

Report

Report to:	Lanarkshire Valuation Joint Board
Date of Meeting:	7 March 2022
Report by:	Assessor and Electoral Registration Officer

Subject:	Lanarkshire Valuation Joint Board - Service Plan - 1 April 2022 to 31 March 2025
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1. Purpose of Report

1.1. The purpose of the report is to:-

- ◆ request approval of the Lanarkshire Valuation Joint Board (LVJB) 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 Lanarkshire Valuation Joint Board Service Plan covering the period 1 April 2022 to 31 March 2025 be approved.

3. Background

3.1. LVJB's current Service Plan, covers the period from 1 April 2019 through to 31 March 2022. Consequently, a new Plan has been prepared, covering the period from 1 April 2022 through to 31 March 2025.

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 Updates on key business areas and progress on specific projects contained within the Service Plan will be reported to the Joint Board as was the case with the previous Service Plan.

5. Key Challenges

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

Within Electoral Registration:- to respond to, and implement changes which result from any electoral reform throughout the currency of the Service Plan; to plan for and ensure service delivery for each election arising over the period of the Service Plan; to implement changes which result from any boundary review and polling district review processes; to ensure the completeness and accuracy of the Electoral Registers.

Key changes from the current Service Plan in relation to Electoral Registration include planning for and undertaking the new duties as a result of proposals contained within the Elections Bill, including plans for the introduction of voter identification; absent vote personal identifiers being refreshed more frequently; and changes to voting arrangement for overseas British Citizens.

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; undertake new statutory duties which are as a result of the Barclay Review of Non-Domestic Rating.

Key changes from the current Service Plan in relation to non-domestic valuation will essentially stem from the Barclay review into non domestic rating, with the implementation of the Non-Domestic Rates (Scotland) Act 2020 which introduces three yearly revaluations; requires that certain subjects within parks be entered in the valuation roll; introduces the provision of certain information by Assessors at revaluation; allows for significant changes to the current appeal arrangements (there is also a planned transfer of appeal functions from Local Valuation Appeal Panels to the Scottish Court and Tribunal Service (SCTS) with effect from 1 January 2023); and introduces strengthened powers for Assessors in relation to information gathering, including the introduction of a new civil penalty regime.

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.

Key changes from the current Service Plan in relation to Council Tax include a change to the process attached to proposals and appeals, including the transfer of related work to the SCTS with effect from 1 January 2023.

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.

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Assessor and Electoral Registration Officer

24 February 2022

Previous References

- ◆ LVJB's current Service Plan covering the period 1 April 2019 to 31 March 2022 - approved 4 March 2019

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) & 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.

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.

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.

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 ongoing 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.

1.6 MANAGING SERVICE DELIVERY GOING FORWARD

Following on from the disruption caused by the pandemic, there have been a number of revisions to working practices implemented within LVJB to ensure that service delivery is maintained. Such practices will be retained, and indeed be developed further with the overarching objective that service delivery is maintained as our organisation recovers from the recent unprecedented period.

The last couple of years have essentially, as will be the case with most organisations, led to business process re-engineering to ensure that LVJB delivered its services, and in particular to ensure that the statutory duties of the Assessor and Electoral Registration Officer were undertaken.

The early provision of laptop computers to staff in order that they could undertake work from home has established that blended working arrangements can now be more formally adopted going forward. It is likely that a number of similar organisations will implement such working arrangements, and it is key that LVJB, in terms of retaining and attracting staff, continue to offer agile/flexible ways in which staff can carry out their tasks.

The coming period will also see the development of more digital platforms for service users to interact with our organisation, mindful of equality issues. LVJB will continue to contribute towards development at the Scottish Assessors Association Portal, which will see a number of new initiatives being introduced as we prepare for the non-domestic revaluation which comes into effect from 1 April 2023. Such initiatives include; the expected provision of more public facing summary valuations; the provision of information attached to the 2023 valuations; and the continued development of online forms to allow for Assessor Information Notices to be returned digitally.

The increased use of other digital platforms, such as obtaining planning information from constituent authorities through their respective digital platforms, will also continue, as will the continued use of electronic communications across all three main business areas. It is also likely that LVJB staff will continue to participate in meetings using relevant software applications, such as MS Teams and Webex, which were perhaps under-utilised pre the pandemic.

Our staff will be encouraged to suggest new ways of working, with the aim of not only maintaining service delivery, but improving it, as our organisation moves into a new phase of dealing with the pandemic.

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.

2.1.2 Revaluation 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. More recent decisions are hosted on a Scotland wide website which, w and can be viewed at <https://scotvac.org/>

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.

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.

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.

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.

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.

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.

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.

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 (eg, 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.

- 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.
- 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.

- 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.

- 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.

- 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 elections 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.

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 were deemed appropriate.
- 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.

- 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.
- 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.

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

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.

- 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.

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 were 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.
- 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.
- 2.7.3 Performance Indicators will be used for year-on-year comparisons as well as comparisons with other bodies were 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.
- 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).

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.

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

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.

- 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.

- 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.

- 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.

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.

- 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.

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.

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

- 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.

- 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.
- 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.
- 2.11.6 Satellite systems to support primary functions and reporting requirements will be maintained and developed as required.
- 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.
- 2.11.8 The LVJB website remains under constant review. The content of the website will be monitored to ensure that it remains current.
- 2.11.9 LVJB will continue to utilise the most appropriate PC Operating System and desktop applications as advised by SLC IT.
- 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.

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.
- 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.
- 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.

- 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.

- 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.

- 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.

- 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.

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.

- 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.

- 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.
- 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.