

ANNUAL PUBLIC REPORT 2009/10

1 PURPOSE OF REPORT

The purpose of the report is to seek Board approval for the publication of the 2009/10 Annual Public Report.

2 PUBLICATION

Since the commencement of the Best Value regime there has been a requirement to produce an Annual Public Performance Report. While it contains statistical information on performance it also outlines some of the key issues and activities that the Board has been involved with throughout the year.

Following approval, the Report shall be supplied to Joint Board members, the Chief Executives of Edinburgh, East Lothian, Midlothian and West Lothian Councils, displayed on the Board's website, staff intranet and also made available to our customers at our Reception.

3 RECOMMENDATION

The Board is requested to approve the 2009/10 Annual Public Report.



Joan M Hewton
ASSESSOR

6 September 2010

Assessor's Report

One of the major activities during 2009/10 was the completion of the 2010 Revaluation. All commercial and non-domestic properties in the Lothian area were re-valued to establish new rateable values. These reflect changes to rental and cost evidence established at the last Revaluation in 2005. By doing this, the rating burden follows market trends with emphasis shifting between the different sectors that make up the property market.

All non-domestic ratepayers, should they be in disagreement with the assessment that has been made, have until the end of September 2010 to lodge appeals with the Assessor. In the first instance staff are available to discuss fully any issues taxpayers may have and it may be possible to avert the need for the lodging of formal appeals.

In May 2009 the European election saw the first use of personal identifier information with regard to postal voting. This involved considerable collaboration and partnership working with each of the Returning Officers of the constituent authorities. This process was repeated for the General Election in May 2010 and the previous experience was invaluable in ensuring that the data exchange occurred as smoothly as possible.

Anyone living in Edinburgh cannot be unaware of the Tramways project. Given the scale of this undertaking it is not surprising that many local businesses have sought reductions in their rateable values. I would like to thank my staff for the time and effort taken to deal with these enquiries. This work has been undertaken over and above the many other tasks that I ask them to carry out.

I would also like to thank the members of

the Valuation Appeal Committee who have freely given their time to the hearing of appeals over the last few years.

Electoral Registration is increasingly to the forefront in terms of the Boards activities. Whether they are Local, Scottish, Westminster or European rarely a year now goes by without an election taking place. This combined with our annual canvass activities means there is always work to be prioritised in the electoral registration area.

Recently we have made renewed efforts to promote the need for registration. During January to March, in the run up to the general election, we had considerable success with a number of our promotional activities. Outwith the canvass this is an area we shall continue to be proactive in with greater emphasis and effort being given to reach specific areas of our community.

I shall close on a note of concern. 2009/10

saw the first indication that Local Authorities and Boards in Scotland could be facing major reductions in budget allocation in the forthcoming years. While the extent of these cuts is unknown there can be no doubt that changes shall have to be made in the way services shall be delivered. In light of Best Value we will continue our efficiency drive.

Contact Us

**The Assessor & Electoral
Registration Officer**
Lothian Valuation Joint Board
17A South Gyle Crescent
Edinburgh
EH12 9FL

Telephone (0131) 344 2500
Fax (0131) 344 2600
E-mail enquiries@lothian-vjb.gov.uk
Website www.lothian-vjb.gov.uk

Electoral Registration

Electoral Registration is an extremely dynamic area and there is increasing pressure to provide a high quality service to the electorate of Lothian. It is extremely important that all those eligible are entered on the Electoral Register. This ensures that electors can exercise their right to vote at elections. Each year in support of this aim an annual canvass of all households in Lothian is carried out.

Authority	Electorate as at 1 September 2009	Electorate as at 1 December 2009	Canvass Percentage Return	Number of Postal Voters as at 1 December
Edinburgh	328,054	328,232	81%	50,344
East Lothian	73,480	74,100	91%	9,652
Midlothian	61,625	61,951	91%	7,623
West Lothian	123,060	123,975	90%	15,513

While this is in the main a postal activity we have found that good results can be achieved from a door to door approach and we aim to increase this in future years. The overall canvass return rate for Lothian in 2009 was 85% very similar to that achieved in previous years. It is becoming increasingly difficult to engage with electors through the annual canvass and this is reflected in the fact that throughout the canvass period some 662,482 forms were issued to 385,512 households.

As a result we have increased our attempts to promote electoral registration within Lothian and throughout 2009

undertook a variety of activities aimed at engaging with potential electors. We have specifically targeted such sectors as school leavers, students at colleges and universities, the homeless and carer organisations, we have made contact with housing and nursing associations while also attending citizenship ceremonies, and have engaged with the Services community. In terms of general advertising we have used radio, poster adverts in cinemas, railway stations and bus shelters, and our staff have taken our information stand out into the public arena at such locations as shopping centres, hospitals, libraries and other civic buildings. Through these activities we secured over 1,300 new registrations during 2009 and many more electors were provided with information on issues such as postal and proxy voting.

It is vitally important that we keep searching for new ways to engage with the electorate and with that in mind we shall investigate such options as telephone and Internet registration during 2010.

The Electoral Registration function is not just about annual

canvass and the "Voters Roll" as it is known locally. When an election is called this is a signal for preparations to commence for a period of intense activity. As can be expected many voters want to check their registration details at this time and a forthcoming election can bring forward new electors who need to register for the first time. However at election times one of the biggest activities for Board staff is the processing of postal vote applications. There exists a very short timeframe from the calling of an election to when applications for postal votes need to be received, processed and the information supplied to the Returning Officers. Within only a matter of weeks some 8,000 new postal vote applications were received, checked and processed in advance of the General Election in May.

The timetable shows a major election is due in 2011, 2012, 2014 and 2015. It is clear that electoral registration shall continue to create a considerable workload for the Board and the need for a quality service aimed at the needs of the elector shall remain a primary objective.



**Find your voice.
Register to vote.**

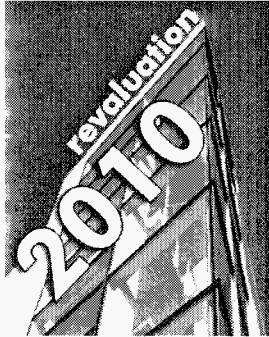
Look out for the Electoral Registration Form being delivered to your household.

Complete it and send it back to ensure you're registered to Vote.

www.lothian-vjb.gov.uk 0131 344 2500

Valuation Roll

During 2009 the huge exercise to undertake the 2010 Revaluation was completed and its culmination saw thousands of Valuation Notices issued during March 2010. The process started during 2008 with the collection of rental and cost evidence, there followed a period of analysis and with the preparation of Valuation Practice Notes. The bulk of new valuations were carried out during 2009 with approximately 30,100 properties in the Valuation Roll subject to fresh appraisal.



In order to provide time to consider the rate poundage levels and the impact of various relief schemes, the Scottish Government had requested that valuations be completed by September 2009. I can report that within Lothian and throughout Scotland this target date was met and the Scottish Government had a number of months to assess the overall impact of the Revaluation before public notification was given. In terms of rateable value the revaluation created a 17% growth with the total rateable value now standing at £1.2 billion.

Considerable advancement has been made at this Revaluation in terms of providing easily accessible information to the ratepayer. For the first time a summarised valuation is available for viewing by the public, in respect of the majority of shop, office and industrial class of properties, by going on-line at www.saa.gov.uk. This is seen as a major step forward in providing

Building	Phase	Description	Area (sq ft)	Rentable Area (%)	Value
1000000	1	OFFICE	10000	100	1000000
1000000	2	OFFICE	10000	100	1000000
1000000	3	OFFICE	10000	100	1000000
1000000	4	OFFICE	10000	100	1000000
1000000	5	OFFICE	10000	100	1000000
1000000	6	OFFICE	10000	100	1000000
1000000	7	OFFICE	10000	100	1000000
1000000	8	OFFICE	10000	100	1000000
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1000000	96	OFFICE	10000	100	1000000
1000000	97	OFFICE	10000	100	1000000
1000000	98	OFFICE	10000	100	1000000
1000000	99	OFFICE	10000	100	1000000
1000000	100	OFFICE	10000	100	1000000

information and data in a clear and consistent fashion and also provides a high level of transparency and openness in our communication with the ratepayer. In conjunction with these summary valuations direct links are provided to the Valuation Practice Notes in order for the ratepayer to gain a greater understanding of the information that is being presented and of the processes that have been carried out to derive it.

At the time of the release of Revaluation information on the Portal there was a marked increase

in the number of hits the site received and while this has settled down the level of access to the Portal remains higher than that experienced pre-revaluation. While we received hundreds of phone calls from ratepayers these were less than at previous Revaluations and it is likely that the additional information now available assisted the ratepayer and lessened the necessity to make direct contact.

Another facility available to the ratepayer at this Revaluation is a link that gave access to a rates calculator provided by the Scottish Government. This also allowed not just an estimate of rates liability to be shown but also indicated the impact of any rates relief that was applicable. Also an on-line appeal facility has been provided making it much easier and quicker for ratepayers to lodge appeals with their respective Assessor. Statute provides a legal right of appeal against entries in the Valuation Roll and in respect of the 2010 Revaluation ratepayers have until the end of September 2010 to lodge appeals.

Over the period of a quinquennium, the 5 year break between Revaluations, the organisation issues many Valuation Notices, rental, cost and schedule returns of information, all in paper format. Moving forward a project focusing on electronic engagement shall be undertaken seeking as its objectives a lowering of costs and providing a faster and more efficient service to the stakeholder.

Of course while the Revaluation activity is ongoing the annual tasks surrounding the Valuation Roll still require to be carried out. During 2009 3,792 changes were made to the Valuation Roll which generated an additional £12 million of rateable value. The performance attached to these changes, expressed in terms of the statutory Key Performance Indicators, is noted in the following table.

Year	Total number of entries	Total Rateable Value	Number of Amendments	Percentage of amendments within 3 months	Percentage of amendments within 3-6 months	Percentage of amendments more than 6 months
2006/07	28,920	£1,050.2m	3,314	74.9	13.9	11.2
2007/08	29,311	£1,058.5m	4,206	83.26	11.63	5.11
2008/09	29,659	£1,056.8m	4,258	80.77	11.53	7.7
2009/10	30,185	£1068.5m	3,792	78.09%	11.10%	10.81%

It can be seen that the performance levels are slightly lower than the previous year, this however is entirely due to the need to divert staff resources towards Revaluation tasks. Taking this into account the performance achieved is praiseworthy.

While the resolution of appeals against changes made to entries in the Valuation Roll is in essence an ongoing activity, during 2009 considerable extra pressure and workload was added to this as a result of the physical disruption caused by the Edinburgh Tramways project.

Many occupiers of retail properties located along the route of the planned tramway took the opportunity to appeal their rateable value on the basis of prolonged disruptions to their business operation. Where it could be established that the rental value of the property had been unsettled as a result of the tramways work then allowances were granted. In other cases where this could not be proven there was a need to resort to the local Valuation Appeal Committee to seek resolution.

Council Tax

There remains some uncertainty over the future of Council Tax. Political parties within the Scottish Government have undertaken reviews and consultations considering not only a range of alternative taxation systems but also modifications to the existing Council Tax.

While an outcome is awaited, and this may not be until after the next Scottish Parliamentary election, the Council Tax workload within the Board continues to be dealt with and a service to Council Taxpayers provided.

Council Tax is a direct revenue stream to local authorities and the speed in which new houses can be entered onto the Council Tax List is an important element of this revenue collection.

The table below indicates the performance associated with this activity for 2009/10 along with the number of houses added. It can be seen that performance remains at a high level.

Valuation List	0-3 Months	3-6 Months	Over 6 Months	New Houses Added
2005/06	81.2	12.4	6.4	4,288
2006/07	84.8	11.3	3.9	5,515
2007/08	93.22	5.17	1.62	5,323
2008/09	94.13	4.53	1.33	4,345
2009/10	95.36	2.46	2.18	3,984

There is little doubt that the current state of the economy has had a major impact on house construction and the housing market generally. This is reflected in the fewer number of new houses entering the list, the lower number of physical alterations that we are monitoring and the reduced number of bandings reconsidered following a sale.

Notwithstanding this, the level of enquiry by council taxpayers remains relatively high with staff regularly engaged in providing information, explanations and if necessary preparing and attending Valuation Appeal Committee hearings to defend Bands.