

Draft

Minute of Meeting of the Central Scotland Valuation Joint Board held within Hillside House, Stirling on Friday 22 November 2019 at 9.30 a.m.

Councillors: David Balfour (Convener)
Lorna Binnie
Douglas Dodds
Kenneth Earle
Gordon Hughes
Patrick Nimmo
Martha Benny

Officers: Brian Pirie, Assistant to the Clerk
Lynn Previn, Assistant to the Treasurer
Lindsay Sim, Treasurer
Jane Wanless, Assistant Assessor
Pete Wildman, Assessor and Electoral Registration Officer

VJB23. Apologies

Apologies were intimated on behalf of Councillors Alexander, Coombes, Mason, Thomson, Spears and Holden.

VJB24. Declarations of Interest

No declarations were made.

VJB25. Minute

The minute of the meeting held on 27 September 2019 was approved.

VJB26. Revenue Budget 2018/19 – Review as at 30.9.19

The Board considered a report by the Treasurer presenting the revenue budget position at 31 March 2020 together with the forecast year end out turn.

The projected outturn at 31 March 2019 was £127k below budget. The underspend was, in the main, due to a projected underspend of £141k in employee costs and £71k due to a delay in recruiting to the additional posts required for the Barclays Review. An overspend of £14k in supplies and services was also projected.

Decision

The Board noted the report.

VJB27. Records Management Plan – Progress Update Review

The Board considered a report by the Assistant Assessor presenting the Progress Update Report by the Public Records (Scotland) Assessment Team on the Board's Records Management Plan for comment.

The Board had agreed its Records Management Plan on 28 September 2018 (ref VJB23) and had been invited by the Keeper of the Records of Scotland to submit a progress update by 30 August 2019. The evaluation report had been received and was presented. The overall assessment had been that the Board continued to take its statutory obligations seriously and was working hard to bring all elements of its arrangements into compliance with its obligations. It was recommended that the Board consider publishing the update reports on its website as an example of best practice.

Following a question the Assessor confirmed that staff continued to use paper files where appropriate although the Service was working towards a paper free environment. This was easier for domestic properties compared to its non-domestic ones, which were more complex.

Moving to a paperless environment would require less space and this could generate savings when the lease for Hillside House was due to fall or be regenerated.

Following a question on the retention time for files, the Assistant Assessor confirmed that these depended on the type of file. For Council Tax files, for example, the retention period could be lengthy whereas for employee files the records would be destroyed following the period of employment. The Assistant Assessor undertook to provide the Board with details of the current retention schedule.

Decision

The Board noted the report.

VJB28. Interim Valuation Performance Report

The Board considered a report by the Assistant Assessor presenting Service performance information for the period 1 April 2019 to 30 September 2020.

The service performance indicators for Valuation Roll work and for Valuation List work were set out.

In regard to Valuation Roll work, which measured the period taken to change the Valuation Roll, 473 changes had been made during the period - of these 82% were amended within 3 months, 96% within 6 months and 1% took longer – against targets of 75%, 90% and 10% respectively.

In regard to the Valuation List work, the time taken to add houses to the Valuation List, 421 new entries were registered in the period, with 95% added within 3 months, 99% added within 6 months and 1% took longer – as against targets of 96%; 99% and 4% respectively.

It was noted that at this stage in the financial year all targets are being met or exceeded.

Decision

The Board noted the report.

VJB29. Valuation Team Appeals Report

The Board considered a report by the Assistant Assessor presenting the Valuation Team Appeals report.

The 2017 revaluation required the revaluation of approx. 11800 non domestic properties, with a rateable value of approximately £350m. Since the 2017 revaluation, 4571 appeals had been received (an increase on the 2010 revaluation). At 29 October 2019 79% had been disposed of, with 943 outstanding. All were required to be dealt with by the Valuation Appeals Committee by 31 December 2020.

In the Financial year to 30 September 2019 there had been 473 changes to the Valuation Roll. In the same period 92 running roll appeals had been received. In the same period 421 new entries had been made in the Council Tax List, the Valuation Team had disposed of 119 proposals and appeals.

In regard to the 2005 and 2010 Valuation Rolls there was 3 and 19 appeals outstanding respectfully. Outstanding appeals were referred to the Councils Tribunal (or in the case of 1 from 2010, the Lands Valuation Appeals Court). Such appeals were complex and substantial.

Decision

The Board noted the report.

VJB30. Disciplinary Policy Report

The Board considered a report by the Assistant Assessor presenting an updated Disciplinary Policy and Procedure for approval.

The Board's current policy and procedure dated from April 2000. The revised policy was based on that of Clackmannanshire Council and had been consulted upon with the Board's Staff Consultation forum.

The main revisions were in regard to:-

- Emphasis on the need for managers, in the first instance, to try to encourage improvement and use the informal route to address the problem before escalating the matter to the formal disciplinary procedures;
- Clearer and more detailed guidance on roles and responsibilities; and
- Introduction of 'Attendance Warnings' where an employee has exceeded the triggers points in the Maximising Attendance policy and Support and Guidance procedures have been exhausted.

There was no longer a requirement for all appeals against dismissal to be heard by the Appeal Committee of the Board.

Following a question on the general process of reviewing the Board's policies the Assessor explained that there had been a rolling programme for doing this. Where there were gaps new policies had been introduced. Following this the current policies, many of which had been in place for a number of years, had been reviewed, this being the oldest.

The Board also sought assurance in regard to the level of penalty for breach of data protection. The Assessor explained that the penalty would reflect the circumstances and nature of the information.

The Board welcomed the proposed revised policy. However following questions on the interaction of the Policy and the Board's Appeals Committee, asked the Assessor to review the proposed Policy and to bring it back to the next meeting, for further consideration.

Decision

The Board agreed to continue consideration of this item to the next meeting.