

HIGHLAND AND WESTERN ISLES VALUATION JOINT BOARD

23 September 2024

Agenda Item	5
Report No	VAL/11/24

Departmental Report

Report by the Assessor and Electoral Registration Officer

Summary

This report outlines the main business of the office of the Assessor and Electoral Registration Officer (ERO) since the last meeting of the Board.

1. General

The business for the valuation section since the last meeting of the Board has involved, the continued audit of self-catering subjects, the disposal of revaluation proposals and the remaining legacy 2017 appeals. The main business for electoral staff has been work on the UK Parliamentary General Election (UKPGE) which was held on 4 July 2024. Following the completion of the election processes staff have now turned to work on the annual canvass.

2. Electoral Registration

On 4 July 2024 a snap UK Parliamentary General Election was held under new Elections Act legislation. Changes in legislation and the timing of the election resulted in staff working excessive hours. This was in part due to prearranged annual leave with a shortage of staff but also complexities in the legislation changes and new government systems which had not been tested to any great extent in Scotland. Since delivery of the election a report has been sent to the Ministry of Housing, Communities & Local Government (MHCLG) on difficulties faced with the new ERO Portal which electors can use to apply for Voter Authority Certificates, postal or proxy voting or to vote as an Overseas Elector. A feedback meeting was held on 16 August 2024 with a research company on the use of the ERO Portal to establish how improvements can be made.

Given the complexity of the election, which included cross-boundary working for the first time with Argyll & Bute and Moray Councils, there was a total of seventeen clerical errors. Electoral administrators will look at each of these clerical errors to identify any potential training issues. Delivery of the election was achieved largely through the dedication and hard work by staff at all levels. Staff should be commended for all their efforts.

A by-election in Ward 4 (Na Hearadh) was held on 4 July 2024. This was a well-run election with no clerical errors. By-elections will be held on 26 September 2024 in Ward 6 (Cromarty Firth) and Ward 14 (Inverness Central).

Electoral and Central Admin staff have been carrying out public engagement events at various venues since the beginning of August 2024. These are detailed below:

Venue	Date
Black Isle Show (with Highland Council Elections Team)	1 August 2024
UHI Thurso (Freshers Fayre)	28 August 2024
UHI Stornoway (Freshers Fayre)	29 August 2024
UHI Thurso (Freshers Fayre)	3 September 2024
UHI Ainess (Freshers Fayre)	4 September 2024
UHI Stornoway (Freshers Fayre)	5 September 2024
UHI Inverness (Freshers Fayre)	12 September 2024
UHI Inverness (Student Support Day)	25 September 2024

The annual canvass of electors commences on 9 September 2024. The results of local and national data matching are noted below, with a comparison carried out with 2023 results. Information on the number of canvass communications issued compared to 2023 has also been provided.

National data matching involves checking of information on existing electors on the register using name, address, UPRN (where information is held) and date of birth (if held) against data held by the Department for Work and Pensions. This match allows the ERO to identify properties where the household composition may have changed. This information is then used to determine which type of communication each property should receive. Route 1 is the matched property route, with route 2 being the unmatched property route.

Due to the Cyber Security incident in 2023 in Western Isles local data was unavailable for data matching purposes. Self-catering return information was used as part of the local data matching exercise.

2024 – National Data Match results

Route	National data match result (properties)
Route 1	92,110
Route 2	54,225

2023 – National Data Match results

Route	National data match result (properties)
Route 1	92,260
Route 2	52,527

2024 – National and Local Data matching results by %

	National data matching	Local data matching
Elector level	82.81%	92.08%
Property level	62.95%	76.55%

2023 – National and Local Data matching results by %

	National data matching	Local data matching
Elector level	82.86%	92.92%
Property level	63.72%	77.32%

Number of forms issued

Communication Type	2023	2024
CCA	111,942	112,032
CCB	32,526	TBC
Canvass form	22,948	34,125
Route 3 properties	309	199 *

*reduction in figures due to NHS not responding to requests for information in 2022 and 2023 (to be Route 2 properties in 2024).

3. Valuation for Rating

Staff are working through the 2023 Revaluation proposals, while the legacy 2017 running roll appeals are making their way through the appeals system, with significant numbers of disposals prior to the Tribunal hearing dates, either by settlement or withdrawal. The next Tribunal hearing is scheduled for 8 October, with another following on 11 November – these hearings should conclude the 2017 legacy cases which require to be disposed of by 31 December 2024.

In respect of the 2023 Revaluation proposals, Highland and Western Isles are currently taking the national lead on visitor attractions and hostels, with proposal determination dates (PDDs) set for the end of September and mid-November respectively. This is in addition to the joint lead taken alongside Tayside VJB on self-catering units, salmon fishing rights and shooting rights and deer forests, as reported previously.

PDDs have now been set for November and December 2024 in respect of the outstanding proposals for shops and offices. At the time of writing, all valuation staff are engaged with the shops proposals, as responses in the form of written statements require to be submitted to proposers or their agents no later than 70 days prior to the PDD (the PDD being the date by which the Assessor's detailed final decision notice must be issued).

While these two categories of subjects constitute a significant proportion of the 2023 caseload, proposal work will continue to be given priority over the next 12 months in the run-up to the statutory disposal date of 30 September 2025.

Senior valuation staff have recently attended meetings of the various Scottish Assessors' Association standing committees and working groups, with more scheduled over coming weeks. Items covered have included progress made on 2023 proposals and initial preparations for the 2026 Revaluation.

The second year of the self-catering audit (SCU audit), covering the year April 2023 to March 2024, is now well underway. Experience gained during the inaugural audit year, together with tailored IT system developments (SAA portal returns compatible with in-house system development) and changes to the regulations have contributed to improved progress and monitoring of the audit. To date, approximately 80% of audit forms have been issued, over seven batches. Initially, the return rate was between 83% and 86% for the first four batches, however this has tailed-off over the subsequent mail-outs.

The majority of returns have been approved with no further action required while numbers transferred to the Council Tax list have been relatively small, as have late returns (returns made after the 56 day statutory deadline).

Discussions have taken place with the Non-Domestic Rates team at Highland Council regarding the implications of the establishment of the Inverness and Cromarty Firth Green Freeport and any associated development, which is expected to be significant.

4. Council Tax

With the temporary redeployment of some technical and valuation staff to assist with Electoral matters in the run-up to the General Election, coupled with resources allocated to the SCU audit, there was a slight slow-down in the rate of new houses being added to the Council Tax list during the early to mid-summer. This work has now picked up again, particularly in respect of new housing schemes and we are witnessing a return to more typical levels.

There has been no Council Tax hearing before the First-tier Tribunal since the last Board meeting, however, we have recently received notification of four cases being listed for a hearing on 27 November 2024. This will be an online hearing, as with previous hearings.

5. Administration

Parts of the office file server have now moved to SharePoint and other parts are in the process of being moved. Both electoral and valuation staff are now using SharePoint and becoming familiar with its use. Any new categories of data are set up directly on SharePoint (rather than on the file server).

Meetings were held on 28 May and 10 July with ICT to discuss backup and cyber security procedures as part of disaster recovery. Other aspects of disaster recovery and plans for business continuity will be covered at a further meeting to be held shortly. SharePoint meetings are ad hoc as required. It is also intended to review cloud hosting with ICT later in the year.

Between 1 June and 31 August, the department received twelve complaints which all related to electoral registration and in particular, the UK Parliamentary General Election. Six of these complaints were either not upheld or resolved at stage 1. One complaint was dealt with as a stage one complaint but was escalated to stage 2. Five complaints were dealt with at stage 2 and were resolved. The final two complaints

were partially upheld. More information on these complaints can be found on the Board's website [[Complaints Reports](#)].

Due to the migration to the new CiA financial system in April 2024, budget upload on the new system has not been finalised by The Highland Council. It is hoped that a monitoring report and statement will be available for the November Board meeting.

Quotes have been received for a new logo for the department. An initial meeting has been held on the design brief and three designs will be presented in the coming weeks.

6. Staffing

There are presently four vacancies within the Inverness Office: two Valuers, a Field Officer and a Senior Clerical Assistant.

The Valuer posts have arisen following a retirement and the resignation of a recently qualified Valuer who has taken up a promoted post at another Valuation Joint Board. Due to nationwide difficulties in recruiting suitably qualified valuation staff many VJBs are moving to more flexible arrangements. Previously the Board's relative remoteness was seen as a barrier to the movement of newly qualified staff but post-Covid working patterns have changed this. The jobs market between VJBs has become very competitive and a review of gradings and structure should be carried out to ensure competitiveness in the current job market.

It has been noted that a number of the job titles in use do not reflect the work that staff now carry out. Two examples are Clerical Assistant/Typist and Field Officer. It became evident during the recent UK Parliamentary General Election that frontline staff were giving more complex advice than they previously had to as the legislation attached to electoral registration has become more complex. It would be an opportune time to review the Clerical Assistant posts in relation to, not only the job title, but the work that is carried out.

The job title 'Field Officer' stretches back to the days of Community Charges when surveys were limited. Field Officers are now expected to survey both domestic and non-domestic properties and as such the job title has become somewhat meaningless. It is proposed that the job title becomes 'Surveying Technician' and 'Senior Surveying Technician'

The Board have been made aware at recent meetings that there is no provision for the Board to access Occupational Health services as the new Highland Council agreement excluded the VJB. Following assistance from the Occupational Health, Safety and Wellbeing Manager at the Highland Council the appropriate paperwork has been lodged to allow the VJB access to join The Highland Council's provider on the same terms and costs.

7. Recommendation

The Board is invited to comment and otherwise note the recent activities of the department as set out in this report.

Designation: Assessor and ERO

Date: 9 September 2024

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