms and may encounter difficulties at work as a result of their symptoms.

7.2 Menopause

The menopause is a natural transition stage in most women's lives. For some, it will be medically induced. Each woman will be affected in different ways and to different degrees over different periods of time and menopausal symptoms can often indirectly affect their partners, families and colleagues as well. Women with disabilities and those with pre-existing health conditions, may find that the menopause can aggravate their existing impairments and health conditions or even trigger new ones. Menopausal symptoms can in turn also be made worse by the woman's disability impairment or health condition. LVJB recognises that for many reasons, women's individual experiences of the menopause may differ greatly.

7.3 Andropause

The male menopause, or andropause, is the decline in male hormone production. Andropause is a term used to describe the symptoms and conditions some men experience after the age of 40. The decline can be very slow (about 1% a year from age 30 to 40 years). Although it is a slower progression, andropause can still be responsible for physical and emotional symptoms in men.

7.4 Transgender

It is recognised that transgender people can also experience menopause symptoms. Trans men will experience a natural menopause if their ovaries remain in place and no hormone therapy is given. Trans men will also experience menopausal symptoms if the ovaries and uterus are surgically removed but symptoms may be reduced or complicated if hormone therapy is in place. Trans women undertaking hormone therapy will generally experience menopausal-like symptoms.

7.5 Non-Binary

Non-binary people do not identify as either male or female however they may also experience menopause. This is dependent on a variety of factors including their sex assigned at birth and their medical treatments. While it is not appropriate to ask about these things, it is important to be aware of them and allow space for the individual to take the lead on the support and adjustments they may require.

7.6 Intersex

The intersex definition is a person born with a combination of male and female biological traits. They therefore may also experience menopause, depending on a variety of factors including their sex assigned at birth and their medical treatments. While it is not appropriate to ask about these things, it is important to be aware of them and allow space for the individual to take the lead on the support and adjustments they may require.

MENOPAUSE TOOLKIT

In an ideal world, it is one that we would all feel able to open up about. Yet many women continue to experience difficult menopause symptoms in silence, especially in the work environment. This toolkit will provide guidance to help you support any team members experiencing menopausal symptoms, encourage open conversations and create a better working environment for women at this time of life.



Some women may find it daunting to discuss the menopause with someone who knows little about it. So the first step to providing support is to understand how the menopause affects women's lives. This will help to make you more approachable and give you the confidence to discuss any issues with your staff. It is also worth considering that many women who start to experience menopausal symptoms may still be learning about the menopause themselves. So providing information and raising awareness within your workplace could make a difference for everyone; whether they are experiencing the menopause themselves, or in a position where they could support colleagues who are.



What is the menopause? At the menopause, a woman's oestrogen levels fall, and she stops having periods. During the time leading up to the menopause – the perimenopause – hormonal changes can cause several physical and psychological symptoms. Some women have mild or no symptoms, but others may be severe symptoms and find it hard to cope. The perimenopause can last for several years, affecting a woman's performance and attendance at work. In the UK, most women go through the menopause between the ages of 45 and 55 with the average age being 51, younger women can be affected too, by early menopause (aged 40 to 45) or premature menopause (before the age of 40). Premature menopause may happen due to surgery (eg a hysterectomy) or medical treatments (eg cancer). The menopause can also affect people from transgender, non-binary and intersex communities, and its symptoms and impact can vary among different ethnic groups.

Understand the symptoms. Every woman experiences the menopause differently, and her symptoms may flare up and down and change over time. Some people treat their symptoms with hormone replacement therapy (HRT), while all women will benefit from looking at their lifestyle and making helpful changes to ease menopause symptoms. Common menopausal symptoms include:

- Hot flushes (a sudden feeling of heat in the face, neck and chest)
- Aches and pains
- An urgent or regular need to urinate
- Irregular or very heavy periods
- Poor sleep and night sweats
- Poor concentration, memory issues, and an inability to think clearly – often called “brain fog”
- Palpitations/change in blood pressure
- Headaches and migraines.



Many women also experience mood changes, feeling low or anxious, and increased stress at work can make this worse. Without treatment or support, menopause symptoms can make it harder for women to cope at work, lowering their confidence and interfering with relationships with colleagues and at home.



How can you help? Treat the menopause with the same support and understanding as you would treat any other ongoing health concerns affecting employees. The menopause can be a particularly sensitive and personal issue, and some women may be worried that they could be stigmatised by colleagues. So it needs to be handled with care. Normalising the menopause in your workplace shows it is being taken seriously and women should not be embarrassed to bring up the topic. Make sure staff know who they can speak to if they are experiencing any menopausal symptoms that do, or could, affect their work in any way. One way to make sure menopause symptoms are not being made worse by the work environment, or by working practices, is to carry out a workplace assessment. Have regular, informal one-to-one chats with your team members to encourage conversations about any issues (including health) that may be affecting their work.

Open up conversations. If team members are struggling with menopausal symptoms, they need to know that help and support is readily available. There is no 'one size fits all' approach and some women may find it easier than others to discuss the menopause with their colleagues or managers. Give staff the option of speaking to someone other than their manager, especially if their manager is younger or male. Some people may feel more comfortable speaking to a colleague they work with more closely, while others may feel more able to talk openly with someone from a completely different part of the organisation who has no influence over their role. Staff may appreciate, for example, the chance to have a female mentor who has been through similar life experiences, or equally sympathetic male mentors who have a partner or family member they supported through the menopause. Treat each team member as an individual, as the menopause affects everyone differently.



The menopause is a sensitive topic, so any conversations should be held in a private area where there will be no interruptions. Do not offer medical advice but do offer support. Suggest employees see their GP if their symptoms are affecting their daily life. Reassure your staff that discussions about their health, including the menopause, will always remain confidential. Information will only be shared if they consent to this. The symptoms (and impact) of the menopause can vary over time. So you'll need to have regular discussions to make sure your team member's needs continue to be met.



Find practical solutions. Specific measures may need to be put in place that will help staff cope with troublesome menopausal symptoms. Even simple changes to a working environment can make a big difference, enabling a woman to continue to perform at her full potential. Some changes may be physical ones, such as providing new equipment, while others may involve being more flexible with certain procedures. For some staff, many of the practical steps below will be easier to do when working from home than in the workplace. But this very much depends on their home environment. For other staff, being at their workplace may be much better. It is important to support staff in working from the most comfortable environment for them, when work duties allow some flexibility.



- Can they sit by an open window for some fresh air?
- Can they adjust the air conditioning or heating?
- Do they need a desk fan for when they have a hot flush?
- Do they have easy access to toilets and washing facilities? Bladder leakage (stress incontinence) may get worse at the menopause.
- Is cold drinking water readily available during meetings or when travelling?
- Is there somewhere they can rest or take a quiet break if they need to? Hot flushes can be very uncomfortable, embarrassing and distressing, and some menopausal women get very tired. Mindfulness, meditation and other relaxation techniques may help to reduce stress levels.

- Is their desk or workstation set up properly to reduce aches and pains? This can be an especially important consideration when people are working from home.
- If their work involves long periods of sitting or standing, can they move around freely, or take regular breaks?
- Can they take time off for healthcare appointments or leave early if their symptoms flare up?
- Can they start and finish work later than usual if they have a bad night's sleep?
- If they are not working from home already, do they have the option to do so on a day when it would help them to manage symptoms?

Top Tips to Remember



Further Help and Information

NHS information

www.nhs.uk/conditions/menopause

www.nhs.uk/conditions/early-menopause

NICE guidelines on "Menopause: diagnosis and treatment"

www.nice.org.uk/guidance/ng23/ifp/chapter/About-this-information

Menopause Matters www.menopausematters.co.uk

Women's Health Concern www.womens-health-concern.org

The Menopause Exchange www.menopause-exchange.co.uk

Health Line "What to Know About Menopause When You're Trans or Non binary"

<https://www.healthline.com/health/menopause/ask-the-expert-menopause-in-trans-men-and-nonbinary-people#menopause-in-transmen>

NHS information: The Male Menopause www.nhs.uk/conditions/male-menopause/

CHECKLIST FOR MANAGERS

Employee:		Date of assessment:	
Line Manager:			

What are the hazards?	Considerations	Level of risk	What is already being done	What further action is necessary	Action by whom	Action by when	Date achieved
Information on menopause	<ul style="list-style-type: none"> Does the staff member have access to information on menopause, relevant policies on attendance management, flexible working? 						
Sickness reporting	<ul style="list-style-type: none"> Is there the facility, for those who are not able to attend work due to menopausal symptoms, to report these to a female manager or other point of contact? 						
Stress	<ul style="list-style-type: none"> Are the appropriate mechanisms in place to deal with issues such as stress? Does a stress risk assessment need to be completed? 						
Occupational health	<ul style="list-style-type: none"> Has the staff member been made aware of the facility to make an occupational health (OH) referral and support to remain in the workplace? Do they need a OH referral? 						
Support groups	<ul style="list-style-type: none"> Is the member of staff aware of support groups or champions in the workplace that may be able to help? 						

What are the hazards?	Considerations	Level of risk	What is already being done	What further action is necessary	Action by whom	Action by when	Date achieved
Environment/ duties	<ul style="list-style-type: none"> • Have workstation risk assessments been reviewed to take menopause into account? • Are there opportunities to switch to lighter or different duties if a risk assessment identifies this as required? • Are there flexible arrangements in place in relation to breaks? • Can start and finish times be adjusted? • Have work processes been assessed to see if any reasonable adjustments are needed? • Is the noise level suitable? • Is the worker experiencing any fatigue – mental or physical? • Is there sufficient and suitable workspace? • Is there somewhere a quiet break can be taken? 						
Workstations	<ul style="list-style-type: none"> • Are workstations/locations easily accessible to sanitary and rest facilities? • Is there workstation set up properly to reduce aches/pains? 						
Facilities	<ul style="list-style-type: none"> • Are there private changing and washing facilities available? • Is there access to sanitary products? 						

What are the hazards?	Considerations	Level of risk	What is already being done	What further action is necessary	Action by whom	Action by when	Date achieved
Temperature	<ul style="list-style-type: none"> • Is ventilation available and is it regularly maintained? • Is additional ventilation provided if necessary eg desk fan? 						
Working conditions	<ul style="list-style-type: none"> • Is there a suitable work pattern? • If not already working from home, is there the option to do so to help manage symptoms? • Is there overtime in the schedule? • Is there travel for work involved? • Can time be taken off for healthcare appointments? 						
Other hazards: please identify							



Mental Health Commitments and Action Plan

Please find below our Mental Health Action Plan. This plan utilises the 6 standards in the [Mental Health at Work Commitment](#) to map out what is already in place for our staff and identify and plan activity to effectively and proactively support employee mental health.

ID	Activity	Responsibility	Status
Prioritise mental health in the workplace by developing and delivering a systematic programme of activity. (Standard 1)			
1	Develop and deliver a mental health action plan.	H&S Committee	In Progress
2	Communicate the mental health action plan to staff.	H&S Committee	Pending
3	Ensure CLT ownership and accountability, with clear reporting structures	HR Manager/CLT	In Progress
4	Encourage feedback from employees and make improvements where required	HR Manager	Pending
Proactively ensure work design and organisational culture drive positive mental health outcomes. (Standard 2)			
5	Effectively reduce stress via Management of Stress Policy and associated Workplace Stress Risk Assessment.	HR Manager/ Line Managers	Complete
6	Sickness Absence Management Policy and Procedure and occupational sick pay	HR Manager	Complete
7	Provide all employees with good physical working conditions and environment including exposure to natural daylight, the ability to control the temperature, a range of breakout spaces including quiet rooms, plants and greenery, pictures and paintings.	HR Manager	Complete
8	Encourage healthy work/life balance. Encourage working sensible hours, taking a full lunch break, resting and recuperating after particularly busy periods and taking full annual leave entitlement.	Line Managers	In Progress
9	Offer flexible working.	HR Manager	Complete
10	Ensure the demands of each job is appropriate, that duties are clearly defined and there is adequate support (My PaTH).	Line Managers	Continuing
11	Encourage praise and recognition for achievements via My PaTH. Contribution Awards.	HR Manager/ Line Managers	Continuing
Promote an open culture around mental health (Standard 3)			
12	Consider signing up to The Mental Health at Work Commitment	H&S Committee	Pending
13	Engage with external campaigns to address mental health stigma, eg. Time to Talk Day (February), Mental Health Awareness Week (May), or World Mental Health Day (October)	HR Manager	Pending

ID	Activity	Responsibility	Status
14	Encourage open two-way conversations about mental health and the support available at all stages of employment?	H&S Committee/ HR Manager	Pending
15	Make wellbeing part of regular catch-ups, including using My PaTH as a platform for a “welfare check”. Get to know employees.	Line Managers	In Progress
16	Pre-employment checks during recruitment and selection provides the opportunity for new employees to disclose and declare any mental health matters to ensure appropriate support is in place from the start of their employment.	HR Manager	Complete
17	Ensure mental health and welfare is integrated into induction, i.e. tell new employee about PAM Assist and signpost to resources on SharePoint, signpost to HR Manager.	Line Managers	Pending
18	Seek feedback from staff on how easily accessible help resources are and how supportive they have been.	HR Manager	Pending
Increase organisational confidence and capability (Standard 4)			
19	Consider mental health training for all staff to increase knowledge including how to identify signs and symptoms of poor mental health and where to signpost for support.	H&S Committee	Pending
20	Commitment from CLT to addressing mental health in LVJB. Supporting mental health could be included in My PaTH objectives of senior staff.	CLT	Pending
21	Increase training and guidelines for line managers to effectively deal with mental health.	HR Manager	Pending
22	Upskill line managers on their communication style in relation to mental health.	HR Manager/ Line Managers	Pending
Provide mental health tools and support (Standard 5)			
23	Consider peer support groups.	H&S Committee	Pending
24	Health and Wellbeing sub site on SharePoint. Raise awareness of support available to employees.	HR Manager	In Progress
25	PAM Assist Employee Counselling	HR Manager	Complete
26	Occupational Health	HR Manager	Complete
27	Bank of Mental Health First Aiders	HR Manager/ Mental Health First Aiders	Complete
28	Reminders of tips to support good mental health.	HR Manager	In Progress
29	Signpost to external services and helplines.	HR Manager	In Progress
Increase transparency and accountability through internal and external reporting (Standard 6)			
30	Collect data to measure mental health, such as absence and disclosure rates.	HR Manager	Pending

ID	Activity	Responsibility	Status
31	Share anonymised absence data with CLT, highlighting areas for concern around mental health.	HR Manager	Pending
32	Publicise internally and externally our commitment to mental health. We shared on social media Mental Health First Aid Training etc. More of this.	HR Manager	Pending