

# Report

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Report to:	<b>Lanarkshire Valuation Joint Board</b>
Date of Meeting:	<b>3 September 2018</b>
Report by:	<b>Assessor and Electoral Registration Officer</b>

Subject:	<b>Progress Update</b>
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## 1. Purpose of Report

1.1. The purpose of the report is to:-

- ◆ Provide an overview of the service to members
- ◆ Outline current issues and service priorities
- ◆ Provide an update on performance
- ◆ Highlight issues affecting the future direction of the Joint Board
- ◆ Advise of the closure of the Joint Board's offices on 27, 28 and 31 December 2018

## 2. Recommendation(s)

2.1. The Board is asked to approve the following recommendation(s):  
**(1)** that the content of the report be noted.

## 3. Service Overview and Priorities

### 3.1. Electoral Registration

#### 3.1.1 Annual Canvass

First stage reminder forms are being prepared to be issued on 17 August 2018 (approximately 140,000 forms). The second reminder stage is scheduled for mid-September and will consist of, as has been the case with previous years, a comprehensive door to door exercise.

#### 3.1.2 Individual Electoral Registration (IER)

Notification from the Cabinet Office (CO) in respect of Lanarkshire Valuation Joint Board's (LVJB's) funding allocation for the financial year 2018/19 has now been received. Following discussions with the CO, funding levels are more aligned to anticipated expenditure for the period 2018/19, however as with previous years, it is anticipated that a further funding bid will be required once the annual canvass of electors exercise is complete.

#### 3.1.3 Elections Held Since Last Board Meeting

No elections have been held since the last meeting of the Board.

### **3.2 Non-Domestic Valuation**

A summary of information in this area can be found in appendices 1.1 to 1.5.

#### **3.2.1 Changes to the 2017 Valuation Roll (Running Roll)**

These are highlighted in appendices 1.1 and 1.2 for the period 1 April 2018 to 1 August 2018.

#### **3.2.2 2005 Valuation Roll Appeals (Revaluation and Running Roll)**

A summary of the position with 2005 Revaluation and Running Roll appeals is contained in appendix 1.3.

#### **3.2.3 2010 Valuation Roll Appeals (Revaluation and Running Roll)**

A summary of the position with 2010 Revaluation and Running Roll appeals is contained in appendix 1.4.

#### **3.2.4 2017 Valuation Roll Appeals (Revaluation and Running Roll)**

The 2017 revaluation appeal workload continues to be resource intensive. The number of appeals being cited for each Valuation Appeal Committee hearing is around 250, with four more hearings scheduled until the end of this year. Consideration is currently being given to the number of hearings likely to be required for 2019. The statutory disposal date for dealing with the 2017 revaluation appeals is 31 December 2020.

A summary of the position with regards to 2017 Revaluation and Running Roll appeals is contained in appendix 1.5.

### **3.3 Council Tax**

A summary of information in this area can be found in appendices 2.1 to 2.4.

#### **3.3.1 New Houses**

A summary of the position for the period 1 April 2018 to 1 August 2018 is contained at appendix 2.2.

#### **3.3.2 Proposals and Appeals**

Appendices 2.3 and 2.4 contain information on Council Tax proposals and appeals. Good progress has again been made in respect of dealing with outstanding proposals and appeals. Each proposal to alter the band, whether made within statutory timescales or not, continues to be considered to ensure that the correct band is applied to each of the dwellings concerned.

### **4. Staffing**

4.1. Since the last Board meeting, one Valuer and one part qualified Valuer have left LVJB to take up posts elsewhere. Following a successful recruitment process, three staff members will become Trainee Valuers from early September in time for the commencement of the relevant degree course. Additionally, three Trainee Technicians have been recruited to assist with both the current and anticipated workload within our valuation service delivery area.

4.2 As has been the case in previous years, it is intended that our office will be closed between Christmas and New Year; closing 27, 28 and 31 December 2018. Staff will use annual leave / accrued flexi time for these days.

4.3 Staff absence levels for the last year are summarised in appendix 3.0.

## **5. Other Matters**

### **5.1 Complaints Received and Dealt with Since Last Progress Update Report**

Since the last update provided for the Board meeting, no complaints have been received.

### **5.2 Complaints to the Ombudsman**

No decisions have been issued by the Scottish Public Services Ombudsman since the last progress update report to the Board.

### **5.3 Scottish Assessors Association (SAA) Annual Report**

Following on from the Barclay review of non-domestic rates, the SAA has produced an annual report covering the three main business areas in which it is involved, namely; non-domestic rating, council tax, and electoral registration. The report can be viewed at [www.saa.gov.uk](http://www.saa.gov.uk).

### **5.4 Barclay Review Implementation**

A consultation by the Scottish Government on the implementation of the recommendations contained within the Barclay review of non-domestic rates is underway. The SAA is currently formulating a response to the consultation.

## **6. Employee Implications**

6.1. See 4 above.

## **7. Financial Implications**

7.1. None.

## **8. Equality Impact Assessment and Consultation Arrangements**

8.1. This report does not introduce a new policy, function or strategy or recommend a change to an existing policy, function or strategy and, therefore, no impact assessment is required.

8.2. There is no requirement for consultation in respect of this report.

## **9. Other Implications**

9.1. There are no implications for risk or sustainability in terms of the information contained in this report.

## **10. Privacy Impact Assessment**

10.1. This report does not introduce a new policy, function or strategy or recommend a change to an existing policy, function or strategy and therefore no impact assessment is required.

**Gary Bennett BSc MSc AEA (Cert-Scotland) MRICS IRRV (Hons)**

**Assessor and Electoral Registration Officer**

16 August 2018

## **Previous References**

Progress Update Report for Board meeting of 4 June 2018

**List of Background Papers**

None.

**Contact for Further Information**

If you require further information, please contact:-

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**Alterations made to the Valuation Roll (including appeal adjustments) between 01/04/2018 and 01/08/2018**

Area	AS AT 01/04/18		ADDED		DELETED		ALTERED		AS AT 01/08/2018	
	SUBJECTS	RV	SUBJECTS	RV	SUBJECTS	RV	SUBJECTS	RV	SUBJECTS	RV
<b>North Lanarkshire</b>	10,157	293,969,180	66	456,450	51	484,850	136	-558,975	10,172	293,381,805
<b>South Lanarkshire</b>	10,434	740,711,050	65	490,255	84	568,590	194	393,425	10,415	741,026,140
<b>LVJB total</b>	<b>20,591</b>	<b>£1,034,680,230</b>	<b>131</b>	<b>£946,705</b>	<b>135</b>	<b>£1,053,440</b>	<b>330</b>	<b>-£165,550</b>	<b>20,587</b>	<b>£1,034,407,945</b>

**Summary of time taken to make alterations (excluding appeal adjustments) to the Valuation Roll**

**Period : 1 April 2018 to 1 August 2018**

Area	Total altered	altered < 3 months		altered 3 to 6 months		altered > 6 months	
	No.	No.	%age	No.	%age	No.	%age
<b>North Lanarkshire</b>	179	178	99.44%	1	0.56%	0	0.00%
<b>South Lanarkshire</b>	192	173	90.10%	12	6.25%	7	3.65%
<b>LVJB totals</b>	<b>371</b>	<b>351</b>	<b>94.61%</b>	<b>13</b>	<b>3.50%</b>	<b>7</b>	<b>1.89%</b>

## Valuation Roll Appeals: Revaluation and Running Roll 2005

### 1. Revaluation Appeals

Area	Appeals received since 2005 Valuation Roll	Appeals resolved as at 1 August 2018	Appeals heard but awaiting stated case for appeal to Lands Valuation Appeal Court	Rateable Value of Appeals in process of appeal to LVAC	Appeals outstanding awaiting determination of Lands Tribunal for Scotland	Rateable Value of Outstanding Appeals awaiting determination of LT	Appeals Outstanding as at 1 August 2018
North Lanarkshire	3,921	3,916	0	£0	5	£95,600	5
South Lanarkshire	3,148	3,146	0	£0	2	£82,400	2
<b>LVJB total</b>	<b>7,069</b>	<b>7,062</b>	<b>0</b>	<b>£0</b>	<b>7</b>	<b>£178,000</b>	<b>7</b>

### 2. Running Roll Appeals

Area	Appeals received since 2005 Valuation Roll	Appeals resolved as at 1 August 2018	Appeals heard but awaiting stated case for appeal to Lands Valuation Appeal Court	Rateable Value of Appeals in process of appeal to LVAC	Appeals outstanding awaiting determination of Lands Tribunal for Scotland	Rateable Value of Outstanding Appeals awaiting determination of LT	Appeals Outstanding as at 1 August 2018
North Lanarkshire	2,023	2,006	0	£0	17	£3,001,536	17
South Lanarkshire	1,695	1,678	0	£0	17	£4,679,250	17
<b>LVJB total</b>	<b>3,718</b>	<b>3,684</b>	<b>0</b>	<b>£0</b>	<b>34</b>	<b>£7,680,786</b>	<b>34</b>

## Valuation Roll Appeals: Revaluation and Running Roll 2010

### 1. Revaluation Appeals

Area	Appeals received since 2010 Valuation Roll	Appeals resolved as at 1 August 2018	Appeals heard but awaiting stated case for appeal to Lands Valuation Appeal Court	Rateable Value of Appeals in process of appeal to LVAC	Appeals outstanding awaiting determination of Lands Tribunal for Scotland	Rateable Value of Outstanding Appeals awaiting determination of LT	Appeals Outstanding as at 1 August 2018
North Lanarkshire	4,460	4,451	0	£0	9	£2,494,300	9
South Lanarkshire	3,103	3,095	0	£0	8	£2,484,300	8
<b>LVJB total</b>	<b>7,563</b>	<b>7,546</b>	<b>0</b>	<b>£0</b>	<b>17</b>	<b>£4,978,600</b>	<b>17</b>

### 2. Running Roll Appeals

Area	Appeals received since 2010 Valuation Roll	Appeals resolved as at 1 August 2018	Appeals heard but awaiting stated case for appeal to Lands Valuation Appeal Court	Rateable Value of Appeals in process of appeal to LVAC	Appeals outstanding awaiting determination of Lands Tribunal for Scotland	Rateable Value of Outstanding Appeals awaiting determination of LT	Appeals Outstanding as at 1 August 2018
North Lanarkshire	5,480	5,434	0	£0	24	£16,015,325	46
South Lanarkshire	6,727	6,678	0	£0	30	£24,990,920	49
<b>LVJB total</b>	<b>12,207</b>	<b>12,112</b>	<b>0</b>	<b>£0</b>	<b>54</b>	<b>£41,006,245</b>	<b>95</b>



## Valuation Roll Appeals: Revaluation and Running Roll 2017

### 1. Revaluation Appeals

Area	Appeals received since 2017 Valuation Roll	Appeals resolved as at 1 August 2018	Appeals heard but awaiting stated case for appeal to Lands Valuation Appeal Court	Rateable Value of Appeals in process of appeal to LVAC	Appeals outstanding awaiting determination of Lands Tribunal for Scotland	Rateable Value of Outstanding Appeals awaiting determination of LT	Appeals Outstanding as at 1 August 2018
<b>North Lanarkshire</b>	4,728	806	0	£0	0	£0	3,922
<b>South Lanarkshire</b>	4,553	1,023	0	£0	0	£0	3,530
<b>LVJB total</b>	<b>9,281</b>	<b>1,829</b>	<b>0</b>	<b>£0</b>	<b>0</b>	<b>£0</b>	<b>7,452</b>

### 2. Running Roll Appeals

Area	Appeals received since 2017 Valuation Roll	Appeals resolved as at 1 August 2018	Appeals heard but awaiting stated case for appeal to Lands Valuation Appeal Court	Rateable Value of Appeals in process of appeal to LVAC	Appeals outstanding awaiting determination of Lands Tribunal for Scotland	Rateable Value of Outstanding Appeals awaiting determination of LT	Appeals Outstanding as at 1 August 2018
<b>North Lanarkshire</b>	262	15	0	£0	0	£0	247
<b>South Lanarkshire</b>	223	12	0	£0	0	£0	211
<b>LVJB total</b>	<b>485</b>	<b>27</b>	<b>0</b>	<b>£0</b>	<b>0</b>	<b>£0</b>	<b>458</b>



**Council Tax Subjects as at 01/08/2018**

BAND	ENTRIES AS AT 01/04/18			ADDITIONS			DELETIONS			CURRENT ENTRIES			BAND 'D' EQUIVALENT		
	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL
A	53341	36401	89742	5	6	11	31	30	61	53315	36377	89692	35545	24253	59798
B	37417	30283	67700	58	17	75	4	5	9	37471	30295	67766	29145	23563	52708
C	19463	25819	45282	45	52	97	2	3	5	19506	25868	45374	17339	22994	40333
D	16621	20478	37099	86	95	181	2	5	7	16705	20568	37273	16705	20568	37273
E	16212	19226	35438	122	109	231	3	3	6	16331	19332	35663	21457	25400	46858
F	8787	11817	20604	117	132	249	1	4	5	8903	11945	20848	14467	19411	33878
G	2895	6216	9111	22	46	68	1	2	3	2916	6260	9176	5710	12259	17969
H	132	544	676	3	3	6	0	0	0	135	547	682	331	1340	1671
<b>TOTAL</b>	<b>154868</b>	<b>150784</b>	<b>305652</b>	<b>458</b>	<b>460</b>	<b>918</b>	<b>44</b>	<b>52</b>	<b>96</b>	<b>155282</b>	<b>151192</b>	<b>306474</b>	<b>140699</b>	<b>149788</b>	<b>290488</b>
'D' EQIV.	140160	149220	289380	575	614	1189	35	46	81	140699	149788	290488			

**JOINT BOARD  
TOTALS**

		01/04/2018	01/08/2018	Increase
<b>TOTAL CHARGEABLE ENTRIES</b>	North	154868	155282	414
	South	150784	151192	408
	<b>Total</b>	<b>305652</b>	<b>306474</b>	<b>822</b>
<b>BAND 'D' EQUIVALENT</b>	North	140160	140699	539
	South	149220	149788	568
	<b>Total</b>	<b>289380</b>	<b>290487</b>	<b>1107</b>

**Summary of time taken to enter new houses in Valuation (Council Tax) List**

**Period : 1 April 2018 to 1 August 2018**

Area	Total added	added < 3 months		added 3 to 6 months		added > 6 months	
<b>North Lanarkshire</b>	458	450	98.25%	5	1.09%	3	0.66%
<b>South Lanarkshire</b>	460	451	98.04%	6	1.30%	3	0.65%
<b>LVJB totals</b>	<b>918</b>	<b>901</b>	<b>98.15%</b>	<b>11</b>	<b>1.20%</b>	<b>6</b>	<b>0.65%</b>

**Summary of Council Tax Proposals/Appeals received and dealt with as at 1 August 2018**

Valid	Proposals/Appeals outstanding @ 1 April 2018	Proposals/Appeals received since 1 April 2018	Proposals/Appeals completely resolved 01/04/2018 to 01/08/2018	Outstanding balance
<b>North Lanarkshire</b>	15	10	8	17
<b>South Lanarkshire</b>	38	33	28	43
<b>LVJB total</b>	<b>53</b>	<b>43</b>	<b>36</b>	<b>60</b>

Invalid	Proposals/Appeals outstanding @ 1 April 2018	Proposals/Appeals received since 1 April 2018	Proposals/Appeals completely resolved 01/04/2018 to 01/08/2018	Outstanding balance
<b>North Lanarkshire</b>	35	28	47	16
<b>South Lanarkshire</b>	76	36	85	27
<b>LVJB total</b>	<b>111</b>	<b>64</b>	<b>132</b>	<b>43</b>

Combined	Proposals/Appeals outstanding @ 1 April 2018	Proposals/Appeals received since 1 April 2018	Proposals/Appeals completely resolved 01/04/2018 to 01/08/2018	Outstanding balance
<b>North Lanarkshire</b>	50	38	55	33
<b>South Lanarkshire</b>	114	69	113	70
<b>LVJB total</b>	<b>164</b>	<b>107</b>	<b>168</b>	<b>103</b>

**Summary of resolution of Council Tax Proposals/Appeals Between 1 April 2018 and 1 August 2018**

Valid	Proposals/Appeals completely resolved 01/04/2018 to 01/08/2018	Number withdrawn	Number abandoned	Number adjusted	Number dismissed by VAC	Number adjusted by VAC
<b>North Lanarkshire</b>	8	5	0	0	2	1
<b>South Lanarkshire</b>	28	15	0	6	7	0
<b>LVJB total</b>	<b>36</b>	<b>20</b>	<b>0</b>	<b>6</b>	<b>9</b>	<b>1</b>

Invalid	Proposals/Appeals completely resolved 01/04/2018 to 01/08/2018	Number withdrawn	Number abandoned	Number adjusted	Number dismissed by VAC	Number adjusted by VAC
<b>North Lanarkshire</b>	47	2	40	0	5	0
<b>South Lanarkshire</b>	85	2	79	0	4	0
<b>LVJB total</b>	<b>132</b>	<b>4</b>	<b>119</b>	<b>0</b>	<b>9</b>	<b>0</b>

Combined	Proposals/Appeals completely resolved 01/04/2018 to 01/08/2018	Number withdrawn	Number abandoned	Number adjusted	Number dismissed by VAC	Number adjusted by VAC
<b>North Lanarkshire</b>	55	7	40	0	7	1
<b>South Lanarkshire</b>	113	17	79	6	11	0
<b>LVJB total</b>	<b>168</b>	<b>24</b>	<b>119</b>	<b>6</b>	<b>18</b>	<b>1</b>

## ABSENCE MANAGEMENT STATISTICS

Month	Self Certified		Medically Certified		Unauthorised Absence		Total			Total			
	No of Days	%	No of Days	%	No of Days	%	No of Days	Work Days Avail	%	Month	No of Days	Work days available	%
	<b>July 2017</b>	6	0.4%	27	2.0%	Nil	0.0%	33	1360	2.4%	<b>July 2016</b>	64	1304
<b>August 2017</b>	8	0.5%	23	1.6%	Nil	0.0%	31	1469	2.1%	<b>August 2016</b>	58	1462	4.0%
<b>September 2017</b>	5	0.4%	21	1.6%	Nil	0.0%	26	1352	1.9%	<b>September 2016</b>	74	1489	5.0%
<b>October 2017</b>	9	0.6%	22	1.6%	Nil	0.0%	31	1418	2.2%	<b>October 2016</b>	48	1403	3.4%
<b>November 2017</b>	11	0.8%	7	0.5%	Nil	0.0%	18	1382	1.3%	<b>November 2016</b>	76	1461	5.2%
<b>December 2017</b>	23	1.8%	3	0.2%	Nil	0.0%	26	1294	2.0%	<b>December 2016</b>	59	1450	4.1%
<b>January 2018</b>	22	1.5%	0	0.0%	Nil	0.0%	22	1423	1.5%	<b>January 2017</b>	56	1450	3.9%
<b>February 2018</b>	3	0.2%	0	0.0%	Nil	0.0%	3	1242	0.2%	<b>February 2017</b>	39	1318	3.0%
<b>March 2018</b>	23	1.7%	12	0.9%	Nil	0.0%	35	1352	2.6%	<b>March 2017</b>	71	1514	4.7%
<b>April 2018</b>	15	1.9%	9	0.7%	Nil	0.0%	24	1263	1.9%	<b>April 2017</b>	50	1322	3.8%
<b>May 2018</b>	17	1.2%	25	1.8%	Nil	0.0%	42	1364	3.1%	<b>May 2017</b>	46	1513	3.0%
<b>June 2018</b>	15	1.2%	0	0.0%	Nil	0.0%	15	1230	1.2%	<b>June 2017</b>	34	1449	2.3%
<b>Averages for 12 months</b>	13	1.0%	12	0.9%	Nil	0.0%	26	1346	1.9%		56	1428	3.9%