

Item 8

PERFORMANCE UPDATE

1.0 INTRODUCTION

The purpose of this report is to update members on current service delivery, priorities and issues

2.0 ELECTORAL REGISTRATION

2.1 Annual Household Canvass

The 2018 Household canvass is currently ongoing and shall conclude in advance of the Register publication date of 1st December 2018.

The table below indicates the canvass form return rate as at 15th October.

Council	Initial HEFs Issued	HEFs Returned	%
Edinburgh	245,736	17,128	69.64%
East Lothian	47,818	38,292	80.08%
Midlothian	40,602	31,771	78.25%
West Lothian	79,640	59,574	74.80%
LOTHIAN REGION	413,796	300,765	72.68%

At this stage the current prediction is for a modest increase in the return rate by comparison to the 2017 canvass where a rate of 74% was achieved.

Of the returns received by the 15th October, 143,862 were in paper format, 147,958 were received by electronic means and 8,945 were gathered as part of the canvasser door knock activity.

As an additional activity we issued 43,586 email reminders following the final issue of paper reminders.

Return of canvass forms can give rise to the issue of Invitation to Register forms (ITR). During this year's canvass we have posted 32,752 ITR's, emailed an additional 8,480, followed up with 37,899 1st and 2nd paper reminders, and 547 email reminders.

The current Absent Vote list stands at 124,011 which is slightly down from the 1st December 2017 position of 127,725.

2.2 Elector Engagement

Elector engagement is an essential activity throughout the year. Engagement activities draw attention to the accessibility of the registration process with a particular focus to direct electors through the on-line registration process. During the annual household canvass period additional emphasis is placed on the importance to return the Household Canvass Form.

Following the launch of a redesigned LVJB web site, www.lothian-vjb.gov.uk, a new twitter feed has been created in order to provide information and access to registration information through social media. This shall provide an additional platform for electors to engage with the organisation.

Noted below are some of the recent engagement activities undertaken;

- Registration events held at various locations in each of the four council areas to allow people to return Household Enquiry Forms and check if they are registered.
- Attendance at Edinburgh University's 'Welcome Week Expo' & at Pollock Halls to register new students and promoter voter registration.
- Attendance at Queen Margaret University matriculation event to register new students.
- Social media advertising through constituent Councils Corporate Communications departments to encourage return of Household Enquiry Forms.
- Attendance at Citizenship Ceremonies to register newly qualified electors.
- Over 12,000 ITR's issued to new Council Tax Payers using Data Mining program.
- Promotional materials on display as part of Museum of Edinburgh's exhibition 'Their Work Is Not Forgotten' celebrating the centenary of women's suffrage.

2.3 Service Priorities

- Conclude the annual household canvass, process all returned information as necessary.- Publish the revised Electoral register on 1st December 2018.
- Continue processing all applications received, such as registration forms, absent vote applications etc.
- Continue doorstep activity in respect of outstanding ITR's
- Carry out absent vote signature refresh
- Continue with elector engagement activities
- Continue contingency planning for major electoral event
- Continue to assess and model the impact of proposed new canvass process

3.0 COUNCIL TAX

Noted below is information, covering the period 1st April to 15th October, in respect of activity on the Council Tax List.

1 st April 2018 to 15 Oct 2018	Inserts	Amends	Deletions
Edinburgh	1,789	118	366
Midlothian	361	8	10
West Lothian	484	20	16
East Lothian	382	22	36
LOTHIAN REGION	3,016	168	428

The current performance indicator for new house inserts is as follows, 94.43% within 3 months, 4.77% within 3 to 6 months, and 0.8% greater than 6 months.

During the period 1st April to 30 September 2018, 122 bandings were altered following Point of Sale consideration. These are instances where additions to existing dwellings are deemed sufficient to alter the council tax band with the alteration coming into effect at the point the dwelling is subsequently sold.

The Council Tax service priorities are;

- Continue to update the Council Tax list in respect of new builds, demolitions, splits and mergers
- Continue to monitor point of sales.
- Continue to dispose of Council Tax appeals
- Continue to monitor domestic building warrant material
- Continue with the introduction of wireless field technology to domestic survey activity.

4.0 NON-DOMESTIC RATING – THE VALUATION ROLL

4.1 2017 Revaluation Appeals

Disposal of 2017 Revaluation appeals continues to dominate the workload of professional staff within the organisation.

During the period 1st April to 15th October 2018 4,395 appeals have been dealt with and by the end of the year this shall have risen to circa. 6,000. This shall represent approximately 46% of the total number of appeals received.

Following recent discussions with the secretary of the Valuation Appeal Committee agreement has been reached in respect of the 2019 appeal citation diet. It is anticipated that the target of 75% to 80% appeal disposal by December 2019 shall be achieved.

All Revaluation appeals, if not referred to the Lands Tribunal, require to be disposed of by 31st December 2020.

The tables below provide further information on revaluation appeal disposal.

1 APRIL 2017 TO 15 OCTOBER 2018	Total Appeals Received (2017 RV)	Total Appeals Closed	% of Total Appeals Received Closed	Number of Appeals Withdrawn or Dismissed	% of Appeals Withdrawn	Number of Appeals Adjusted	% of Appeals Adjusted
Edinburgh	8,343	2,887	34.6%	2,368	82.0%	519	18.0%
Midlothian	1,059	238	22.4%	150	63.0%	88	37.0%
West Lothian	2,499	821	32.8%	686	83.5%	135	16.5%
East Lothian	1,107	449	40.5%	388	86.4%	61	13.6%
LOTHIAN REGION	13,008	4,395	33.8%	3,592	81.7%	803	18.3%

1 APRIL 2017 TO 15 OCTOBER 2018	Shops	Offices and Car Parking	Industrials	Other Types
Edinburgh	715	1,716	132	324
Midlothian	99	26	105	8
West Lothian	139	367	288	27
East Lothian	137	127	153	32
LOTHIAN REGION	1,090	2,236	678	391

4.2 2017/2018 Valuation Roll- Running Roll

Valuation Roll is subject to annual alteration to reflect new property inserts, amendments to existing properties and deletions.

Achieving the correct balance of available resources between this activity and revaluation appeal disposal is an ongoing challenge for the organisation. Investigations have commenced to ascertain in what way internal processes and resource allocation can be improved in order to better support these competing activities.

The table below provides information on Valuation Roll alteration activity.

1 April 2018 to 15 Oct 2018	Inserts	Amends	Deletions
Edinburgh	499	639	366
Midlothian	35	49	31
West Lothian	79	181	143
East Lothian	78	77	24
LOTHIAN REGION	691	946	564

The current performance associated with this activity is as follows, 72.41% in less than 3 months, 23.38% in 3 to 6 months, and 4.21% greater than 6 months.

Running Roll activity can give rise to further appeal activity. The table below indicates the volume of appeals received and dealt with as a result of running roll activity during the period 1st April 2017 to 15th October 2018. The legislative deadline for disposing of these appeals is 31st December 2020. In many cases where both a revaluation appeal and running roll appeal exist for the same property they shall be dealt with at the same time.

1 APRIL 2017 TO 15 OCTOBER 2018	Total RR Appeals Received (2017 RV)	Total Appeals Closed	% of Total Appeals Closed	Number of Appeals Withdrawn or Dismissed	% of Appeals Withdrawn or Dismissed	Number of Appeals Adjusted	% of Appeals Adjusted
Edinburgh	763	168	22.0%	111	66.1%	57	33.9%
Midlothian	77	7	9.1%	2	28.5%	5	71.5%
West Lothian	237	68	28.6%	53	77.9%	15	22.1%
East Lothian	65	9	13.8%	8	88.9%	1	11.1%
LOTHIAN REGION	1,142	252	22.1%	174	69.0%	890	31.0%

5.0 FINANCIAL STATEMENT

5.1 Budget 2018/2019 Projected Outturn

The Treasurer's report indicates a projected budget out turn of an under spend of £103k. This has mainly resulted from the recruitment process undertaken following the recent organisational restructuring.

5.2 Reserve Fund

The Board holds a reserve fund, originally created to provide financial support to the Boards policy on early voluntary release. It is now agreed that this fund should be used to provide mitigation against future financial risks facing the Board subject to an ongoing review and assessment of the severity of risk faced.

The Treasurers report provides detail and quantification where possible on the current risks facing the Board. The Board shall be required to make both a decision on the allocation of the 2018/19 budget outturn and the general level of reserve fund to be maintained within 2019/20 at a future meeting.

As has been indicated the Board faces considerable pressure both from uncertainty resulting from changing service delivery requirements and the ongoing fiscal constraint in respect of available funding for local authorities.

5.3 3/5 Year Organisational Strategy

A recent recommendation from the external Auditors is that a 3 to 5 year organisational strategy be developed that provides an indication of future service delivery direction, acknowledging the challenges faced, in conjunction with an assessment of the financial support required to sustain the identified service requirements over the strategy period.

Accordingly the proposed strategy shall be developed by the Assessor and Treasurer and presented to the Board for consideration.

6.0 GOVERNANCE

6.1 Internal/External Audit Update

During 2018/19 both City of Edinburgh Internal Audit and Scott Moncrieff, External Auditors were active within the organisation. The recommendations identified within the resulting audit reports were highlighted to the Board at its meeting on the 3rd September 2018.

The following is an update on progress made on those recommendations;

Audit Review of Data & Records Management Framework indicated 3 significant risks and 19 moderate risks. Of the significant risks 2 have now been dealt with and the remaining one is on target for completion within the agreed timescale. Of the moderate risks 10 have been concluded, the remaining 9 are within timescale for completion.

Audit Review of Business Rates Assurance Framework indicated 8 medium and 2 low risks. In respect of the medium risks 3 are now complete, 7 are within agreed timescale for completion.

External audit identified 2 moderate risks both of which are currently under action and shall be completed within the agreed timescales.

6.2 Governance Group Meeting with Key Stakeholders

The Governance Group held its first external meeting with key stakeholders on 24th October. The meeting was provided with updates on actions arising from internal/external audit activity, risk registers, the progress of projects arising from the ongoing Transformation Programme, and monthly quality assurance activities.

Attendees also discussed how future meetings should be structured and the reporting of governance matters to the Board.

7.0 RECOMMENDATION

The Board is requested to note the content of this report.

Graeme Strachan
ASSESSOR & ERO