

QUARTERLY PROGRESS REPORT TO THE JOINT BOARD



26 November 2012

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 22nd August 2012 – 12th November 2012

2.1.1 2012 Canvass

As I mentioned at the last Board meeting the method of carrying out the canvass was reviewed in light of the Electoral Commission downgrading my performance in relation to the carrying out of personal door to door canvass.

The Royal Mail delivery of Canvass forms commenced on 31st August. 393,295 forms were delivered at this first stage canvass. I had added a statement to the front of the envelope stating '*Save taxpayers money – reply immediately to avoid a reminder or home visit*' in the hope of improving the percentage return from the first issue however it made little difference to the first stage return rate.

I employed 4 temporary clerical/canvass staff for 1-3 months to assist with mail opening, sorting, scanning and indexing during the first phase of the canvass; unfortunately 3 of them left after just 4 weeks. This meant that only one temporary staff was available to latterly carry out door to door canvass for areas where canvassers had not been employed. Additionally, 231 canvassers were employed to carry out door to door canvassing between 12th October and 11th November.

At the second stage reminder canvass 87,824 forms were delivered by Royal Mail to households which had been confirmed had no elector changes by checks to Council Tax records. Over 50,000 canvass forms were delivered by doorstep canvass to households where there was no elector or where Council tax records confirmed a change in the household. Unfortunately I did not manage to get sufficient canvassers to cover all the required doorstep canvass and I was required to send 15,700 forms out again by Royal Mail.

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2.1.1/ The latter forms, where no response is received, will be followed up by a further door to door canvass in early 2013 to satisfy the relevant Electoral Commission performance standard criteria. Although the final figures are not yet known it is now certain that there will be a small improvement in the response rate. I will provide more statistical information at the next Board meeting.

2.1.2 Absent Voters List

The absent voters list has approximately 100,000 electors. As a result of requests made on the canvass forms for absent vote applications, 32,000 application forms have been issued. I expect less than 33% electors will actually complete the application and submit.

2.1.3 Cabinet Office Data Matching Pilot

I have given several reports to the previous Board members on the Cabinet Office data matching pilots which we are participating in. We continue to work with the cabinet office to improve the matching methods to ensure that the matching system due to be utilised during the transition to Individual Electoral registration are as robust as possible.

2.2 Electoral Registration – Service Priorities December 2012 – February 2013

2.2.1 The service priorities over the next 3 months

- Carry out personal door to door canvass of Lothian households who have not returned their canvass form, where there are no electors or the electorate is expected to have changed;
- Continue with initiatives to encourage participation and improve registration rates;
- Complete Electoral Commission canvass data collection return;
- Complete statutory statistical return to National Records of Scotland;
- Apply absent voting requests as received;
- Work with the Cabinet Office in the Data Matching Pilot exercise.
- Carry out preparatory work for the Absent Vote refresh which is due to be undertaken in Autumn 2013.
- Prepare plans and strategy for the final old style canvass due in 2013/14
- Consider process maps, timetabling, risk analysis and overall strategy for IER introduction

3.0 COUNCIL TAX OVERVIEW AND PRIORITIES

3.1 Council Tax – Service Overview– 21st August 2012 – 12th November

3.1.1 /....

3.1.1 Council Tax – New Dwellings

As at 21st August 2012 there were 393,985 chargeable dwellings in Lothian which has risen very slightly to 394,766 as at 12th November 2012, an increase of just 781 dwellings in almost 3 months. House building continues to be sluggish.

3.1.2 Council Tax – Altered Bands

During the period, as a result of alterations carried out prior to the date of sale and re-appraisal of bandings, the bandings of 49 dwellings have been altered. The number of band changes remains at a very low level possibly reflecting the lower number of house sales.

3.1.3 Council Tax – Altered Houses with no sales

During the period, the records of 409 dwellings have been updated, as a result of alteration work being carried out to existing dwellings. As previously reported 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 or property tax.

3.1.4 Council Tax – Proposals and Appeals

The numbers of Council Tax proposals/appeals outstanding continues to stand at reasonable levels. As at 12th November 2012 there were 62 cases outstanding. Appeal hearings continue to be arranged regularly to ensure the disposal of most of outstanding cases.

3.1.5 Council Tax File Review

Within the organisation we hold details of every dwelling in Lothian. The process of modernisation of the file contents and document retention continues. The contents of the files are checked against electronically held data with the purpose of updating all electronic systems. Plans and other paper documentation which is not otherwise noted in data format is being scanned and paper files disposed of. This is a long process which may take a number of years. I intend to carry out a review of performance and working practices for this task during December.

3.2 Council Tax – Service Priorities December 2012 – February 2013

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

- 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;
- Continue improvement on the time taken between the sale of houses which have been altered and the date their Council Tax Band is changed;
- Update my records by carrying out the survey of Council Tax subjects which have been altered and not sold;
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- Continue to resolve proposals and appeals against Council Tax banding;
- Continue with the transfer of house data from paper to electronic format and review performance achieved.

4.0 NON DOMESTIC RATING OVERVIEW AND PRIORITIES

4.1 Non-Domestic Rating – Service Overview 21st August 2012 - 12th November

4.1.1 2005 Revaluation Appeals

4.1.1.1 There has been no change in the number of 2010 Revaluation appeals which remain outstanding at the Lands Tribunal. The listing of such appeals is in the hands of the Tribunal and out with my control.

4.1.2 2010 Revaluation Appeals

A total of 10,927 appeals were received against the 2010 Revaluation Roll as published. The number of subjects appealed was 10,386. A total of 8,860 appeals have been resolved to date with just 118 of those appeals being dealt with during the period 21st August – 12th November 2012. A diary of courts continues to ensure the appeals are all disposed of by the 31st December 2013, the last date permitted by statute. We have made exceptional progress with disposal of the Revaluation appeals. Recent Lands Valuation Appeal Court decisions have given assessors, agents and taxpayers clear guidance on the interpretation of the law and should now facilitate the clearance of the final appeals.

I am pleased with progress to date but staff are aware that, due to the extremely large number of Running Roll appeals now received that appeal disposal will need to take top priority for the foreseeable future. Progress is under close monitoring.

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 21st August 2012 to 12th November, there have been 187 additions, 366 valuation alterations and 164 deletions.

4.1.4 Running Roll Appeals

As a result of amendments to the Valuation Roll and, issues relating mainly to the economic decline, running roll appeals are constantly being received and dealt with where possible. As at 21st April 2012, there were 13,804 running roll appeals outstanding. During the period 21st August to 12th November 5,122 of those appeals have been resolved. As at 12th November the number of outstanding running roll appeals 8,995. Courts to deal with this type of appeal are scheduled to continue through the Winter 2012 with 8 hearings scheduled to the end of this year and another 6 courts scheduled for early 2013. The appeals are required to be cleared, within the same statutory framework as the Revaluation appeals, by 31st December 2013.

I have previously highlighted the extremely high number of economic circumstance appeals that that have been lodged with the expectation that appeals will now be lodged on an annual basis instead of five yearly. This is an incredible number of appeals and resolution within the statutory timetable will be extremely difficult.

4.1.5 Lands Tribunal and Lands Valuation Appeal Courts

Appeals for telecommunication masts are listed for hearing by the Lands Tribunal for Scotland for December. The Assessor for Renfrew is acting for all assessors in Scotland and there has been an agreement set up to share costs incurred.

Lothian has one stated case in preparation. The appeal is by the taxpayer against the Valuation Appeal Committee decision.

4.1.6 2015 Revaluation

Preparation for the forthcoming revaluation in 2015 has been discussed at UK level. The UK Government has announced that the revaluations in England and Wales will be delayed until 2017. As local taxation is a resolved matter it could be that the Scottish revaluation proceeds in isolation. The next few years workload is therefore unable to predict.

4.2 Non-Domestic Rating – Service Priorities September 2012 – December 2012

The service priorities in Non-Domestic Rating are:-

- Prepare cases as may be required by the Valuation Appeal Committee;
- Schedule and action the disposal of appeals resulting from the 2010 Revaluation;
- Schedule and action the disposal of running roll appeals;
- Survey and value new property or alterations to existing properties to ensure the Valuation Roll is as complete and accurate as possible;
- Continue to update databases with rent, cost, turnover and throughput information to ensure analysis is as complete and accurate as possible.

5.0 HUMAN RESOURCES

5.1 UNISON

Regular JCC meetings continue to be held.

Policies are timetabled for review to ensure that all policies meet current legal, management and staff requirements.

Staffing/....

5.1/ Staffing and staff reviews continue to be a key topic for discussion.

5.2 Staffing

All temporary staff who had been employed for the canvass work have now come to the end of their contract.

I received a letter of resignation from one of my Divisional Valuers who has taken a post nearer her home. I have advertised this post internally as this allows me to fill the post quickly from a knowledgeable and well trained staff group.

I intend to recruit 2 or 3 part-time canvass staff during February/March 2013 to assist with door-to-door canvass duties.

5.3 Equalities

No items of concern have been received.

Equality impact assessments have been carried out for the 3 areas where I am carrying out a review of working practices.

6.0 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 strategic risk register continues to be reviewed and updated on a regular basis. Further job specific risk registers continue to be developed to meet audit recommendations.

7.0 FINANCIAL IMPLICATIONS

Although there are no financial implications arising from this report it should be noted that there remains a strong probability that greater than normal monies will almost certainly be veered between various budget headings.

8.0 RECOMMENDATIONS

As there are no financial implications, nor approvals sought, the Joint Board is requested to note the contents of this report.

Joan M Hewton
ASSESSOR & ERO

26 November 2012