

Report to:	Lanarkshire Valuation Joint Board
Date of Meeting:	4 September 2017
Report by:	Assessor and Electoral Registration Officer

Subject:	Progress Update
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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 29 December 2017

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

The annual canvass of electors is now well underway with over 300,000 Household Enquiry Forms (HEFs) having been issued. This has been followed up with around 150,000 reminders, and some 15,000 Invitation to Register forms (ITRs) having been issued. The door to door canvassing element of the canvass project is scheduled to begin the week beginning Monday 18 September. Potential electors continue to be encouraged to use the online digital registration service (www.gov.uk/register-to-vote).

3.1.2 Individual Electoral Registration

Initial funding levels for the period 2017/18 have been intimated to Electoral Registration Officers. Concerns have again been raised with the Cabinet Office in relation to the amount allocated to Lanarkshire Valuation Joint Board (LVJB), in particular to cover the costs incurred carrying out the annual canvass exercise. It is expected that, as has been the case in previous years, a 'Justification Led Funding Bid' will be submitted to the Cabinet Office before the end of this financial year.

3.1.3 Elections Held Since Last Board Meeting

No election has taken place since the last meeting of the Board. A review was carried out in relation to the late production of files (second run) for poll cards for the UKPGE on 8 June 2017 and identified that there was a significant rise in registration applications made via the UK Government digital service, in particular on the last date for registration (midnight on 22 May 2017). Of the 3,700 approximately registration applications received on that day alone, some 30% were duplicate applications. An action plan has been developed as part of the review process to mitigate against a re-occurrence of similar issues in the future. Preparations are well underway for a by-election in Ward 13, Fortissat, North Lanarkshire, to be held on 7 September 2017.

3.2 Non-Domestic Valuation

A summary of information in this area can be found in appendices 1.1 to 1.4.

3.2.1 Changes to the Valuation Roll (Running Roll)

These are highlighted in appendices 1.1 and 1.2 for the period 1 April 2017 to 1 August 2017.

3.2.2 2005 Valuation Roll Outstanding Appeals (Revaluation and Running Roll)

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

3.2.3 2010 Revaluation Appeals

A summary of the position with 2010 Revaluation appeals is contained within table 1 of appendix 1.4.

3.2.4 2010 Valuation Roll Outstanding Appeals (Running Roll)

A summary of the position with 2010 running roll appeals is contained within table 2 of appendix 1.4. Appeal decisions continue to be uploaded to the Lanarkshire Valuation Appeal Panel website – www.lvap.org

3.2.5 2017 Non-Domestic Revaluation

Revaluation appeals continue to be received and a schedule will be put in place with regards to appeals disposal to ensure that the appeals are dealt with in accordance with statutory deadlines once the last date for the receipt of appeal (30 September 2017) has passed.

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 2017 to 1 August 2017 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. The number of appeals outstanding at any one time has reduced following concerted efforts to deal with the spike in proposals, principally as a result of the introduction of increased payments to band E and above.

4. Staffing

- 4.1. Since the last Board meeting, one qualified Valuer has retired and a part Valuer/part Divisional Valuer post has become vacant due to the post holder leaving for a promotion to another Assessor's office. LVJB's management team is currently considering the filling of the posts mindful of budgetary pressures. Following a recruitment and selection process, the position of Electoral Services and Support Manager (job share) has been filled, together with the filling of two Clerical Assistant positions.
- 4.2 Following consultation with staff, as has been the case in previous years, LVJB's office will be closed between Christmas and New Year, closing 27, 28 and 29 December 2017. Staff will use annual leave, or 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, seven complaints have been received and investigated, a summary of which is as follows:

Service Area	Nature of Complaint	Outcome
ERO (ref: 2017/18 – 4)	Postal vote not received in time for either Local Government or UK General Election.	No note of a postal vote application ever being received from complainant. Complainant's contact was after the deadline for postal vote applications in respect of the UK General Election.
ERO (ref: 2017/18 – 5)	Neither a postal vote nor a proxy vote application was granted in time for General Election.	Postal and proxy applications were received after the legislative deadlines.
ERO (ref: 2017/18 – 6)	Did not appear on Electoral Register for General Election	Complainant had been removed in error from the Electoral Register instead of another person with the same name. This error was rectified within 10 minutes and the polling station staff informed that the complainant had been added back and was eligible to vote.
ERO (ref: 2017/18 – 7)	Postal vote not received for General Election.	Postal vote application received but not correctly processed. Subsequently corrected.
ERO (ref: 2017/18 – 8)	Proxy vote refused at polling station.	Proxy application was received and properly processed with the information correctly transferred to the Returning Officer. Complainant's name was properly shown on the Electoral Register, on the day, as having a proxy vote.

Service Area	Nature of Complaint	Outcome
Valuation (ref: 2017/18 – 9 and 10)	<ol style="list-style-type: none"> 1. LVJB actions prejudiced client by not carrying out statutory duty to reduce 2010 or 2017 values to reflect errors in the valuations. 2. LVJB deliberately delayed meeting agent thus prejudicing client. 3. LVJB entered into a restrictive appeals practice and abused the Valuation Appeal Committee regulations. 	<ol style="list-style-type: none"> 1. Complainant advised of the Assessor's position and interpretation of the law. 2. Information supplied by the complainant was insufficient to prove any error in the valuations, despite requests to provide. The complainant was advised that no further resources to be allocated to the matter until such evidence was provided. 3. LVJB did not enter into a restrictive practice nor abused Valuation Appeal regulations. In cases where the Assessor is not satisfied that there is an error, then the only remaining course of action is for the matter to be referred to the Valuation Appeal Committee. This is entirely appropriate and correct in law.

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 **Barclay Review of Business Rates**

The Barclay review group, set up to make recommendations that seek to enhance and reform the business rates system in Scotland, published its report on 22 August 2017.

6. **Employee Implications**

6.1. See 4. above.

7. **Financial Implications**

7.1. None.

8. **Other Implications**

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

9. **Equality Impact Assessment and Consultation Arrangements**

9.1. 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.

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

9.3 The 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

22 August 2017

Previous References

Progress Update Report for Board meeting of 26 June 2017

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 01/04/2017 and 01/08/2017

Area	AS AT 01/04/17		ADDED		DELETED		ALTERED		AS AT 01/08/2017	
	SUBJECTS	RV	SUBJECTS	RV	SUBJECTS	RV	SUBJECTS	RV	SUBJECTS	RV
North Lanarkshire	10,013	291,967,285	122	748,250	125	771,965	102	-120,980	10,010	291,822,590
South Lanarkshire	9,961	744,327,185	157	1,961,660	83	744,620	135	-12,353,800	10,035	733,190,425
LVJB total	19,974	1,036,294,470	279	2,709,910	208	1,516,585	237	-12,474,780	20,045	1,025,013,015

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

Period : 1 April 2017 to 1 August 2017

Area	Total altered	altered < 3 months		altered 3 to 6 months		altered > 6 months	
	No.	No.	%age	No.	%age	No.	%age
North Lanarkshire	315	310	98.41%	5	1.59%	0	0.00%
South Lanarkshire	320	312	97.50%	8	2.50%	0	0.00%
LVJB totals	635	622	97.95%	13	2.05%	0	0.00%

Valuation Roll Appeals: Revaluation and Running Roll 2005

1. Revaluation Appeals

Area	Appeals received since 2005 Valuation Roll	Appeals resolved as at 1 August 2017	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 2017
North Lanarkshire	3,921	3,916	0	£0	5	£95,600	5
South Lanarkshire	3,148	3,146	0	£0	2	£82,400	2
LVJB total	7,069	7,062	0	£0	7	£178,000	7

2. Running Roll Appeals

Area	Appeals received since 2005 Valuation Roll	Appeals resolved as at 1 August 2017	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 2017
North Lanarkshire	2,023	2,006	0	£0	17	£3,001,536	17
South Lanarkshire	1,695	1,678	0	£0	17	£4679,250	17
LVJB total	3,718	3,684	0	£0	34	£7,680,786	34

Valuation Roll Appeals: Revaluation and Running Roll 2010

1. Revaluation Appeals

Area	Appeals received since 2010 Valuation Roll	Appeals resolved as at 1 August 2017	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 2017
North Lanarkshire	4,460	4,448	0	£0	12	£3,640,600	12
South Lanarkshire	3,103	3,092	0	£0	11	£3,979,550	11
LVJB total	7,563	7,540	0	£0	23	£7,620,150	23

2. Running Roll Appeals

Area	Appeals received since 2010 Valuation Roll	Appeals resolved as at 1 August 2017	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 2017
North Lanarkshire	5,379	5,196	0	£0	28	£18,649,395	183
South Lanarkshire	6,734	6,541	0	£0	31	£85,600,920	193
LVJB total	12,113	11,737	0	£0	59	£104,250,315	376

Council Tax Subjects as at 01/08/2017

BAND	ENTRIES AS AT 01/04/17			ADDITIONS			DELETIONS			CURRENT ENTRIES			BAND 'D' EQUIVALENT		
	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL	NORTH	SOUTH	TOTAL
A	53611	36408	90019	15	25	40	60	18	78	53566	36415	89981	35712	24278	59990
B	37223	30209	67432	29	24	53	1	5	6	37251	30228	67479	28974	23511	52485
C	19315	25646	44961	29	65	94	4	4	8	19340	25707	45047	17191	22851	40042
D	16355	20234	36589	77	71	148	4	6	10	16428	20299	36727	16428	20299	36727
E	15917	18966	34883	89	87	176	0	2	2	16006	19051	35057	21030	25031	46061
F	8504	11480	19984	98	106	204	3	1	4	8599	11585	20184	13973	18826	32799
G	2831	6010	8841	14	55	69	1	2	3	2844	6063	8907	5569	11873	17443
H	131	509	640	1	5	6	0	0	0	132	514	646	323	1259	1583
TOTAL	153887	149462	303349	352	438	790	73	38	111	154166	149862	304028	139202	147928	287130
'D' EQIV.	138816	147391	286207	441	571	1012	55	34	89	139202	147928	287130			

**JOINT BOARD
TOTALS**

		01/04/2017	01/08/2017	Increase
TOTAL CHARGEABLE ENTRIES	North	153887	154166	279
	South	149462	149862	400
	Total	303349	304028	679
BAND 'D' EQUIVALENT	North	138816	139202	386
	South	147391	147928	537
	Total	286207	287130	923

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

Period : 1 April 2017 to 1 August 2017

Area	Total added	added < 3 months		added 3 to 6 months		added > 6 months	
North Lanarkshire	352	336	95.45%	12	3.41%	4	1.14%
South Lanarkshire	438	423	96.58%	8	1.83%	7	1.60%
LVJB totals	790	759	96.08%	20	2.53%	11	1.39%

Summary of Council Tax Proposals/Appeals received and dealt with as at 1 August 2017

Valid	Proposals/Appeals outstanding @ 1 April 2017	Proposals/Appeals received since 1 April 2017	Proposals/Appeals completely resolved 01/04/2017 to 01/08/2017	Outstanding balance
North Lanarkshire	18	10	11	17
South Lanarkshire	34	37	15	56
LVJB total	52	47	26	73

Invalid	Proposals/Appeals outstanding @ 1 April 2017	Proposals/Appeals received since 1 April 2017	Proposals/Appeals completely resolved 01/04/2017 to 01/08/2017	Outstanding balance
North Lanarkshire	23	34	38	19
South Lanarkshire	44	43	63	24
LVJB total	67	77	101	43

Combined	Proposals/Appeals outstanding @ 1 April 2017	Proposals/Appeals received since 1 April 2017	Proposals/Appeals completely resolved 01/04/2017 to 01/08/2017	Outstanding balance
North Lanarkshire	41	44	49	36
South Lanarkshire	78	80	78	80
LVJB total	119	124	127	116

Summary of resolution of Council Tax Proposals/Appeals Between 1 April 2017 and 1 August 2017

Valid	Proposals/Appeals completely resolved 01/04/2017 to 01/08/2017	Number withdrawn	Number abandoned	Number adjusted	Number dismissed by VAC	Number adjusted by VAC
North Lanarkshire	11	6	0	0	5	0
South Lanarkshire	15	14	0	0	1	0
LVJB total	26	20	0	0	6	0

Invalid	Proposals/Appeals completely resolved 01/04/2017 to 01/08/2017	Number withdrawn	Number abandoned	Number adjusted	Number dismissed by VAC	Number adjusted by VAC
North Lanarkshire	38	3	32	0	3	0
South Lanarkshire	63	0	59	0	4	0
LVJB total	101	3	91	0	7	0

Combined	Proposals/Appeals completely resolved 01/04/2017 to 01/08/2017	Number withdrawn	Number abandoned	Number adjusted	Number dismissed by VAC	Number adjusted by VAC
North Lanarkshire	49	9	32	0	8	0
South Lanarkshire	78	14	59	0	5	0
LVJB total	127	23	91	0	13	0

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	%
	July 2016	28	1.7%	36	2.8%	Nil	0.0%	64	1304	4.9%	July 2015	24	1472
August 2016	12	0.8%	46	3.1%	Nil	0.0%	58	1462	4.0%	August 2015	18	1342	1.3%
September 2016	16	1.1%	58	3.9%	Nil	0.0%	74	1489	5.0%	September 2015	45	1416	3.2%
October 2016	6	0.4%	42	3.0%	Nil	0.0%	48	1403	3.4%	October 2015	49	1420	3.5%
November 2016	26	1.8%	50	3.4%	Nil	0.0%	76	1461	5.2%	November 2015	36	1375	2.6%
December 2016	19	1.3%	40	2.8%	Nil	0.0%	59	1450	4.1%	December 2015	20	1505	1.3%
January 2017	27	1.9%	29	2.0%	Nil	0.0%	56	1450	3.9%	January 2016	20	1379	1.5%
February 2017	12	0.9%	27	2.0%	Nil	0.0%	39	1318	3.0%	February 2016	29	1358	2.1%
March 2017	19	1.3%	52	3.4%	Nil	0.0%	71	1514	4.7%	March 2016	37	1481	2.5%
April 2017	10	0.8%	40	3.0%	Nil	0.0%	50	1322	3.8%	April 2016	29	1350	2.1%
May 2017	0	0.0%	46	3.0%	Nil	0.0%	46	1513	3.0%	May 2016	37	1397	2.6%
June 2017	5	0.3%	29	2.0%	Nil	0.0%	34	1449	2.3%	June 2016	62	1382	4.5%
Averages for 12 months	15	1.1%	41	2.9%	Nil	0.0%	56	1428	3.9%		34	1406	2.4%