

# Report

Report to:	<b>Lanarkshire Valuation Joint Board</b>
Date of Meeting:	<b>4 March 2024</b>
Report by:	<b>Assessor and Electoral Registration Officer</b>

Subject:	<b>Lanarkshire Valuation Joint Board - Service Plan – 1 April 2022 to 31 March 2025 – Update</b>
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## 1. Purpose of Report

1.1. The purpose of the report is to:-

- ◆ provide members with an update on Lanarkshire Valuation Joint Boards (LVJB's) Service Plan covering the period 1 April 2022 to 31 March 2025

## 2. Recommendation(s)

2.1. The Board is asked to approve the following recommendation(s):-  
**(1)** that the content of the report be noted.

## 3. Background

3.1. LVJB's current Service Plan, which covers the period from 1 April 2022 through to 31 March 2025, was approved at the Board meeting of 7 March 2022. This is the second update to that Service Plan.

## 4. Key Business Areas

4.1. The Service Plan sets out the key business areas identified for LVJB over a three-year period. The Plan assists in ensuring that LVJB's services are delivered as effectively and efficiently as possible to service users.

4.2. LVJB's Core Purpose and Vision statement reaffirms that we seek to achieve completeness and accuracy in all work undertaken. This includes producing:-

- ◆ complete Electoral Registers which include all eligible electors in Lanarkshire accurately named at their qualifying address
- ◆ a complete Valuation Roll which includes all relevant lands and heritages with accurate rateable values
- ◆ a complete Valuation (Council Tax) List which includes all dwellings with accurate bands

4.3. This report provides updates on key business areas and details progress on specific projects within the three key business areas of the Board, namely - Electoral Registration, Non-Domestic Rating and Council Tax.

## **5. Key Challenges**

- 5.1. The key challenges faced by LVJB over the period of the Service Plan within its three main business areas were identified as follows:-

*Within Electoral Registration:-* to plan for and ensure that individual electoral registration continues to be managed successfully; to respond to and implement changes which result from the electoral reform review process; to plan for and ensure service delivery for each election arising over the period of the Service Plan; to ensure the completeness and accuracy of the Electoral Registers.

*Within Non-Domestic Valuation:-* to ensure the maintenance of the Valuation Roll between revaluations and that values accurately reflect changes to Valuation Roll entries; to ensure the disposal of all appeals received in accordance with statutory timescales; to plan for and ensure the completion of, in accordance with statutory timescales, the 2023 Revaluation and the future challenges as a result of the Barclay Review of Non-Domestic Rating.

*Within Council Tax:-* to ensure that new houses are entered in the Valuation List as soon after completion as possible; to ensure that band changes relating to a material change of value of a dwelling, followed by its subsequent sale, are effected as soon as possible; to continue to deal with proposals to alter Council Tax bands as efficiently as possible.

## **6. Employee Implications**

- 6.1. None.

## **7. Financial Implications**

- 7.1. Financial issues in relation to the Service Plan are covered annually as part of the budgetary process and discussions with the Treasurer to the Board.

## **8. Climate Change, Sustainability and Environmental Implications**

- 8.1. There are no climate change, sustainability or environmental implications in terms of the information contained in this report.

## **9. Other Implications**

- 9.1. There are various risks associated with not either having or adhering to an organisational Service Plan. LVJB have in place a specific risk register which is monitored and reviewed by the management team.

## **10. Equality Impact Assessment and Consultation Arrangements**

- 10.1. Such matters are referred to in the Service Plan.

## **11. Privacy Impact Assessment**

- 11.1. Such matters are referred to in the Service Plan.

**Christine Maxwell BSc MRICS**

**Assistant Assessor and Electoral Registration Officer**

15 February 2024

**Previous References**

- ◆ Lanarkshire Valuation Joint Board - Service Plan - 1 April 2022 to 31 March 2025 reports for Board meetings of 7 March 2022 and 6 March 2023

**List of Background Papers**

- ◆ None

**Contact for Further Information**

If you require further information, please contact:-

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**The Office of the  
Assessor and Electoral Registration Officer**

**SERVICE PLAN**

**April 2022 – March 2025**



## **Our Core Purpose**

To prepare, maintain and update an accurate Valuation Roll, Valuation List (Council Tax) and Electoral Register having regard to statutory requirements.

## **Our Vision**

Our vision is to deliver quality in the work which we undertake, provide efficient services to all service users, and ensure completeness and accuracy of the Electoral Register, Valuation Roll and the Valuation (Council Tax) List.

## **In Order That We 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 efficient government and continuous improvement.

Undertake customer care surveys to assist us in improving our service delivery.

Recognise our employees as both stakeholders and our most important asset.

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

Encourage innovation and recognise achievement within the organisation.

Monitor and report performance levels to stakeholders.

Integrate equalities issues into all aspects of our service provision.

Undertake our duties having regard to sustainability.

Build on our achievements to date.

**LANARKSHIRE VALUATION JOINT BOARD**  
**ASSESSOR AND ELECTORAL REGISTRATION OFFICER**  
**SERVICE PLAN**  
**PART ONE**  
**SERVICE FUNCTION**

**1.1 VALUATION ROLL**

The Valuation Roll is a list of all non-domestic properties, which are not excluded properties, along with the Net Annual and Rateable Values which the Assessor has established for each property. These annual values form the basis for non-domestic rates charges. The Roll is published annually and updated weekly.

Assessors are now required to complete a Revaluation of all non-domestic properties within the Valuation Roll every 3 years, with the next Revaluation due to come into effect on 1 April 2023.

As at 1 February 2022 there were a total 21,264 properties in the Valuation Rolls for North and South Lanarkshire Council areas, with a total rateable value of £1,024,919,840.

Update February 2023:

At 31 January 2023 there were a total of 21,345 properties in the Valuation Rolls for North and South Lanarkshire Council areas, with a total rateable value of circa £980,000,000.

Update February 2024:

At 31 January 2024 there were a total of 23,013 properties in the Valuation Rolls for North and South Lanarkshire Council areas, with a total rateable value of circa £1,093,778,000.

**1.2 VALUATION LIST**

The Valuation List is a list of all domestic properties upon which Council Tax charges are based.

Each dwelling is placed in one of eight broad valuation bands according to their estimated market value as at 1 April 1991.

As at 1 February 2022 there were a total of 315,096 council tax entries – excluding garages - in the Valuation Lists for the Lanarkshire area.

Update February 2023:

At 31 January 2023 there were a total of 317,865 council tax entries – excluding garages - in the Valuation Lists for the Lanarkshire area.

Update February 2024:

At 31 January 2024 there were a total of 319,990 council tax entries – excluding garages - in the Valuation Lists for the Lanarkshire area.

### **1.3 REGISTER OF ELECTORS**

The Register of Electors contains the names of all persons resident within the area and eligible to vote at UK Parliamentary, Scottish Parliamentary, European and Local Elections together with referenda. It is generally published annually, by 1 December, and updated regularly throughout the year.

Prior to publication, the Register is updated by an annual canvass consisting of a postal canvass of all households, which is usually carried out during July - November each year, and a door-to-door canvass.

As at 1 February 2022 the total electorate in Lanarkshire who are eligible to vote in Scottish Parliamentary elections was 516,624.

#### Update February 2023:

At 1 February 2023 the total electorate in Lanarkshire who are eligible to vote in Scottish Parliamentary elections is now 519,339 electors.

#### Update February 2024:

At 1 February 2024 the total electorate in Lanarkshire who are eligible to vote in Scottish Parliamentary elections is now 519,691 electors.

### **1.4 OTHER FUNCTIONS**

The Assessor carries out a range of functions in support of these primary services, and these are covered in Part Two, Core Objectives, below.

### **1.5 RISK OF THE CORONAVIRUS PANDEMIC ON THE FUNCTIONS OF LANARKSHIRE VALUATION JOINT BOARD**

Following the outbreak of the coronavirus pandemic, LVJB's management team have continued to monitor advice from the UK and Scottish Governments, and also NHS Scotland. This has been an ongoing process whereby management has reacted to a fast paced, ever-changing situation during this health crisis whilst still endeavouring to meet service standards.

Following a period in which all on-site inspections for both non-domestic and council tax purposes were paused, LVJB developed Risk Assessment and Safe Systems of Work documents to permit physical inspections to resume in the case of non-domestic subjects. The requirement for such inspections is minimised by the on-going use of receipt of electronic plans, photographs, leases, and other relevant information.

In terms of non-domestic appeals, our organisation received circa 8,000 appeals material change of circumstances appeals. Negotiation and disposal of this unexpected volume of appeals could place an onerous burden on the organisation's resources.

In respect of the Council Tax business area, physical inspections are currently undertaken on a limited basis. However, statutory duties continue to be undertaken with plans to introduce full return to survey undertakings.



In terms of Electoral Registration matters, the annual canvass of electors will commence on, or around July, of each year. As referred to at 2.3.1, the number of canvasser household visits is now lower than previous years, due to canvass reform, however risk assessments will continue to be undertaken before embarking on such visits.

In terms of the welfare of staff, risk assessments remain under review, with plans for a blended working arrangement being rolled out throughout the organisation.

Update February 2023:

Whilst the previous level of threat to core business from the effects of the coronavirus have to some extent subsided, the management team remain vigilant to any changing advice issued by the UK and Scottish Governments, and also NHS Scotland.

In respect of non-domestic valuation, a full return to on-site surveys has been established with the exception of certain care setting properties such as Hospitals and Care Homes.

With regard to the voluminous number of appeals lodged on the grounds that the coronavirus had caused a material change of circumstance affecting the value of the properties, the vast majority of these remain outstanding although some professional agents have now submitted withdrawals of all such appeals lodged (see Section 2.1.3 below)

In respect of council tax matters, a full return to on-site surveys has resumed. Certain practices established during the period of homeworking have been retained.

In respect of Electoral Registration, the door-to-door element of the canvas recommenced in September 2022.

Update February 2024:

We continue to be vigilant in relation to any advice from the Scottish Government or NHS Scotland.

Whilst good progress has been made in respect of reducing numbers of outstanding number of appeals lodged on the grounds that the coronavirus had caused a material change of circumstance affecting the value of the properties, there still remains a substantial number to be settled (see Section 2.1.3 below)

**LANARKSHIRE VALUATION JOINT BOARD**  
**ASSESSOR AND ELECTORAL REGISTRATION OFFICER**  
**SERVICE PLAN**  
**PART TWO**  
**CORE OBJECTIVES**

**2.1 THE VALUATION ROLL**

**2.1.1 Maintenance of the Valuation Roll**

Maintenance of the Valuation Roll, including the addition of new subjects, the deletion of subjects and the amendment of existing subjects, will continue, year-on-year, in accordance with the Joint Board's established procedures for completion within the statutory timescales and annual targets. Valuation Notices will be issued to all Proprietors, Tenants and Occupiers and all relevant changes will be notified to the billing authorities timeously.

Update February 2023:

In the period 1 April 2022 to 31 January 2023, some 777 value changes had been made to the Valuation Roll. 65% of these changes were made within 3 months of their effective alteration date (performance target for period 2022/23 set at 77%).

Update February 2024:

In the period 1 April 2023 to 31 January 2024, some 2,434 value changes had been made to the Valuation Roll. 79.58% of these changes were made within 3 months of their effective alteration date (performance target for period 2023/24 set at 77%).

**2.1.2 Revaluation Proposals & Appeals**

All Revaluation 2017 appeals were timeously disposed of by the statutory date of 31 December 2021, leaving 207 which have been referred to the Lands Tribunal for Scotland (LTS) for determination. LVJB staff continue to negotiate with ratepayers and their professional representative in connection with these appeals to attempt to reach a settlement without need for recourse to the LTS.

The next Revaluation appeals to be received will be those relating to Revaluation 2023. Legislation governing the administration of these appeals has yet to be enacted and LVJB will require to adapt IT systems accordingly. These changes will be considered in terms of undertaking business processing re-engineering where deemed appropriate.

Following a review, the existing Valuation Appeal Committee structure will now be transferred to the Scottish Courts & Tribunal Service (SCTS) throughout the country with effect from 1 January 2023.

Where values are deemed to be correct, then they will continue to be robustly defended. Historical decisions of cases which have proceeded to a Valuation Appeal Committee hearing can be viewed at [www.lvap.org](http://www.lvap.org). More recent decisions are hosted on a Scotland wide website which can be viewed at <https://scotvac.org/>

Update February 2023:

Following amended legislation enacted by the Scottish Parliament, the transfer of existing appeals to the Scottish Courts & Tribunal Service (SCTS) has been delayed from 1 January 2023 until 1 April 2023. In respect of the 2023 Revaluation, valuation notices will be issued on or around 1 April 2023 and it is expected that several thousand proposals will be lodged against the issued values.

LVJB remain in dialogue with software suppliers to ensure that IT systems are suitably amended to allow the logging and maintenance of these proposals.

Update February 2024:

Following the 2023 Revaluation LVJB received 1,403 proposals deemed to be complete. The management team has now prepared a schedule of Proposal Determination Dates for each of these subjects.

In respect of Revaluation 2017 there remains some 56 appeals outstanding which have been transferred to the Upper Tribunal for determination. We await final confirmation of this figure from the Tribunal in due course.

### 2.1.3 **Running Roll Appeals**

Our organisation will include running roll appeals in the ongoing programme for the disposal of non-domestic appeals in accordance with statutory disposal dates for each appeal received. However, as the current outstanding running roll appeals number circa 8,000 - mainly as a result of the pandemic - with a disposal date of 31 December 2022, there is a significant challenge ahead for all Assessors' offices to ensure that such appeals are disposed of timeously; the matter has been raised with the Scottish Government.

Update February 2023:

Non Covid-19 Running Roll Appeals: as at 31 January 2023, 1,620 running roll appeals have been settled since 1 April 2017 leaving 148 appeals outstanding. It is expected that many of these appeals have been lodged on the grounds of Covid-19 but have not stated that explicitly in the notice of appeal. In continued efforts to seek disposal of these appeals, they have all been cited for the four remaining Valuation Appeal Committee hearings in February and March 2023.

Covid-19 Running Roll Appeals: LVJB have received 7,873 running roll appeals explicitly on the grounds of Covid 19 constituting a material change of circumstance affecting value. Thus far, 1,246 of these have now been withdrawn.

All Running Roll appeals which remain outstanding as at 31 March 2023 will be transferred to the Scottish Courts & Tribunal Service (SCTS). At the present time it is understood that the SCTS will write to each appellant seeking to establish if they wish to continue with the appeal.

Update February 2024:

Good progress has been made in the previous 12 months in respect of the disposal of running roll appeals.

Covid-19 Running Roll Appeals: some 3,649 have been settled in the previous 12 months leaving a further 2,977 appeals outstanding which, by statute, require to be settled by 31 December 2024. To assist with this disposal programme, we are currently liaising with ratepayers and their professional agents to identify those which can now be settled. Additionally, the appellants and their professional agents have been written to by the Local Taxation Chamber (LTC) to establish which

appeals are not being maintained. At the present time we await confirmation of such appeals from the LTC.

Non Covid-19 Running Roll Appeals: in the previous 12 months, 145 such appeals have been settled with a further 191 remaining outstanding.

#### **2.1.4 Appeals to the Lands Tribunal for Scotland and Lands Valuation Appeal Court**

Our organisation will allocate resources as appropriate to deal with appeals which are referred to the Lands Tribunal for Scotland and appeals to the Lands Valuation Appeal Court. Timetabling of such appeals is generally set by the respective appellate bodies.

##### Update February 2023:

Significant progress has been achieved in this area of business with 201 appeals referred to the Lands Tribunal for Scotland (LTS) having been settled in the period 1 April 2022 to 31 January 2023. Some 71 such appeals remain outstanding.

##### Update February 2024:

Since the previous update, all outstanding appeals lodged with the Lands Tribunal for Scotland have now been transferred to the Upper Tribunal for Scotland (part of the Scottish Courts and Tribunal Service). LVJB remain active in attempting to reach agreement of these appeals and remain in dialogue with the professional agents acting on the appellants' behalf. There are now 56 such appeals outstanding.

#### **2.1.5 Designated Assessor Responsibility**

Under the terms of The Non-Domestic Rating (Valuation of Utilities) (Scotland) Order 2005 the Assessor for Lanarkshire is designated as being responsible for the conventional valuation of the majority (in rateable value terms) of the Electricity Utilities for all of Scotland. This has had a significant impact on the functions and structure of the office. The Assessor will continue to allocate resources as appropriate to deal with these additional legislative duties which are specific to the position of the Lanarkshire Assessor. The Assessor will raise the resourcing of these duties with the Treasurer to the Board where it is envisaged that their undertaking is either onerous in terms of resourcing, or where they may affect other service delivery areas. Currently, the total value in the Valuation Roll of Electricity subjects is over £470m. There are currently 63 appeals outstanding against these subjects with the majority referred to Lands Tribunal for Scotland (LTS) for determination.

##### Update February 2023:

With regards to the 2017 non-domestic revaluation, further progress has been achieved in this area of business with LVJB leading the national agreement of wind farms. Consequently, as at 31 January 2023, 54 appeals in respect of Electricity Generation subjects remain outstanding (both 2017 Revaluation and Running Roll). Of these 38 have been referred to the Lands Tribunal for Scotland for determination. Notwithstanding such referrals, LVJB staff remain in dialogue with appellants and their professional representatives to explore whether settlement is possible without recourse to the Lands Tribunal.

In respect of Revaluation 2023, LVJB are again the national lead for the valuation of wind farms. Discussions have commenced with professional agents in respect of wind farms, and also electricity transmission and distribution values for the 2023 revaluation.

Update February 2024:

In respect of Revaluation 2023, LVJB are again the national lead for the valuation of wind farms. Discussions have commenced with professional agents in respect of proposals that have been submitted for wind farms. All such subjects have been allocated a Proposal Determination Date of 8 March 2024.

Proposals submitted with regard to electricity transmission and distribution values for the 2023 Revaluation have now been settled.

**2.1.6 2023 Revaluation**

Currently, LVJB staff are in the early phase of undertaking the 2023 Revaluation. This is the first 3-yearly revaluation following the recommendations of the Barclay review on non-domestic rating.

As with the 2017 Revaluation, there is the creation of a Revaluation Strategy Group comprising members of staff from within LVJB's management and senior management teams to set targets, monitor progress, and review certain valuations. This group will meet monthly, or more regularly as required.

LVJB will engage with landlords, tenants, and other relevant parties to ensure that all rental information required to complete the revaluation is sought.

Valuation staff will participate in meetings of the Scottish Assessors Association to ensure that consistency in valuation approach is achieved. Certain staff will also be required to draft valuation practice notes to be applied throughout Scotland.

The values produced for the 2023 Revaluation will come into effect on 1 April 2023 and reflect levels of value as at 1 April 2022 (the "tone date"). This is the first revaluation which has a tone date 1 year prior to the revaluation. Previously, the tone date was 2 years prior to the date of the revaluation. This shortened time between tone date and completion of the revaluation creates practical challenges for our organisation in relation to ingathering appropriate rental information, analysing, and setting resultant values.

Whilst, as noted above, the values will come into force on 1 April 2023, it is expected that the Scottish Government will require draft values to be published some time before that. The Scottish Assessors Association (SAA) awaits final guidance on that matter.

Update February 2023:

Following the enactment of the Non-Domestic Rates (Scotland) Act 2022, Assessors were required to publish a draft revaluation roll on the Scottish Assessors Association portal on 30 November 2022 with accompanying notices issued to all proprietors, tenants, and occupiers shortly thereafter. Under the terms of this legislation, which put into law certain recommendations of the Barclay Review, Assessors were also required to publish on the Scottish Assessors Association portal a list of rented subjects which informed the basic rate applied to each of subject of a legislatively prescribed genus. These new requirements have been met by LVJB.

New legislative undertakings also require Assessors to value and enter certain parks, recreation grounds, pleasure grounds and associated building (e.g. Golf Courses). LVJB staff entered into dialogue with both constituent authorities to identify the majority of these subjects from their asset list.

All recipients of draft valuation notices have the opportunity to make representations to the Assessor. All such representations are currently being dealt with. Where the representation is well founded, the draft value will be amended prior to the publication of the final Valuation Roll.

Final valuations will be posted on the Scottish Assessors Association portal on 1 April 2023. All interested parties will be issued with valuation notices providing details of the entry together with the procedure and timescales for lodging a proposal against the valuation roll entry.

Update February 2024:

Revaluation notices were timeously issued at the end of March 2023. Some 1,403 revaluation proposals were received before the 31 August 2023 deadline; the disposal date for any appeals which result from these proposals being September 2025. As stated earlier, the management team have prepared a schedule of Proposal Determination Dates for each of the proposals received.

## **2.2 THE VALUATION LIST**

### **2.2.1 Maintenance of the Valuation List**

Maintenance of the Valuation List, in particular the addition of new subjects, will continue, year-on-year, in accordance with the Joint Board's established procedures for completion within annual targets. Banding Notices will be issued to all interested parties and all relevant changes will be notified to the billing authorities timeously.

Update February 2023:

In the period from 1 April 2022 to 31 January 2023 some 2,350 new houses were added to the Valuation List; 91% of these additions have been made within three months of their effective completion date (performance target for period 2022/23 set at 87%).

The volume of new housing is returning to pre-pandemic levels and in an effort to ensure new housing continues to be added promptly to the valuation list, LVJB staff have maintained good communication channels with sales staff of housing construction sites in North and South Lanarkshire and with individual house builders.

Update February 2024:

In the period from 1 April 2023 to 31 January 2024 some 2,183 new houses were added to the Valuation List; with over 95% of these additions having been made within three months of their effective completion date (performance target for period 2023/24 set at 87%).

### **2.2.2 Alterations to Bands**

Band changes following alteration and subsequent sale will continue in accordance with relevant legislation and the Joint Board's established procedures for completion within annual targets.

Update February 2023:

In the period from 1 April 2022 to 31 January 2023 some 141 Council Tax bands have been increased as a result of the property being altered and subsequently sold, the alteration being deemed significant enough to warrant an increase in band.

#### Update February 2024:

In the period from 1 April 2023 to 31 January 2024 some 150 Council Tax bands have been increased as a result of the property being altered and subsequently sold, the alteration being deemed significant enough to warrant an increase in band. 82% of these increases were undertaken within 6 months of the date of sale (LVJB KPI target is 52%).

### **2.2.3 Proposals & Appeals**

Council Tax proposals and appeals will continue to be considered, whether invalidly made or not, to ensure that dwellings are entered in the Valuation List at the correct band. When a band is considered to be incorrect, then our organisation will correct it, either upwards or downwards, under current legislative powers.

Whilst Council Tax appeals have continued to be cited for hearing by the Secretary to the LVAP, all physical hearings since the outbreak of the pandemic have been paused, which has impacted on the disposal of a number of council tax appeals. It has been agreed with the Panel Secretary and Chair that hearings will now recommence via MS Teams, and that this will continue until 1 May 2022, when the matter is to be reviewed. Additional hearings have been scheduled throughout 2022 in efforts to dispose of as many of these appeals as possible.

#### Update February 2023:

As at 31 January 2023 some 59 proposals and appeals remain outstanding with 4 remaining Council Tax valuation appeal hearings having been arranged for the remainder of this financial year as part of a strategy to deal with these as efficiently as possible. Of this number, 31 have been identified as having been validly made. All proposals and appeals outstanding on 31 March 2023 will be transferred to the SCTS to administer.

#### Update February 2024:

In respect of proposals deemed to have been validly made 58 remain live and 1 has been formally appealed to the FTT for determination as of 31 January 2024.

In respect of proposals deemed to have been invalidly made, some 56 remain live and a further 4 have been formally appealed to the FTT for determination as of 31 January 2024.

## **2.3 REGISTER OF ELECTORS**

- 2.3.1 The Register of Electors will be published by 1 December in each year following an annual canvass of electors, unless legislation dictates otherwise. The objective of the canvass will be to ensure the maximum possible response to canvass communications and that the register accurately reflects the updated information.

Canvass Reform has allowed Electoral Registration Officers (EROs) to data match the existing electoral register against data sets held by the Department for Work & Pension (DWP) (known as national matching), and also against the Council Tax data sets held by the constituent authorities (known as local matching).

Where a household is fully matched through this process an ERO is no longer required to issue a canvass form (CF) to these households, but rather will issue a Canvass Communication A (CCA) to advise the household of the details held on the register. CFs are only required to be issued to households which do not fully match

during national and local matching process. Reminders and subsequent household visits are only required to be carried out to those households who received a CF.

Additionally, canvass reform permits an ERO to obtain current electors' details from certain categories of properties (e.g., Care Homes, Halls of Residence etc) from a single, responsible individual.

The Statutory Review of Polling Districts and Polling Places is required to be carried out between October 2023 and February 2024 by the Returning Officer.

Boundary Reviews are required to be carried out at certain times as laid down in legislation. The next UK Parliamentary Boundary Review is due to be completed by 1 July 2023; the Scottish Parliamentary Boundary Review must be completed by May 2026; and the Scottish Local Government Boundary Review by December 2028. The Scottish Boundary Commission will decide the scheduling of these in due course.

Update February 2023:

The 2022 canvass commenced on 1 August 2022 and was completed successfully under canvass reform with local and national data matching carried out before the initial issue of communications.

The household visit element of the canvass was also completed with canvassers calling at around 44,000 properties. A telephone canvass was also conducted where a telephone number was known, and e-communications were issued where an email address was held.

The revised register was published on 1 December 2022.

The Boundary Commission for Scotland completed their final consultation of the 2023 Review of UK Parliamentary Constituencies on 5/12/22 and their final recommendations will be submitted by 1 July 2023.

Update February 2024:

The 2023 canvass commenced on 1 August 2023 and was completed successfully under canvass reform with local and national data matching carried out before the initial issue of communications.

The household visit element of the canvass was also completed with canvassers calling at around 41,000 properties and a telephone canvass was also conducted where a telephone number was known.

The revised register was published on 1 December 2023 after completion of the 2023 Review of UK Parliamentary Constituencies.

- 2.3.2 The Register will be updated on a monthly basis between annual canvasses. All statutory notices and lists will be timeously provided to relevant parties. This includes updates in October and November, during the annual canvass of electors period.

Update February 2023:

Monthly updates to the electoral registers continue to be published timeously apart from December when the revised registers are published.



Update February 2024:

Monthly updates to the electoral registers continue to be published timeously apart from December when the revised registers are published.

- 2.3.3 Election Registers and Lists of Absent/Postal/Proxy voters etc will be produced as required by statute and by agreement with Returning Officers.
- 2.3.4 The Electoral Administration Act 2006 introduced a number of duties on EROs, including a duty to maximise registration and to collect personal identifiers for electors wishing to vote by post or by proxy.
- 2.3.5 Individual registration was implemented in Scotland on 19 September 2014. Processes and procedures have been developed to assist in managing this fundamental change to electoral registration, in particular to ensure that individual registration does not compromise the completeness and accuracy of the Electoral Register. Discussions will continue with the Cabinet Office and the Treasurer to the Board where it is envisaged that their undertaking is either onerous in terms of resourcing, or where they may affect other service delivery areas.
- 2.3.6 The implementation of canvass reform has resulted in a reduction in volume for both paper communication and door to door canvassing. IER continues to be actively pursued by LVJB who issue ITRs to potential electors where names have been received from a variety of sources, such as Council Tax information, telephone calls and canvass forms.

There is the requirement, for EROs to continue the process of refreshing personal identifiers collected in relation to absent voting. This exercise will be repeated annually in January of each year. Those electors who fail to return the refresh form or reminder will have their postal vote expired.

Update February 2023:

After the local and national data matching steps in July 2022, 80% of properties were matched and circa 254,000 letters were issued to these properties. Some 62,000 canvass forms were issued to the unmatched properties, with a further circa 50,800 reminders issued. Thereafter circa 37,800 house visits were required to those who had not responded.

A refresh of personal identifiers was carried out in January 2023 which involved a write out to circa 9,130 electors requesting a refresh of their signature. Reminder letters are issued to those who have not responded.

Update February 2024:

After the local and national data matching steps in July 2023, 79.5% of properties were matched and circa 253,500 letters were issued to these properties. Some 65,000 canvass forms were issued to the unmatched properties, with a further 52,000 reminders issued. Thereafter approximately 41,000 house visits were required for those who had not responded.

A refresh of personal identifiers was carried out in January 2024 which involved a write out to circa 14,200 electors requesting a refresh of their signature. Reminder letters are issued to those who do not respond.

- 2.3.7 Following the extension of the franchise allowing 16 and 17-year-olds to vote in Scottish elections, LVJB Assistant Assessors & EROs continue to work in partnership with their respective contacts within the Local Authorities Departments of Education and Further Education establishments to encourage young persons in Lanarkshire to register to vote.

LVJB continues to liaise with the education authorities to record relevant details of “attainers” – i.e., young people who are currently 14 and 15 years old.

Contact is also made with liaison officers who deal with travelling people and refugees to promote registration within these groups.

Following the enactment of the Scottish Elections (Franchise and Representation) Act 2020, LVJB is now adding prisoners with a sentence of 12 months or less, and foreign nationals with a right to reside in Scotland, to the electoral register. These electors can now vote in Scottish elections.

Update February 2023:

In terms of prisoners LVJB continue to issue registration forms to prisoners from a monthly list provided by the Scottish Prison Service.

Update February 2024:

In terms of prisoners LVJB continue to issue registration forms to prisoners from a monthly list provided by the Scottish Prison Service.

- 2.3.8 The next scheduled election is the Scottish Local Government election on 5 May 2022.

It is not possible to predict if there will be another rise in postal vote figures for these elections, however LVJB continue to monitor the situation, and have issued Household Notification Letters (HNLs) in February 2022, in advance of the elections to highlight and promote the early uptake of postal voting and registration.

Dialogue continues with South Lanarkshire Council (IT Services) and LVJB’s software application provider to ensure that system performance requirements are met.

Update February 2024:

The next scheduled election is the Scottish Parliamentary Elections on 7 May 2026. The next Local Government election will be held on 6 May 2027. However, a UK Parliamentary election must be called before 24 January 2025, so preparations are currently underway to ensure that we are prepared for this.

- 2.3.9 The Elections Bill is currently progressing through Parliament and should be in effect by May 2023 elections. This Bill has extensive changes to the current UK Parliamentary elections legislation, such as extending the voting for overseas electors from 15 years to life, the introduction of voter identification at polling stations (Voter ID to be provided by the ERO), with the refreshing of signatures for absent voting proposed to reduce from 5 years to every 3 years. This Bill will have a major impact on the work of the ERO.

Update February 2023:

The Elections Act 2022 received Royal assent in April 2022. Voter ID will be required to be shown at polling stations from 4 May 2023 onwards for UK by-elections and recall petitions, and from October 2023 for UK Parliamentary

elections. For those electors who do not have a form of photographic ID, an application can be made for a Voter Authority Certificate to be provided by the ERO via a new Government website, and accessed through the new ERO Portal which went live on 16 January 2023. Other changes introduced by this legislation as detailed above will not come into force until July 2023.

Update February 2024:

The Elections Act 2022 has introduced a number of new measures in addition to Voter ID.

The postal and proxy vote requirements came into force on 31 October 2023 and included the gradual move to 3 yearly renewals and the ability to apply online via the new ERO portal for UK Parliamentary elections.

The Act also removed the 15-year time limit for overseas electors enabling all British citizens living abroad to register to vote if they have ever lived in the UK; this change came into effect from 16 January 2024. The ERO portal has been updated to allow new overseas elector applications to be made online, although renewals are still required in paper form, for the time being, with a gradual move to a 3 yearly application process (rather than the current yearly process).

## **2.4 CORPORATE GOVERNANCE**

- 2.4.1 The Valuation Joint Board will ensure that the Assessor and Electoral Registration Officer is adequately resourced to perform his statutory functions. It will meet to discuss and approve budgets, policies and practices as is deemed necessary and the members will act in accordance with the Code of Conduct for Councillors.
- 2.4.2 The officers of the Valuation Joint Board will act in accordance with the relevant Schemes of Delegation, Financial Regulations, Standing Orders and Codes of Conduct. Further, reference will be made to such good practice and good governance guidance as provided by Audit Scotland.
- 2.4.3 The Service Plan and other relevant plans will be maintained and actioned. The Service Plan will cover a three-year period. Such plans will be reviewed in a manner which integrates with budget planning. Updates will be provided to Board meetings where deemed appropriate.

Update February 2023:

A new service plan was presented to the Board at the 7 March 2022 meeting. This covers the period 2022 to 2025, to which this report is the first update.

Update February 2024:

This report is the second update of the service plan presented to the Board on 7 March 2022.

- 2.4.4 A Code of Corporate Governance has been developed and implemented. This was based on the framework established by The Chartered Institution of Public Finance and Accountancy (CIPFA) and The Society of Local Authority Chief Executives (SOLACE) in the publication Delivering Good Governance in Local Authority Government Framework (2016 Edition). Fraud prevention measures will be implemented in accordance with South Lanarkshire Council guidance.

- 2.4.5 The strategic objectives will be laid down and monitored by the Senior Management and Management Teams, and both strategic and operational matters will be considered by the LVJB's Senior and Management Teams. Actions will be communicated to staff by means of team meetings and written bullet points.

Organisational strategic objectives will be set/reviewed at LVJB's monthly management team meetings, bulleted, and relayed to staff via core briefs and section meetings. They will also be set/reviewed at regular meetings of the senior management team and cascaded down through the monthly management meetings.

Update February 2023:

Meetings of the Senior Management Team continue to be held weekly and the Management Team meetings monthly, utilising MS Teams as appropriate. Bullet points from Management Team meetings are disseminated to all staff.

Update February 2024:

Meetings of the Senior Management Team continue to be held weekly and the Management Team meetings monthly. Bullet points from the Management Team meetings are disseminated to all staff.

- 2.4.6 Effective performance management systems have been implemented and monitored via monthly Management Team meetings and regular Senior Management meetings, such meetings being identified as the principal forums for matters relating to performance management, planning, and reporting.

Update February 2023:

Performance management continues to be monitored at Management and Senior Management meetings, which are held in person or utilising MS Teams.

Update February 2024:

Performance management continues to be monitored at Management and Senior Management meetings, which are normally held in person.

- 2.4.7 Specific operational matters will be within the remit of the various scheduled meetings set up to ensure that operational procedures are reviewed, updated and implemented, and also that best practice is shared between working partners, such as parties responsible for election management issues and non-domestic rates and Council Tax billing. Additional groups, such as The Health and Safety Working Group will also contribute towards ensuring that appropriate procedures and processes are adhered to. These groups in turn will report to the LVJB's Management Team.
- 2.4.8 Senior management will liaise as and when required with staff representatives.
- 2.4.9 Where deemed appropriate the Valuation Joint Board will align its personnel and other related policies with those of South Lanarkshire Council.
- 2.4.10 The financial management and operations of the Valuation Joint Board will be subject to internal and external audit (see later).
- 2.4.11 LVJB is fully committed to the principles and practice of Best Value.
- 2.4.12 LVJB's Records Management Plan was approved by the Keeper of Records of Scotland on 9 August 2016. LVJB will continue to adhere to the agreed plan to meet its full obligations under the Public Records (Scotland) Act 2011.

The most recent invitation to submit our Progress Update Review (PUR) was received by LVJB in August 2021. Following submission, the final report on LVJB's PUR by the Public Records (Scotland) Act 2011 Assessment Team was received in January 2022. The Assessment Team evaluated the submission and agreed that the proper record management arrangements outlined in LVJB's plan continue to be properly considered.

LVJB have been scheduled by the Keeper to submit its next PUR in August 2022.

Update February 2023:

Following receipt of LVJB's invite to submit the Progress Update Review (PUR) on 4 August 2022, this was timeously provided to the Keeper of Records on 20 September 2022. A draft version of the final report was received 8 December 2022 seeking clarification on 4 elements this was provided and resubmitted before 31 January 2023 deadline.

The Assessment Team evaluated LVJB's submission and considered that LVJB continue to take their statutory obligations seriously and are working towards bringing all elements of their Records Management Plan into full compliance with the Act.

Update February 2024:

Following receipt of LVJB's invite to submit the Progress Update Review (PUR) on 2 August 2023, this was timeously provided to the Keeper of Records on 14 November 2023. A draft version of the final report is expected to be received by 14 February 2024 but to date has not.

2.4.13 LVJB will undertake an annual review of the Risk Register.

Update February 2023:

The Risk Register was reviewed by LVJB's Management Team and is the subject of a report to the Board at the meeting of 6 March 2023.

Update February 2024:

The Risk Register was reviewed by LVJB's Management Team in January 2024 and is the subject of a report to the Board at the meeting of 4 March 2024.

## **2.5 HEALTH AND SAFETY**

2.5.1 Lanarkshire Valuation Joint Board will take all reasonable steps to ensure the health, safety, and welfare of all its employees, and all persons likely to be affected by its operations.

Lanarkshire Valuation Joint Board has a general duty to ensure, so far as is reasonably practicable, the health, safety, and welfare at work of all employees under the Health and Safety at Work Act 1974. The Management of Health and Safety at Work Regulations 1999 require all employers to assess the risks to their employees while they are carrying out their daily duties. Employees whose job requires them to deal with the public can be at risk from violence. In line with South Lanarkshire Council's OHSMS, Lanarkshire Valuation Joint Board have developed their own Personal Safety System. The Personal Safety System has two objectives:

- To reduce the risk of aggressive or violent behaviour from service users.
- To ensure that service users with various requirements retain a sense of personal safety when using our services.

2.5.2 LVJB have adopted, use and participate in South Lanarkshire Council's Occupational Health and Safety Management System (OHSMS). LVJB's Management Team will ensure that this function is adequately resourced to meet legal obligations and ensure that health and safety is an integral part of the overall management culture.

LVJB's in-house H&S committee meets quarterly. LVJB H&S representatives will attend and participate in meetings of South Lanarkshire Council's Finance and Corporate Health and Safety Group. Both meetings are minuted, actions undertaken as appropriate and all information relevant to LVJB is disseminated to staff. H&S is a standing item on the agenda of LVJB Senior and Management Team meetings.

2.5.3 Health and Safety Officers will be appointed to actively participate in South Lanarkshire Council's, Finance and Corporate Health and Safety Group meetings so that Risk Assessments, Safe Systems of Work and PUWER assessments continue to be relevant as South Lanarkshire Council's OHSMS changes.

2.5.4 A Fire Action Plan has been developed in line with the OHSMS to ensure the safe evacuation of employees and service users.

2.5.5 Risk Assessments and Safe Systems of Work are developed, reviewed, and updated in line with the OHSMS to ensure the safety of all employees.

2.5.6 Relevant training will be identified and provided to all staff in line with the OHSMS to ensure the safety of all employees. New employees will be given information and training on health and safety as part of Lanarkshire Valuation Joint Board's staff induction procedure. H&S instruction is included in LVJB Induction Procedures.

2.5.7 All matters relating to health and safety will be communicated to staff by email, management bullet points, LVJB health and safety group minutes and training. Any matters relating to individual members of staff will be communicated through email, Personal Development Review meetings, and training.

2.5.8 LVJB have adopted the traffic management plan for David Dale House, Blantyre which they moved to in February 2021.

2.5.9 LVJB have recently updated the Surveying Safely guidance note which is available to all staff.

Updated February 2023:

LVJB's Surveying Safely guidance note incorporates advice from the OHSMS and guidance published by the Royal Institution of Chartered Surveyors.

2.5.10 Since the Coronavirus pandemic began LVJB have put the safety of their staff first to reduce the risk of them contracting the virus when working. Throughout the two years since news of the virus emerged Risk Assessments and Safe Systems of Work have been regularly altered to conform with Scottish Government and NHS (Scotland) guidance. Working practices have been altered to allow for home working when there have been lockdowns. While the safety of the staff has been paramount, services have continued to be delivered LVJB's stakeholders.

Updated February 2023:

Risk Assessments and Safe Systems of Work have been regularly updated to conform with Scottish Government and NHS (Scotland) guidance. Whilst working practices were initially altered to allow for home working, where necessitated by lockdowns, these have been further adapted latterly where the organisation have adopted a blended working model. While the safety of the staff has been paramount, services have continued to be delivered for LVJB's stakeholders.

Updated February 2024:

LVJB have implemented steps to deal with the Scottish Fire and Rescue Service's Unwanted Fire Alarm Signals (UFAS) procedures. A number of new floor controllers have been appointed along with a fire investigation team which has been fully trained in accordance with the guidance provided by South Lanarkshire Council (SLC) Health and Safety team.

## **2.6 ACCOUNTABILITY**

- 2.6.1 Annual Accounts will be submitted for external audit and published in accordance with the requirements of Audit Scotland.
- 2.6.2 The procedures and practices of the Valuation Joint Board will also be subject to external audit.
- 2.6.3 A Service Level Agreement has been entered into with the Internal Audit Services of South Lanarkshire Council, and an audit strategy encompassing the requirements of the external and internal auditors devised.
- 2.6.4 Detailed Annual audit plans will, likewise, be agreed with Internal Audit Services of South Lanarkshire Council.
- 2.6.5 Performance will be monitored and reported internally and externally. Accordingly, a schedule of performance reports has been developed and reported at monthly Management Team meetings and also other scheduled meetings where deemed appropriate. In response to changing external requirements and management need, this schedule will be subject to continuous review.
- 2.6.6 Decisions of the Management Team will be minuted.

## **2.7 BEST VALUE**

- 2.7.1 LVJB recognises its duty, under Section 1 of The Local Government in Scotland Act 2003, to make arrangements to secure Best Value. The Valuation Joint Board is committed to the principles and practices of Best Value and to the integration of this theme into all areas of operation.

Update February 2023:

LVJB continues to be represented at SAA Governance Committee meetings via MS Teams, and Governance remains a standing item on the agendas of meetings of both the Senior Management Team and the Management Team

Update February 2024:

LVJB continues to be represented at SAA Governance Committee meetings via MS Teams, and Governance remains a standing item on the agendas of meetings of both the Senior Management Team and the Management Team.

- 2.7.2 Performance will be planned and targeted. Key Performance Indicators have been agreed in conjunction with the Scottish Government and the Scottish Assessors Association and reported to the Scottish Government and other key service users annually. Targets will however have to be set mindful of the continued budgetary constraints which public local authority bodies are experiencing, including LVJB.

Update February 2023:

LVJB continues to monitor performance through a suite of statistics and performance continues to be considered at both Senior Management Team meetings and Management Team meetings.

Update February 2024:

LVJB continues to monitor performance through a suite of statistics and performance continues to be considered at both Senior Management Team meetings and Management Team meetings.

- 2.7.3 Performance Indictors will be used for year-on-year comparisons as well as comparisons with other bodies where deemed appropriate.
- 2.7.4 In accordance with Section 13 of The Local Government in Scotland Act 2003, the performance of LVJB in relation to its functions will be reported to all service users of the Valuation Joint Board, including staff, in the most appropriate manner. These statistical measures are placed on the LVJB website under the heading Public Performance Reports.

Update February 2023:

LVJB's Public Performance Report for the period 2021/22 was presented to the Board at the meeting of 27 June 2022.

Update February 2024:

LVJB's Public Performance Report for the period 2022/23 was presented to the Board at the meeting of 5 June 2023.

- 2.7.5 Service User Consultations will be continually developed and implemented, and the outcomes taken account of in-Service Planning. This consultation includes a Customer Care Policy and Customer Comments and Complaints procedures, together with initiatives co-ordinated via the Scottish Assessors Association such as consultation on future development of the SAA Portal ([www.saa.gov.uk](http://www.saa.gov.uk)).

Users of LVJB's services are sampled at random for their comments on the service LVJB provides and complaints are reported to the Board quarterly and summarised in the annual Public Performance Report.

Update February 2023:

After a refresh of LVJB's Customer Care strategy, users of LVJB's services are sampled at random for their comments on the service LVJB provides. Complaints are reported to the Board quarterly and summarised to the Board annually.

- 2.7.6 A Service Plan will be produced and annually updated in light of changing priorities and external factors.

Update February 2023:

See 2.4.3.



- 2.7.7 LVJB recognises its duty under the Government's 'Efficient Government' initiative and will prepare and monitor plans to ensure compliance. LVJB will prepare annual efficiency statements and report to the Board.

Update February 2023:

LVJB's annual Efficiency Statement for the period 2021/22 was presented to the Board at the meeting of 27 June 2022.

Update February 2024:

LVJB's annual Efficiency Statement for the period 2022/23 was presented to the Board at the meeting of 5 June 2023.

## **2.8 EQUAL OPPORTUNITIES**

- 2.8.1 LVJB recognises its duties under Equalities Legislation and is committed to eliminating discrimination, harassment, and victimisation, advancing equality of opportunity and fostering good relations.
- 2.8.2 LVJB has published an Equal Opportunity Policy setting out a summary of policy objectives.
- 2.8.3 Regulation 3 of The Equality Act 2010 (Specific Duties) (Scotland) Regulations 2012 requires a listed authority to publish a Mainstreaming Equalities Report and Equality Outcomes. LVJB will publish such outcomes on our website.
- 2.8.4 Regulation 4 in accordance with Section 6 of The Equality Act 2010 (Specific Duties) (Scotland) Regulations 2012 and 2016 LVJB as a listed authority has a duty to gather and use employee information on the composition of its employees and the recruitment, development and retention of employees. LVJB will undertake this duty and publish outcomes, where deemed appropriate, on our website.
- 2.8.5 Relevant training on equality and diversity will continue to be provided to all staff.

## **2.9 STAFFING AND PERSONNEL MATTERS**

- 2.9.1 Appropriate training will be provided to all members of staff in accordance with both Lanarkshire Valuation Joint Board's and staff training needs. Such needs will be assessed at annual and interim Performance Development Reviews (PDR's).

In addition to training being built into PDR's, LVJB also have comprehensive training guides for trainee valuers and trainee technicians, which are reviewed and updated to reflect changes made to the Assessment of Professional Competence (APC) by the Royal Institution of Chartered Surveyors (RICS) when such changes are undertaken.

Update February 2023:

LVJB continues to provide training to staff as appropriate to their individual needs. This training is identified by managers at each employee's Personal Development Review (PDR). Additionally, the trainee valuers and trainee technicians training guides are at present being updated following a raft of new legislation and case law.

Update February 2024:

Due to new legislation and personnel shortages LVJB have delivered rigorous training to trainee valuers, in relation to valuation of properties for non-domestic rating. Recent and imminent changes relating to electoral registration legislation also highlighted the need for additional training and sharing of knowledge. In conjunction with in-house training, LVJB are also supporting an employee through the Royal Institution of Chartered Surveyors Diploma in Rating course, whilst another employee is undertaking study towards the Association of Electoral Administrators Certificate. LVJB recognise the need for personal development and are committed to working alongside their employees improving the knowledge and skill set of the Joint Board.

- 2.9.2 Staffing requirements continue to be monitored via LVJB's management team with respect to matters such as previous year's performance, anticipated workload, staffing levels, and budgetary constraints. LVJB has developed a Workforce Plan to ensure that the right number of people with the right skills are in the place to deliver our short- and long-term objectives. This plan will be reviewed annually.

Update February 2023:

Whilst the management team remain committed to filling key posts, the recruitment of experienced chartered surveyors remains challenging in the current climate.

Update February 2024:

LVJB have been unable to recruit a sufficient number of qualified chartered surveyors, the staffing crisis has been exacerbated due to several employees tendering their resignations. The retention of our existing employees is priority, and as such we have undertaken a review of duties and tasks in conjunction with training and re-appraisal of the salary placements for existing trainee surveyors. It has become apparent we must work to improve the skill set we currently have and introduce new staff at a lower tier with the intention of advancement through training.

- 2.9.3 The Valuation Joint Board has adopted SLC's Competence Initiative Scheme, including an annual Performance and Development Review process. This encompasses a range of procedures for managing both organisational and employee performance and is a process which links the Joint Board's strategies and service objectives to tasks and employees. It provides a systematic approach to management which is based on setting objectives, assessing performance, appraising achievement, and identifying ways to improve, through training and development, at both an organisational and individual level.

Following South Lanarkshire Council amending their PDR process to include a behaviours framework, LVJB likewise now conduct their PDRs (both the annual appraisal and 6-monthly review) using the revised framework.

Update February 2023:

Following the adoption of South Lanarkshire Council's PDR behaviours framework, LVJB managers have undertaken the annual review and 6-monthly assessment with staff remotely using a mix of face-to-face meetings and MS Teams during the previous 12-months of hybrid working.

Update February 2024:

LVJB continue to carry out PDR assessments bi-annually, in the main these are carried out within the office at David Dale House.

- 2.9.4 LVJB remains committed to offer an interview to disabled people and veterans of the armed forces who meet the minimum criteria for the job.

Update February 2023:

In the most recent recruitment and selection process for trainee technicians, one applicant declared themselves to be disabled and had the minimum requirements for the position. The applicant was therefore guaranteed an interview, and indeed was successful in securing one of the posts.

Update February 2024:

Our commitment to recruitment remains unchanged.

## **2.10 FINANCE AND BUDGETING**

- 2.10.1 The officers of the Valuation Joint Board will act in accordance with the relevant Financial Regulations and Standing Orders, which will be regularly reviewed.
- 2.10.2 In partnership with the Finance and IT Resources of South Lanarkshire Council, budgets will be prepared annually for approval by the Joint Board.

A three-year financial plan is produced by the Treasurer to the Board on an annual rolling basis. The first of these was approved by the Board in March 2018.

Update February 2023:

A new 3-year financial strategy for the financial years 2023/24 to 2025/26 was presented to, and approved, at the Board meeting of 27 June 2022.

- 2.10.3 Appropriate procedures for procurement, authorisation and payment have been implemented in accordance with guidance from SLC.

Adequate training in respect of these procedures will be provided to relevant staff.

- 2.10.4 Financial monitoring reports are received and verified on a monthly basis with variations in expenditure being reported both to management and to the Joint Board.

Update February 2023:

The staff of the Treasurer to the Board and LVJB staff liaise regularly in respect of financial monitoring and planning matters, and discuss the various reports produced by the Treasurer for each Board meeting, including the Annual Accounts.

Update February 2024:

The staff of the Treasurer to the Board and LVJB staff continue to liaise regularly in respect of financial monitoring and planning matters, and discuss the various reports produced by the Treasurer for each Board meeting, including the Annual Accounts

## **2.11 INFORMATION TECHNOLOGY & INFORMATION MANAGEMENT**

- 2.11.1 The provision of Information Technology assets, systems and services by South Lanarkshire Council is managed through regular liaison with the Business Systems Manager and Project Manager allocated to LVJB.

An Assistant Assessor & ERO holds monthly meetings with two of SLC IT's business managers, who also attend LVJB's monthly management team meetings.

Update February 2023:

An Assistant Assessor continues to hold monthly meetings with the Business Systems Manager and Project Manager allocated to LVJB, and both managers attend LVJB's monthly management team meetings via MS Teams.

Update February 2024:

An Assistant Assessor continues to hold monthly meetings with the Business Systems Manager, Project Manager and Team Leader allocated to LVJB. All the managers attend LVJB's monthly management team meetings via MS Teams

- 2.11.2 A Service Level Agreement (SLA) with SLC (IT) is in place and will be updated as and when deemed appropriate.

Update February 2023:

An update to the existing SLA was agreed in February 2023.

- 2.11.3 Assets will be refreshed in accordance with the Service Level Agreement between SLC and their hardware suppliers. A desktop PC refresh to ensure Windows 10 functionality, is anticipated to be carried out late March/early April 2022.

Update February 2023:

To achieve Windows 10 functionality, and in particular to ensure service delivery in LVJB's key business areas, a refresh of the desktop PCs was undertaken in July 2022. Further, a refresh of laptop devices is due around July 2023.

Update February 2024:

The scheduled refresh of LVJB laptop devices is now due circa June 2024.

- 2.11.4 LVJB adheres to the principles of Data Protection and regularly reviews its Notification to the Information Commissioner. Privacy Impact Assessments will continue to be undertaken for new policies prior to implementation. Formal data sharing agreements will be entered into with other parties where deemed appropriate to do so.

Update February 2023:

LVJB's privacy notice is periodically reviewed and updated when deemed appropriate to do so.

- 2.11.5 Procedures are in place to enable compliance with the requirements of the Freedom of Information (Scotland) Act 2002. In October 2017 both LVJB and the Assessor adopted the SIC Model Publication Scheme which we are only required to do once. Thereafter, the Joint Guide to Information has been continually reviewed to ensure compliance with guidance issued by the SIC and is published on the LVJB website.

An Assistant Assessor & ERO is a member of the SAA FOI Practitioners Group, which shares knowledge and good practice throughout the SAA. Data Protection Officer arrangements are in place with the SAA.

Update February 2023:

LVJB's staff continue to comply with the requirements of the FOISA Act 2002, responding to information requests in line with legislative requirements.

- 2.11.6 Satellite systems to support primary functions and reporting requirements will be maintained and developed as required.

Update February 2023:

Systems continue to be adapted as required in order to facilitate direct and remote working.

Update February 2024:

Whilst a hybrid model of working continues to be available to all members of staff, there may be instances where due to the nature of the task, management will require staff to work solely from David Dale House for a period of time.

- 2.11.7 LVJB will play an active role in the development of the SAA Portal with a view to continuing the provision of this web based joined up service delivery initiative.

Update February 2023:

The display of valuations at the Portal in respect of Self-Catering Units, Shootings and various Contractors based valuations including Schools are now available to view. It is intended that the development work necessary to have the Burial Grounds and Wastewater Treatment Works valuations also added will continue.

The provision of Portal Rented Property Lists, to allow public view of the properties used to help determine the basic rate within the valuation of certain subjects, was completed on schedule for the issue of draft valuations on 30 November 2022.

Update February 2024:

Work is continuing on the expansion of the categories of non-domestic valuations that are available at the SAA portal.

- 2.11.8 The LVJB website remains under constant review. The content of the website will be monitored to ensure that it remains current.

Update February 2023:

LVJB's website content remains under continual review with the announcement's facility being used regularly following discussions at each LVJB Management Team meeting.

Update February 2024:

LVJB's website was reviewed and updated to reflect the changes to the non-domestic proposals and appeals procedures. The announcements facility is used to highlight in the main, election news.

- 2.11.9 LVJB will continue to utilise the most appropriate PC Operating System and desktop applications as advised by SLC IT.

Update February 2023:

The refresh of the office PCs to models that are capable of supporting the Windows 10 operating system was carried out successfully in July 2022.

- 2.11.10 Information Technology initiatives shall be continually considered by LVJB's Management Team in terms of their possible contribution to delivering services more efficiently and effectively.

LVJB will continue with the programme to digitise paper-based records. With the exception of Architect's plans, LVJB's non-domestic files have now been digitised. An arrangement to digitise these large-scale plans has been reached with our service provider and this will commence in April 2022.

Update February 2023:

The large-scale architects' plans have now been digitised and are available for staff to view as necessary.

## **2.12 KEY PARTNERSHIPS**

- 2.12.1 The support services provided by South Lanarkshire Council will continue to be managed by regular liaison meetings with relevant persons in each of the supporting resources.

Update February 2023:

Regular meetings continue to be undertaken between SLC staff and LVJB officers in relation to business areas such as Personnel matters, Health and Safety, Equal Opportunities, and Information Technology. These meetings are undertaken in a mix of face-to-face and via MS Teams settings.

Update February 2024:

Regular meetings continue to be undertaken between SLC staff and LVJB officers in relation to business areas such as Personnel matters, Health and Safety, Equal Opportunities, and Information Technology.

- 2.12.2 Being the primary recipients of operational outputs (Valuation Rolls, Councils Tax Valuation Lists and Electoral Registers), LVJB recognises both North and South Lanarkshire councils as key stakeholders and will consult with these bodies in all areas relating to these matters.

Update February 2023:

Such matters are managed via identified officers from each organisation who maintain dialogue on a number of areas of mutual interest, in recognition that both North and South Lanarkshire councils are key stakeholders.

- 2.12.3 LVJB will continue to commit resources to the workings of the Scottish Assessors Association. In this respect, it will participate in Plenary, Committee and Working Group meetings and fully engage in the exchange of information, ideas and knowledge provided by this association with a view to continuing the process of sharing services where possible and sharing best practice.

In preparation for the 2023 Revaluation LVJB has undertaken a review of its staff representatives and Practice Note authors in all SAA Committees and Working Groups.

Update February 2023:

LVJB staff continue to participate in all relevant SAA Committees and working groups.

Update February 2024:

Following the departure of a number of staff from LVJB, a full review has recently been undertaken to ensure that LVJB continue to participate in all relevant SAA Committees and working groups.

- 2.12.4 Through the SAA, LVJB will maintain liaison with bodies such as the Valuation Office Agency (England and Wales), the Valuation and Land Agency (Northern Ireland), the Valuation Office of Ireland, The Royal Institution of Chartered Surveyors and The Institute of Revenues, Rating and Valuation.

The Assessor is currently the President of the SAA and accordingly attends harmonisation meetings with the Valuation Office Agency (England and Wales), the Valuation and Land Agency (Northern Ireland), and the Valuation Office of Ireland.

Update February 2023:

The Assessor continues to attend these meetings.

Update February 2024:

The Assessor continues to attend these meetings.

- 2.12.5 Similarly, Joint Board staff participate in the workings of the Association of Electoral Administrators were deemed appropriate.

- 2.12.6 LVJB recognises the role of, and support provided by, The Electoral Commission (EC) in respect of Electoral Registration matters and will continue to participate in EC events.

Update February 2023:

LVJB staff attend the SAA Electoral Registration Committee meetings with the Electoral Commission (EC) in attendance. LVJB staff continue to receive bulletins and attend relevant EC events.

Update February 2024:

LVJB staff attend the SAA Electoral Registration Committee meetings with the Electoral Commission (EC) in attendance. LVJB staff continue to receive bulletins and attend relevant EC events and undertake appropriate training.

- 2.12.7 Staff are recognised as both key assets of the Valuation Joint Board and primary stakeholders and will be consulted on matters such as improving service delivery both via team meetings and through representative organisations where appropriate. Scheduled section/team meetings will continue to be undertaken and act as forums for staff to be consulted on improving service delivery.

Update February 2023:

Staff continue to be consulted in matters affecting them and the future of the organisation, most recently in responding to a consultation which resulted in the formalisation of a hybrid working arrangement.

- 2.12.8 Relationships with external suppliers of systems and services are subject to contract conditions and/or Service Level Agreement and are managed through liaison with the relevant account manager or similar representative.

Senior staff monitor the bulk mailing and printing contract ensuring that deadlines are met. The current bulk mailing contract was renewed by South Lanarkshire Council's procurement team and runs until 31 March 2023.

Update February 2023:

Dialogue with South Lanarkshire Council's procurement team is currently ongoing to keep LVJB abreast of developments with the bulk mailing contract.

Update February 2024:

LVJB were advised that the bulk mailing contract had been awarded.

## **2.13 MISCELLANEOUS**

- 2.13.1 The Valuation Joint Board is committed to various initiatives, not covered above but which have significant implications for Service Planning, priorities and actions. These tend to be of an ad-hoc nature and demand variable commitment.

LVJB will respond, either directly or through its relevant associations, to pertinent legislative and other consultations.

Update February 2023:

The SAA continue to make representations to the Scottish Government on new and amended legislation relating to the new proposals and appeals system.

- 2.13.2 Any future local authority boundary or electoral constituency changes will require resource allocation and planning.

The Boundary Commission for Scotland has published a proposed review of boundaries for future UK parliamentary elections. It is currently at public consultation stage and the final recommendations will be submitted to the UK government in July 2023.

Update February 2024:

The 2023 Review of UK Parliamentary Constituencies has been completed, and the new constituencies will take effect at the next UK Parliamentary election. The 1 December registers were published under the new constituencies, however, EROs are still required to retain existing polling districts to allow the registers to be published on either the old or new constituencies in case of a by-election.

- 2.13.3 LVJB is committed to the development and implementation of both North and South Lanarkshire Councils' Corporate Property Gazetteer and Property Database, and through these initiatives the formation of a National Gazetteer and use of National Unique Property Reference Numbers.

Update February 2023:

LVJB continue to download CAG data from One Scotland Gazetteer which is populated into core systems facilitating consistent property referencing across a number of data sets.

- 2.13.4 LVJB is committed to ensuring that environmental sustainability is considered when delivering our services. Part 4 of the Climate Change (Scotland) Act 2009 requires that a public body must, in exercising its functions, act: in a way best calculated to contribute to delivery of the Act's emissions reduction targets; in a way best calculated to deliver any statutory adaptation programme; and in a way that it considers most sustainable. In complying with its duties, LVJB have developed an Environmental Action Plan, which is reviewed monthly at management team meetings, with any environmental initiative implemented within LVJB being subsequently reviewed.



Update February 2023:

The LVJB management team continue to consider environmental improvements on a monthly basis as part of a standing agenda item.

Update February 2024:

The LVJB management team continue to consider environmental efficiencies on a monthly basis as part of a standing agenda item.