

ASSESSOR'S PROGRESS REPORT TO THE LOTHIAN VALUATION JOINT BOARD

12 June 2023

1.0 PURPOSE

1.1 To provide members with an overview of current service delivery, priorities, risks, and future direction.

2.0 ELECTORAL REGISTRATION – MAINTENANCE

2.1 Since the last progress report to the Board in April 2023 all maintenance tasks supporting the registration process have continued.

2.2 There were 16,415 ITR's and 2208 postal vote applications issued by post between 19 April and 24 May 2023. We do, when we can, issue documents by email, but legal requirements and lack of email address will limit this. Our enquiry agents visited over 5,000 properties to assist electors in registering.

2.3 Processing volumes continue to be steady. There were 19,824 transactions undertaken for the monthly updates 2 May to 1 June. The number of additions/deletions by ward is shown as appendix (A).

3.0 POSTAL VOTES/PROXY VOTES.

3.1 The percentage of the electorate currently choosing to vote by post remains consistent from previous reports. See appendix (B)

3.2 There are changes to postal vote and proxy vote provisions which will impact on UK Parliamentary elections. These changes may result in a divergence in legislation between devolved and reserved elections. Preparatory work is ongoing on this.

4.0 ELECTORAL REGISTRATION ENGAGEMENT

4.1 We continue to engage with electors and promoting the functions of the Electoral Registration Office to include home movers, prisoners and foreign nationals. This includes attending British citizenship ceremonies and two events held by Re-Act Scotland 2 and 3 June.

5.0 ELECTORAL REGISTRATION – VOTER AUTHORITY CERTIFICATES

5.1 The volumes received have now become minimal. There is the intention to include an A5 sheet produced by the Electoral Commission in canvass forms. This will provide information on the requirements for Voter Identification at certain elections. It is expected that this will increase volumes of applications.

6.0 CANVASS

6.1 Preparation for canvass is underway with National Data Match scheduled for 14 June.

7.0 VALUATION ROLL – APPEALS

7.1 We have approximately 6,400 Covid appeals remaining and are hopeful that this number will fall significantly as a result of the SCTS write out to appellants which is due to take place before the end of June 2023

7.2 There are approximately 1,000 non Covid Revaluation 2017 appeals that must be disposed of by 31st December 2023. Staff are continuing to try to resolve as many of these as possible without the need to proceed to Hearing, although it is likely that there will be some appellants who will wish to have their case heard.

8.0 VALUATION ROLL – MAINTENANCE

8.1 Since the last report to the Board there have been 158 key value alterations, covering the period 1st April 2023 to 26th May 2023, made to the valuation roll with respect to running roll activities. These changes comprised 37 amendments to existing entries, 87 deletions, 34 inserts. For the same period last year there were a total of 176 key value alterations, so it is largely in line with that.

In the year of revaluation, there is usually far more development required to our valuation systems and our data transfer protocols to our finance authorities and the SAA portal. For this revaluation that has been particularly challenging as we are constantly looking to provide more transparency and promote greater engagement with ratepayers. As part of that process, a new valuation notice has been created to provide them with more information as to the nature of the changes to the roll. Due to that additional development, our new valuation systems went live in early May. The changes noted below have therefore effectively been processed over a three week window. Our new valuation notices are now being issued for the changes we are making to the roll.

	Edinburgh	Midlothian	W. Lothian	E. Lothian	Total
Inserts	25	0	3	6	34
Deletions	69	5	6	7	87
Amendments	17	5	5	10	37

9.0 2023 REVALUATION UPDATE

9.1 The proposals and appeals system which has been designed to comply with the new legislation is moving closer to being completed, with a range of staff involved in the testing of the new system.

Revaluation 2023 enquiries continue to be at a manageable level and a staff resource is in place to deal with any escalation, should that occur.

9.2 We have received approximately 85 Revaluation 2023 Proposals as a result of the issue of a Revaluation Notice, mostly from unrepresented ratepayers, and have now started the process of issuing acknowledgments and Incomplete Proposal Notices in line with the prescribed statutory timescale of 56 days. Whilst the proposals received so far have been single proposals logged on the SAA Portal, the facility to lodge bulk proposals on the SAA Portal went live on the 22nd May and we are monitoring to see what is received through this route. As was mentioned in the last report, it is our expectation that the number of proposals lodged will increase significantly as we move towards the end of July 2023.

10.0 COUNCIL TAX – MAINTENANCE

10.1 Over the period 1st April 2023 to 26th May 2023, 954 new houses have been added to the list, this compares to 941 for the same period in 2022/23.

Band	Edinburgh	Midlothian	West Lothian	East Lothian	Total
A	157	0	5	1	163
B	55	26	25	2	108
C	38	10	61	3	112
D	48	17	25	25	115
E	66	26	14	30	136
F	50	37	39	29	155
G	78	23	22	37	160
H	3	0	0	2	5
Total	495	139	191	129	

10.2 There are currently 181 outstanding Council Tax appeals including 20 New proposals received after 1st April 2023 which fall under the new proposal regulations.

11.0 COVID/HYBRID WORKING – UPDATE

11.1 As part of the hybrid / agile working plan, technical staff have moved to the South side of the first floor with the North side now being used predominantly as a hot-desking area. The hot-desking trial will feed into our wider accommodation review.

12.0 GOVERNANCE STRATEGY GROUP

12.1 It has not been possible for the Group to meet since the last Board meeting in April due to diary commitments of members. It is planned to organise fixed dates for the coming year.

13.0 CONTINUAL IMPROVEMENT PROGRAMME

13.1 At its meeting on 24th October 2022, in the report Revenue Budget 2022 - 2027, the Board noted potential options to develop the budget on a more sustainable basis. One option was the development of the Board's Transformation Programme to create sustainable employee cost savings in future years.

13.2 The report from the Treasurer Revenue Budget 2023/24 and Indicative Financial Plan 2024/25 - 2026/27 reported to the Board in January that the Interim Assessor and ERO initiated Phase Three of the Board's Transformation Programme in November 2022.

13.3 The Treasurer noted that the proposed budget for 2023/24 is forecast to require a maximum drawdown of £0.580m from the Board's Reserves. The application of reserves to support service delivery offers a short-term solution for 2023/24, pending development of sustainable financial savings through Phase Three of the Board's Transformation Programme to address the projected funding gap from 2024/25.

	2023/24 £'000	2024/25 £'000	2025/26 £'000	2026/27 £'000
Core	6,318	6,521	6,687	6,859
Individual Electoral Registration (IER)	107	110	114	117
Total Requisition	(5,847)	(5,847)	(5,847)	(5,847)
Operating shortfall/(surplus)	578	784	954	1,129
VR - one-off severance/pension strain	0	0	0	0
NET TOTAL COSTS	578	784	954	1,129
Use of Reserves				
General Reserve drawdown - Core	(578)	(308)	0	0
Net Shortfall – Core and IER	0	476	954	1,129

13.4 The table above shows the overspend if no transformation savings are established.

13.5 As previously reported to the Board the Transformation Programme Phase 3 has been renamed as the Continuous Improvement Programme (CIP).

13.6 The CIP report can be found under agenda item 4.2. The findings of the initial phase of CIP has provided the conclusion that structural change is needed. It uses VERA funded by a reserve spend of £450k to generate annual savings of over £280k PA from 2024/25 onwards. I will speak to the CIP document after my Progress report has been noted by the Board.

13.7 Key themes of the CIP phase 1

- “Bottom up” approach, motivate and involve staff in the change process
- No cuts at our front facing service delivery points
- Remedy perceived organisational top heaviness

- Improve reporting lines & communication
- Creating the corporate leadership team needed to meet the challenges ahead
- Task driven business model resourced by a skilled and agile workforce

14.0 ACCOMMODATION REVIEW

14.1 The accommodation request form required to assess our potential future property needs has been completed and approved. It has been passed to our landlord CEC and positive initial discussions have already taken place.

15.0 RECOMMENDATION

15.1 The Board is asked to note the content of this report.

Michael Wilkie
INTERIM ASSESSOR & ERO

Attached:
Appendix 1- Electoral Statistics

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Appendix (A) Table Registration Changes by month – May/June

Eligibility Date	WARD	Additions	Deletions
	01 Almond	183	97
	02 Pentland Hills	125	97
	03 Drum Brae/Gyle	123	92
	04 Forth	192	115
	05 Inverleith	303	137
	06 Corstorphine/Murrayfield	107	86
	07 Sighthill/Gorgie	276	176
	08 Colinton/Fairmilehead	116	74
	09 Fountainbridge/Craiglockhart	166	103
	10 Morningside	195	152
	11 City Centre	268	203
	12 Leith Walk	303	240
	13 Leith	229	129
	14 Craigentiny/Duddingston	166	113
	15 Southside/Newington	255	151
	16 Liberton/Gilmerton	264	114
	17 Portobello/Craigmillar	236	115
2 May 2023	Total	3507	2194
	01 Almond	216	173
	02 Pentland Hills	143	140
	03 Drum Brae/Gyle	117	105
	04 Forth	173	230
	05 Inverleith	192	237
	06 Corstorphine/Murrayfield	122	127
	07 Sighthill/Gorgie	257	302
	08 Colinton/Fairmilehead	89	101
	09 Fountainbridge/Craiglockhart	159	203
	10 Morningside	232	288
	11 City Centre	271	470
	12 Leith Walk	301	370
	13 Leith	234	210
	14 Craigentiny/Duddingston	123	200
	15 Southside/Newington	175	415
	16 Liberton/Gilmerton	331	164
	17 Portobello/Craigmillar	189	161
1 Jun 2023	Total	3324	3896
Total CEC		6831	6090
	01 Musselburgh	146	88
	02 Preston, Seton and Gosford	172	42
	03 Tranent, Wallyford and Macmerry	149	60
	04 North Berwick Coastal	90	55
	05 Haddington and Lammermuir	130	66
	06 Dunbar and East Linton	117	63
2 May 2023	Total	804	374
	01 Musselburgh	98	94
	02 Preston, Seton and Gosford	78	67
	03 Tranent, Wallyford and Macmerry	142	57
	04 North Berwick Coastal	70	69

	05 Haddington and Lammermuir	87	59
	06 Dunbar and East Linton	73	54
1 Jun 2023	Total	548	400
Total ELC		1352	774
	01 Penicuik	86	36
	02 Bonnyrigg	99	38
	03 Dalkeith	92	28
	04 Midlothian West	139	43
	05 Midlothian East	82	42
	06 Midlothian South	91	39
2 May 2023	Total	589	226
	01 Penicuik	54	42
	02 Bonnyrigg	137	72
	03 Dalkeith	95	36
	04 Midlothian West	98	59
	05 Midlothian East	49	56
	06 Midlothian South	86	45
1 Jun 2023	Total	519	310
Total MLC		1108	536
	01 Linlithgow	84	48
	02 Broxburn, Uphall and Winchburgh	139	60
	03 Livingston North	149	61
	04 Livingston South	181	66
	05 East Livingston and East Calder	151	66
	06 Fauldhouse and the Breich Valley	92	35
	07 Whitburn and Blackburn	95	56
	08 Bathgate	135	59
	09 Armadale and Blackridge	75	34
2 May 2023	Total	1101	485
	01 Linlithgow	59	53
	02 Broxburn, Uphall and Winchburgh	86	55
	03 Livingston North	105	63
	04 Livingston South	133	69
	05 East Livingston and East Calder	100	55
	06 Fauldhouse and the Breich Valley	52	49
	07 Whitburn and Blackburn	71	66
	08 Bathgate	85	81
	09 Armadale and Blackridge	59	44
1 Jun 2023	Total	750	535
Total WLC		1851	1020

(B) Table-Postal Voters and Total Electorate at 1 June 2023

Council	Postal Voters	Total electorate
CEC	92953	399255
ELC	21519	89159
MLC	17475	76333
WLC	29925	146598
TOTAL	161872	711345