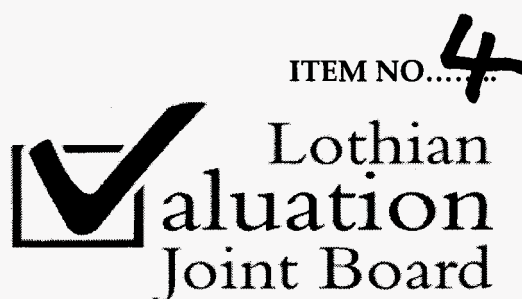


QUARTERLY PROGRESS REPORT TO THE JOINT BOARD



23 March 2009

1.0 PURPOSE OF REPORT

To advise and update members as to the service overview and priorities, current issues and the future direction of the Joint Board.

2.0 ELECTORAL REGISTRATION SERVICE OVERVIEW AND PRIORITIES

2.1 Electoral Registration – Service Overview 1st December 2008 – 1st March 2009

2.1.1 Post 2008 Annual Canvass Review

Our ability to process returned canvass forms within timetable, without overtime and without causing undue stress on staff is a reflection on the time spent in previous years honing, adjusting and improving our internal processes. A process of review still takes place annually adding to the finely tuned yet robust system processes we deploy.

Initiatives and changes for consideration identified at the review are as follows:-

- Foreign language cards could be produced for use by door to door canvassers.
- Student areas may benefit from the door to door canvass starting a few weeks later.
- The training timetable and the size of the training groups to be reviewed.
- An additional scanner to be considered as the single bulk scanner is now seen as a possible risk in the event of failure.
- Additional promotional events where some form of positive contact can be made to be considered as this is thought to be the most effective.
- Daytime door to door calls for identified void properties to be further considered.

2.1.2 Rolling Registration

During the period 1st December 2008 to 1st March my staff actioned 3,806 additions, 5,494 deletions and 3,477 changes to the register.

2.1.4 Absent Voters List

The number of electors on the absent vote list at December 2008 was 75,164 this has increased to 77,645 as at the present day.

2.1.5 Electoral Commission – Performance standards for Electoral Registration Officers in Great Britain

The Electoral Commission ingathered performance standards for Electoral Registration Officers in January 2009. The Commission subsequently visited 50% of EROs to verify the data provided, Lothian was one of those audited. An assessment of EROs' performance against the standards is expected to be published in the spring of 2009.

2.1.6 4 June 2009 European Parliamentary Election

Approximately 12,000 application forms were issued to all European Union Citizens currently registered in Lothian giving the option of registering to vote for the European Parliamentary Elections in Lothian as opposed to their home country, to date only 2,245 have been returned.

Several meetings and discussions have taken place and continue with the Returning Officers to ensure the electoral processes are in place. This election will be the first in Lothian to require the checking of Personal Identifiers for absent votes. Unfortunately the four constituent councils have opted for different software suppliers for their identifier checking process. This has increased the resources required to ensure all systems are compatible and minimise the risk of data transfer error.

To meet the requirement to encourage participation we organised a meeting with representatives of the four Councils to discuss advertising and pre-election events where registration and participation could be encouraged.

Initiatives held or to be considered:-

- Advertisement in CEC Outlook
- Advert at Haymarket railway station
- Attendance at shopping malls, national library, ERI, colleges, council offices
- Poster to be sent to numerous venues for display eg community halls, libraries, universities.

2.2 Electoral Registration – Service Priorities March 2009 – June 2009

2.2.1 The service priorities over the next 3 months

- Apply rolling registration and absent voting requests as received

- Continue with timetabled preparations for the European Parliamentary Election 2009
- Continue with initiatives to encourage participation and improve registration rates
- Continue with data matching and cleansing in preparation for the first stage of CORE.

3.0 COUNCIL TAX OVERVIEW AND PRIORITIES

3.1 Council Tax – Service Overview 1st December 2008 – 28th February 2009.

3.1.1 Council Tax – New Dwellings

The Council Tax List activity has increased compared to the equivalent period in 2008. As at 1st December 2008 there were 383,366 chargeable dwellings in Lothian which has risen to 384,624 as at 28th February 2009, an increase of 1,258 dwellings in 3 months. In Band 'D' equivalent terms the Council Tax List has increased from 390,303 to 391,663, an increase of 1,360 in 3 months.

3.1.2 Council Tax – Altered Bands

Since my last report my staff have considered registered sales. As a result of alterations carried out prior to the date of sale and re-appraisal of bandings, the bandings of 37 dwellings have been altered.

3.1.3 Council Tax – Altered Houses with no sales

Since my last report my staff have updated the records of 1,062 dwellings as a result of alteration work being carried out to existing dwellings. The updated information should improve the time taken to alter the bands of any altered dwellings which are subsequently sold and also ensure preparation for any future revaluation.

3.1.4 Council Tax – Proposals and Appeals

The numbers of Council Tax proposals/appeals outstanding continues to stand at reasonable levels. As at 28th February 2009 there were 88 cases outstanding. A diet of appeal hearings has been arranged to ensure the disposal of most of the outstanding cases.

3.2 Council Tax – Service Priorities March 2009 – June 2009

The main service priorities in Council Tax are as normal:-

- To continue improvement on the time taken between completion of new dwellings and the insertion of the dwelling in the Council Tax List in accordance with performance targets;

- To continue improvement on the time taken between the sale of houses which have been altered and the date their Council Tax Band is changed;
- To update my records by carrying out the survey of Council Tax subjects which have been altered and not sold;
- To continue to resolve proposals and appeals against Council Tax banding.

4.0 NON DOMESTIC RATING OVERVIEW AND PRIORITIES

4.1 Non-Domestic Rating – Service Overview 1st December 2008 – 28th February 2009

4.1.1 2005 Revaluation Appeals

The total number of revaluation appeals received was 8,579. All appeals, with the exception of those referred to the Lands Tribunal for Scotland, were disposed of by 31st December 2008 in line with the Valuation Timetable Order. The last few months of 2008 were extremely busy with a large number of hearing dates to manage. I would like to thank my staff for the professionalism and commitment demonstrated during this very demanding time.

4.1.2 Lands Tribunal Referrals

The Lands Tribunal for Scotland is the forum for hearing appeals that are generally highly complex or would have a consequential affect on other subjects. Lothian presently has 95 live appeals with the Tribunal 73 of which relate to Telecommunication subjects which I hope can still be settled without recourse to a full Hearing. Preliminary formal exchange of documents has commenced for one subject and I expect the hearing date to be arranged for late Spring early Summer.

4.1.3 Running Roll

My professional and technical staff have continued to survey and value subjects that have been newly constructed, altered or demolished. From 1st December 2008 to 28th February 2009, there have been 333 additions, 393 alterations and 212 deletions. The number of new subjects entering the Valuation Roll during this period is slightly less than the comparable period in 2008. The number of alterations has decreased substantially and deletions remained fairly static.

4.1.4 Running Roll Appeals

As a result of amendments to the Valuation Roll and in many instances the tram works, running roll appeals are constantly being received and dealt with. As at 1st December 2008, there were 607 appeals outstanding. During the period 1st December 2008 to 28th February 2009, 452 appeals have been resolved and a further 199 appeals received. 482 appeals remain outstanding as at 28th February.

4.1.5 2010 Revaluation Preparation

My senior management team continues to develop and update the timetable to ensure that all processes, procedures and IT development are fully coordinated and able to deliver the 2010 Revaluation on schedule. The current phase of the programme involves ingathering a large amount of information to enable a robust analysis to be carried out. The valuation of the 29,493 non-domestic properties has now commenced. As at the 28th February 7,337 subjects, 25% have been revalued. The initial valuation of all subjects should on target to be completed by the end of August 2009.

With a view to increasing openness and transparency summary valuations of bulk subjects including standard shops, offices and industrials will for the first time be available on the internet to the ratepayers in Scotland. It is hoped that this initiative will enable ratepayers to check their Net Annual Values and increase the confidence of the ratepayer in the accuracy of the assessment.

4.2 Non-Domestic Rating – Service Priorities March 2009 – June 2009

The service priorities in Non-Domestic Rating are:-

- To prepare cases as required by the Lands Tribunal for Scotland;
- To schedule and action the disposal of appeals resulting from Running Roll alterations;
- To survey and value new property or alterations to existing properties.
- To continue IT development in preparation for 2010 revaluation.
- To carry out analysis and provide staff guidance for carrying out the valuation of non-domestic subjects in preparation for the 2010 Revaluation.
- To set valuation rates and carry out the valuation of office and industrial properties.
- To prepare Practice Notes through the Scottish Assessors Association and Staff Guidance for internal use.

5.0 HUMAN RESOURCES

5.1 UNISON

Regular JCC meetings continue to be held and no items of significant note raised.

5.2 Staffing

There has been no change to staffing since my last report.

5.3 Closure of Office at Festive Season 2009

Last year I proposed and the Board approved that the office close for the 3 working days in between Christmas and New Year in the interest of efficiency. Staff used two of the floating public holiday and the Joint Board gave the third day as an incentive to encourage participation. No issues were raised by our stakeholders and there was no detrimental affect on our business.

I proposed that the initiative be carried out as a pilot and a vote taken again this year to ascertain if the initiative was widely accepted. Staff have voted 116: 1 to accept the proposal which is fully backed by UNISON.

I request approval of the Board to close the office on 29th to 31st December which in effect would allow us to close on Thursday 24th December 2009 and re-open on Tuesday 5th January 2010.

5.4 Equalities

No items of concern have been received.

6.0 FREEDOM OF INFORMATION

The Freedom of Information (Scotland) Act 2002 requires each public authority to have a publication scheme. The scheme sets out what classes of information the Authority will publish, how this information will be made available and whether this information will be available free of charge or on payment. The publication schemes have now been in existence for 5 years and are now subject to review in line with requirements of the Act.

The reviewed Assessor's publication scheme has been submitted to the Commissioner for approval. The reviewed scheme when approved will be made available on the LVJB internet site. The publication scheme requires a scheme of charges to be included and made available for public view. I attach the reviewed scheme of charges for approval of the Board.

The Board must also review its publication scheme and to this end I am liaising with the Clerk to the Board to enable the existing scheme to be reviewed, updated and forwarded to the Commissioner for approval. It is intended that the Joint Board publication scheme will also be available on the LVJB internet site.

7.0 RISK MANAGEMENT

The risk register continues to be updated at each management meeting ensuring that all risks are considered and mitigated as soon as practicable.

The economic decline has been noted as a potential risk for the accuracy of the 2010 Revaluation Roll. The analysis of rental, cost and turnover information is being closely monitored.

The risk score set against the effect on the organisation of losing a property based local tax has been downgraded as a result of the recent Scottish Government announcement.

8.0 FINANCIAL IMPLICATIONS

There are no financial implications arising from this report.

9.0 RECOMMENDATIONS

The Joint Board is requested approve the closure of the office over the 2009 Festive period.

The Joint Board is requested approve the scheme of charges for 2009/10



Joan M Hewton
ASSESSOR & ERO

23 March 2009

SCHEDULE OF CHARGES

2009 - 2010

Council Tax Valuation List

COUNCIL TAX LIST ON CD ROM	£35 per thousand entries (or part thereof)
TYPED EXTRACTS	
▪ For a single entry or the first of a number	£20
▪ For additional entries (consecutive)	£17 for each multiple of three (or part thereof)
▪ For additional entries (non-consecutive)	£18 for each multiple of three (or part thereof)
▪ Extracts required by Procurator Fiscal	Free

Valuation Roll

VALUATION ROLL ON CD ROM	CD Rom 3 Times/Year	CD Rom One-off
▪ Full Lothian Roll	£375	£295
▪ City of Edinburgh Roll	£205	£165
▪ East Lothian Roll	£60	£45
▪ West Lothian Roll	£65	£55
▪ Midlothian Roll	£50	£35
TYPED EXTRACTS		
▪ For a single entry or the first of a number	£20	
▪ For additional entries (consecutive)	£17 for each multiple of 3 (or part thereof)	
▪ For additional entries (non-consecutive)	£18 for each multiple of 3 (or part thereof)	
▪ Extracts required by the Procurator Fiscal for Court Purposes	Free	
VALUATION ROLL (<i>Non-current Valuation Rolls Except 31/3/89</i>)		
▪ Full Lothian Roll	£65 (whole Roll only available)	
MISCELLANEOUS COSTS (<i>Note – 1989 Valuation Roll Only</i>)		
▪ Certified Copy (as at 31/3/89)	£30 per tenant	
▪ House Valuation Certificate (as at 31/3/89)	£100 (Set by Statute)	

Index of Streets (Printed)

<i>(Valuation Roll & Council Tax)</i>	
▪ Full Lothian Index	£95
▪ City of Edinburgh Council Index	£25
▪ East Lothian Council Index	£25
▪ West Lothian Council Index	£25
▪ Midlothian Council Index	£25