

Minute

Education, Leisure and Housing Committee

Wednesday, 10 September 2025, 09:30.

Council Chamber, Council Offices, School Place, Kirkwall.



Present

Councillors Gwenda M Shearer, Ivan A Taylor, Graham A Bevan, Stephen G Clackson, Alexander G Cowie, David Dawson, Steven B Heddle, James R Moar, Janette A Park, John A R Scott and Jean E Stevenson.

Teacher Representatives:

Jo Hill and Mary Maley.

Present via remote link (Microsoft Teams)

Councillor Heather N Woodbridge.

Clerk

- Sandra Craigie, Committees Officer.

In Attendance

- James Wylie, Director of Education, Communities and Housing.
- Peter Diamond, Head of Education.
- Erik Knight, Head of Finance.
- Alex Rodwell, Head of Performance and Business Support.
- Frances Troup, Head of Community Learning, Leisure and Housing.
- Georgette Herd, Principal Solicitor.
- Morag Miller, Service Manager (Primary Education) (for Items 1 to 10 and 12 to 17).
- Lesley Mulraine, Service Manager (Housing, Homelessness and Schoolcare Accommodation).
- Siobhan Wilks, Service Manager (Support for Learning and Inclusion).
- Laura Baillie, Team Manager (Housing Strategy, Development and Data) (for Items 1 to 5, 7 and 8).
- Cheryl Rafferty, Team Leader (Youth Services).
- Shaun Tulloch, Operational Manager (Early Learning and Childcare).

In Attendance via remote link (Microsoft Teams)

- Seonaidh McDonald, Principal, UHI Orkney (for Items 12 to 15).
- Julie Muir, Head Teacher, Westray Junior High School (for Items 8 and 9).
- Christine Scott, Finance Manager, UHI Orkney (for Items 12 to 15).

Observing

- Wendy Bowen, Quality Improvement Officer (Attainment and Achievement).
- Katie Lucas, Head Teacher, St Andrews Primary School (for Items 5 to 10).
- Andrew Hamilton, Service Manager (Resources).
- Jane Partridge, Service Manager (Secondary and Tertiary Education).
- Jessica Nicolson, Nursery Manager, Dounby Primary School (for Items 5 to 10).
- Nigel Fyffe, Team Manager (Maintenance and Heritage).
- Kirsty Groundwater, Team Leader (Communications) (for Items 1 and 2).
- Ashley Gillespie, Senior HR Advisor.

Apologies

- Reverend Susan Kirkbride, Religious Representative.
- Reverend Fraser Macnaughton, Religious Representative.

Declaration of Interest

- Councillor Steven B Heddle – Items 13, 14 and 15.

Chair

- Councillor Gwenda M Shearer.

1. Exclusion of Public

On the motion of Councillor Gwenda M Shearer, seconded by Councillor Ivan A Taylor, the Committee resolved that the public be excluded from the meeting for consideration of Item 2, as the business to be considered involved the disclosure of exempt information of the classes described in the relevant paragraphs of Part 1 of Schedule 7A of the Local Government (Scotland) Act 1973 as amended.

2. Strategic Housing Investment Plan

Under section 50A(4) of the Local Government (Scotland) Act 1973, the public had been excluded from the meeting for this item on the grounds that it involved the disclosure of exempt information as defined in paragraphs 6 and 9 of Part 1 of Schedule 7A of the Act.

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and hearing a report from the Head of Community Learning, Leisure and Housing, the Committee:

Noted:

2.1. That the proposed Strategic Housing Investment Plan included proposals for affordable housing and mixed tenure housing developments with a vision for 10 years, with a view to achieving a longer-term commitment from Scottish Government to support funding for housing in Orkney.

2.2. That the ambitious housing programme continued to require a strategic and assertive project management approach from the Council, as the Strategic Housing Authority, across all relevant Council services to enable all suppliers to deliver the programme.

The Committee resolved to **recommend to the Council**:

2.3. That the Strategic Housing Investment Plan for the period 2026/27 to 2030/31, attached as Appendix 1 to this Minute, be approved for submission to the Scottish Government.

3. Devolved School Management

After consideration of a report by the Director of Education, Communities and Housing, together with an Equality Impact Assessment and an Island Communities Impact Assessment, copies of which had been circulated, and after hearing a report from the Head of Education, the Committee:

Resolved to **recommend to the Council** that the Orkney Education Service Scheme of Devolved School Management, attached as Appendix 2 to this Minute, be approved.

4. Community Learning and Development Partners Plan

After consideration of a report by the Director of Education, Communities and Housing, together with an Equality Impact Assessment and an Island Communities Impact Assessment, copies of which had been circulated, and hearing a report from the Head of Community Learning, Leisure and Housing, the Committee:

Noted:

4.1. The 2025 Orkney Community Learning and Development Partners Plan Progress and Evaluation Report, attached as Appendix 1 to the report by the Director of Education, Communities and Housing, insofar as it related to the remit of this Council.

The Committee resolved to **recommend to the Council**:

4.2. That the revised Orkney Community Learning and Development Partners Plan 2024-2027, attached as Appendix 3 to this Minute, be approved insofar as it related to the remit of the Council.

Mary Maley left the meeting at this point.

5. Housing Service – Annual Assurance Statement

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and after hearing a report from the Head of Community Learning, Leisure and Housing, the Committee:

Resolved to **recommend to the Council** that the Annual Assurance Statement, together with supporting Annexes, attached as Appendix 4 to this Minute, be approved for submission to the Scottish Housing Regulator.

6. Education Scotland – St Andrews Primary School

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and after hearing a report from the Service Manager (Primary Education), the Committee:

Noted the inspection letter in respect of St Andrews Primary School, attached as Appendix 1 to the report by the Director of Education, Communities and Housing, issued by Education Scotland on 26 August 2025.

Councillor David Dawson left the meeting during discussion of this item.

7. Education Scotland – Dounby Primary School Nursery

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and after hearing a report from the Operational Manager (Early Learning and Childcare), the Committee:

Noted the inspection report in respect of Dounby Nursery, attached as Appendix 1 to the report by the Director of Education, Communities and Housing, issued by Education Scotland on 27 May 2025.

Councillor David Dawson rejoined the meeting during discussion of this item.

8. Education Scotland – Dounby Community School.

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and after hearing a report from the Service Manager (Primary Services), the Committee:

Noted the inspection letter in respect of Dounby Community School, attached as Appendix 1 to the report by the Director of Education, Communities and Housing, issued by Education Scotland on 17 June 2025.

9. Care Inspectorate – Westray Junior High School Nursery

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and after hearing a report from the Head of Education, the Committee:

Noted the report in respect of Westray Junior High School Nursery, attached as Appendix 1 to the report by the Director of Education, Communities and Housing, issued by the Care Inspectorate in April 2025.

10. Care Inspectorate – Papdale Halls of Residence

School Care Accommodation Service

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and after hearing a report from the Service Manager (Housing, Homelessness and Schoolcare Accommodation), the Committee:

Noted the report in respect of School Care Accommodation Services at Papdale Halls of Residence, attached as Appendix 1 to the report by the Director of Education, Communities and Housing, published by the Care Inspectorate on 29 May 2025.

11. Housing Revenue Account

Revenue Repairs and Maintenance Programmes – Expenditure Outturn

After consideration of a report by the Head of Finance, copies of which had been circulated, the Committee:

Noted:

11.1. The summary position of expenditure incurred for financial year 2024/25, against the approved Housing Revenue Account revenue repairs and maintenance programme, as detailed in section 1.4 of the report by the Head of Finance.

11.2. The detailed analysis of expenditure figures and programme updates in respect of the approved Housing Revenue Account revenue repairs and maintenance programme for 2024/25, attached as Appendix 1 to the report by the Head of Finance.

Jo Hill left the meeting during discussion of this item.

12. Housing Revenue Account

Revenue Repairs and Maintenance Programmes - Expenditure Monitoring

After consideration of a report by the Head of Finance, copies of which had been circulated, the Committee:

Noted:

12.1. The summary position of expenditure incurred, as at 30 June 2025, against the approved Housing Revenue Account revenue repairs and maintenance programme for 2025/26, as detailed in section 1.4 of the report by the Head of Finance.

12.2. The detailed analysis of expenditure figures and programme updates in respect of the approved Housing Revenue Account revenue repairs and maintenance programme for 2025/26, attached as Appendix 1 to the report by the Head of Finance.

Jo Hill rejoined the meeting at this point.

13. Revenue Expenditure Outturn

Councillor Steven B Heddle declared an interest in this item, in that his wife was the Director of the Institute for Northern Studies, but concluded that his interest did not preclude his involvement in the discussion.

After consideration of a report by the Head of Finance, copies of which had been circulated, the Committee:

Noted:

13.1. The revenue expenditure monitoring statement in respect of service areas for which the Education, Leisure and Housing Committee was responsible, for financial year 2024/25, attached as Annex 1 to the report by the Head of Finance, indicating a net budget overspend position of £1,283,600, comprising the following:

- Underspend of £357,700 against General Fund services.
- Overspend of £1,641,300 against Non-General Fund services.

13.2. The revenue financial detail by service area statement in respect of service areas for which the Education, Leisure and Housing Committee was responsible, for financial year 2024/25, attached as Annex 2 to the report by the Head of Finance.

13.3. The explanations given and actions proposed in respect of significant budget variances, as outlined in the Budget Action Plan, attached as Annex 3 to the report by the Head of Finance.

14. Revenue Expenditure Monitoring

Councillor Steven B Heddle declared an interest in this item, in that his wife was the Director of the Institute for Northern Studies, but concluded that his interest did not preclude his involvement in the discussion.

After consideration of a report by the Head of Finance, copies of which had been circulated, the Committee:

Noted:

14.1. The revenue expenditure monitoring statement in respect of service areas for which the Education, Leisure and Housing Committee was responsible, for the period 1 April to 30 June 2025, attached as Annex 1 to the report by the Head of Finance, indicating a net budget overspend position of £160,500, comprising the following:

- Underspend of £719,700 against General Fund services.
- Overspend of £880,200 against Non-General Fund services.

14.2. The revenue financial detail by service area statement in respect of service areas for which the Education, Leisure and Housing Committee was responsible, for the period 1 April to 30 June 2025, attached as Annex 2 to the report by the Head of Finance.

14.3. The explanations given and actions proposed in respect of significant budget variances, as outlined in the Budget Action Plan, attached as Annex 3 to the report by the Head of Finance.

15. UHI Orkney – Capital Funding Expenditure Plan

Councillor Steven B Heddle declared an interest in this item, in that his wife was the Director of the Institute for Northern Studies, but concluded that his interest did not preclude his involvement in the discussion.

After consideration of a report by the Director of Education, Communities and Housing, copies of which had been circulated, and after hearing a report from the Finance Manager, UHI Orkney, the Committee:

Noted the UHI Capital Funding Expenditure Plan for UHI Orkney for financial year 2025/26, attached as Appendix 1 to the report by the Director of Education, Communities and Housing.

16. Exclusion of Public

On the motion of Councillor Gwenda M Shearer, seconded by Councillor Ivan A Taylor, the Committee resolved that the public be excluded from the meeting for consideration of Item 17, as the business to be considered involved the disclosure of exempt information of the classes described in the relevant paragraphs of Part 1 of Schedule 7A of the Local Government (Scotland) Act 1973 as amended.

17. Support for Learning

Under section 50A(4) of the Local Government (Scotland) Act 1973, the public had been excluded from the meeting for this item on the grounds that it involved the disclosure of exempt information as defined in paragraph 1 of Part 1 of Schedule 7A of the Act.

After consideration of a report by the Director of Education, Leisure and Housing, copies of which had been circulated, and after hearing a report from the Head of Education, the Committee:

Noted the contents of the report relating to the Support for Learning service.

The above constitutes the summary of the Minute in terms of the Local Government (Scotland) Act 1973 section 50C(2) as amended by the Local Government (Access to Information) Act 1985.

Councillor Stephen Clackson and Jo Hill left the meeting during discussion of this item.

18. Conclusion of Meeting

At 13:22 the Chair declared the meeting concluded.

Signed: Gwenda M Shearer.

Appendix 1.

Strategic Housing Investment Plan

Pages 861 to 879.

Resolved that, under section 50A(4) of the Local Government (Scotland) Act 1973, the public were excluded from the meeting for this item on the grounds that it involved the disclosure of exempt information as defined in paragraphs 6 and 9 of Part I of Schedule 7A of the Act.

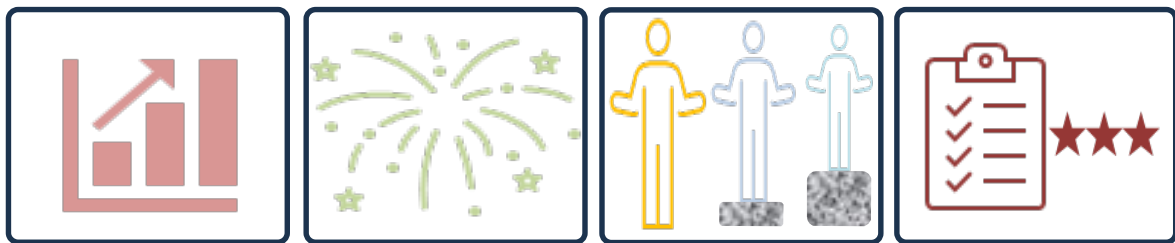
This constitutes a summary of the Appendix in terms of the Local Government (Scotland) Act 1973 section 50C(2) as amended by the Local Government (Access to Information) Act 1985.

Local Government (Scotland) Act 1973 – Schedule 7A

Access to Information: Descriptions of Exempt Information

- | | |
|--------------|--|
| Paragraph 6. | Information relating to the financial or business affairs of any particular person (other than the authority). |
| Paragraph 9. | Any terms proposed or to be proposed by or to the authority in the course of negotiations for a contract for the acquisition or disposal of property or the supply of goods or services. |

Orkney Education Service Scheme of Devolved School Management



‘excellence and equity in education’

August 2025

Version Control

Document Reference.	Revision.	Issue Date.	Reason for Issue.	Reviewer.	Sign.
	1.1.	May 2023.	Initial Draft of Revised Scheme in line with new Guidelines.	Service Manager (Area).	
	1.2.	July 2023.	Revised Draft of policy and guidance.		
	2.0	September 2025.	Final.		

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1. Introduction

The Scheme of Devolved School Management (DSM) was originally introduced nationally in 1993 to enhance and improve the management of resources at school level. National DSM guidance was reviewed in 2006, and again in 2012, taking account of the changing economic and financial climate for both Local Authorities and the Scottish Government. In June 2017 the Scottish Government consulted on changes to Scheme of Devolved School Management as part of the wider "Fair Funding to Achieve Excellence and Equity in Education" consultation.

The current national [DSM guidelines](#), published in summer 2019, set out to build and improve on the DSM Guidelines of 2012 and, critically, reflect and integrate with the Education Reform Programme and priorities emerging from the Scottish Government and COSLA Education Reform Joint Agreement of June 2018.

The Orkney Islands Council Scheme of Devolved School Management was originally introduced in 1994. The current scheme is the result of a review and revision to take account of the current economic drivers and conditions, as well as ensure that Orkney Islands Council Scheme of Devolved School Management policy and practice reflects the 2019 Guidelines.

The Education Service prepared the Scheme of Devolved School Management scheme through collaboration and consultation with a wide range of stakeholders and continues to encourage participation from stakeholders including, schools and parents.

2. The Education Service in Orkney

The overall ambition of the education service is for ‘excellence and equity in education’.

Examples of what this means, in terms of outcomes, are given below:



Figure 1 Examples of excellence and equity in practice

Schools are expected to prioritise actions to realise this ambition, within the context for the community they serve.

With this in mind, the Scheme of Devolved School Management is designed to ensure that each school and setting has an equitable allocation of resources to deliver an appropriate learning experience for each child and young person.

3. Principles of The Scheme of Devolved School Management (DSM)

The national determined principles of the Scheme of Devolved School Management (DSM) are:

- Subsidiarity and Empowerment.
- Collaboration.
- Accountability and Responsibility.
- Clarity and Equity.

The Scheme of Devolved School Management supports the operation of the learning estate across the Orkney community.

The Scheme of Devolved School Management is intrinsically linked to the improvement planning process and enables schools to plan for improvement and raise educational attainment within the community served.

The Scheme of Devolved School Management operates within the Council's overarching Financial Regulations and Contract Standing Orders. Through this process decision-making powers and budgetary responsibilities are devolved to managers to respond to local needs.

The Scheme of Devolved School Management takes account of the range of strategic policy frameworks and objectives that impact on children's services including, for example, the National Improvement Framework, the Scottish Attainment Challenge and the 'Promise', as well as Getting it Right for Every Child.

4. Role of Parent Council

Parental involvement is welcomed and recognised as being essential in developing a strong partnership between parents and schools. Research has shown that children do better if their parents are involved in their education. Whatever that sphere of involvement may be it is greatly appreciated and welcomed.

Parent Councils help parents and carers to become more actively and effectively involved in their children's learning. They were established under the Scottish Schools (Parental Involvement) Act 2006 in recognition of the important role that parents can play, both in their own children's learning, and in the life of a school.

The role of the Parent Council is to:

- support the school in its work with children and young people.
- represent the views of parents and carers to Headteacher, Education Authority and Education Scotland.
- encourage links between the school, parents and carers, children and young people, pre-school groups and the wider community.
- report on the Council's activities to the members of the Parent Forum.

Parent Councils play an important part in providing opportunities for parents to get involved in ways that suit them and to support their school in getting the best education for their children and young people.

As part of the routine report to Parent Council meetings, Headteachers should update their Parent Council on their school budget throughout the school year.

5. Budget Overview

The Scheme of Devolved School Management aims to ensure that there is a balance between democratic accountability in delivering a key public service and the managerial freedom and flexibility to exercise initiative and ensure the efficient and effective use of resources.

Devolved management delegates managerial responsibility to the most appropriate level. Whilst this will result in the majority of the available resources being delegated to individual school level, due account will be given to certain services where an individual school need cannot be reasonably predicted from the outset, or where they relate to the needs of an individual child or young person.

In regard to funding, the Council will continue to be responsible for the overall education budget and the delegation of funding to schools. Head teachers will make decisions on the spending within that delegated budget. The scheme ensures that there is transparency throughout the process and that budgets are allocated equitably.

Orkney Islands Council's revenue budget is routinely published on the Council website and this includes details of the budget allocated to Education.

The figure below illustrates, in general terms, how this budget is then distributed across the various parts of the service:

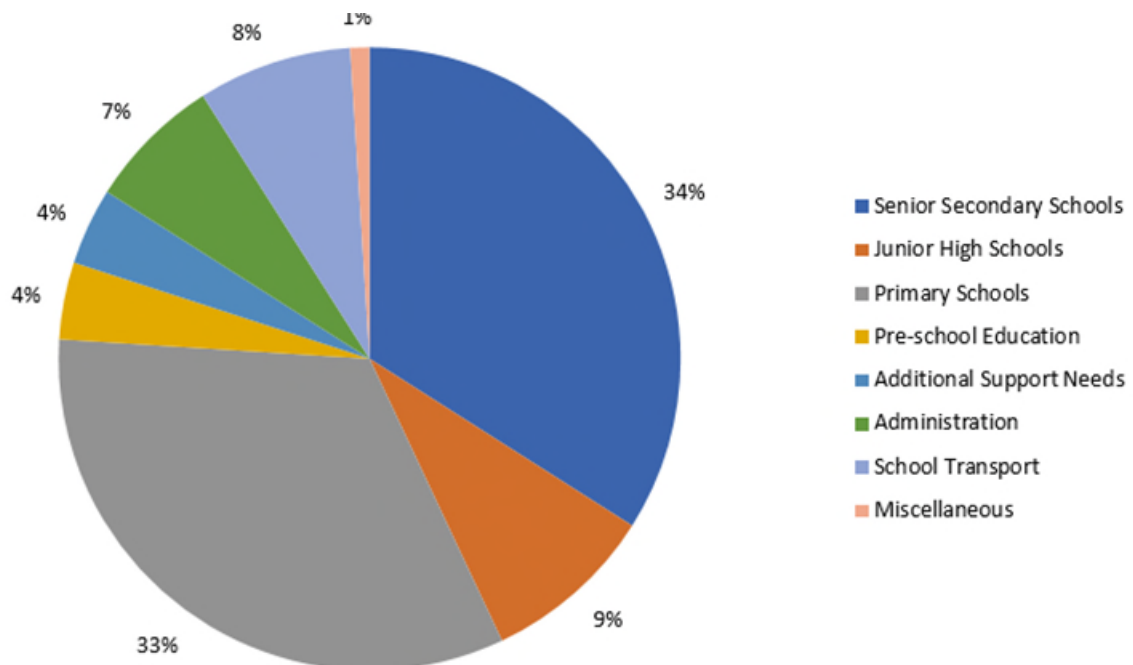


Figure 2 illustrative distribution of education budget across education functions

Whilst heads of establishment are to be given maximum flexibility over their budgets and have access to an oversight of the total running costs for each establishment, there are areas of expenditure that are generally not considered suitable for devolution.

The reasons for this may include, but are not limited to areas of spend that:

- are outside the influence of an establishment manager.
- have unacceptable levels of risk.
- benefit from economies of scale,

Some examples of this are given below:

- Long term absence cover.
- Home to school pupil transport.
- School meals.
- School Care Accommodation.
- School clothing grants.
- Education Maintenance Allowances.
- Local Authority Information Management Systems (SEEMIS).
- Recruitment.
- Capital expenditure and contracted work on managing the school estate.
- Property Insurance.
- Corporate support function costs for example Finance and Legal functions.

It is important however, that senior leaders are aware of the total cost of running the establishment that they are responsible for, therefore the relevant sector lead will, throughout the year, keep Head Teachers apprised of the overall financial position relating to the establishment they manage.

Where a non-devolved expenditure exceeds the budget set, initial actions legitimately include seeking to balance the overall budget using any underspend within the devolved elements.

6. Areas Devolved to schools

The budgets for the following areas are devolved to school managers:

Teaching (devolved), used to cover the cost of – basic pay (with oncosts) of the teaching staff associated with the establishment; (teaching) staff travel costs; (teaching) staff subsistence claims.

Non-teaching (Devolved), used to cover the cost of – basic pay (with oncosts) of the staff (not teachers) associated with the establishment; rates and water rates; (non-teaching) staff travel costs; (non-teaching) staff subsistence claims.

School Management (Devolved), used to cover the cost of – short term cover (supply), including paid Leave of Absence; energy, minor repairs and maintenance, cleaning supplies, other property costs; requisition and other costs directly associated with learning, teaching and assessment, medical supplies (for example, defibrillators and general PPE); costs associated with Information Technology; pupil travel (including excursions and outdoor education); office supplies, telephony, photocopying, other costs in-directly associated with learning, teaching, and assessment (note: administration costs include Early Learning and Childcare, irrespective of the provision of a Nursery Manager).

Early Learning and Childcare (ELC), used to cover the cost of – basic pay (with oncosts) of the staff; cover (supply), including paid Leave of Absence; Requisition and Other Costs directly associated with the provision; Medical Supplies; Care Supplies (including setting specific PPE); (ELC) staff travel costs.

Pupil Equity Fund (PEF), used to cover the cost of – basic pay (with oncosts) of the teaching staff associated with the establishment; requisition and other costs directly associated with the provision (including directly commissioned project work); staff travel costs; staff subsistence claims.

The Pupil Equity Fund is (effectively) ring fenced and may only be used for PEF related activity.

PEF planning and reporting (spend and impact) are covered by separate guidance.

7. Building the Budget

The principles of setting budget types are set out below. Full details are given in Appendix 1. The Head of Education is responsible for ensuring that budgets are built in accordance with the principles and guidance set out within this document.

Where the budget derived from a formula exceeds the total budget available, universal percentage capping will apply. For example, in a particular year, the total DSM budget made available to Head Teachers is actually 99.3% of the formula derived budget. Should this be necessary, the percentage applied will be indicated at the point indicative budgets are published.

Pupil numbers vary from year to year, and also within year. To accommodate this variation, the budget made available to Head Teachers at the start of the financial year will be built on the roll figures recorded at the census point in the previous September. Budgets will then be adjusted following the next census in the following September.

Where there is a significant (percentage) roll change outside of these check points, a review can be requested either by the head teacher or relevant service manager.

Staffing: Staffing budgets are built on projected actual costs. Projected staffing will be reviewed and revised annually and the budget adjusted accordingly.

Staff allocations will be based on the Council's current (sector related) Staffing Policies.

Where national targets for teacher numbers (and/or maintaining FTE) have been set, allocations and budgets will reflect this.

The Authority staffs its resourced facilities for pupils with special needs according to the number of pupils and an assessment of their needs.

The real cost of providing staffing is calculated for the forthcoming financial year through the annual staffing exercise, basing the calculation on the actual staff who are expected to be in post, plus an estimate for vacancies (which may thereafter be adjusted). This figure is given to schools as their staffing budget.

From time-to-time staffing budgets may be adjusted, and mandated, through the Council's budget setting process.

Posts that are vacant at the point the budget is set may be calculated at the grade average.

An allowance will be built in during budget setting for anticipated pay awards.

Any changes within staffing including hours of posts, post titles, creation of new posts, extension of existing temporary posts etc. from the agreed establishment, must be made in line with the Council's governance processes and relevant Human Resources Policies and Procedures, before these changes can be implemented.

Supply Staff: An overall supply/relief staff budget is included. This is broadly calculated on the number of 'classes' there are in the school, however the budget needs to cover the full range of relief needs.

Any changes within staffing including recruiting supply staff, issuing of fixed term temporary contracts for supply teachers, or temporary contracts for support staff must be made in line with the Council's governance processes and relevant Human Resources Policies and Procedures, before these changes can be implemented.

Non-Staff Budgets: In principle these budgets will seek to reflect the rolling average (previous 3 years) with a standard uplift for inflation.

Should this (across all establishments) exceed the total budget allocation available, a uniform percentage reduction will apply. Should this be required, an action will be entered into the service risk register.

Requisition and Other Costs Directly Associated with Learning: In principle these budgets will be linked to roll. A minimum (floor) will apply, and an additional uplift will be added to the budget for inner and outer isles schools.

The roll related multiplier will taper (reduce as pupil numbers increase), in order to acknowledge the potential for 'economies of scale' in the bigger settings.

Multipliers will be reviewed annually and adjusted to reflect inflation.

Repairs and Maintenance: A corporate programme related to lifecycle repairs and maintenance is managed by the Council's Property Team. This is reviewed annually, in line with the analysis of the Learning Estate Condition Surveys and takes account of the budget available to progress works identified.

Any defects should be reported and logged via Concerto, the Council's property and estate management system.

Head teachers are responsible for instructing minor repairs and the budget is constructed to reflect this. For example, if it is necessary to make good a broken window, the charge would be against the devolved budget; if there are burst pipes, faults in the electrical or heating system, or choked drains, the work would be a charge on the retained budget.

This includes minor repairs and improvements to Community facilities, and the repair of items damaged by Community use. For Community Schools, the annual levy (charged to Community Associations) will be used to offset overall running costs including repairs. This arrangement covers ordinary usage and not misuse of the estate, which should be pursued directly with the relevant user group.

Repairs and improvements in relation to Swimming Pools, the Hydrotherapy Pool and Fitness Suites are not met from the devolved budget.

Detail for each element of school budget is given in Appendix 1.

8. Transfer of Funds and Carry-over

All devolved budgets may be spent on any other part of the devolved budget, and any overspends must be met from other parts of the devolved budget.

The funds are interchangeable subject to the Head teacher continuing to meet whatever standards and limitations are written into the budgets.

A December review of the budget will be included in the Authority's arrangements and information will be provided to allow Head teachers to make decisions about transferring funds.

Individual budgets are not carried over from year to year, but the devolved budgets of a school are aggregated, and a surplus may be carried over by the Head of Education to the following year subject to the following limitations beyond which surpluses are not allowed to accumulate:

Small Primary Schools (roll 200 or less including nursery)	- £4,000
Large Primary Schools (roll over 200 including nursery)	- £8,000
Junior High Schools	- £8,000
Six-year Secondaries	-£70,000

If surpluses are likely to exceed these figures for valid reasons, the Head Teacher must obtain special permission to carry-over the sum from the Head of Education, otherwise carry-over will be limited to the above amounts. The amount of carry-over may be varied by the Authority to allow for inflation or for other reasons. Where overall costs (devolved and non-devolved budget lines) exceed the allocated budget, a carry forward would not normally be permitted.

If, due to exceptional circumstances, an over-spend in excess of half of the figure shown in the table seems likely to occur, the Head Teacher must immediately inform the Authority of the circumstances. Overspending is subtracted from the following year's devolved budgets.

The Authority reserves the right to alter these arrangements in circumstances which might result in the Authority being disadvantaged.

9. School Fund

The School Fund exists to enable to purchase of resources to enhance curriculum, pastoral and other school-related provision for pupils. It is the intention that the Fund should provide items which will enhance and enrich the students' education over and above those provided for through the school's delegated budget, as well as equipment which will improve the learning experience. For further information please refer to the OIC School Fund Procedure Manual.

10. General Information on the Scheme of Devolved School Management

Orkney Education Service, the Scheme of Devolved School Management is compliant with and operates within the Council's Financial Regulations, Scheme of Delegation to Officers, Local Code of Corporate Governance and Procurement Strategy.

The Council must secure Best Value in accordance with Section 1 of the Local Government Scotland Act 2003. Value for money is a key aspect of Best Value Principles and all decisions regarding resource use at school level should provide this. Head teachers are expected to deploy the school's budget in accordance with best value principles.

In order to operate DSM and manage budgets, appropriate key personnel have access to the Council's financial system, Integra. This is also the same system used to order goods and services.

11. Publication

A full copy of the scheme will be maintained to view on the Orkney Islands Council Website, with links also available on school websites to ensure easy access to all stakeholders.

12. Training and Support

The authority will implement a rolling programme of training in order to ensure that the Head Teachers, managers, and key administrative staff are familiar with the procedures associated with the scheme. The training will be provided through dedicated DSM training sessions, induction training and general presentations at Head Teachers meetings. One to one meetings will also be available for further or bespoke training. Training will cover all aspects of DSM scheme.

This training is envisaged as a two-way process in the course of which Head teachers will suggest ways in which procedures can be improved and will identify the information they need to enable them to manage their devolved budgets in an efficient way.

Training will be made available for other staff both in and out with schools who are likely to be involved in handling any aspect of the devolved or associated (eg retained) budget(s).

Elected members, Trade Union and Parent Council representatives (and individual Parent Councils, by arrangement) will have access to a relevant awareness raising training programme.

The authority will provide guidance to schools on accounting and will provide training, where requested on computerised accounts.

Professional support will be available from:

- Service Managers Education.
- Quality Improvement Officer.
- Administration and Finance Officers.
- Accounting Team.
- Procurement Services.
- Legal Service.
- IT.

13. Monitoring and Evaluation by the Authority

The Authority has the responsibility for setting budgets for each school in each of the devolved areas before the beginning of the financial year. It has the responsibility for providing clear information on which budget decisions can be taken.

The Authority retains ultimate responsibility for the quality of service in areas of the Scheme of Devolved School Management. It intends to meet its responsibilities by setting standards against which monitoring and evaluation can take place.

The Authority has the ultimate responsibility of taking appropriate action and providing support in cases where the management of devolved expenditure has encountered difficulties.

The Head teacher's management of the devolved budget is subject to certain requirements:

- a) The Head teacher must ensure that the school continues to meet national statutory requirements, policies, standards and conditions.
- b) The Head teacher must continue to meet curricular and other policies and standards which have been adopted by the Authority.
- c) The Head teacher must ensure that the school meets Health and Safety legislation.
- d) The Head teacher must ensure that the school operates the Authority's Equal Opportunities Policies.
- e) The Head teacher must maintain the confidence of parents, staff, Parent Council and the Authority in areas relating to devolved expenditure.
- f) When the Head teacher has received devolved funds to cover community use or nursery provision, there is an obligation to use the funds in such a way as to foster good relations with all those who have an interest in these uses.

The monitoring and evaluating of the scheme will be conducted with three purposes in mind:

- 1. To review financial procedures.
- 2. To advise the Head teacher whether value-for-money is being obtained.
- 3. To ensure that national and local standards are maintained in areas of devolved expenditure.

Monitoring and evaluation will be conducted by the Council's Internal Audit team. Following discussion of the results of this process, the Head teacher will be obliged to act on any written instruction relating to the devolved budget.

Quality assurance will continue to be pivotal in all DSM reviews. All reviews will ensure that our scheme continues to support Head Teachers to manage their budget through applying the account principles of DSM and the National Improvement Framework to ensure every child has an opportunity to succeed.

14. Consultation, Engagement and Transparency

The Scheme of DSM has been developed in consultation and collaboration with stakeholders including Education Managers, Head Teachers, Finance Colleagues, and Parent Council Representatives.

The Scheme of DSM expects Head Teachers to continue to consult with staff, Parent Councils, pupils and the wider community on any appropriate matters which may include how school and class resources are allocated.

The Scheme of DSM has been written in plain English in order to maximise engagement and support transparency.

The Council's Scheme of DSM and associated appendices will be maintained on the Council's website, where any amendments or changes will also be noted. Head Teachers should ensure that links are available on their website or newsletter and advise parent and interested parties of its availability.

Annex 1 - Building the Budget – Line by Line

The table below sets out what activity each budget line should support, and the principles of how annual budgets are set.

The first part of the table refers specifically to the ‘devolved’ part of the budget, the second part then goes on to reference the activities which, as an outcome of consultation with establishment managers, were considered not suitable to be devolved and/or can be more effectively managed to deliver outcomes through central co-ordination.

Title	Subtitle	Purpose	Method of Calculation
Teaching (Devolved).	Staff Costs.	Basic pay (with oncosts) of the teaching staff associated with the establishment.	Establishment FTE derived from approved Staffing Policy; budget based on actual costs. Final figure includes any prescribed efficiency saving.
	Transport, vehicle and plant.	Staff travel costs.	Based on assessment of previous 3 years, adjusted for inflation*.
	Admin.	Staff subsistence claims Itinerant meals and airport car parking. Insurance charges – auto applied by Finance.	Based on 3-year trend, adjusted for inflation*. Based on FTE.
Non-teaching (Devolved).	Staff Costs.	Basic pay (with oncosts) of the staff (not teachers) associated with the establishment.	Establishment FTE derived from approved Staffing Policy; budget based on actual costs. Final figure includes any prescribed efficiency saving.
	Property Costs.	Rates, water rates, refuse collection, cleaning costs, sanitary/nappy bins emptying, property Insurance.	Based on 3-year trend, adjusted for inflation*.

Title	Subtitle	Purpose	Method of Calculation
	Supplies & Services	Annual Licence costs (eg copyright).	Based on 3-year trend, adjusted for inflation*.
	Transport vehicle and plant	Staff travel costs. Swimming Transport costs. KGS/Glaitness – minibus fuel/garage costs. KGS/SA – transport to Orkney College. KGS /SA pupil daily travel – Orkney Ferries.	Based on 3-year trend, adjusted for inflation*.
	Admin	Insurance charges – auto applied by Finance.	Based on 3-year trend, adjusted for inflation*.
	Third Party Payments	Secondary – SQA exam costs.	Based on 3-year trend, adjusted for inflation*.
School Management (Devolved)	Staff Costs	Supply – short-term sickness absence, development, paid Leave of Absence.	Based on formula: 'floor' of £1000 + 'number of classes' (notional) x £1000 + 'number of teachers' x £400 + 'FTE' x £200 + Adjusted by % for trend/budget constraints.
	Property Costs	Energy, Minor Repairs and Maintenance**, Cleaning Supplies, Other Property	Based on 3-year trend, adjusted for inflation* (includes ELC, primary and secondary as appropriate)

Title	Subtitle	Purpose	Method of Calculation
	Supplies and Services.	Requisition and Other Costs directly associated with learning, teaching and assessment, Medical Supplies (for example, defibrillators and general PPE; Costs associated with Information Technology.	Primary Population 'Floor' of £1,100. 'Floor top up' of £1,200 for isles (ferry/air service access). First 10 pupils, £30/head; 11-25 pupils, £28/head; 26-50 pupils, £26/head; 51-75 pupils, £25/head; 76+ pupils, £20/head. Secondary Population. Floor of £1,250. 'Floor top up'; based on the distribution of core curriculum funding (by 2026 to be incorporated into per capita rate). First 100 pupils, £14/head; 101-500 pupils, £13/head; 501+ pupils, £12/head.
	Transport vehicle and plant.	Discretionary Pupil Travel (including excursions and outdoor education).	Based on 3-year trend, adjusted for inflation*.
	Admin.	Office Supplies, Telephony, Photocopying, Other Costs indirectly associated with learning, teaching, and assessment.	Based on 3-year trend, adjusted for inflation* (note that for admin costs, ELC is included here).
Early Learning and Childcare.	Staff Costs.	Basic pay (with oncosts), cover (supply), including paid Leave of Absence.	Establishment FTE derived from approved Staffing Policy; budget based on actual costs.
	Supplies and Services.	Requisition and Other Costs directly associated with the provision; Medical Supplies;	Lump sum + calculation based on establishment roll.

Title	Subtitle	Purpose	Method of Calculation
		Care Supplies (including setting specific PPE).	
	Transport, vehicle and plant.	Staff travel costs.	Based on 3-year trend, adjusted for inflation*.

* Adjustment for inflation will vary. % Change will be set in April each year and linked to the overall budget setting process. % chosen may differ across budget headings depending on economic conditions (and variance in inflation across supplies and services generally). It is possible for the adjustment to be set at 0. Where specific savings are targeted, this may be expressed as a negative percentage.

** Life Cycle Costs; Electrical Safety Testing (and other contracted whole Council inspection activity) is budgeted for corporately and does not feature as part of the Education budget and accountancy process. Access to life-cycle repairs and maintenance programme generally follows on from the work of the Building Inspector and reflects the outcomes of the Condition and Suitability Survey update.

*** Supplies and services budget may be offered as a % of the sum calculated to reflect the overall budget allocated to the service.

Unique Cost Centres (not devolved)

KGS and Stromness Primary School Only (Schools Investment Programme) – Specifically for the Facility Management (FM) aspects of the programme (repairs and maintenance + life cycle costs)

Title	Subtitle	Purpose	Method of Calculation
SIP Pitches & Building		Facility Management Programme, Repairs and Maintenance, Life-cycle Costs	Based on forecast cost linked to programmed works; budget held and managed by Service Manager, Property

Glaitness Only

Title	Subtitle	Purpose	Method of Calculation
Hydrotherapy Pool.		Chemicals and pool maintenance.	Based on 3-year trend, adjusted for inflation* and managed by Head of Service.

Centrally managed (not devolved) cost centres, costs shared by all establishments.

Title	Subtitle	Purpose	Method of Calculation
Teaching Retained.	Staff Costs, Transport, vehicle and plant, Admin.	Long-term absence.	Based on 3-year trend, adjusted for inflation*. Final figure includes any prescribed efficiency saving. Managed by the relevant Service Manager.

Title	Subtitle	Purpose	Method of Calculation
Non-Teaching Retained.	Staff Costs, Transport, vehicle and plant, Admin.	Long-term absence.	Based on 3-year trend, adjusted for inflation*. Final figure includes any prescribed efficiency saving. Managed by the relevant Service Manager.
Primary Recruitment.	Staff Costs, Transport, vehicle and plant, Admin.	Staff recruitment including candidate expenses.	Based on 3-year trend, adjusted for inflation* Managed by the relevant Service Manager.
Junior High Recruitment.	Staff Costs, Transport, vehicle and plant, Admin.	Staff recruitment including candidate expenses.	Based on 3-year trend, adjusted for inflation* Managed by the relevant Service Manager.
Secondary Recruitment.	Staff Costs, Transport, vehicle and plant, Admin.	Staff recruitment including candidate expenses.	Based on 3-year trend, adjusted for inflation* Managed by the relevant Service Manager.

Centrally managed cost centres, service delivered across schools/settings (as appropriate)

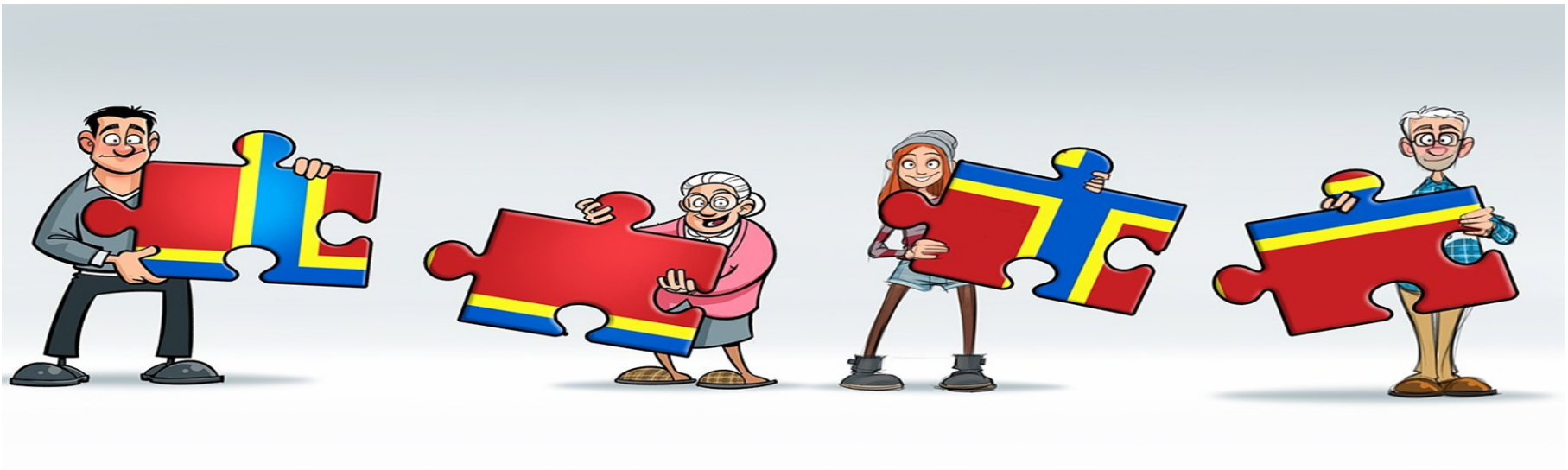
Title	Subtitle	Purpose	Method of Calculation
Early Learning and Childcare.		Centrally based and deployed support; Partnership Provision (ELC); 3 rd Sector Funding (Home Start); supplies and services; staff travel and subsistence; recruitment.	Establishment FTE derived from approved policy; budget based on actual costs; vacant posts estimated at the lowest point on the relevant pay scale, 3 rd Sector Funding determined by Service Level Agreement; transfer of additional resources to settings based on floor and number enrolled. Final figure includes any prescribed efficiency saving. Managed by the relevant Service Manager.
Additional Support Needs.		Centrally based and deployed support; Educational Psychology; SEAL; supplies and services; Out of Orkney Placements, supply; staff travel and subsistence; recruitment.	Establishment FTE derived from approved policy; budget based on actual costs; vacant posts estimated at the lowest point on the relevant pay scale; Out of Orkney Placements determined by contract and/or level of assessed reclaim (if another local authority). Final figure includes any prescribed efficiency saving. Managed by the relevant Service Manager.
Administration and Quality Development.		Education Resources. staff based in School Place; authority learning events (specific and annual).	Establishment FTE derived from approved policy; budget based on actual costs. Final figure includes any prescribed efficiency saving. Managed by the relevant Service Manager.
Assistance for Students.		Grants, bursaries, EMA, clothing allowance and FME.	Estimate based on 3 previous years demand. Managed by the relevant Service Manager.

Title	Subtitle	Purpose	Method of Calculation
School Meals.		Staff costs; supplies and services; recruitment.	Based on 3-year trend, adjusted for inflation* Managed by the relevant Service Manager.
School Transport.		Contract costs; additional needs transport; procurement.	Determined by contract commitments with appropriate adjustment for inflation.
School Crossing Patrol.		Staff costs; recruitment.	Establishment FTE derived from approved policy; budget based on actual costs. Managed by the relevant Service Manager.
Parent Council.		Grant; insurance; expenses.	Lump sum, adjusted for inflation. Managed by the relevant Service Manager.

CLD Partners Plan

2024-2027

(2025 update)



Sustainable Development

We will work to support sustainable development through partnership learning opportunities to build people's skills, confidence and strengthen individual and community capacity and resilience to benefit everybody in our communities, with nobody left behind.

Outcome	Action	Lead	Target Date	Milestones	Evidence
1. Increased capacity and resilience of community groups and organisations to deliver what is needed for their communities and ensure these organisations prosper	1) Promote and support community organisations to develop local development action plans / place plans as required	HIE, CLLD, (Community Development Forum)	September 2026	<ul style="list-style-type: none"> Promotion of opportunity by September 2026 3 Plans developed by September 2027 4 new projects undertaken by September 2027 	<ul style="list-style-type: none"> Publicity Correspondence with community organisations Number of plans developed Feedback
2. Increased coordination and expansion of youth achievement opportunities and pathways to ensure young people progress and reach their full potential	2a) Undertake a strategic review of youth accreditation and awards offered by CLD partners to ensure effective delivery of appropriate awards based on need	CLDE, VAO, (Youth Workers Forum)	September 2026	<ul style="list-style-type: none"> Awards booklet created by September 2026 Annual youth awards data collection established Increased youth awards offered by Sept. 2027 	<ul style="list-style-type: none"> Minutes and Agendas Youth Awards booklet Increase in youth awards Annual data of all youth awards Number of accredited and non-accredited awards Review completed
	2b) Work with Education and wider CLD partners to explore opportunities to better track the achievements of young people	Education, CLDE, VAO, (Youth Workers Forum)	September 2027	<ul style="list-style-type: none"> Pilot established by March 2026 Review of tracking completed by March 2027 Improvement plan developed by Sept. 2027 	<ul style="list-style-type: none"> Minutes and Agendas Review of tracking systems Improvement plan Improved tracking system developed in pilot school Number of meetings held
	**2c) Develop partnership solutions to reduce antisocial behaviour and keep the community safe through learning, early intervention and prevention approaches in the local community	Police Scotland, CLDE, Education, (Youth Workers Forum)	September 2027	<ul style="list-style-type: none"> Partnership projects agreed Funding secured Engagement with the local community Identify baseline of anti-social behaviour 	<ul style="list-style-type: none"> Projects undertaken Funding applications Funding secured Programme of delivery Numbers engaged Feedback and evaluations Decrease in reported anti-social behaviour

Sustainable Development

We will work to support sustainable development through partnership learning opportunities to build people's skills, confidence and strengthen individual and community capacity and resilience to benefit everybody in our communities, with nobody left behind.

Outcome	Action	Lead	Target Date	Milestones	Evidence
3. Increased coordination and expansion of adult learning opportunities and pathways to ensure learning is lifelong, life-wide and learner centred	3a) Development of the Adult Learning Forum to review and coordinate adult learning provision in Orkney	CLDE, UHI Orkney, VAO, Orkney Library & Archive	September 2026	<ul style="list-style-type: none"> Adult Learning Forum established and meeting 3 times a year Review of current adult learning provision across Orkney completed 	<ul style="list-style-type: none"> Adult Learning Forum minutes, agendas and meeting schedule Review of current adult learning provision
	3b) Create a baseline and increase the wider accreditation opportunities for adults	CLDE, UHIO, (Adult Learning Forum)	September 2027	<ul style="list-style-type: none"> Adult learning provision baseline created by September 2026 Increase in wider accreditation opportunities by September 2027 	<ul style="list-style-type: none"> Number of adult learners Number of accreditation and non-accreditation awards Number of qualifications Number of ESOL learners
	3c) Develop opportunities for a collaborative adult returner learning programme.	UHI Orkney, CLDE, (Adult Learning Forum)	September 2026	<ul style="list-style-type: none"> Meetings established Adult returns learning programme created Course advertised Course delivered by December 2026 	<ul style="list-style-type: none"> Minutes and Agendas Publicity Adult returns programme Course completed Numbers attending Feedback and evaluations

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Cost of Living

We will support individuals, children, and families through this difficult time, committing time, energy, and resources to work towards the elimination of poverty throughout Orkney. Addressing both immediate need and longer-term initiatives to combat persistent poverty.

Outcome	Action	Lead	Target Date	Milestones	Evidence
4. Improved confidence and skills, for priority groups identified as needing additional support to achieve positive outcomes	4) Develop a partner's baseline and increase free learning opportunities including delivery of life skills courses, financial literacies and budgeting	NHSO, CLDE, Sport & Leisure	September 2026	<ul style="list-style-type: none"> Develop a baseline of free learning provision by September 2026 Increase free learning by 10% by September 2027 	<ul style="list-style-type: none"> Partnership baseline developed Number of courses delivered Number of participants Participant feedback (formal / informal)

Local Equality

We will work to address the continuing disadvantage experienced by some of our communities when trying to access services, facilities, and opportunities. Helping meet local needs through the effective provision of community learning and development opportunities to enhance individual and community capacity and resilience.

Outcome	Action	Lead	Target Date	Milestones	Evidence
5. People have increased confidence and opportunities to express their views and influence decision making and service design	5a) Promote and embed the continuous involvement of those with lesser heard voices and priority groups within consultation and in matters that affect them	VAO, HIE, OIC, (Community Development Forum)	September 2027	<ul style="list-style-type: none"> Support the progress of the 4 strands of the Community Engagement Project Utilise full results of Orkney Matters 2 (OM2) for updated CLD plans 	<ul style="list-style-type: none"> Working group minutes and agendas Evaluation / feedback Number of lived experience groups Number engaged in Orkney Matters 2 Number of lived experience groups
	5b) Provide strategic leadership and direction in the development of a relevant, coordinated and representative youth voice structure	CLDE, VAO, (Youth Workers Forum)	September 2027	<ul style="list-style-type: none"> Task group created Develop youth engagement and participation infrastructure and action plan by March 2027 	<ul style="list-style-type: none"> Records of meetings Youth engagement infrastructure Action plan agreed and delivered
6. Reduction in barriers and increase in opportunities for lifelong learning and development to keep the CLD offer as local as possible	6) Work collaboratively to increase the opportunities for those in marginalised communities, including the ferry linked isles, to participate in training and development opportunities and reduce isolation	CLDE, Development Trusts, Community Associations, (Adult Learning Forum)	September 2026	<ul style="list-style-type: none"> Training programme offered in 2 areas by September 2026 Report published and shared following CLDE isles training offer Session with local community organisations to identify needs Collated details of lifelong learning opportunities across the Partnership 	<ul style="list-style-type: none"> Island Training Report Number of sessions arranged Number of islands supported Number of attendees Number of qualifications Evaluation & feedback Meetings & minutes Press coverage

Health and Wellbeing

We will work together to provide the required support through the delivery of targeted interventions to improve health and wellbeing, build trusted relationships, increase confidence, improve resilience and develop new skills.

Outcome	Action	Lead	Target Date	Milestones	Evidence
7. Improved health and well-being outcomes and increased engagement with learning to develop motivation, confidence, and skills through youth work, adult & family learning and community development	7a) Increase collaborative family support provision across Orkney	CLDE, Sport & Leisure, UHI Orkney, Education	September 2026	<ul style="list-style-type: none"> Minimum of 5 family learning opportunities delivered by Sept 2026 Train a minimum of 2 volunteers in family learning opportunities Arrange 2 training opportunities specifically for parents by September 2026 	<ul style="list-style-type: none"> Family learning offer developed Number of family learning opportunities offered Number of families engaged Outcomes for families Attendance at events Evaluation / feedback Number of Family Learning opportunities funded
	7b) Identify and test a shared approach to measuring improvements to mental health and wellbeing outcomes through CLD activity	CLDE, (Data Subgroup)	September 2026	<ul style="list-style-type: none"> Data collection process developed Inclusion of baseline data Increased input to shared KPI's Data collected, analysed and reported annually 	<ul style="list-style-type: none"> Minutes of meetings Data sharing protocols developed. Number of partners inputting to KPI's Progress against identified KPIs
	**7c) Work with all partners, including the Integrated Joint Board, to deliver on the joint actions from the Orkney Physical Activity and Wellbeing Strategy	CLDE, Sport & Leisure, UHI Orkney, Education, VAO, NHSO	September 2027	<ul style="list-style-type: none"> Relevant actions identified from the Physical Activity & Wellbeing strategy Streamlined reporting process created Linkages made with Integrated Joint Board Progress and achievement on some priority actions 	<ul style="list-style-type: none"> Presentation of the Physical Activity & Wellbeing Strategy to CLD Partnership Relevant actions agreed by CLD Partnership Progress and reporting on key actions

We will work to ensure we have a skilled workforce by raising awareness of CLD and strengthening learning opportunities for those working and volunteering in the CLD sector.

Outcome	Action	Lead	Target Date	Milestones	Evidence
8. Increased visibility and awareness of CLD as a recognised profession	8a) Explore and expand opportunities and pathways into and within the CLD profession through collaborative work with regional and national partners	CLDE, VAO, SDS, (Training Subgroup)	September 2027	<ul style="list-style-type: none"> CLD training opportunities identified CLD qualifications progressed Increase CLD Standard Council membership across Orkney 	<ul style="list-style-type: none"> Training opportunities shared across the network Number of people completing CLD qualifications Number of CLD qualified staff CLD Pathway publication developed Increase in CLDSC registration
	**8b) Use different methods to increase awareness of the CLD sector and the outcomes that can be achieved through CLD delivery	CLDE, (All CLD Partnership subgroups)	September 2027	<ul style="list-style-type: none"> Partnership case studies Social media posts Identify funding for marketing A short CLD film created 2 case study films created CLD Partners webpage developed 	<ul style="list-style-type: none"> 2 partner case studies created CLD Partnership website created Film created on CLD outcomes 2 case study films created Number of views or likes to the webpage
9. Orkney has a skilled, trained, and confident CLD workforce with a shared understanding of relevant national occupational standards, CLD values and competences	9a) Undertake a training needs audit of the CLD sector	VAO, CLDE, NHSO, (Training Subgroup)	September 2026	<ul style="list-style-type: none"> Training needs assessment disseminated by September 2026 Identify training requirements across CLD Identify possible trainers and people willing to share good practice 	<ul style="list-style-type: none"> Needs assessment designed Number of respondents Publicity to promote the training needs assessment Numbers willing to deliver training sessions
	9b) Deliver a training programme for the CLD workforce and volunteers, based on needs identified through a new training needs analysis	VAO, CLDE, NHSO, (Training Subgroup)	September 2027	<ul style="list-style-type: none"> Programme of training is developed Training offered Universal evaluation undertaken after every training session Review evaluation findings 	<ul style="list-style-type: none"> Number of training courses delivered Attendance numbers Number of organisations benefiting Participant feedback Annual progress report

We will work to ensure we have a skilled workforce by raising awareness of CLD and strengthening learning opportunities for those

working and volunteering in the CLD sector.					
Outcome	Action	Lead	Target Date	Milestones	Evidence
10. Effective and consistent gathering, analysis and reporting of data for planning and reporting on outcomes	10) Improve the quality of the data that we are sharing across the partnership to better understand local CLD needs and outcomes	CLD, (Data Subgroup)	September 2026	<ul style="list-style-type: none"> • KPI data collection process developed • Inclusion of additional baseline data in reporting • Increased input to shared KPI's • Data collected, analysed and reported annually • Social value engine pilot undertaken by September 2026 	<ul style="list-style-type: none"> • Minutes of meetings • Data sharing protocols developed • Number of partners inputting to KPI's • Progress against identified KPIs • Social Value engine finding across pilot area • Annual Report

**** - New actions added in year 2 of the plan.**

Unmet needs during this period (2024-27)

At a time of changing national policy, realignment of priorities and ever reducing resources, it is clearly evident that not all CLD needs can be met during the lifetime of this plan. This recognition that there will be unmet needs over this 2024-27 period is stipulated as a requirement in the CLD legislation. Priority areas of work that are recognised as important and which partners are keen to pursue, but may not be able to due to limited resources and capacity include:

- Develop partnership work with Housing partners to explore opportunities around tenant participation.
- Creation of a collaborative family learning strategy and plan.
- Increased access to affordable childcare including breakfast club and after school provision.
- Whilst we have been unable to include as many specific actions in the plan around climate challenge as we would have liked, engagement work to raise awareness and support within the community continues and we will seek to weave related opportunities into other actions in this plan where possible.

Orkney Islands Council's Housing Service

School Place

Kirkwall

Orkney

KW15 1NY

Annual Assurance Statement

We achieve all of the following standards and outcomes for tenants, people who are homeless and others who use our services:

- All relevant regulatory requirements set out in Chapter 3 of the Regulatory Framework.
- All relevant standards and outcomes in the Scottish Social Housing Charter.
- All relevant legislative duties.

Where additional explanatory information is required, this is included in annex 1 of the attached report and will be reproduced in the contextual information provided with the Annual Return against the Charter to the Scottish Housing Regulator.

I confirm that the Council's Education, Leisure and Housing Committee have seen and considered appropriate evidence to support the level of assurance we have at the meeting held on 10 September 2025.

Signed

Chair of Education, Leisure and Housing Committee.

Annex 1 – Key points relating to the Council’s performance

Explanatory information has been provided to explain either a change in performance or areas where Orkney’s context is particularly important.

Annual Return Against the Charter

The Annual Return against the Charter (ARC) for financial year 2024/25 has been completed for Orkney Islands Council and was submitted to the Scottish Housing Regulator by 31 May 2025. Areas of performance which required additional explanation are as follows (the indicators referred to are nationally required):

Satisfaction Survey

The Council undertook a wholesale tenant satisfaction survey in line with the Scottish Social Housing Charter in April 2024. The Council does this every 2 years, as opposed to every 3, to ensure closer alignment with the current tenant base. Results were timed to align with submission of the ARC and results were presented to the Council’s Education, Leisure and Housing Committee in September 2024, along with an action plan for improvement. The use of a warm up mailing and telephone survey option is the approach adopted by most social landlords and following the same approach allowed more appropriate benchmarking against others. Accordingly, in 2024 the company which undertook the survey ensured a higher level of telephone surveys despite the increased cost as the potential cost benefit was potentially helpful.

The tenant survey was undertaken by an independent body to ensure tenants felt able to openly express their views.

In addition to the wholesale survey, the Council undertakes a range of satisfaction surveys covering different parts of the service and these generally show good levels of satisfaction, though the response rate is low (with the exception of repairs customer satisfaction).

The Tenant Participation Officer is working with tenants with a view to increasing their involvement, improving the provision of information and considering alternative ways to collect information. This has included arranging events at the community fridge and parent and child groups in partnership with Orkney Housing Association Ltd. She is also developing an armchair panel and has created a leaflet promoting this accordingly. In addition, a social media page was set up to improve our provision of information in an accessible manner across the island group.

Information obtained from customer surveys and other means of obtaining information is used to inform the Housing Service’s relevant Service Delivery Plan accordingly.

Given that the repairs customer satisfaction survey is run as a rolling programme, that data was used for the Annual Return against the Charter rather than the wholesale tenant survey.

Indicators 3 and 4 (Complaints)

During the financial year 2024/25, a total of 24 first stage complaints were received, all of which were fully responded to. Additionally, 19 stage 2 complaints were received and 4 remained open at year end and will be carried forward into financial year 2025/26.

The average response time for first stage complaints was 3.38 days, showing a significant improvement from 6.9 days the year before. The average for stage 2 complaints also improved, decreasing from 23.78 days to 17.40 days.

One complaint at each stage exceeded the target (taking 7 and 41 days respectively), both delays were due to administrative oversight, which has since been reviewed. A manual audit of complaint handling has been completed, and targeted training is being rolled out for Housing Officers and Building Inspectors to improve complaint recording and resolution within the Concerto computer system.

This training is expected to have a positive knock-on effect for stage 2 complaints, as it frees up managers' time to concentrate on the more complex cases.

Indicators 8 and 9 (Repairs)

Delivery of property management services is undertaken by our Infrastructure and Organisational Development Services for the Housing Service.

A total of 346 emergency repairs were completed with a total of 3,498 hours, giving an average completion time of 10.11 hours and a median of 3.72 hours. This is a slight increase from last year's average of 8.97 hours. The majority of emergency repairs were completed within target timescales; however, 29 repairs exceeded the 24 hour limit, with 7 of those taking more than 30 hours. These delays were primarily due to contractor errors in raising follow-on orders, difficulties in sourcing specialist parts, access issues and third-party dependencies such as utility providers. Several isles jobs were also affected by weather related disruption and contractor availability.

Significant work has been undertaken during 2024/25 to close a backlog of historic open orders, bringing the number of live jobs to a more manageable level. Regular meetings are now held with Building Inspectors and contractors to review jobs at risk of exceeding target timescales, ensuring early intervention and seeking to prevent delayed completions.

The Council continues to work closely with its contractors to ensure the performance management culture remains central to service provision despite significant pressures on services and Orkney's remote and rural context.

As regards non-emergency repairs - a total of 1,526 repairs were undertaken with a total of 23,836 working days resulting in an average completion time of 15.62 days. This reflects an improvement from 2023/24, when the average reached 17.23 days. A total of 680 repairs were completed within 7 working days, and 971 were completed within 14 days, demonstrating that the majority of repairs continue to be delivered efficiently. A total of 347 repairs exceeded 20 working days, with the longest taking 197 days to complete.

These delays were mainly due to access constraints, contractor and subcontractor delays, and the bundling of similar repair types such as painter or fencing jobs, which were recorded as individual orders. While these cases represent a small proportion of overall repairs, they have had a disproportionate impact on the average. Work to improve the categorisation and recording practices will be undertaken in 2025/26 to ensure consistency and improve accuracy, particularly in processes between contractors and the Building Inspector interface.

As regards the indicator on “Right First Time” (RFT), during 2024/25, a total of 1,517 reactive repairs were completed, of which 1,105 were recorded as completed right first time, giving an overall rate of 72.84%. The accuracy of this measure is dependent on consistent reporting and appropriate use of follow-on orders where additional works are required. A mid-year audit by CD Consultancy highlighted concerns around how RFT data was being recorded and the need for clearer links between initial repairs and any subsequent visits. In response, a manual review of recorded RFT jobs has been carried out to identify discrepancies or misreporting, particularly where follow-up work may not have been properly linked. Targeted training is also being delivered to relevant staff.

Contractors undertaking repair work for the Council remain very busy and there remain difficulties in obtaining sub-contractors with availability. Some trades are particularly scarce including painters. Some of our contractors have been successful in expanding their staff teams and tried to restructure their processes which is positive. Recruitment remains challenging generally, and this inter-connects with the piece of work the Council is progressing in relation to increasing the supply of housing by bringing in an additional housing provider with financial capacity to deliver increased levels of housing.

Indicator 14 (Tenancy Offers Refused)

The percentage of tenancy offers refused in 2024/25 was 17.65%, up from 12.09% in 2023/24 but continuing a strong downward trend from previous years (29.92% in 2022/23 and 32.64% in 2021/22). The focus remains on reducing refusals through improved communication, pre-allocation contact, and matching processes.

It was previously advised that there is an intention to introduce a new lettings policy, based on the principles of choice, by April 2021, while delayed as a result of COVID-19, meantime given the local position around homelessness, lets to homeless households are being prioritised and the implementation of our lettings policy will progress during financial year 2025/26.

Indicators 15 (Anti-Social Behaviour)

The Council has neighbourhoods which are clean and attractive. The level of anti-social behaviour in Orkney remains very low. Along with Orkney Housing Association Ltd, joint work is undertaken closely with the Council’s corporate Anti-Social Behaviour Co-Ordinator and the Police in order to take a multi-agency approach to any issues which arise.

Orkney continues to maintain a very low level of anti-social behaviour, with few cases of serious incidents. The Council's anti-social behaviour policy, significantly reviewed in 2019, introduced realistic and proportionate targets. An appendix added to the anti-social behaviour policy on harassment was introduced in 2023/24 to ensure appropriate processes are in place to address any issues, which may arise specifically as a result of harassment, and this is related to the enhancement of equalities processes.

There were just 21 cases of anti-social behaviour, during financial year 2024/25 and all of these were resolved within the required timescale.

Indicators 16 (Tenancy Sustainment)

Overall tenancy sustainment (indicator 16) shows sustained performance.

An assessment of cases where a tenancy which began within the year previous and had not been sustained for longer than a year, indicated reasons such as death, hospitalisation and leaving Orkney as well as those who had sought housing in another sector.

A total of 69 tenancies were sustained for more than a year – 20 from the waiting list, 1 existing tenant and 48 homeless households. This was from a total of 79 tenancies, being 26 from the waiting list, 2 existing tenants and 51 homeless households. Of the tenancies which were not sustained for longer than a year, 2 were due to abandonments, 4 as a result of death and 4 renunciations. In percentage terms these were as follows:

- Existing tenants - 50%.
- Homeless households – 94.12%.
- Waiting list – 76.2%.
- Overall tenancy sustainment – 87.34%.

As regards tenancy sustainment generally, the Council is keen to assist tenants to sustain their tenancies and employs a qualified Social Worker within Housing Services. This allows specialist Social Work skills to be used to assist those with a range of issues including addiction. In addition, the Council employs a Housing Support worker who works directly with tenants in this respect. The Housing Support and Homelessness aspects of our service are registered with the Care Inspectorate accordingly and these obtain good inspection grades and staff are registered with the Scottish Social Services Council (SSSC) accordingly.

Indicators 18 and 30 (Empty Property Rental Loss and Time Taken to Relet Properties)

Void (empty property) loss increased from £62,408 in 2023/24 to £66,946, representing a slight increase in the amount of rent due to properties being empty but a percentage reduction from 1.49% to 1.47%. There were 71 relets in 2024/25, compared to 79 in the previous year. Despite ongoing issues with electric meters, for which assistance was sought from Orkney's MSP, a consistent relet performance was maintained.

Regarding the indicator on the average length of time taken to relet properties, a total of 71 properties were relet during the financial year 2024/25. The time taken to relet properties decreased. The total number of calendar days they were empty was 4,306, resulting in an average relet time of 60.65 days. This represents a decrease from the previous financial year 2023/24, where the average relet time was 71.43 days.

We again experienced a small number of voids with extended relet times due to low demand, particularly in specialist or isles stock. This included one supported accommodation unit, one sheltered, and one very sheltered property, which together took 539 days to relet. A further two island properties categorised as low demand took 413 days in total. Excluding these five properties, the adjusted average relet time would be 50.81 days, which compares favourably to 52.99 days the previous year. This demonstrates that, for the majority of stock, relet times are continuing to improve.

There continues to be a focus on minimising delays in relet processes, improving void turnaround times, and refining demand analysis for specialist properties to inform future lettings strategy.

Indicator 27 (Gross Rent Arrears as at 31 March each year as a Percentage of Rent Due for the Reporting Year)

Gross arrears continued to be challenging throughout the financial year 2024/25. The figures at year-end show a significant reduction to 9.43% from 12.58% in 2023/24. This shows the downward trend has continued from 12.65% in 2022/23 and 14.35% in 2021/22. This steady reduction reflects the sustained focus placed on income recovery and arrears management over the past four years.

We continue to maintain strong oversight of arrears performance. This approach includes early intervention by Housing Officers, close joint working with Orkney Citizen's Advice Bureau on income maximisation and debt advice, and escalation of complex cases to our dedicated Housing Officer (Income Collection). A second officer has remained in post throughout 2024/25 to support arrears recovery and supplement the wider Housing Management team. Performance is monitored closely and reported regularly to senior officers and elected members.

The percentage of rent collected as a percentage of rent due in the year was 98.84% compared to 102.47% for financial year 2023/24. While still within an acceptable range, this decrease reflects timing differences at year-end and ongoing administrative pressures. In year collection remained steady across all four quarters and the close monitoring of trends continues.

The number of households for which the Council received housing cost payments directly remained at 479, unchanged from 2023/24. However, the total value increased to £1,708,909, reflecting higher average entitlement. Manual inputting of Universal Credit and bank payments continues to place pressure on a small staffing resource and the Housing Revenue Account. Testing of the latest release of the Northgate computer system has now been completed and close joint working with the relevant software provider is

ongoing to schedule the automation of Universal Credit postings, which in turn will reduce administrative workload and improve data accuracy.

Discretionary Housing Payments (DHP) continue to be publicised through our website, social media etc in an attempt to reach more tenants who are struggling.

The Council previously actively and prudently pursued former tenant arrears rather than writing these off, however this had a detrimental impact on overall rent arrears performance - statistics and anecdotal evidence suggested that the practice in other organisations is to write off the majority of former tenant debt. This approach has been reconsidered to ensure resources are targeted at bringing in current arrears, and that tenants who are in arrears are ensuring their focus is on resolving their current arrears as opposed to former tenant arrears from the past. Currently a process is underway in relation to the consideration of a wider programme of write-off. Work is being undertaken with our Finance Service to seek approval for this. This will take time to affect our statistics, however.

Write-offs for the financial year 2024/25 decreased to 0% from £42,007, or 18.26% of the former tenant arrears outstanding the year before, representing a significant change from the previous year. Discussions are still ongoing to potentially increase the level of write-offs for former tenant arrears. This reflects the fact that no write-offs were processed during 2024/25, as our focus remained on recovering historic debt where feasible. However, we are working with Finance colleagues to implement a wider and more structured write-off programme in 2025/26. This approach aligns more closely with common practice across the sector and will ensure a more consistent and sustainable focus on current arrears.

“Mandatory” Box

While introduced initially in 2022/23, the ARC for 2023/24 included a new requirement for a mandatory box to be completed with enhanced information. This related to areas of tenant and resident safety and required that as well as providing specific information on the number of properties which failed electrical safety checks and the provision of interlinked heat and smoke alarms, data must also be included to show the number of properties which fell out of compliance during the year.

The last full stock condition survey was undertaken in 2007 by Savills, an independent surveyor. The Housing Service intends to undertake a full stock condition survey in 2026/27.

There is an internal target to undertake at least 10% check of properties in a reporting year. During 2023/24, 12% of assessments were recorded on our computer system, Concerto. Work continues to improve the evidence base and operational processes in relation to Scottish Housing Quality Standard (SHQS) for the period prior to 2023/24 and we are working with the Scottish Housing Regulator in this respect.

The cost of undertaking a comprehensive stock condition survey was included in the Housing Revenue Account Business Plan which was approved by our Education, Leisure

and Housing Committee in February 2024. Additional committee approval will be required before a stock condition survey can be progressed and, assuming this approval is granted, a procurement process will then follow. It is likely therefore that the stock condition survey will be undertaken during financial year 2026/27 as outlined in our engagement plan.

We will continue to maintain ongoing evidenced assessment of at least 10% of total stock. A comprehensive stock condition survey will be undertaken as outlined above – the precise detail of which will be determined through our committee processes during financial year 2025/26.

Currently work is being undertaken on internal processes for assessing SHQS compliance to ensure we have appropriately robust written procedures and that these are undertaken and appropriately evidenced by Building Inspectors for all void properties. A contract has been issued in order to ensure that current compliance with interlinked smoke alarms to LD2 standard can be fully evidenced.

As at 31 March 2025, the Council held 1,024 properties which were in scope for the Scottish Housing Quality Standard (SHQS).

One-criterion fails: A total of 38 properties fail on a single SHQS criterion. Of these, 34 relate to Energy Performance Certificates (EPC), 3 relate to LD2 smoke and heat alarm compliance, and 1 relates to secure common front door entry.

Two-or-more-criteria fails: A further 8 properties fail on two or more SHQS criteria. These include combinations such as EICR (electrical installation condition reports), LD2 alarms, bathroom standard, lead-free pipework, and common or public lighting.

In addition, 12 properties are recorded as being in abeyance, and 5 are recorded as exempt. The exemptions consist of four former schoolhouses for which formal Committee approval has been given for disposal once they become vacant, and one property where legal constraints prevent the necessary compliance works from being undertaken.

These figures represent our final reported position for year-end, following a comprehensive internal review and a 9-month data audit conducted by CD Consultancy in 2023/24. As part of this process, it was identified that a number of properties had previously been recorded as exempt without fully meeting the criteria outlined in the ARC Technical Guidance. These cases have since been reviewed and reclassified to ensure the return is fully compliant. The total number of properties reported excludes those considered out of scope.

Annual Report for Tenants

The annual report for tenants will be produced by 31 October 2025 as required by the Scottish Housing Regulator. This will include key information which is of interest to tenants.

The Council has a joint Residents' Panel with Orkney Housing Association Ltd which consists of tenants / residents of both organisations. They will be asked for their views on the Annual Report ahead of publication and their views will be taken into account in producing the final document. The Council includes a section in the Annual Report which encourages feedback from tenants more generally on how they feel about the report and the information in it.

The Residents' Panel will also be involved in discussions around the Annual Assurance Statement prior to submission.

Customer Satisfaction Survey

The Council is required to undertake a wholesale tenants' satisfaction survey every three years. This was undertaken most recently in April 2024 by an independent body in order to ensure impartiality.

A range of customer satisfaction surveys are in place across the Service in order to assess the quality of the service on an ongoing basis. These include:

- New tenants' survey regarding quality of home and service.
- Repairs Satisfaction survey.
- Improvements satisfaction survey.
- Exit questionnaires for tenants leaving the Council's accommodation.
- Homelessness service, new tenants' questionnaire.
- Homelessness service, exit questionnaire.
- Housing Advice service, exit questionnaire.

In addition, information is used from complaints and general feedback as encouraged by footnotes on all correspondence etc. The information is used to inform the Service Delivery Plan for the relevant part of the Service which underpins service improvements.

This links to standard 3.12 in the National Standards for Information and Advice Providers which is part of the Council's accreditation.

While the Council collects data from its wholesale tenant satisfaction survey, this can lead to some distortion in figures. For example, when questions are raised regarding repairs it should be the most recent repair. It is therefore more effective to collect this data immediately following completion of the repair.

The Council intends to use its ongoing customer satisfaction information so it can evidence that the information collected relates to the present day.

Scottish Housing Regulator's Engagement Plan

The Scottish Housing Regulator's engagement plan highlights key indicators, relating to services to people who are homeless, service quality, stock quality and tenant and resident safety where they have indicated they wish to engage with the Council.

During 2024/25 they reviewed and compared the data for all local authorities from the Scottish Government's national homelessness statistics. They also spoke to all local authorities to gather further information and assurance about their homelessness services. To assess the risks to people who are threatened with or experiencing homelessness they will engage with all local authorities during 2025/26 with a focus on the provision of appropriate temporary accommodation.

Specifically, they will engage with Orkney in relation to the following areas:

- Orkney's provision of temporary accommodation to people who are homeless.
- The Scottish Housing Regulator's Engagement Plan states that in January 2023, the Council advised the Scottish Housing Regulator that it had identified weaknesses in the quality of the evidence underpinning the data used to report on Scottish Housing Quality Standard (SHQS) compliance. In December 2023 the Council confirmed that the SHQS data remained unvalidated, and that there were inaccuracies in the data held. The Council advised it is progressing an improvement plan to address these weaknesses.
- The Council last carried out a stock condition survey in 2007. It will complete a stock condition survey in 2026/27 which will fully assess SHQS compliance in all of its homes. Until then, it will continue to perform SHQS checks to validate its data.
- The Engagement Plan further states that in January 2025, the Council told them that a number of planned legionella risk assessments had not been completed. The Council investigated this and found that it had only completed legionella risk assessments for a small number of its homes. The Council is planning to carry out legionella risk assessments in all of its homes.
- Further, the Scottish Housing Regulator's engagement plan states that in order to assess the risk to social landlords they have reviewed and compared the 2023/24 service quality performance of all social landlords to identify the "weakest performing" landlords. They will therefore engage with Orkney about tenant satisfaction, repairs and rent arrears.

Accordingly, the Council must:

- Send the Scottish Housing Regulator information required in relation to its homelessness service.
- Advise of any emerging issues preventing it from fulfilling its statutory duty to provide temporary accommodation when it should and comply with the Unsuitable Accommodation Order.
- Provide monthly updates on progress to validate and improve the quality of its data used to report compliance with the SHQS and on its progress with completing legionella risk assessments and any required actions in its homes.

- Provide updates on progress with completing a full stock condition survey in 2026/27.
- Send information about the actions being taken to improve performance on tenant satisfaction, repairs and rent arrears.

Data on homelessness is not included within the Annual Return against the Charter generally. Instead, this information is provided through returns outlined at section 4.2 of the committee report and is reported to the Council's Education, Leisure and Housing Committee, specifically a report is presented to the June cycle of meetings.

The position relating to the other areas referred to above, is outlined at the relevant parts of this annex.

Annex 2: Assurance Action Plan

Assurance and Notification

Requirement.	Who.	When.	RAG.	Comments.
Prepare an Annual Assurance Statement in accordance with guidance.	Head of Community Learning, Leisure and Housing and Data Analysts.	October 2025.	Green.	Committee report and appendices to be presented to Education, Leisure and Housing Committee on 10 September 2025.
Submit Annual Assurance Statement to Scottish Housing Regulator between April and October each year.	Data Analysts.	October 2025.	Green.	On target to be submitted by October 2025.
Make Annual Assurance Statement available to tenants and other service users.	Data Analysts and Tenant Participation Officer.	October 2025.	Green.	To be included in Housing Services' area of website.
Notify Scottish Housing Regulator during the year of any material changes to the assurance in the Annual Assurance Statement.	Head of Community Learning, Leisure and Housing and Data Analysts.	As required.	Green.	
Have assurance and evidence that we are meeting all our legal obligations associated with housing and homelessness services, equality and human rights, and tenant and resident safety.	Head of Community Learning, Leisure and Housing and Team Manager (Maintenance and Heritage).	Ongoing.	Amber*.	In general compliance with our legislative duties links to Standard 1.5 of National Standards for Information and Advice Providers. We were re-accredited by the Scottish Legal Aid Board during 2022 and are scheduled for re-accreditation during 2025/26.

Requirement.	Who.	When.	RAG.	Comments.
				<p>Evidence includes a broad range of Council corporate policies including the Health and Safety Policy; Policy on Unacceptable Actions and Challenging Behaviour by Service Users and Complainants; The Role of Customer Service Advisers and All Staff Using the Customer Services Facility; Housing Services' Staff Training and Development Policy; Library Procedure for Housing Services; staff training logs and internal portal which includes a broad range of information on corporate policy areas.</p> <p>Staff management processes are in place across Housing Services including induction, regular one to ones in line with the Line Management Policy and all staff are required to complete the Personal Development Award for Advisors with Shelter at the next intake after taking up post. In addition, structures such as qualified housing officer are in place to encourage housing staff to complete a housing qualification.</p> <p>During 2021 we undertook a review of our equalities policy and the processes</p>

Requirement.	Who.	When.	RAG.	Comments.
				<p>relating to equalities data collection and human rights. Our revised Equalities Policy and Action Plan was approved by our Education, Leisure and Housing Committee in June 2021. We sought equalities information from all existing tenants and housing applicants, in relation to 9 protected characteristics in line with the Scottish Housing Regulator's Regulatory Framework and Scottish Federation of Housing Association Limited's Guidance. Equalities data requested has been expanded across all housing and homelessness service areas accordingly and data will be used as required to ensure continued improvement of service provision.</p> <p>As regards tenant safety, specifically in relation to the points outlined in the Scottish Housing Regulator's guidance of summer 2023 and updated in March 2025:</p> <ul style="list-style-type: none"> • Gas safety is not applicable as Orkney has no mains gas; • As regards electrical safety, we have in place a 5 yearly rolling programme to carry out EICRs and address any

Requirement.	Who.	When.	RAG.	Comments.
				<p>remedial works identified from them. An issue arose which affected this in December 2022 and by 31 March 2025 just 9 properties require to have an EICR completed. All are properties where there are other issues affecting the ability to complete an EICR including legal issues, undergoing major works or hoarding issues experienced by the tenant.</p> <ul style="list-style-type: none"> • Fire safety - We are also working through a programme of implementing the residual aspects of our contract on interlinked smoke alarms. At 31 March 2025, just 9 properties require LD2s to be fitted. Again, all are properties where there are other issues impacting on the ability to complete the works. These include an abandonment in a remote location, legal issues and hoarding issues affecting the tenant. We also have a total of 588 properties where a contract is in place to ensure the evidence that LD2 has been fitted has been obtained – note this is

Requirement.	Who.	When.	RAG.	Comments.
				<p>specifically different to the fitting of LD2.</p> <ul style="list-style-type: none"> • Water safety – we have entered into a contract with a contractor who will undertake legionella risk assessments across all of our housing stock. A plan has been developed and implementation has begun during 2025/26. • Asbestos – The amount of asbestos in our properties is low and is largely confined to artex ceilings, external fabric such as soffits, roof sheeting etc, that have been surveyed in accordance with the Control of Asbestos Regulations 2012. • Our asbestos records are held on an external online platform. This is fully accessible to our contractors and allows us to track users access. Details are held on when the property was last surveyed, updates carried out as well as if any asbestos containing materials were identified or removed. The data is

Requirement.	Who.	When.	RAG.	Comments.
				<p>updated as asbestos is managed / removed, and historical data maintained. In 2023/24, 4 asbestos surveys required to be completed and 3 were completed accordingly. Access issues affected the fourth and attempts to gain access continue. The property concerned was previously within our stock, so historic records exist. Some additional properties purchased during 2024/25 require asbestos surveys and accordingly a total of 8 require to be completed in 2025/26.</p> <ul style="list-style-type: none"> • We are currently completing a procurement process to recruit a contractor to undertake our asbestos surveys over the next three years and will look to re-survey our stock. The duty to manage asbestos does not apply to domestic properties, (but common areas are covered) however we are responsible for maintaining the buildings' structure and are

Requirement.	Who.	When.	RAG.	Comments.
				<p>considered duty holders under the Control of Asbestos Regulations (CAR).</p> <ul style="list-style-type: none"> • Radon – we previously carried out radon gas testing to 56% of our properties which generated remedial works to 18 properties that have been subsequently completed. The survey data and remedial actions are captured and maintained in a property tracker held by the Council. • The contractor which undertook the work 10 years ago is no longer in business. We are currently working with our Procurement Service to look at availability of specialist contractors via the Scotland Excel framework. Should this process fail, we will advertise via Public Contracts Scotland and undertake a full procurement exercise. It is hoped that this will be concluded in September 2025 and that a contractor will be in place. The data will be picked up from 10 years ago with any properties situated in

Requirement.	Who.	When.	RAG.	Comments.
				<p>areas of high readings revisited along with a sample of other areas.</p> <ul style="list-style-type: none"> • Damp and mould – a policy on damp and mould was approved by our Education, Leisure and Housing Committee in September 2023 and staff were trained accordingly. Our recording and monitoring processes were enhanced (and continue to improve and develop) to allow focused measures to be implemented to address cases of damp and mould in our social housing. Where damp and mould has been identified we have put in place joint visits, between Building Inspectors and Housing Officers, to provide our tenants with technical and practical assistance and guidance to address the issue. Where fabric issues have been identified as the cause, remedial works have been carried out. • Indicators have been included in the Annual Return against the Charter for 2025/26. Data so far, shows that 12 cases were completed between 1 April and 31 July 2025. Most cases were

Requirement.	Who.	When.	RAG.	Comments.
				<p>condensation related but a small number were caused by plumbing leaks. We will now strengthen our process to ensure the cause is recorded for every case. The average time for completion of cases was 29 days including delays relating to arranging access with tenants. All cases involved a joint Housing Officer / Building Inspector visit, and follow up inspections are planned around 6 months after completion. As at 30 July 2025, there were two open cases, both still well within target timescales.</p> <ul style="list-style-type: none"> • Service improvements around damp and mould include clearer tenant advice at tenancy sign up stage and when damp / mould is reported; all cases are prioritised within the 20 day target but with urgent escalation where health risks are identified; proactive inspections of similar property types or neighbouring homes where a case is found and the use of case data to inform targeted investment in extractor fans, insulation upgrades and cold-spot treatment etc.

Requirement.	Who.	When.	RAG.	Comments.
				<p>This approach ensures we are responding quickly, improving the consistency of monitoring processes and using data to reduce the risk of repeat issues for tenants.</p> <ul style="list-style-type: none"> Lift safety – this is not applicable in an Orkney situation as the Council has no social housing which is fitted with lifts. <p>Going forward revised structures will be implemented around monitoring of preventative, protective maintenance.</p>
Notify Scottish Housing Regulator of safety matters which have been reported to or investigated by the Health and Safety Executive (HSE) or reports from other regulatory or statutory authorities or insurance providers, relating to safety concerns.	Head of Community Learning, Leisure and Housing / Head of Property, Asset Management and Facilities and Team Manager (Maintenance and Heritage).	In place.	Green.	<p>The Council's Health and Safety Advisor provides guidance on all aspects of health and safety as required. If a report were received from the Health and Safety Executive, immediate steps would be taken to address the issue, and the Scottish Housing Regulator would be advised accordingly.</p> <p>We have policies covering issues such as Asbestos and procedures in place regarding Radon / Legionella etc. Our Infrastructure and Organisational Development Service undertakes property inspections and ensures</p>

Requirement.	Who.	When.	RAG.	Comments.
				properties are fitted with interlinked smoke alarms etc. Housing Services has quality assured the data on checks to evidence compliance with the Scottish Housing Quality Standard.
Make Engagement Plan easily available and accessible to tenants and service users, including online.	Head of Community Learning, Leisure and Housing and Data Analysts.	May 2025.	Green.	To be included by link to the Scottish Housing Regulator's website from Housing Services' area of the Council's website.
Register all requirements for providing data to Scottish Housing Regulator and Information Commissioners Office.	Head of Community Learning, Leisure and Housing and Head of Legal Services.	In place.	Green.	Housing Services will hold a register of any matters reported to the Scottish Housing Regulator and Legal Services will record all matters reported to the Information Commissioners Office.

Scottish Social Housing Charter Performance

Requirement.	Who.	When.	RAG.	Comments.
Submit Annual Return against the Charter to Scottish Housing Regulator in accordance with published guidance.	Head of Community Learning, Leisure and Housing and Data Analysts.	May 2025.	Green.	Submitted by 31 May 2025.
Involve tenants, and where relevant service users, in the preparation and scrutiny of performance information.	Tenant Participation Officer.	In place.	Green.	<ul style="list-style-type: none"> Residents' Panel involved in development of annual report as standard.

Requirement.	Who.	When.	RAG.	Comments.
<ul style="list-style-type: none"> • Agree an effective and meaningful approach with tenants. • Publicise approach to tenants. • Verify approach and evidence involving tenants has happened. • Involve other service users in an appropriate way. 				<ul style="list-style-type: none"> • Section in the annual report to encourage feedback. • Residents' Panel are invited to an annual presentation on performance from Scotland's Housing; Network (from 2019) and discussion at Residents' Panel meeting thereafter.
<p>Report performance to tenants and other service users no later than October each year:</p> <ul style="list-style-type: none"> • Agree format of performance reporting with tenants and ensure accessible with plain and jargon free language. • Provide assessment of performance in delivering Charter outcomes. • Include relevant comparison including previous years, other landlords and with national performance. • Set out how we intend to address areas for improvement. 	Head of Community Learning, Leisure and Housing and Data Analysts and Tenant Participation Officer.		Green.	The Council has a joint Residents' Panel with Orkney Housing Association which consists of tenants / residents of both organisations. They are asked for their views on the Annual Report ahead of publication and their views will continue to be taken into account in producing the final document. The Council includes a section in the Annual Report which encourages feedback from tenants more generally on how they feel about the report and the information on it.

Requirement.	Who.	When.	RAG.	Comments.
<ul style="list-style-type: none"> Give tenants and service users a way to feedback views on style and form of reporting. 				
Make Scottish Housing Regulator report on our performance easily available to tenants including online.	Head of Community Learning, Leisure and Housing and Data Analysts.	When produced by SHR.	Green.	To be included as a link to the Scottish Housing Regulator's website from Housing Services' area of the Council's website.

Whistleblowing

Requirement.	Who.	When.	RAG.	Comments.
Ensure effective arrangements and a policy for whistleblowing for staff and elected Members.	Head of HR and Performance.	In place from October 2015.	Green.	Policy on Whistleblowing is available on internal portal or in either electronic or hard copy from HR on request. Trade Unions are also aware of this. There is a monthly meeting with Trade Unions which is corporate and each individual service holds regular meetings with the Trade Unions as well.
Make Whistleblowing policy easily available and promote its existence.	As above.	In place. As above.	Green.	As above.

Tenants and Service Users Redress

Requirement.	Who.	When.	RAG.	Comments.
Make information on reporting any significant performance failures, including the Scottish Housing Regulator's leaflet, available to our tenants.	Head of Community Learning, Leisure and Housing and Tenant Participation Officer.	In place from June 2019.	Green.	A link will be provided to the Scottish Housing Regulator's leaflet from the Council's website.
Provide tenants and service users with the information they need to exercise right to complain and seek redress.	Team Manager (Housing Strategy, Development and Data).	In place.	Green.	The Council's corporate complaints process is used and corporate policy in line with the guidance from the Scottish Public Services Ombudsman. Information is available through our website and in hard copy on request.
Respond to tenant complaints within our service standards timescales and in accordance with the Scottish Public Services Ombudsman guidance.	Team Manager (Housing Strategy, Development and Data).	In place.	Green.	Reporting against timescales is included in the Annual Return against the Charter.
Ensure we have effective arrangements to learn from complaints and other tenant and service user feedback, in accordance with SPSO guidance.	Head of Community Learning, Leisure and Housing and Head of Legal Services.	In place.	Green.	This links with standard 3.12 of the National Standards for Information and Advice Providers which covers using feedback to inform service provision. Information collected through complaints, comments and customer satisfaction surveys is used to inform the

Requirement.	Who.	When.	RAG.	Comments.
				update of the Service Delivery Plan for the relevant service area.

Equality and Human Rights

Requirement.	Who.	When.	RAG.	Comments.
Have assurance and evidence we consider equality and human rights issues properly when making decisions, in the design and review of internal and external policies, and in our day to day service delivery.	Senior Management Team of the Council.	In place.	Green.	<ul style="list-style-type: none"> All policies within Housing Services contain a section on equalities. The Housing Service has a specific Equalities Policy and one on Accessibility and reviewed its Equalities Policy during 2021. Equalities monitoring across 9 protected characteristics has been taken forward in line with the national guidance. We sought equalities information from all existing tenants and housing applicants, in relation to 9 protected characteristics in line with the Scottish Housing Regulator's Regulatory Framework and Guidance from the Scottish Federation of Housing Associations. Equalities data requested has been expanded across all housing and homelessness service areas accordingly and data will be used as required to ensure continued improvement of service provision.

Requirement.	Who.	When.	RAG.	Comments.
				<ul style="list-style-type: none"> • Committee reports on policy matters all contain a section on equality so this is mainstreamed. • Completion of equality impact assessments is standard. • Island communities impact assessments are undertaken as required. • The Council monitors its website and ensures it meets website accessibility requirements. • The Council employs a specialist equalities officer to ensure compliance. • Housing staff and staff within our Infrastructure and Organisational Development Service received refresher training on equalities in the autumn of 2023.
Collect data relating to protected characteristics for existing tenants, new tenants, people on waiting lists and elected Members and staff.	Head of Community Learning, Leisure and Housing	In place.	Green.	<ul style="list-style-type: none"> • Equalities criteria do not currently apply to Elected Members given that they are democratically elected. • Equalities monitoring information across 9 protected characteristics is now collected for new tenants and applicants and information has also

Requirement.	Who.	When.	RAG.	Comments.
				<p>been sought in relation to existing tenants also. This is sought along with information relating to requirements for information in a range of formats.</p> <ul style="list-style-type: none"> As regards staff, our HR Service collect information relating to 9 protected characteristics for staff when they apply for any post whether when they initially come into the organisation or where an internal application is submitted. Updates are requested through the MyView portal and annual communications are issued to remind staff to update details. The staff survey also requests information relating to the 9 protected characteristics and an annual report is produced on staff diversity which in turn is used to inform any relevant changes to policy required.
Collect data on protected characteristics of people who apply as homeless.	Head of Community Learning, Leisure and Housing.	In place.	Green.	<ul style="list-style-type: none"> Equalities monitoring information is collected for people who apply as homeless. Our homelessness interview form has been updated to include all 9 protected characteristics.

Requirement.	Who.	When.	RAG.	Comments.
Collect data on protected characteristics of people who use our Gypsy / Traveller services.	N/A.	N/A.	N/A.	N/A.

* Those requirements marked as “amber” will all revert to green during 2024/25 when the issue has been addressed through ensuring the Council complies with the requirements in the Scottish Housing Regulator’s engagement plan. Delivery of repairs services is undertaken by the Council’s Infrastructure and Organisational Development Service for the Housing Service including the physical aspects of ensuring tenant and resident safety (gas, electrical, fire, water, asbestos, radon, damp and mould and lift safety).