

ASSESSOR'S PROGRESS REPORT TO THE LOTHIAN VALUATION JOINT BOARD

6 November 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 June 2023 all maintenance tasks supporting the registration process have continued.

2.2 There were 11,855 initial ITR's, 9518 reminder ITR's and 2954 second reminder ITR's issued along with 3778 Postal Votes sent by post between 2 September and 25 October.

2.3 Processing volumes continue to be steady. There were 42527 transactions undertaken for the monthly updates of 2 October and 1 November. During this period work was undertaken on removing electors marked as absent from canvass return within CEC and WLC. Two pieces of evidence are required to remove an elector unless the information is provided by Registrar office or the elector is confirmed as registered elsewhere via a 'movers record' . Names cannot be removed from the register simply on the strength of the name marked as absent from canvass return.
This can reflect in peaks and troughs of additions and deletions for different areas on the monthly update cycle during the canvass period.

The number of additions/deletions/modifications by ward is shown as appendix (A).

Total number of electors and postal voters as at 1 November is shown as appendix (B).

3.0 POSTAL VOTES/PROXY VOTES

3.1 The changes to postal vote and proxy vote (Absent Votes) provisions, which were intimated in a previous report to the Board, took effect on 31 October. All applications for an absent vote in respect of reserved elections require the applicant to provide their NI number or proof of identity via prescribed documents. All such applications must be processed via a government online portal. Postal votes must be renewed after a period of three years.

3.2 These changes have resulted in a divergence in legislation between devolved and reserved elections. Applications for devolved elections cannot be made via the government portal and do not require proof of identity. Indefinite applications continue for such elections with the requirement to refresh the electors signature every 5 years.

- 3.3 There is a transitional period running until 31 January 2026 for existing postal voters to renew their application. The ERO will be required to write to these electors at appropriate time to advise them of this requirement. This is currently being timetabled.
- 3.4 Existing Proxy voters will require to renew their current arrangement for reserved elections by 31 January 2024 although their proxy will remain in place for devolved elections. Those electors will be written to after 31 October 2023 to advise of the position.

Within LVJB these changes will impact on processing times for absent votes and existing procedures. Extensive training has been undertaken on these changes against a background of systems and documentation coming through at very short notice. The EMS used (EROS) has been upgraded to link to the government portal and testing on that has been undertaken. A new suite of absent vote application forms and letters are required. These will be place when the new requirements take effect. The changes to absent voting legislation are being carefully considered in order communication with electors is clear in what is required.

4.0 UK PARLIAMENTARY BOUNDARY CHANGES

Work has been undertaken, in conjunction with elections teams from relevant councils, where changes to the UK Parliamentary constituencies boundaries are being undertaken. Whilst these constituency changes will only take effect at the next General Election there is the intention to publish the next revised register in the new constituencies. In the event of a by election or a recall petition the current constituencies would be used for those events.

5.0 ELECTORAL REGISTRATION ENGAGEMENT

We continue to engage with electors at events such as citizenship ceremonies to encourage voter registration and promote the functions of the Electoral Registration Office.

As part of encouraging young attainers to register we will be matching school lists to our elector database and write to any attainers not shown inviting them to register. Data from education departments are normally received around end of October.

6.0 ELECTORAL REGISTRATION – VOTER AUTHORITY CERTIFICATES

- 6.1 The volumes received continue to be very low. Feedback from the recent Rutherglen and Hamilton West by election suggested that there were no issues and all ran smoothly. Given this the expectation is that applications will remain low even at an election. However, the ability to deal with large volumes has been mitigated for.

7.0 CANVASS

Canvass returns for route 2 properties are disappointing and are down from this time last year. Final return figures will be available once canvass is complete. This downward trend appears consistent with other ERO's experiences. Door to door canvass is due to be completed on 17 November 2023 at

which point our enquiry agents will switch to purely individual elector registration canvass. Publication of the revised Electoral Register be on 1 December 2023.

8.0 VALUATION ROLL – MAINTENANCE

8.1 Since the last report to the Board, the cumulative total of amendments made to the valuation roll for the period 1 April 2023 to 30 September 2023 currently stands at 1275. Of that total of running roll activity, around 60% of the changes have been actioned within 3 months of them becoming effective. That compares with a total of 783 (50% within 3 months) for the equivalent period in the previous year. More focus has been deployed to running roll following the completion of the 2023 revaluation. On that point, certain changes will have been actioned occurred as result of that revaluation becoming effective on 1 April 2023. That can often trigger ratepayers to report certain factual changes to their properties that are not conveyed through other official channels - such as planning applications or building warrants - due to them being notified of a new rateable value for the next three years. We are often made aware of such changes outwith the key three-month target date, but they can only be backdated to 1 April 2023 in accordance with statute.

The breakdown of the nature of the 1275 changes is 298 amendments to existing entries, 594 deletions, 383 inserts. That has been spilt down further and is shown by county in the table below.

	Edinburgh	Midlothian	W. Lothian	E. Lothian	Total
Inserts	230	38	65	50	383
Deletions	422	25	101	46	594
Amendments	159	46	57	36	298

The comparatively high proportion of deletions from the roll (particularly within the City of Edinburgh) will be due to, but not exclusively, a significant number of Self Catering Units that have now reverted back to the valuation list following changes to the legislation in 2022, which added a further qualification for them to remain on the roll. The recent introduction of the licensing of these subjects will have also accounted for a number of these being removed from the roll and place back on the list.

9.0 VALUATION ROLL – APPEALS

9.1 We continue to await confirmation from the SCTS Local Taxation Chamber as to how many appellants have indicated that they wish to maintain their pursuit of the outstanding R17 Covid appeals appeals following their write-out in June 2023. As has been outlined in previous reports, we remain hopeful that the final numbers will not be significant but we are continuing to monitor this situation closely.

9.2 There are approximately 1,000 non Covid Revaluation 2017 appeals that must be disposed of by 31st December 2024. In respect of these appeals, two First Tier Tribunal Hearings have been set by the SCTS Local Taxation Chamber for 30th November and 14th December 2023. Staff are currently engaging with the appellants and agents on these appeals and the current indication is at least one case will proceed before the Tribunal. A further Hearing has also been set for 24th January 2024. As part of the ongoing changes to the organisation developed through agile working, a team of staff will shortly be working exclusively on the resolution of these appeals, prior to the focus shifting to R23 Proposals

10.0 2023 REVALUATION UPDATE

10.1 In respect of the c. 3,500 R23 Proposals received, Technical Support staff have continued to issue acknowledgments and Incomplete Proposal Notices, in line with the prescribed statutory timescale, as the 56 day deadline approached. Focus is now on establishing a timetable for the setting of Proposal Determination Dates (PDD's) and this is involving significant engagement and co-ordination with the Scottish Assessors Association in relation to those subjects valued by reference to national Practice Notes. Planning around the issue of PDD's for those categories of subjects which are not valued by reference to national Practice Notes (examples being shops, offices and industrials) is also underway and we are continuing to undertake training of the valuation staff in order to be as best prepared for dealing with these Proposals as possible.

11.0 COUNCIL TAX – MAINTENANCE

11.1 Over the period 1st April 2023 to 30th September 2023, 3103 new houses have been added to the list, this compares to 3116 for the same period in 2022/23.

Band	Edinburgh	Midlothian	West Lothian	East Lothian	Total
A	180	-	16	2	198
B	205	53	48	16	322
C	147	55	138	69	409
D	278	75	131	100	584
E	233	79	75	111	498
F	170	97	163	127	557
G	216	82	87	118	503
H	22	5	3	2	32
Total	1451	446	661	545	

11.2 There are currently 269 outstanding Council Tax appeals, of which 43 are invalidly made. At present, 35 cases have been cited for hearings before the new First Tier Tribunal with dates between now and January, the first cases for Lothian having been heard on 18 October.

11.3 As the review of Self Catering Units for 2022/23 draws to a close, we have confirmed the status of 1315 properties from a total of 1653 original requests. The staff resource on this project has now decreased significantly, though the introduction of the licensing requirement for Self Catering Units has resulted in a notable increase in requests for properties to revert to domestic valuation.

While not all as a result of the licencing requirement, many of these requests being in progress, it is worth noting that 231 self catering units have been removed from the Valuation Roll since April 23.

12.0 REVENUE BUDGET 2023-2027

12.1 I note the content of the Treasurer's Revenue Budget Report.

13.0 GOVERNANCE STRATEGY GROUP

The group recently met to discuss Phase 2 CIP progress, to conduct the contribution awards ceremony and discuss the proposed CLT session on the implementation of Management of Capability procedures

13.1 Contribution awards

The event was attended in person and virtually by staff members and there was an excellent turnout. The awards were attended also by the Convenor , Vice Convenor and Councillor Russell.

In my view the awards were a great success and provide a valuable link between the Board and its employees.

14.0 CONTINUAL IMPROVEMENT PROGRAMME

14.1 CIP update

The Continual Improvement Programme (CIP) continues to make excellent progress

We are holding an initial corporate leadership workshop to assess internal management performance against our recently introduced Management of Capability Procedure framework on Tuesday 7 November. It is anticipated that this will commence a programme of analysis and evaluation into improving our performance targets and service delivery objectives.

I am also looking at the Administration side of the office to bring in improvements there and realise potential cost savings.

15.0 HR POLICY UPDATES

15.1 Modern Apprentice within LVBJ

I have attached at Appendix 2 a proposal to engage a Modern Apprentice within LVJB

15.2 Proposal to undertake Job Evaluation within LVJB

Further to Appendix 2 of the Board Report dated 18th September 2023 (Proposal to undertake Job Evaluation within LVJB), we are pleased to provide information in Appendix 3 of this report in relation to mapping of job evaluation scores using the Capital Job Evaluation Scheme to correlate to the Lothian Valuation Joint Board salary scales. The Board is now asked to approve the proposal to commence job evaluation within LVJB.

16.0 RECOMMENDATION

16.1 The Board is asked to note the content of this report and to approve the paper at Appendix 2.

Michael Wilkie
ASSESSOR & ERO

Attached:

Appendix 1- Electoral Statistics

Appendix 2 -Lothian Valuation Joint Board – Proposal to engage a Modern Apprentice within LVJB

Appendix 3- Job Evaluation Scores – Salary Mapping to LVJB Salary Scales

Appendix 1- Electoral Statistics

Appendix (A) Table Registration Changes by month – October to November

1: The City of Edinburgh Council			Change			
Eligibility Date			Add	Del	Mod	Total
02-Oct	01 Almond		296	430	23	749
	02 Pentland Hills		218	338	23	579
	03 Drum Brae/Gyle		159	325	17	501
	04 Forth		267	508	29	804
	05 Inverleith		354	575	15	944
	06 Corstorphine/Murrayfield		174	338	12	524
	07 Sighthill/Gorgie		387	761	16	1164
	08 Colinton/Fairmilehead		181	262	11	454
	09 Fountainbridge/Craiglockhart		292	509	9	810
	10 Morningside		423	747	19	1189
	11 City Centre		469	797	14	1280
	12 Leith Walk		515	982	14	1511
	13 Leith		396	708	12	1116
	14 Craigtinny/Duddingston		306	483	16	805
	15 Southside/Newington		416	704	13	1133
	16 Liberton/Gilmerton		293	404	31	728
	17 Portobello/Craigmillar		351	471	26	848
	Total		5497	9342	300	15139
01-Nov	01 Almond		335	375	12	722
	02 Pentland Hills		234	311	6	551
	03 Drum Brae/Gyle		224	274	10	508

		04 Forth	281	457	11	749
		05 Inverleith	330	528	7	865
		06 Corstorphine/Murrayfield	202	264	10	476
		07 Sighthill/Gorgie	399	679	9	1087
		08 Colinton/Fairmilehead	159	256	9	424
		09 Fountainbridge/Craiglockhart	346	465	4	815
		10 Morningside	477	845	8	1330
		11 City Centre	601	1061	15	1677
		12 Leith Walk	612	914	12	1538
		13 Leith	299	523	8	830
		14 Craigtinny/Duddingston	308	491	8	807
		15 Southside/Newington	646	942	14	1602
		16 Liberton/Gilmerton	331	407	16	754
		17 Portobello/Craigmillar	323	421	13	757
		<i>Total</i>	<i>6107</i>	<i>9213</i>	<i>172</i>	<i>15492</i>
CEC	Total		11604	18555	472	30631
<i>2: East Lothian Council</i>			<i>Change</i>			
			<i>Add</i>	<i>Del</i>	<i>Mod</i>	<i>Total</i>
<i>Eligibility Date</i>	<i>02-Oct</i>	01 Musselburgh	134	79	9	222
		02 Preston, Seton and Gosford	116	68	14	198
		03 Tranent, Wallyford and Macmerry	143	73	12	228
		04 North Berwick Coastal	94	58	4	156
		05 Haddington and Lammermuir	142	67	7	216
		06 Dunbar and East Linton	100	46	7	153
		<i>Total</i>	<i>729</i>	<i>391</i>	<i>53</i>	<i>1173</i>

<i>Eligibility Date</i>	<i>01-Nov</i>	<i>01 Musselburgh</i>	<i>184</i>	<i>246</i>	<i>3</i>	<i>433</i>
		<i>02 Preston, Seton and Gosford</i>	<i>133</i>	<i>142</i>	<i>1</i>	<i>276</i>
		<i>03 Tranent, Wallyford and Macmerry</i>	<i>157</i>	<i>156</i>	<i>4</i>	<i>317</i>
		<i>04 North Berwick Coastal</i>	<i>78</i>	<i>114</i>	<i>3</i>	<i>195</i>
		<i>05 Haddington and Lammermuir</i>	<i>133</i>	<i>219</i>	<i>7</i>	<i>359</i>
		<i>06 Dunbar and East Linton</i>	<i>93</i>	<i>159</i>	<i>8</i>	<i>260</i>
		<i>Total</i>	<i>778</i>	<i>1036</i>	<i>26</i>	<i>1840</i>
ELC	Total		1507	1427	79	3013
			<i>Change</i>			
3: Midlothian Council						
			<i>Add</i>	<i>Del</i>	<i>Mod</i>	<i>Total</i>
<i>Eligibility Date</i>	<i>02-Oct</i>	<i>01 Penicuik</i>	<i>68</i>	<i>47</i>	<i>11</i>	<i>126</i>
		<i>02 Bonnyrigg</i>	<i>131</i>	<i>78</i>	<i>8</i>	<i>217</i>
		<i>03 Dalkeith</i>	<i>104</i>	<i>34</i>	<i>12</i>	<i>150</i>
		<i>04 Midlothian West</i>	<i>155</i>	<i>57</i>	<i>9</i>	<i>221</i>
		<i>05 Midlothian East</i>	<i>71</i>	<i>48</i>	<i>6</i>	<i>125</i>
		<i>06 Midlothian South</i>	<i>89</i>	<i>34</i>	<i>18</i>	<i>141</i>
		<i>Total</i>	<i>618</i>	<i>298</i>	<i>64</i>	<i>980</i>
			<i>Add</i>	<i>Del</i>	<i>Mod</i>	<i>Total</i>
	<i>01-Nov</i>	<i>01 Penicuik</i>	<i>82</i>	<i>152</i>	<i>3</i>	<i>237</i>
		<i>02 Bonnyrigg</i>	<i>136</i>	<i>198</i>	<i>1</i>	<i>335</i>
		<i>03 Dalkeith</i>	<i>97</i>	<i>142</i>	<i>5</i>	<i>244</i>
		<i>04 Midlothian West</i>	<i>201</i>	<i>200</i>	<i>6</i>	<i>407</i>
		<i>05 Midlothian East</i>	<i>80</i>	<i>123</i>	<i>1</i>	<i>204</i>
		<i>06 Midlothian South</i>	<i>95</i>	<i>144</i>	<i>2</i>	<i>241</i>
		<i>Total</i>	<i>691</i>	<i>959</i>	<i>18</i>	<i>1668</i>
MLC	Total		1309	1257	82	2648

			<i>Change</i>			
<i>4: West Lothian Council</i>						
			<i>Add</i>	<i>Del</i>	<i>Mod</i>	<i>Total</i>
<i>Eligibility Date</i>	<i>02-Oct</i>	<i>01 Linlithgow</i>	<i>101</i>	<i>67</i>	<i>5</i>	<i>173</i>
		<i>02 Broxburn, Uphall and Winchburgh</i>	<i>136</i>	<i>68</i>	<i>12</i>	<i>216</i>
		<i>03 Livingston North</i>	<i>167</i>	<i>101</i>	<i>16</i>	<i>284</i>
		<i>04 Livingston South</i>	<i>199</i>	<i>106</i>	<i>14</i>	<i>319</i>
		<i>05 East Livingston and East Calder</i>	<i>187</i>	<i>69</i>	<i>15</i>	<i>271</i>
		<i>06 Fauldhouse and the Breich Valley</i>	<i>112</i>	<i>66</i>	<i>7</i>	<i>185</i>
		<i>07 Whitburn and Blackburn</i>	<i>115</i>	<i>72</i>	<i>8</i>	<i>195</i>
		<i>08 Bathgate</i>	<i>137</i>	<i>99</i>	<i>17</i>	<i>253</i>
		<i>09 Armadale and Blackridge</i>	<i>90</i>	<i>66</i>	<i>14</i>	<i>170</i>
		<i>Total</i>	<i>1244</i>	<i>714</i>	<i>108</i>	<i>2066</i>
	<i>01-Nov</i>	<i>01 Linlithgow</i>	<i>77</i>	<i>175</i>	<i>0</i>	<i>252</i>
		<i>02 Broxburn, Uphall and Winchburgh</i>	<i>173</i>	<i>279</i>	<i>6</i>	<i>458</i>
		<i>03 Livingston North</i>	<i>145</i>	<i>337</i>	<i>6</i>	<i>488</i>
		<i>04 Livingston South</i>	<i>189</i>	<i>322</i>	<i>8</i>	<i>519</i>
		<i>05 East Livingston and East Calder</i>	<i>259</i>	<i>307</i>	<i>6</i>	<i>572</i>
		<i>06 Fauldhouse and the Breich Valley</i>	<i>145</i>	<i>268</i>	<i>5</i>	<i>418</i>
		<i>07 Whitburn and Blackburn</i>	<i>256</i>	<i>391</i>	<i>7</i>	<i>654</i>
		<i>08 Bathgate</i>	<i>150</i>	<i>357</i>	<i>12</i>	<i>519</i>
		<i>09 Armadale and Blackridge</i>	<i>75</i>	<i>211</i>	<i>3</i>	<i>289</i>
		<i>Total</i>	<i>1469</i>	<i>2647</i>	<i>53</i>	<i>4169</i>
WLC	Total		2713	3361	161	6235

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

<i>Council</i>	<i>Postal Voters</i>	<i>Total electorate</i>
<i>CEC</i>	<i>92,369</i>	<i>395,082</i>
<i>ELC</i>	<i>21,563</i>	<i>89,389</i>
<i>MLC</i>	<i>17,429</i>	<i>76,470</i>
<i>WLC</i>	<i>29,920</i>	<i>146,882</i>
TOTAL	161,281	707,823

Lothian Valuation Joint Board – Proposal to engage a Modern Apprentice within LVJB

1.0 Introduction:

- 1.1 This paper outlines the rationale for Lothian Valuation Joint Board to welcome a Modern Apprentice into our workforce.
- 1.2 Any Modern Apprentice would be facilitated via [QA](#), who are funded by Skills Development Scotland and specialise in modernising workforces by championing digital, IT and technological training and solutions. QA have placed more than 30,000 Modern Apprenticeships to date in the UK and have 100,000 Modern Apprenticeship applications annually.

2.0 Background Information

- 2.1 LVJB has developed an excellent working relationship with QA over a number of years, utilising their training and development opportunities to update and modernise the skills of our staff.
- 2.2 Due to our organisation size, we are duty bound to submit payment to the Apprenticeship Levy. In the last 2-3 years, we have significantly built upon accessing associated funding available to us, namely the Flexible Workforce Development Fund, which we facilitate via Edinburgh College. This has provided a wide breadth of training and development to benefit and upskill our workforce.
- 2.3 The success of the above has provided a catalyst for us to give further consideration as to what funding is available to us to benefit, develop and modernise our workforce.
- 2.4 A number of meetings have taken place with QA to scope out how a Modern Apprentice could fit into our organisation with mutual benefits for us and young candidates.

3.0 Modern Apprenticeship Pathway – Digital Applications Support Programme

- 3.1 We have considered the selection of Modern Apprenticeship pathways and compared these against the roles, requirements, and responsibilities within our organisation.
- 3.2 We have concluded that a Modern Apprentice following the Digital Applications Support Programme would be an ideal fit for our office requirements. This programme is 10-12 months in duration. More detailed information on the programme content and qualifications gained can be found [here](#).
- 3.3 Structured and clear outcome-based milestones are set out from month one to month 12 of the programme, with a Skills Coach from QA working closely with us and the Apprentice to provide support and tracking.
- 3.4 The programme is delivered using a combination of on and off the job training, with the Apprentice dedicating at least 2-3 hours out of the working week to focus on diploma work.

- 3.5 The Apprentice would also attend two weeks virtual classroom training, consisting of:
- 1 week = PC passport
 - 1 week = office system user (e.g. cyber security, GDPR etc).
- 3.6 On completion of SCQF Level 6, the Apprentice will have a qualification equivalent to an HNC level.
- 3.7 We anticipate that the Apprentice will be provided with the opportunity to work in a variety of areas of Lothian Valuation Joint Board, gaining experience and exposure to the breadth of our activities.

4.0 Funding a Modern Apprentice

- 4.1 We propose to fund the basic salary and employer oncosts for a Modern Apprentice within the resources of Lothian Valuation Joint Board budget, principally via Barclay Funding. Salary offered will comply with the Scottish Living Wage minimum threshold.
- 4.2 Apprenticeship training is funded by the Scottish Government on the following basis:
- Age 16 – 19: fully funded to complete training and qualification.
 - Age 20 – 24: partially funded (programme dependent) to complete training and qualification.

5.0 Recruitment:

- 5.1 There are two options to consider for recruitment arrangements:

Option 1: QA's optional recruitment service. QA's engagement team would work alongside LVJB to find the best candidate for the role. QA invest in engagement with schools, matching candidate portfolios to our requirements. Recruitment service Information Document available upon request Recruitment fee TBC.

Option 2: LVJB undertake recruitment process, promoting the opportunity for a Modern Apprentice. Upon selection and as long as the candidate matches funding requirements, the successful candidate is enrolled onto the programme by QA.

6.0 Benefits and Advantages for Lothian Valuation Joint Board

- 6.1 The Apprentice will receive formal training and support directly from QA, to provide them with a technical grounding, skills and experience to grow and contribute effectively to our work and our objectives.
- 6.2 The Apprentice will follow a training programme which focuses on the most in-demand skills, such as cyber, IT, software development and data analytics.
- 6.3 Introducing the new role of Modern Apprentice has the potential to provide us with opportunities for a fresh look at reviewing and improving our induction procedure and training frameworks.
- 6.4 A Modern Apprentice offering will enable us to attract new talent and build on our technical skills and digital innovation. At the end of the programme there could be potential for us to extend the employment of the Apprentice or offer a permanent contract.
- 6.5 During their training programme, an Apprentice will acquire skills and knowledge which may be shared and transferred with our existing staff members.

- 6.6 The programme provides opportunities for our existing staff to develop mentoring and coaching skills by working with an Apprentice.
- 6.7 Offering a Modern Apprenticeship is a fixed term commitment. If we do not realise the anticipated benefits after one year then we are able to remove ourselves from the scheme with no obligation to continue into year 2.
- 6.8 Alternatively, as the Apprentice will be given opportunities to develop and contribute in areas throughout our organisation, this may provide prospects to employ the Apprentice on a more permanent basis at the end of their programme, should a suitable vacancy become available.

The Board are asked to approve the above proposal for LVJB to participate in engaging a Modern Apprenticeship.

Hannah Carruthers
HR Manager
October 2023



Job Evaluation Scores –

Salary Mapping to LVJB Salary Scales

