

INTERIM ASSESSOR'S ANNUAL PERFORMANCE REPORT TO THE LOTHIAN VALUATION JOINT BOARD

14th June 2021

1.0 PURPOSE

- 1.1 To provide members with an overview of current service delivery, priorities, risks and future direction.
- 1.2 This report accompanies the 2020/2021 unaudited accounts allowing consideration of organisational performance and budgetary outcome. The statistical performance information provided reflects upon the statutorily defined elements of the Assessor and ERO's key service delivery areas. Comment is also provided on other aspects of organisational activity.
- 1.2 It should be noted that the majority of staff remain working at home during current Covid restrictions. There are however a very limited number of staff attending the office to deal with tasks that cannot be done from home. Valuation staff attend the office on a strictly limited basis to access paper files and deal with a small number of tasks that cannot be done from home.

2.0 ELECTORAL REGISTRATION – MAINTENANCE

- 2.1 This has coincided with the recent Scottish Parliamentary Election.
- 2.2 Regarding the recent Scottish Parliamentary Election, I am pleased to say that everything went well on the day. We received c.70 emergency proxies on the day of the election which were all dealt with. There had been some concern that we would receive large numbers of these on the day of the election, but it transpired not to be the case.
- 2.3 The position regarding total electorate as at 28th April for the 4 constituent councils is shown below.

Constituent Council	28 April 2021 Eligible Electorate	28 April 2021 Eligible Electorate with a postal vote	Percentage of 28 April electorate with a postal vote as at 28 April	Number of prisoners	Number of "M" Electors incl prisoners
City of Edinburgh	401,321	102,021	25.42%	1	41133
East Lothian	87,227	23,216	26.62%	0	2659
Midlothian	74,919	18,233	24.34%	0	2493
West Lothian	144,306	31,499	21.83%	0	7056
Total	707,773	174,969	24.72%	1	53341

2.4 The tables below show canvass return rates 20/21 and voter numbers in July 20 as against June 21 for all the constituent councils by ward.

City of Edinburgh Council	Canvass Return Stats	Total Electors	Young Electors	Total Electors	Young Electors
WARD	Return Rate (%)	1st July 2020	1st July 2020	1st June 2021	1st June 2021
1. Almond	88.05	27356	333	27518	448
2. Pentland Hills	84.77	24410	283	24711	428
3. Drum Brae/ Gyle	89.04	18977	213	18950	273
4. Forth	81.1	24776	214	25016	316
5. Inverleith	87.64	25159	250	25157	291
6. Corstorphine/ Murrayfield	90.46	19829	211	19867	287
7. Sighthill/ Gorgie	76.13	23812	102	23972	195
8. Colinton/ Fairmilehead	89.89	19479	270	19552	350
9. Fountainbridge/ Craiglockhart	80.84	18596	173	18896	175
10. Morningside	83.47	26130	290	26195	375
11. City Centre	71.28	23373	96	24364	114
12. Leith Walk	79.19	26645	90	27218	125
13. Leith	80.69	19284	98	19464	134
14. Craigmillar/ Duddingston	82.57	24238	155	24450	176
15. Southside/ Newington	81.33	25148	273	25245	271
16. Liberton/ Gilmerton	84.08	27612	221	28504	336
17. Portobello/ Craigmillar	82.59	24971	267	25699	350

Midlothian Council	Canvass Return	Total Electors	Young Electors	Total Electors	Young Electors
	Return Rate (%)	1st July 2020	1st July 2020	1st June 2021	1st June 2021
1. Penicuik	91.62	11236	97	11266	136
2. Bonnyrigg	92.25	14160	157	14267	260
3. Dalkeith	86.07	11210	98	11489	157
4. Midlothian West	87.6	12981	128	13390	155
5. Midlothian East	90.32	12218	136	12279	167
6. Midlothian South	88.74	12147	136	12494	172

West Lothian Council	Canvass Return	Total Electors	Young Electors	Total Electors	Young Electors
	Return Rate (%)	1st July 2020	1st July 2020	1st June 2021	1st June 2021
1. Linlithgow	92.99	12429	187	12496	239
2. Broxburn, Uphall and Winchburgh	88.83	16301	193	16500	217
3. Livingston North	88.85	18147	242	18289	291
4. Livingston South	87.52	18709	266	18979	321
5. East Livingston and East Calder	87.3	17322	193	17769	205
6. Fauldhouse and the Breich Valley	86.63	12497	160	12638	191
7. Whitburn and Blackburn	84.31	16590	158	16929	224
8. Bathgate	87.86	18030	230	18122	285
9. Armadale and Blackridge	87.32	12875	177	13146	234

East Lothian Council	Canvass Return	Total Electors	Young Electors	Total Electors	Young Electors
	Return Rate (%)	1st July 2020	1st July 2020	1st June 2021	1st June 2021
1. Musselburgh	88.44	16852	156	16713	199
2. Preston, Seton and Gosford	90.67	14956	150	15101	194
3. Tranent, Wallyford and Macmerry	88.58	15133	179	15369	258
4. North Berwick Coastal	88.66	11606	176	12169	237
5. Haddington and Lammermuir	88.08	15243	184	15853	233
6. Dunbar and East Linton	88.48	11958	165	12386	242

3.0 ELECTORAL LEGISLATION – ELECTIONS

- 3.1 There is currently one by-election to be held in the coming months for Ward 5 in West Lothian, East Livingston / East Calder. As yet no date has been set for the by-election itself to be held.

4.0 ELECTORAL REGISTRATION ENGAGEMENT

- 4.1 Whilst face-to-face engagement opportunities have been curtailed due to ongoing coronavirus restrictions, my office has continued to work in partnership with various groups and constituent councils to draw attention to the importance of participating in the democratic process. Although restrictions have provided a challenge, they have also presented opportunities to work innovatively, exploring new avenues of engagement, particularly with underrepresented sections of the electorate.

4.2 Schools

One of the main thrusts of the engagement role is promoting voter registration in schools across the Lothians. With the introduction of legislation allowing all 14-15 year olds to register to vote, there was an increase in the amount of unregistered school pupils that appeared on school lists provided to us by constituent councils and independent schools at the start of the school year. Using the data mining program 12,738 Invitation to Register (ITR) forms were issued to school pupils that were not registered or not identified during the annual household canvass.

Additionally, the Electoral Commission provided engagement tools and workshops that were disseminated to schools providing resources and advice for how they can help young people engage in democracy. This office also worked in partnership with teachers and pupils at Lasswade High School to create a video promoting voter registration ahead of the Scottish Parliament election – the video is available on the Lothian Valuation Joint Board website.

For details of school pupil's registration rates across all four constituent councils and independent schools from across the Lothians see the tables below: -

Table 1: Total number of school pupils, 14 years old or over (on 1 December 2020), registered to vote by local authority or independent schools – correct as at 6 May 2021

Local Authority	No of Pupils	Registered	% Registered	% Increase
City of Edinburgh	12183	9435	77.44	29.95
East Lothian	3771	2986	79.18	31.55
Midlothian	3164	2294	72.50	30.72
West Lothian	6864	5328	77.62	29.05
Independent Schools	3833	3462	90.32	30.70
TOTAL	29815	23505	78.84	30.11

Table 2: Total number of school pupils, 16 years old or over on 6 May 2021, registered and eligible to vote in Scottish Parliament election by local authority or independent schools – correct as at 6 May 2021

Local Authority	Eligible for SPE	Registered	% Reg @ 6 May
City of Edinburgh	6580	5600	85.11
East Lothian	1965	1718	87.43
Midlothian	1576	1280	81.22
West Lothian	3578	3154	88.15
Independent Schools	2245	2113	94.12
TOTAL	15944	13865	86.96

4.3 Foreign Nationals

A further change in legislation extended voting rights to all foreign nationals with leave to enter or remain, living in Scotland, at Scottish elections. To reach this newly enfranchised group an insert was included in all initial paper canvass communications informing foreign citizens that they are now eligible to register to vote, directing them to the online registration website.

This office worked in partnership with ReAct Refugee Action Scotland, an organisation that assists the resettlement and integration of refugees in Scotland, to create a video promoting voter registration in the refugee community. The video provided an explanation of how to register to vote, which elections foreign citizens are eligible to vote in and how to cast their vote at an election. Whilst this office is primarily concerned with registration within the Lothian region, the video was disseminated across Scotland and was used as part of a suite of voter registration resources collated in conjunction with the Electoral Commission and the Scottish Refugee Council's project to promote voter registration in refugee communities.

For details of registration rates of foreign nationals across all four constituent councils see the table below: -

Table 3: Number of foreign citizens registered to vote by local authority

Local Authority	EU Member State Citizens	Non-EU/Commonwealth Foreign Citizens	Total Non-Commonwealth Foreign Citizens
City of Edinburgh	43,218	4,330	47,548
East Lothian	3,000	200	3,200
Midlothian	2,718	164	2,882
West Lothian	7,502	275	7,777
TOTALS	56,438	4,969	61,407

4.4 Universities

Fresher's Fairs scheduled for September at all four Universities were either cancelled or moved online, with Universities concentrating on promotion of internal societies and groups.

In place of the fairs that we would normally attend voter registration was promoted in the student population through: -

- Web banners on Napier and Queen Margaret Universities Student Association websites.
- Advertising in various Freshers' Information publications.
- Students Association social media channels.
- An E-mail issued to all students appearing on lists provided by each of the universities, inviting those who had not already done so to register to vote via the gov.uk website.
- Providing support and advice to Student Associations running voter registration campaigns ahead of the Scottish Parliament election.

4.5 Other Engagement Activities

Throughout the year a range of other engagement activities are carried out in order to further support the overarching commitment to provide a complete and accurate Electoral Register, examples of these activities are detailed below: -

- Household Notification Letter issued to all households listing names of all registered electors and their absent voting status ahead of the Scottish Parliament election.
- TV and social media campaign to promote postal and proxy vote application options as well as the safety measures that were in place at polling stations ahead of the Scottish Parliament election.
 - Key message – “Plan today so you can vote in May”
- Home movers identified and ITRs issued using the data mining program – approx. 21,000 ITRs issued during the reporting period.
- Promotion of annual household canvass around key dates on social media. Messaging was amplified through constituent council's social media channels.
- Increased social media activity around key dates for Local Government by-elections taking place throughout the year, working in partnership with constituent councils' communications departments to co-ordinate messaging.

Turnout figures for each of the by elections were as follows: -

 - City of Edinburgh Ward 14 – Craigentiny/Duddingston = 31.6%
 - West Lothian Ward 4 – Livingston South = 30.2%
 - Midlothian Ward 5 – Midlothian East = 35.8%

5.0 VALUATION ROLL – MAINTENANCE

- 5.1 At the April board meeting I reported on the full year 20/21 figures regarding amendments to the valuation roll. The performance figures for the year in relation to KPI targets are shown below for 20/21.

Year	20/21	19/20	18/19	17/18	16/17
% Within 3 Months	53.42%	67.39%	57.86%	63.10%	47.15%
KPI Target	65.0%	70.0%	70.0%	70.0%	50.0%

As can be seen in 20/21 there was a dip in the performance level achieved compared to the previous year. The performance level achieved has dropped compared to 19/20, this is not unexpected taking account of all the issues surrounding the Covid-19 pandemic particularly during the first national lockdown.

- 5.2 For the period covering 01/04/21 to 31/05/21, 221 alterations have been made to the valuation roll with respect to running roll activities. These changes comprised 51 amendments to existing entries, 119 deletions, 51 inserts and c.450 name changes.

It perhaps should be noted that of these changes 85 related to self-catering units, 55 deletions and 30 inserts.

In the same period in 20/21, 179 alterations were made to the valuation roll 65 of which related to SCU's, however there were more inserts than deletions, 38 inserts and 27 deletions.

	Edinburgh	Midlothian	W. Lothian	E. Lothian	Total
Inserts	33	10	4	4	51
Deletions	101	3	5	10	119
Amendments	31	5	9	6	51

- 5.3 As lockdown has eased limited external inspections of properties has now restarted. This should assist with the resolution of many of the remaining Revaluation appeals and running roll in general. Staff do continue to undertake necessary actions in the many cases using plans and information provided in the form of photos, videos and any suitable and appropriate online resource.
- 5.4 Internal survey of property is still on hold, with one or two exceptions for particular reasons, at the current time. Realistically I don't expect that this will change in the short term. Until the current lockdown measures are relaxed further this position is unlikely to change.

6.0 VALUATION ROLL – APPEALS

- 6.1 There are currently 764 outstanding 2017 Revaluation appeals. 461 of these have been cited for hearings in June. There are in total 17,288 outstanding running roll appeals of which 16,012 relate to Covid. Central discussions between the SAA and agents are still ongoing. Of these 16,012 appeals c.9,700 have a disposal date, as it currently stands, of 31/12/21.
- 6.2 These appeals, again as it currently stands, must be cited for hearing for a date prior to the 31/12/21 and citations must be issued before the end of June. Plans are in place to do so. Representations have been made to the Scottish Government regarding the current appeal timetable, by the SAA and, I believe, from ratepayer’s representatives, that the current disposal date is unrealistic and a further extension to the timetable should be considered. As yet no decision has been taken regarding this and I am working on the assumption that this will not change, although from a purely personal perspective I believe the timetable will be extended. This number of outstanding running roll appeals is unprecedented and is reflected throughout Scotland. It is still unclear what the final resolution will be regarding these appeals, but it will add a substantial extra amount of work during this period.
- 6.3 One other point to make the Board aware of is that there is the potential that requests may have to be made to the Local Valuation Appeal Committee for these appeals, or certainly a number of them, to be referred to the Lands Tribunal. I’m hopeful that will not be the case but if it does transpire that this course of action is required it will present a financial risk to the board. It is unquantifiable at the current time as to the numbers of referral requests that potentially could be required, but the Board should be aware of the potential for such a course of action to be taken. I have arranged to meet the secretary, Chairperson and Vice Chairperson of the Valuation Appeal Committee on June 15th to discuss these matters in more detail and get some clarity from the committee as to their position regarding this. One piece of good news is that I believe the VAC are to begin having physical hearings from September. This will undoubtedly help to resolve many of the outstanding Revaluation appeals.

7.0 VALUATION ROLL – NDR REFORM

- 7.1 The creation of the Valuation Service Team, part of the Transformation programme Phase 2, which involves the reforming of existing resources in a more effective and efficient fashion, and aimed at supporting the Valuation Roll function, continues to move forward.
- 7.2 Additional in-house software projects are in development to assist with NDR reform. These should improve the valuation and appeal processes of the 2023 Revaluation. Planning for the 2023 revaluation has begun.

8.0 COUNCIL TAX – MAINTENANCE

8.1 Over the period 1st April 2020 to 31st March 2021, 4,637 new houses were added to the list, this compared to 6,011 for the same period in 2019/20. A more detailed breakdown by Council area was reported at the April Board meeting.

8.2 The performance against the KPI is shown below.

Year	20/21	19/20	18/19	17/18	16/17
% Within 3 Months	84.90%	91.21%	93.75%	95.93%	93.86%
KPI Target	95.0%	95.0%	95.0%	95.0%	95.0%

8.3 As can be seen there has been a drop in performance level as compared to previous years. The Covid-19 pandemic has had a large effect on property in general and this is clearly reflected in the statistics above.

8.4 The number of new houses entered on the valuation list between 01/04/21 and 31/05/21 are shown below. The figures for the same period in 2020 are shown for comparison.

	01/04 – 31/05/21	01/04 – 31/05/20
Edinburgh	398	255
Midlothian	160	40
West Lothian	139	32
East Lothian	154	80
Total	851	407

8.5 There are currently c.200 outstanding Council Tax appeals. These are being dealt with subject to the limitations imposed by the pandemic. With the restart of physical hearings by the VAC planned for September this should assist in the resolution of some of these appeals. It should be noted that current restrictions do make resolution of council tax appeals more difficult.

9.0 COVID – UPDATE

9.1 Staff continue to follow Government advice and are in the main working from home. I do have a limited number of staff attending the office daily to deal with a variety of matters that cannot be carried out from home.

9.2 I have issued a staff questionnaire to staff regarding a blended return to office/home working in anticipation of further lockdown easing as the year progresses. A draft Working from Home Policy has been written and initial discussions have taken place with staff representatives. A review of how flexitime will work in the future is also planned.

10.0 Governance Strategy Group

10.1 A further meeting of the Governance Strategy Group was held on the 1st June 2021. In attendance were myself, LVJB Head of Governance, Councillors Key, Russell and Goodfellow. Topics discussed were the recent SP election, an update on an IT project relating to NDR reform, a change as to how Council Tax processing will take place and an update on plans for moving to a blended approach of home and office working when easing of restrictions allow. I personally find the meetings to be very productive and provide insight to Board members on the operations of LVJB.

11.0 Budget Report

11.1 I note the content of the unaudited accounts for 20/21. I have provided a management commentary to the Treasurer's report. I am pleased that the accounts for 20/21 have come in on budget.

12.0 RECOMMENDATION

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

Gary Elliott
INTERIM ASSESSOR & ERO