

Item: 3

Education, Communities and Housing Committee: 9 September 2026.

Highlands and Islands Students' Association.

Articles of Association.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents Highlands and Islands Students' Association (HISA) revised Articles of Association, for members' approval.
- 1.2. UHI Orkney is an Academic Partner of UHI. As such, UHI Orkney students are members of the HISA.
- 1.3. HISA have proposed some changes to the Articles of Association, which is the culmination of a major undertaking begun during the 2024/25 academic year to develop revised governing documents. The documents have been approved by a referendum and Annual All-Student Meeting, and by the Trustee Board and a Special Resolution passed by a Company Law Meeting held of 21 May 2026.
- 1.4. A primary purpose of the revisions to the Articles of Association was to address information that was missing, outdated, conflicting and contradictory, or unnecessarily complex and duplicating. This "tidying up" exercise aimed broadly not to substantively change the current structures, but merely to express them in a clearer, more readable and more useable manner. At the same time, a small number of minor adjustments have been made, including:
 - i. The restructure of the Student Officer team, including the removal of the Highland Theological College (HTC) Depute President.
 - ii. The adjustment of the Trustee Board chair role to now sit with an independent member rather than the President. This change reflects good practice and aims to strengthen governance by allowing an external trustee who is in place for more than one year to help ensure continuity and consistency whilst allowing the elected President to be the vice-chair. This arrangement is seen in the majority of other students' associations in Scotland and is supported in the latest Code of Governance for Students'

Unions. Given the workload of the President, the HISA Trustee Board and Executive Committee supported this change as a means of encouraging applicants to the Cross-Campus Officer roles.

- iii. Continuing to set referendum thresholds at 200 students participating and which reflects current experiences.

- 1.5. The role of the Association and its need to remain accountable to the University and each Academic Partner remains unchanged.

2. Recommendations

- 2.1. It is recommended that members of the Committee

- i. Approve the Highlands and Islands Students' Association's Articles of Association, attached as Appendix 1 to this report.

For Further Information please contact:

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Implications of Report

- 1. **Financial:** None. Any costs that might arise would have to be found within existing resources of UHI Orkney.
- 2. **Legal:** If the recommendations are approved, the revised Articles of Association will be adopted by HISA.
- 3. **Corporate Governance:** None.
- 4. **Human Resources:** None.
- 5. **Equalities:** None.
- 6. **Island Communities Impact:** None.
- 7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☐ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
- 8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☐ Cost of Living.
 - ☐ Sustainable Development.

☒ Local Equality.

☐ Improving Population Health.

9. Environmental and Climate Risk: None.

10. Risk: None.

11. Procurement: None.

12. Health and Safety: None.

13. Property and Assets: None.

14. Information Technology: None.

15. Cost of Living: None.

Background Papers

None.

Appendix

Appendix 1: HISA Articles of Association.



The Companies Act 2006

Company Limited by Guarantee and not Having a Share Capital

Memorandum and Articles of Association of the Highlands and Islands Students' Association

To be adopted following ratification by the Court of the University of the Highlands and Islands and by Academic Partners
HISA Company Law Meeting Special Resolution, 21st May 2026

HISA is a registered charity (SC046142) and represents the students at the
University of the Highlands and Islands, and their academic partners.



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This section describes who the Executive Committee are, how they are appointed, how they can be removed and their powers.

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This section deals with miscellaneous issues.



The Companies Act 2006 Company Limited by Guarantee and not having a Share Capital

Articles of Association of the Highlands and Islands Students' Association

BACKGROUND

- A** The Highlands and Islands Students' Association (the "Association") is a Students' Union within the meaning of the Education Act 1994 (formed in accordance with Article 19.1 of the University's Articles of Association) and is the eligible body to nominate students to the Court of the University of the Highlands and Islands (UHI).

The Highlands and Islands Students' Association will represent the interests of all students (FE and HE) at the University of the Highlands and Islands and its academic partners at a cross-campus level. The Association will also represent the local interests of all students at those academic partners whose representative structures are part of the Association as outlined in the Schedules to these Articles.

- B** The Association will seek at all times to:

- (i) ensure that the diversity of its Student Membership is recognised and that equal access is available to all Student Members of whatever origin or orientation;
- (ii) pursue its aims and objectives independent of any political party or religious group; and
- (iii) pursue equal opportunities by taking positive action within the law to facilitate participation of groups discriminated against by society.

- C** These Articles have been structured to give the Board of Trustees reasonable authority to manage the affairs of the Association in a professional manner. The Student Members enjoy the right, which must be exercised in accordance with charity law, to elect a proportion of the Trustees and to dismiss all of the Trustees. The Board of Trustees will give the utmost consideration to the views of Student Members.

- D** Under the Education Act 1994, the University of the Highlands and Islands and its academic partners have a statutory duty to ensure that the Association operates in a fair and democratic manner and is held to proper account for its finances. The Association therefore works alongside the University of the Highlands and Islands and its academic partners in ensuring that the affairs of the Association are properly conducted and that the educational and welfare needs of the Association's Student Members are met.



Part One

Key Constitutional Provisions

1. Definitions and Interpretation

- 1.1 The meanings of any defined terms used in these Articles are set out below. If any dispute arises in relation to the interpretation of these Articles or any of the Schedules, it shall be resolved by the Student President or, where appropriate, a nominee appointed by them. Any appeal to their interpretation must be directed to the Board of Trustees who shall make a final ruling.

<u>Term</u>	<u>Meaning</u>
Academic Year	the period between 1st July in one year to 30th June in the following year;
Address	includes a postal or physical address and a number or address used for the purpose of sending or receiving documents by Electronic Means;
Appointments Committee	the committee set up in accordance with the Schedules;
Articles	these Articles of Association for the Students' Association; the governing document outlining what we do;
Association	the Highlands and Islands Students' Association, also known as HISA;
Board of Trustees or Board	the Board of Trustees of the Association;
Chair	the chair of the Board of Trustees, who shall be appointed in accordance with Article [47.1];
Chair of the meeting	in the case of Trustees' meetings means the person chairing the meeting in accordance with Article [47];
Circulation Date	in relation to a written resolution, has the meaning given to it in the Companies Acts;
Clear days	in relation to the period of a notice, that period excluding the day when the notice is given or deemed to be given and the day for which it is given or on which it is to take effect;
Code of Practice	the code of practice relating to the University of the Highlands and Islands' and its academic partners' obligations under Section 22 of the Education Act;
Companies Acts	means the Companies Acts (as defined in Section 2 of the Companies Act 2006), in so far as they apply to the Association;
Company Law Meeting	a general meeting of the Company Law Members of the Association for the purposes of the Companies Acts;
Company Law members	members of the Association for the purposes of the Companies Acts, as defined in Article [13];
Connected person	any person falling within one of the following categories and where payment to that person might result in the Trustee obtaining benefit: a) any spouse, civil partner, parent, child, brother, sister, grandparent or grandchild of a Trustee; or b) the spouse or civil partner of any person in (a); or c) any person living with a Trustee or their partner; or d) any company or LLP or firm of which a Trustee is a paid director, member, partner or employee, or shareholder holding more than 1% of the capital;



Cross-Campus Officer Trustee	a Trustee elected in accordance with Article [25], often referred to as a Cross-Campus Officer;
Deputy Chair	the deputy chair of the Board of Trustees, who shall be the Student President in accordance with Article [47.2];
Document	includes summons, notice, order or other legal process and includes, unless otherwise specified, any document sent or supplied in Electronic Form;
Education Act	the Education Act 1994;
Elected Officers	the Cross-Campus Officer Trustees and Local Officers elected under the Schedules;
Electronic Form and Electronic Means	have the meanings respectively given to them in Section 1168 of the Companies Act 2006;
(the) Executive Committee	means the committee comprising the Cross-Campus Officer Trustees and the Local Officers as further described in Article [37];
External Trustee	a Trustee appointed in accordance with Article [27.1] who for the avoidance of doubt shall not be deemed to be either a major Association office holder or a Cross-Campus Officer Trustee for the purposes of Section 22 of the Education Act;
Financial expert	an individual, company or firm who is authorised to give investment advice under the Financial Services and Markets Act 2000;
Hard Copy and Hard Copy Form	have the meanings respectively given to them in the Companies Act 2006;
Local Officers	the Student Members elected in accordance with the Schedules to be Student Officers at the academic partners of UHI;
Members	the Student Members and the Company Law Members;
Positional Policy	representative and campaigning policy set by Referenda in accordance with Article [20] and schedules respectively or by the Student Members at an Annual All Student Meeting or an All Student Meeting in accordance with Article [21] and the schedules;
RAG	the Raising And Giving society which develops students by providing them with an opportunity to raise funds for charitable causes;
Referendum	a ballot in which all Student Members of the Association are entitled to cast a vote, the protocol for which shall be set out in the Schedules;
Schedules	a document outlining the working practices of the Association made from time to time in accordance with Article [52];
Secure Petition	a written request to the Association which shall be fixed in a prearranged place or places or held securely on-line;
Senior Manager	the senior manager of the Association who is appointed by the Board of Trustees;
Student	any individual who is formally registered for an approved programme of study provided by the University of the Highlands and Islands and its academic partners. For the avoidance of doubt, the relevant institution shall determine whether or not an individual has student status;
Student Trustee	a Trustee elected in accordance with Article [26] who is a Student and who, for the avoidance of doubt, shall not be a major Association office holder for the purposes of Section 22 of the Education Act;
Student Members	student members of the Association as defined in Article [11];



Subsidiary Company

any company in which the Association holds more than 50% of the shares, controls more than 50% of the voting rights attached to the shares or has the right to appoint a majority of the board of the company;

Trustee and Trustees

the directors of the Association as defined in Article [24]; and

Writing

the representation or reproduction of words, symbols or other information in a visible form by any method or combination of methods, whether sent or supplied in Electronic Form or otherwise

- 1.2 This constitution uses the gender-neutral pronouns “they”, “their” and “them” throughout the document.
- 1.3 Subject to Article [1.4], any reference in these Articles to an enactment includes a reference to that enactment as re-enacted or amended from time to time and to any subordinate legislation made under it.
- 1.4 Unless the context otherwise requires, other words or expressions contained in these Articles bear the same meaning as in the Companies Act 2006 as in force on the date when these Articles become binding on the Association.

2. Name

The name of the company is the Highlands and Islands Students' Association. In these Articles it is called “the Association”.

3. Registered Office

The registered office of the Association is situated in Scotland.

4. Objects

The objects of the Association are the advancement of education of students at the University of the Highlands and Islands and its academic partners for the public benefit by:

- 4.1 working to enhance the teaching and learning experience of students at the University of the Highlands and Islands and its academic partners by organising, supporting and promoting the role of students, and working in partnership with the relevant institutions and its staff;
- 4.2 promoting the interests and welfare of students during their course of study and representing, supporting and advising students;
- 4.3 being the recognised representative channel between students and the University of the Highlands and Islands and its academic partners and any other external bodies;
- 4.4 providing social, cultural, sporting and recreational activities, and forums for discussions and debate for the personal development of its students; and
- 4.5 being the recognised representative body that represents students to the University of the Highlands and Islands as the regional strategic body for further education in the Highlands and Islands.

5. Powers

To further its objects, but not to further any other purpose, the Association may:

- 5.1 provide services and facilities for Student Members;
- 5.2 establish, support, promote and operate a network of student activities for Student Members;
- 5.3 support any Raising & Giving (RAG) or similar fundraising activities carried out by its Student Members for charitable causes, including the provision of administrative support, banking facilities and acting as a holding trustee of any funds raised;



- 5.4 alone or with other organisations:
 - 5.4.1 carry out campaigning activities;
 - 5.4.2 seek to influence public opinion; and
 - 5.4.3 make representations to and seek to influence governmental and other bodies and institutions regarding the reform, development and implementation of appropriate policies, legislation and regulations, provided that all such activities shall be confined to the activities which a Scottish charity may properly undertake and provided that the Association complies with the Education Act and any guidance published by the Office of the Scottish Charity Regulator (OSCR);
- 5.5 write, make, commission, print, publish or distribute materials or information or assist in these activities;
- 5.6 promote, initiate, develop or carry out education and training and arrange, provide or assist with exhibitions, lectures, meetings, seminars, displays or classes;
- 5.7 promote, encourage, carry out or commission research, surveys, studies or other work and publish the useful results;
- 5.8 provide or appoint others to provide advice, guidance, representation and advocacy;
- 5.9 co-operate with other charities and bodies and exchange information and advice with them;
- 5.10 become a member, affiliate or associate of other charities and bodies;
- 5.11 support, set up or amalgamate with other charities with objects identical or similar to the Association's objects, and act as or appoint trustees, agents, nominees or delegates to control and manage such charities (including without limitation to act as trustee of any charitable trust of permanent endowment property held for any of the charitable purposes included in the Association's objects);
- 5.12 purchase or acquire all or any of the property, assets, liabilities and engagements of any charity with objects similar to the Association's objects;
- 5.13 pay out of the funds of the Association the costs of forming and registering the Association;
- 5.14 raise funds and invite and receive contributions from any person, provided that the Association shall not carry out any taxable trading activities out with the recommendations of OSCR in raising funds;
- 5.15 borrow and raise money on such terms and security as the Association may think suitable including for the purposes of investment or of raising funds in accordance with the restrictions imposed by the Charities and Trustee Investment (Scotland) Act 2005;
- 5.16 purchase, lease, hire or receive property of any kind including land, buildings and equipment and maintain and equip it for use;
- 5.17 sell, manage, lease, mortgage, exchange, dispose of or deal with all or any of its property;
- 5.18 make grants or loans of money and give guarantees;
- 5.19 set aside funds for special purposes or as reserves against future expenditure;
- 5.20 invest and deal with the Association's money not immediately required for its objects in or upon any investments, securities, or property;
- 5.21 delegate the management of investments to an appropriately experienced and qualified financial expert provided that:
 - 5.21.1 the investment policy is set down in writing for the financial expert by the Trustees;
 - 5.21.2 every transaction is reported promptly to the Trustees;
 - 5.21.3 the performance of the investments is reviewed regularly by the Trustees;
 - 5.21.4 the Trustees are entitled to cancel the delegation at any time;
 - 5.21.5 the investment policy and the delegation arrangements are reviewed at least once a year;
 - 5.21.6 all payments due to the financial expert are on a scale or at a level which is agreed in advance and are notified promptly to the Trustees on receipt; and



- 5.21.7 the financial expert may not do anything outside the powers of the Trustees;
- 5.22 arrange for investments or other property of the Association to be held in the name of a nominee (being a company or a limited liability partnership registered or having an established place of business in the United Kingdom) under the control of the Trustees or a financial expert acting under their instructions and to pay any reasonable fee required;
- 5.23 lend money and give credit to, take security for such loans or credit and guarantee or give security for the performance of contracts by any person or company;
- 5.24 open and operate banking accounts and other facilities for banking and draw, accept, endorse, negotiate, discount, issue or execute negotiable instruments such as promissory notes or bills of exchange;
- 5.25 trade in the course of carrying out any of its objects and carry on any other trade which is not expected to give rise to taxable profits;
- 5.26 establish or acquire subsidiary companies to carry on any trade;
- 5.27 subject to Article [6] (Limitation on private benefits), employ and pay employees and professionals or other advisors;
- 5.28 grant pensions and retirement benefits to employees of the Association and to their dependents and subscribe to funds or schemes for providing pensions and retirement benefits for employees of the Association and their dependents;
- 5.29 pay out of the funds of the Association the cost of any premium in respect of any indemnity insurance to cover the liability of the Trustees (or any of them) which by virtue of any rule of law would otherwise attach to them in respect of any negligence, default, breach of trust or breach of duty of which they may be guilty in relation to the Association, including without limitation any liability to make a contribution to the Association's assets as specified in section 214 of the Insolvency Act 1986 (wrongful trading), provided that no such insurance shall extend to:
 - 5.2.9.1 any claim arising from any liability incurred by the Trustees to pay a fine imposed in criminal proceedings or a sum payable to a regulatory authority by way of a penalty in respect of non-compliance with any requirement of a regulatory nature (however arising);
 - 5.2.9.2 any liability incurred by the Trustees in defending any criminal proceedings in which the Trustees are convicted of an offence arising out of any fraud or dishonesty, or wilful or reckless misconduct;
 - 5.2.9.3 any liability incurred by the Trustees to the Association that arises out of any conduct which the Trustees knew (or must reasonably be assumed to have known) was not in the interests of the Association or in the case of which they did not care whether it was in the best interests of the Association or not; or
 - 5.2.9.4 in relation to any liability to make a contribution to the Association's assets as specified in section 214 of the Insolvency Act 1986, any liability to make such a contribution where the basis of the Trustee's liability is their knowledge prior to the insolvent liquidation of the Association (or reckless failure to acquire that knowledge) that there was no reasonable prospect that the Association would avoid going into insolvent liquidation; and
- 5.30 do all such other lawful things as shall further the Association's objects.

6. Limitation on private benefits

- 6.1 The income and property of the Association shall be applied solely towards the promotion of its objects.
- 6.2 Except as provided below no part of the income and property of the Association may be paid or transferred directly or indirectly by way of dividend, bonus or otherwise by way of profit to any Member of the Association. This shall not prevent any payment in good faith by the Association of:
 - 6.2.1 any payments made to any Member in their capacity as a beneficiary of the Association;
 - 6.2.2 reasonable and proper remuneration to any Member for any goods or services supplied to the Association provided that if such Member is a Trustee Article [6.3] shall apply;
 - 6.2.3 interest on money lent by any Member to the Association at a reasonable and proper rate;
 - 6.2.4 any reasonable and proper rent for premises let by any Member to the Association.
- 6.3 Except as provided below no Trustee may sell goods, services or any interest in land to the Association; be employed by, or receive any remuneration from, the Association; or receive any other financial benefit from the Association. This shall not prevent any payment in good faith by the Association of:



- 6.3.1 any payments made to any Trustee or Connected Person in their capacity as a beneficiary of the Association;
- 6.3.2 reasonable and proper out of pocket expenses of the Trustees;
- 6.3.3 reasonable and proper remuneration to any Cross-Campus Officer Trustee or Connected Person for any goods or services supplied to the Association on the instructions of the Trustees provided that:
 - 6.3.3.1 for the avoidance of doubt, the authorisation under this provision shall extend to the remuneration of Cross-Campus Officer Trustees and Connected Persons under contracts of employment with the Association;
 - 6.3.3.2 subject to Article [6.3.3.1], the authorisation under this provision shall not extend to the service of acting as Trustee;
 - 6.3.3.3 if the person being remunerated is a Trustee the procedure described in Article [50] (Conflicts of Interest) must be followed in considering the appointment of the Trustee and in relation to any other decisions regarding the remuneration authorised by this provision;
 - 6.3.3.4 if the person being remunerated is a Connected Person the procedure described in Article [50] (Conflicts of Interest) must be followed by the relevant Trustee in relation to any decisions regarding such Connected Person;
 - 6.3.3.5 subject to Article [6.5], this provision may not apply to more than half of the Trustees (and for these purposes such provision shall be treated as applying to a Trustee if it applies to a person who is a Connected Person in relation to that Trustee); and
 - 6.3.3.6 at all times the provisions of the Education Act and the Charities and Trustee Investment (Scotland) Act 2005 are complied with;
- 6.3.4 interest on money lent by any Trustee or Connected Person to the Association at a reasonable and proper rate;
- 6.3.5 any reasonable and proper rent for premises let by any Trustee or Connected Person to the Association;
- 6.3.6 reasonable and proper premiums in respect of indemnity insurance effected in accordance with Article [5.29];
- 6.3.7 any payments made to any Trustee or officer under the indemnity provisions set out at Article [60]; and
- 6.3.8 any payments authorised in writing by the Office of the Scottish Charity Regulator (OSCR).
- 6.4 For any transaction authorised by Article [6.3], the Trustee's duty (arising under the Companies Act 2006) to avoid a conflict of interest with the Association shall be disapplied provided the relevant provisions of Article [6.3] have been complied with.
- 6.5 Where a vacancy arises on the Board of Trustees with the result that Article [6.3.3] applies to less than half of the Trustees, the Association may continue to pay remuneration to its Cross-Campus Officer Trustees and any Connected Persons receiving remuneration in accordance with Article [6.3.3] provided that the Association uses all reasonable endeavours to fill the vacancy as soon as possible.

7. Liability of Company Law Members

The liability of each Company Law Member is limited to £1, being the amount that each Company Law Member undertakes to contribute to the assets of the Association in the event of its being wound up while they are a Company Law Member or within one year after they cease to be a Company Law Member, for:

- 7.1 payment of the Association's debts and liabilities contracted before they cease to be a Company Law Member;
- 7.2 payment of the costs, charges and expenses of winding up; and
- 7.3 adjustment of the rights of the contributories among themselves.



8. Dissolution

If any property remains after the Association has been wound up or dissolved and all debts and liabilities have been satisfied, it shall not be paid to or distributed among the Members of the Association. It shall instead be given or transferred to some other charitable institution or institutions having similar objects to those of the Association and which prohibits the distribution of its or their income and property among its or their members to an extent at least as great as these Articles impose upon the Association. The institution or institutions which are to benefit shall be chosen by the Trustees of the Association at or before the time of winding up or dissolution.

9. Reviewing and amending the Articles

- 9.1 The Trustees and the Court of the University of the Highlands and Islands shall be required to review the provisions of the Association's Articles of Association at intervals of no more than five years.
- 9.2 Any amendment to the Association's Articles of Association shall require the following:
 - 9.2.1 A resolution passed at an All Student meeting or in a Referendum by a two thirds majority vote approving the Proposal or the Proposal(s) (as the case may be);
 - 9.2.2 A special resolution of the Company Law Members making the amendments to the Articles that have been approved by resolution of the Student Members in accordance with Article [9.2.1];
 - 9.2.3 Approval at a convened meeting of representatives of Court of the University of the Highlands and Islands, subject to ratification of Court in its entirety.

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Part Two Members

10. Members of the Association

- 10.1 The Members of the Association shall be as follows:
 - 10.1.1 Student Members; and
 - 10.1.2 Company Law Members.
- 10.2 The Association may also have the following associate members:
 - 10.2.1 Student Associate Members in accordance with Article [15].; and
 - 10.2.2 Non-Student Associate Members in accordance with Article [16].

BECOMING AND CEASING TO BE A STUDENT MEMBER

11. Student Members

- 11.1 The Student Members of the Association shall be as follows:
 - 11.1.1 each and every Student aged 16 and over registered with the academic partners whose representation structures are part of the Association, who has not opted out by notifying the University of the Highlands and Islands Student Records Office of their wish not to be a Student Member of the Association; and
 - 11.1.2 the Cross-Campus Officer Trustees of the Association; and
 - 11.1.3 the full-time Local Officers of the Association.
- 11.2 A register of students who have opted out of membership of the Association in accordance with these Articles shall be maintained by the University of the Highlands and Islands.

12. Termination of Student Membership

- 12.1 Student Membership shall not be transferable and shall cease on death. A Student Member shall cease to be a Student Member of the Association if:
 - 12.1.1 they cease to be a student. For the avoidance of doubt, this will include the situation where a Student Member's Student status with the University of the Highlands and Islands or its academic partners is revoked by the University of the Highlands and Islands or its academic partners;
 - 12.1.2 they cease to be a Cross-Campus Student Officer; or
 - 12.1.3 they cease to be a full-time Local Officer; or
 - 12.1.4 they opt out of Student Membership by giving written notice to the University of the Highlands and Islands Student Records Office; or
 - 12.1.5 a decision is made to remove them from Student Membership of the Association in accordance with the Association's Code of Conduct or the Disciplinary Procedure for Members Schedule.
- 12.2 Any student who has exercised their right to opt out of Student Membership shall not be unfairly disadvantaged, with regard to the provision of Association services or otherwise, by reason of having done so.
- 12.3 Any student who has exercised their right to opt out shall not be permitted to engage with the democratic governance structures of the Association.

BECOMING AND CEASING TO BE A COMPANY LAW MEMBER

13. Trustees as Company Law Members

- 13.1 The Trustees from time to time shall be the only Company Law Members of the Association.



- 13.2 A Trustee shall become a Company Law Member on becoming a Trustee.
- 13.3 The names of the Company Law Members of the Association shall be entered in the register of Company Law Members.

14. Termination of Company Law Membership

- 14.1 A Company Law Member shall cease to be a Company Law Member if they cease to be a Trustee.
- 14.2 Company Law Membership is not transferable and shall cease on death.

BECOMING AND CEASING TO BE ASSOCIATE MEMEBERS

15. Student Associate Members

- 15.1 Students registered with academic partners that maintain independent students' associations are not Student Members of the Association.
- 15.2 Students registered with academic partners that maintain independent students' associations have a category of membership, Student Associate Member, that enables them to be represented by the Highlands and Islands Students' Association at a cross-campus level.
- 15.3 This category of membership enables these students to fully participate in all Association business in relation to cross-campus matters. This includes Cross-Campus Officer Trustee elections, committees, referenda, petitions and any other cross-campus activity delivered by the Association.
- 15.4 Under agreement between the Highlands and Islands Students' Association and these independent students' associations, some services may be shared.
- 15.5 Student Associate Membership shall not be transferable and shall cease on death. A Student Associate Member shall cease to be a Student Member of the Association if:
 - 15.5.1 they cease to be a Student. For the avoidance of doubt, this will include the situation where a Student Associate Member's Student status with the University of the Highlands and Islands or its academic partners is revoked by the University of the Highlands and Islands or its academic partners;
 - 15.5.2 they opt out of Student Associate Membership by giving written notice to the University of the Highlands and Islands Student Records Office; or
 - 15.5.3 a decision is made to remove their Student Association Membership in accordance with the Association's Code of Conduct or the Disciplinary Procedure for Members Schedule.

16. Non-Student Associate members

- 16.1 The Annual All Student Meeting (AASM) may establish such classes of Non-Student Associate Membership with such description and with such rights and obligations as they think fit and may admit and remove such Non-Student Associate Members in accordance with the Schedules provided that no such Non-Student Associate Members shall be Members of the Association for the purposes of the Articles or the Companies Acts.
- 16.2 Non-Student Associate Members shall not be Members for the purposes of these Articles and shall not be entitled to vote on any matter.

MEMBERSHIP RIGHTS & RESPONSIBILITIES

17. Rights Of Membership

- 17.1 Student Members of the Association shall be entitled to;
 - 17.1.1 Engage with the Association's democratic functions;
 - 17.1.2 Utilise the social facilities administered by the Association;



- 17.1.3 Access the services and support facilities provided by the Association;
- 17.1.4 Join registered student groups (for example Sport Clubs and Societies) subject to the conditions of membership of such groups;
- 17.1.5 Engage in the democratic functions of student groups of which they are members;
- 17.1.6 Represent the organisation in competitive sport including, but not limited to, BUCS competitions subject to qualification conditions of each sporting body;
- 17.1.7 Be represented by the Association on academic issues and any other relevant issues that arise as a result of their student status; and
- 17.1.8 Attend Company Law Meetings as observers at the invitation of the Chair.
- 17.2 Company Law Members shall be entitled to;
 - 17.2.1 Participate in Company Law meetings subject to their rules and regulations;
 - 17.2.2 Utilise the social facilities administered by the Association;
 - 17.2.3 Access the publicly available services provided by the Association (unless otherwise stated); and
 - 17.2.4 Join registered student groups (for example Sport Clubs and Societies) subject to the conditions of non-student membership of such groups and the approval of their committee.
- 17.3 Student Associate Members shall be entitled to;
 - 17.3.1 Engage with the Association's cross-campus democratic functions;
 - 17.3.2 Utilise the social facilities administered by the Association;
 - 17.3.3 Access the services and support facilities provided by the Association;
 - 17.3.4 Join registered student groups (for example Sport Clubs and Societies) subject to the conditions of membership of such groups;
 - 17.3.5 Engage in the democratic functions of student groups of which they are members;
 - 17.3.6 Represent the organisation in competitive sport including, but not limited to, BUCS competitions subject to qualification conditions of each sporting body;
 - 17.3.7 Be represented by the Association on academic issues and any other relevant issues that arise as a result of their student status; and
 - 17.3.8 Attend Company Law Meetings as observers at the invitation of the Chair.
- 17.4 Non-Student Associate Members shall be entitled to;
 - 17.4.1 Utilise the social facilities administered by the Association;
 - 17.4.2 Access the publicly available services provided by the Association (unless otherwise stated);
 - 17.4.3 Join registered student groups (for example Sports Clubs and Societies) subject to the conditions of Non-Student Associate Membership of such groups and the approval of their committee; and
 - 17.4.4 Attend Company Law Meetings as observers at the invitation of the Chair.

18. Responsibilities Of Membership

- 18.1 All types of membership shall be subject to the Articles, Schedules and Policies of the Students' Association including the Code of Conduct.



19. Code of Conduct

- 19.1 The Board of Trustees will establish and monitor a “code of conduct” that all Student Members and all Student Associate Members shall be required to adhere to, including when Student Members are involved in activities or at events that are administered or organised by the Association.
- 19.2 The code of conduct may include a range of sanctions for breach of the code of conduct by a Student Member or a Student Associate Member, including the suspension or removal of any or all of the rights and privileges of Student Membership or Student Associate Membership, including the holding of office.

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Part Three Meetings

20. Referendums

- 20.1 A Referendum may be called on any issue by:
 - 20.1.1 a resolution of the Trustees; or
 - 20.1.2 a majority vote of the Annual All Student Meeting; or
 - 20.1.3 a majority vote of the All Student Meeting; or
 - 20.1.4 A Secure Petition signed by at least 100 Student Members and/ or Associate Student Members
- 20.2 Subject to Article [31.1.2], a resolution may only be passed by Referendum if at least 200 Student Members and/ or Associate Student Members cast a vote in the Referendum and a majority of the votes cast are in favour of the resolution.
- 20.3 Referenda shall be conducted in accordance with these Articles and the Schedules.
- 20.4 Subject to Article [33.3], the Student Members may set Positional Policy by Referendum. Policy set by Referendum may overturn Positional Policy set by an Annual All Student Meeting (AASM) or an All Student Meeting (ASM).

21. Annual All Student Meetings

- 21.1 The Association shall hold an Annual All Student Meeting (AASM) each Academic Year which shall be called and held in accordance with these Articles and the Schedules. The Annual All Student Meeting (AASM) shall be held at such time and place as the Trustees shall think suitable to allow the maximum number of Student Members to attend.
- 21.2 The Annual All Student Meeting (AASM) shall, but is not limited to:
 - 21.2.1 represent the voice of the Students;
 - 21.2.2 ratify minutes of the previous Annual Student Members' Meeting (AASM);
 - 21.2.3 receive the annual Trustee report and / or an overview of the Association's activities since the previous Annual All Student Meeting (AASM);
 - 21.2.4 receive the accounts of the Association for the previous financial year;
 - 21.2.5 subject to Article [33.3], set the Positional Policy of the Association and refer Positional Policy to Referenda of the Student Members;
 - 21.2.6 ratify the decisions made by the Appointments and Remunerations Committee relating to the appointment of Student Trustees and External Trustees in accordance with Articles [26] and [27.1];
 - 21.2.7 scrutinise the activity of the elected Student Officers;
 - 21.2.8 question the Trustees;
 - 21.2.9 make, repeal and amend the Schedules jointly with the Trustees in accordance with Article [52];
 - 21.2.10 approve the list of affiliations of the Association; and
 - 21.2.11 appoint Non-Student Associate Members in accordance with Article [16] and the Schedules
- 21.3 The Association may hold additional All Student Meetings (ASMs) in addition to the Annual All Student Meeting (AASM). Such meetings shall be called and held in accordance with the Schedules.
- 21.4 For the avoidance of doubt, any Annual All Student Meeting (AASM) or All Student Meeting (ASM) held under this Article [21] shall not be a Company Law Meeting of the Association for the purposes of the Companies Acts.



COMPANY LAW MEETINGS

22. Company Law Meetings

- 22.1 The Trustees may call a Company Law Meeting at any time.
- 22.2 Such meetings must be held in accordance with the provisions regarding such meetings in the Companies Acts.
- 22.2 A Company Law Meeting will only be required where the Association wishes to pass a company law resolution (other than by way of written resolution) in accordance with the Articles and/or the Companies Acts, for example a resolution to amend the Association's Articles of Association.

23. Written Resolutions

- 23.1 Subject to this Article [23], a written resolution agreed by:
 - 23.1.1 Company Law Members representing a simple majority; or
 - 23.1.2 (in the case of a special resolution) Company Law Members representing not less than 75%;
of the total voting rights of eligible Company Law Members shall be effective.
- 23.2 On a written resolution each Company Law Member shall have one vote.
- 23.3 A written resolution is not a special resolution unless it stated that it was proposed as a special resolution.

Circulation

- 23.4 A copy of the proposed written resolution must be sent to every eligible Company Law Member together with a statement informing the Company Law Member how to signify their agreement and the date by which the resolution must be passed if it is not to lapse.
- 23.5 In relation to a resolution proposed as a written resolution of the Association the eligible Company Law Members are the Company Law Members who would have been entitled to vote on the resolution on the Circulation Date of the resolution.
- 23.6 The required majority of eligible Company Law Members must signify their agreement to the written resolution within the period of 28 days beginning with the Circulation Date.
- 23.7 Communications in relation to written resolutions must be sent to the Association's auditors in accordance with the Companies Acts.

Signifying agreement

- 23.8 A Company Law Member signifies their agreement to a proposed written resolution when the Association receives from them (or from someone acting on their behalf) an authenticated document:
 - 23.8.1 identifying the resolution to which it relates; and
 - 23.8.2 indicating the Company Law Member's agreement to the resolution.
- 23.9 For the purposes of Article [23.8]:
 - 23.9.1 a document sent or supplied in Hard Copy Form is sufficiently authenticated if it is signed by the person sending or supplying it; and
 - 23.9.2 a document sent or supplied in Electronic Form is sufficiently authenticated if:
 - 23.9.2.1 the identity of the sender is confirmed in a manner specified by the Association; or
 - 23.9.2.2 where no such manner has been specified by the Association, if the communication contains or is accompanied by a statement of the identity of the sender and the Association has no reason to doubt the truth of that statement.



- 23.10 If the Association gives an electronic address in any document containing or accompanying a written resolution, it will be deemed to have agreed that any document or information relating to that resolution may be sent by Electronic Means to that address (subject to any conditions or limitations specified in the document).

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Part Four Trustees

APPOINTMENT AND RETIREMENT OF TRUSTEES

24. Appointment of Trustees

The Trustees shall be made up of the following persons:

- 24.1 Cross-Campus Officer Trustees, elected in accordance with Article [25];
- 24.2 Student Trustees, appointed in accordance with Article [26];
- 24.3 External Trustees, appointed in accordance with Article [27].

25. Cross-Campus Officer Trustees

- 25.1 The Cross-Campus Officer Trustees shall be elected by secret ballot by the Student Members and Associate Student Members of the Association at an election to be held in accordance with the Schedules.
- 25.2 Cross-Campus Officer Trustees shall be elected in accordance with Article [25.1] to posts specified in the Schedules and each of these Cross-Campus Officer Trustees shall also hold office as a Trustee until they cease to be a Cross-Campus Officer Trustee in accordance with Article [31] or cease to be a Cross-Campus Officer Trustee in accordance with Articles [28]. Except where otherwise indicated, references in these Articles to “Cross-Campus Officer Trustees” are to individuals acting solely in their capacity as Cross-Campus Officer Trustees.
- 25.3 The Cross-Campus Officer Trustees shall remain in office for a term of one year commencing in accordance with the Schedules. The term of office may be shorter or longer on a transitional basis to coincide with an alteration of the year start or end. Subject to a transitional change in the year of office, a Cross-Campus Officer Trustee may be re-elected for a maximum further term of one year by the Student Members and Student Associate Members of the Association at an election to be held in accordance with the Schedules. For the avoidance of doubt, a Cross-Campus Officer Trustee’s terms of office may be either consecutive or non-consecutive.
- 25.4 Each Cross-Campus Officer must either be:
 - 25.4.1 a Student Member; or
 - 25.4.2 a Student Associate Member; or
 - 25.4.3 a first year Cross-Campus Trustee; or
 - 25.4.4 a full-time Local Officer;at the time of their election.
- 25.5 In accordance with Article [11], each Cross-Campus Officer Trustee shall become a Student Member of the Association on commencement of their appointment or reappointment as a Cross-Campus Officer Trustee. Such Student Membership shall cease when the Cross-Campus Officer Trustee ceases to be a Cross-Campus Officer Trustee.
- 25.6 The Cross-Campus Officer Trustees shall be deemed to be “major Association office holders” for the purposes of Section 22 of the Education Act.
- 25.7 At the same time as commencing the term of office, each Cross-Campus Officer Trustee will enter into a contract of employment with the Association for a term to be determined by the Schedules. The duties and method of remuneration of each Cross-Campus Officer Trustee shall be as set out in the Schedules.

26. Student Trustees

Subject to Article [26.1] below, Student Trustees shall be appointed by a simple majority vote of the Appointments Committee provided that the appointment of each Student Trustee is ratified by a simple majority vote of the Annual All Student Meeting (AASM) or All Student Meeting (ASM). For the avoidance of doubt, such appointments shall not take effect until it has been ratified by the Annual All Student Meeting (AASM) or All Student Meeting (ASM).

- 26.1 Each Student Trustee must be a Student at the time of their appointment (and shall continue to be a Student for the duration of their term as a Student Trustee).



- 26.2 Student Trustees shall remain in office for a maximum term of two years commencing in accordance with the Schedules. The term of office may be shorter or longer on a transitional basis to coincide with the alteration of the year start or end.
- 26.3 A Student Trustee may serve a maximum of two terms which may either be consecutive or non-consecutive.

27. External Trustees

- 27.1 External Trustees shall be appointed by a simple majority vote of the Appointments Committee provided that the appointment of each External Trustee is ratified by a simple majority vote of the Annual All Student Meeting (AASM) or All Student Meeting (ASM). For the avoidance of doubt, such appointment shall not take effect until it has been ratified by the Annual All Student Meeting (AASM) or All Student Meeting (ASM).
- 27.2 Unless their appointment is terminated in accordance with Articles [28], [29] or [30], External Trustees shall remain in office for a term of up to four years commencing in accordance with the Schedules.
- 27.3 External Trustees may serve for a maximum of two terms which may either be consecutive or non-consecutive.
- 27.4 They may not be Student Members, Associate Student Members, employees of the Association, or serving governors at UHI.

28. Disqualification, Resignation and Removal of Trustees

The office of a Trustee shall be vacated if:

- 28.1 that person ceases to be a Trustee by virtue of any provision of the Companies Act 2006 or is prohibited from being a company director by law;
- 28.2 they become prohibited by law from being a charity trustee;
- 28.3 in the case of a Cross-Campus Officer Trustee, they cease to be a Cross-Campus Officer Trustee;
- 28.4 in the case of a Student Trustee, they cease to be either a Student Member or Student Associate Member;
- 28.5 in the case of a Cross-Campus Officer Trustee or a Student Trustee, their Student Membership or Student Associate Membership of the Association is removed in accordance with the Association's code of conduct;
- 28.6 they resign by notice to the Association (but only if at least three Trustees will remain in office when the notice of resignation is to take effect);
- 28.7 they fail to attend three consecutive meetings of the Trustees and in the opinion of the Trustees there are no mitigating circumstances for that failure and the Trustees therefore resolve that they are removed for this reason; or
- 28.8 they are removed from office under Article [29] or [30].

29. Removal of Student Trustees or External Trustees by an All Student Meeting (ASM)

The office of a Trustee shall be vacated if:

- 29.1 A motion of no confidence in the Trustee is passed by a two thirds majority vote at an All Student Meeting (ASM). Such a motion shall only be triggered by a Secure Petition of no confidence signed by at least 100 Student Members and, or Student Associate Members.

30. Removal of Trustees by the Board

The office of External Trustee or Student Trustee shall be vacated if a majority resolution of no confidence is passed by the Trustees. For the avoidance of doubt, the Trustee concerned and any Trustee who has a conflict of interest in relation to the matter shall not vote on this resolution and the quorum shall be adjusted accordingly in accordance with Article [46].



31. Removal of Cross-Campus Officer Trustees

- 31.1 A Cross-Campus Officer Trustees shall be removed from office if they:
- 31.1.1 resign or die;
 - 31.1.2 are removed from office by a motion of no confidence: this is passed by a simple majority of the Student Members and/ or Student Associate Members voting in a Referendum, provided that at least 200 Student Members and/ or Student Associate Members cast a vote in the Referendum. Such a motion shall only be triggered by a Secure Petition of no confidence signed by at least 100 Student Members and/ or Student Associate Members;
 - 31.1.3 provided that, such removal shall be subject to the Association having first carried out any steps it is required to take under the Elected Officer's contract of employment and/or the applicable disciplinary procedure and otherwise in accordance with good employment practice.

32. Replacement of Trustees

- 32.1 If a Cross-Campus Officer Trustee resigns, is disqualified or is removed from office at any time prior to the commencement of the Academic Year, the vacancy that results on the Board of Trustees shall be filled in accordance with the Schedules.
- 32.2 If a Cross-Campus Officer Trustee resigns, is disqualified or is removed from office after the commencement of the Academic Year the vacancy shall be filled in accordance with the Schedules. Any person elected under these Articles may be required to assume the responsibilities of the Cross-Campus Officer Trustee.
- 32.3 If a Student Trustee resigns, is disqualified or is removed from office, a Student Trustee may be appointed to the vacancy in accordance with Article [26].
- 32.4 If an External Trustee resigns, is disqualified or is removed from office, an External Trustee shall be appointed to the vacancy in accordance with Article [27.1].

TRUSTEES' POWERS AND RESPONSIBILITIES

33. Trustee's general authority

- 33.1 The Board of Trustees shall be responsible for the management and administration of the Association and (subject to the Education Act, these Articles and the Schedules) may exercise all the powers of the Association. A meeting of the Trustees at which a quorum is present may exercise all powers exercisable by the Trustees.
- 33.2 The Board's powers under Article [33.1] shall include but not be limited to responsibility for:
- 33.2.1 the governance of the Association;
 - 33.2.2 the budget of the Association; and
 - 33.2.3 the strategy of the Association.
- 33.3 The Board of Trustees may override any decision or Positional Policy made by the Student Members and/ or Student Associate Members at an Annual All Student Meeting (AASM), or All Student Meeting (ASM), or by Referendum which the Trustees consider (in their absolute discretion):
- 33.3.1 has or may have any financial implications for the Association;
 - 33.3.2 is or may be in breach of, contrary to or otherwise inconsistent with charity or education law or any other legal requirements (including ultra vires);
 - 33.3.3 is not or may not be in the best interests of the Association or all or any of its charitable objects; or
 - 33.3.4 will or may otherwise affect the discharge of any or all of the responsibilities referred to in Article [33.2].
- 33.4 No alteration of these Articles or the Schedules shall invalidate any prior act of the Trustees which would have been valid if that alteration had not been made.
- 33.5 All acts done by a meeting of Trustees, or of a committee of the Trustees, shall be valid, even if it is later discovered that any Trustee who participated in the vote:



- 33.5.1 was not properly appointed;
- 33.5.2 was disqualified from holding office;
- 33.5.3 had vacated office; or
- 35.3.4 was not entitled to vote.

34. Trustees may delegate

- 34.1 Subject to the Articles, the Trustees may delegate any of the powers which are conferred on them under the Articles:
 - 34.1.1 to such person or committee;
 - 34.1.2 by such means (including by power of attorney);
 - 34.1.3 to such an extent;
 - 34.1.4 in relation to such matters or territories; and
 - 34.1.5 on such terms and conditions as they think fit.
- 34.2 If the Trustees so specify, any such delegation may authorise further delegation of the Trustees' powers by any person to whom they are delegated.
- 34.3 The Trustees may revoke any delegation in whole or part, or alter its terms and conditions.

35. Committees

- 35.1 In the case of delegation to committees:
 - 35.1.1 the resolution making the delegation shall specify those who shall serve or be asked to serve on such committee (although the resolution may allow the committee to make co-options up to a specified number);
 - 35.1.2 subject to Article [35.3], the composition of any such committee shall be entirely in the discretion of the Trustees and may comprise such of their number (if any) as the resolution may specify;
 - 35.1.3 the deliberations of any such committee shall be reported regularly to the Trustees and any resolution passed or decision taken by any such committee shall be reported promptly to the Trustees and for that purpose every committee shall appoint a secretary;
 - 35.1.4 no committee shall knowingly incur expenditure or liability on behalf of the Association except where authorised by the Trustees or in accordance with a budget which has been approved by the Trustees.
- 35.2 The Trustees shall establish and retire committees in accordance with their powers under Articles [33.1] and [33.2]. The remit and authority of such committees shall be defined in the Schedules.
- 35.3 For the avoidance of doubt, the Trustees may (in accordance with Articles [34] and [35.1]) delegate all financial matters to any committee provided that such committee shall include at least one Trustee. The Trustees may empower such committee to resolve upon the operation of any bank account according to such mandate as it shall think fit provided that the signature of at least one Trustee shall be required for cheques above a certain amount as set out in the Schedules and provided always that no committee shall incur expenditure on behalf of the Association except in accordance with a budget which has been approved by the Trustees.
- 35.4 The meetings and proceedings of any committee shall be governed by the Articles regulating the meetings and proceedings of the Trustees so far as applicable and not superseded by any Schedules.

36. Delegation of day-to-day management powers to the Association's Senior Manager

In the case of delegation of the day-to-day management of the Association to the Association's Senior Manager:

- 36.1 the delegated power shall be to manage the Association by implementing the policy and strategy adopted by and within a budget approved by the Trustees and if applicable to advise the Trustees in relation to such policy, strategy and budget;



- 36.2 the Trustees shall provide the Association's Senior Manager with a description of their role and the extent of their authority;
- 36.3 the Association's Senior Manager shall report regularly to the Trustees on the activities undertaken in managing the Association and provide them regularly with management accounts sufficient to explain the financial position of the Association; and
- 36.4 the Trustees shall provide the Association's Senior Manager with a performance management structure to aid their work plan and development.

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Part Five Executive Committee

37. The Executive Committee

- 37.1 Unless the Trustees or schedules determine otherwise, the Executive Committee shall include:
 - 37.1.1 the Cross-Campus Officer Trustees; and
 - 37.1.2 one elected Local Officer from each academic partner.
- 37.2 The Executive Committee's responsibility shall not include the duties of the Trustees as set out in Article [33] but shall include representation and campaigning work and the implementation of Positional Policy save in so far as these responsibilities have not been delegated to another committee.
- 37.3 The Association's Senior Manager and the Association's management team may attend meetings of the Executive Committee at the request of the Executive Committee.
- 37.4 The Executive Committee shall meet in accordance with the Schedules.

38. Local Officers

- 38.1 Local Officers shall be elected by secret ballot by the Student Members of the Association at an election to be held in accordance with the Schedules.
- 38.2 The Local Officers shall remain in office for a term of one year commencing in accordance with the Schedules. The term of office may be shorter or longer on a transitional basis to coincide with an alteration of the year start or end. Subject to a transitional change in the year of office, a Local Officer may be re-elected for a maximum further term of one year by the Student Members of the Association at an election to be held in accordance with the Schedules. For the avoidance of doubt, the term of a Local Officer may be either consecutive or non-consecutive.
- 38.3 Each Local Officer must be a Student at the time of their election; in the case of a full-time Local Officer, they may be a first year full-time Local Officer at the time of their election.
- 38.4 In accordance with Article [11], each full-time Local Officer shall become a Student Member of the Association on commencement of their appointment or reappointment as a Local Officer. Such Student Membership shall cease when the Local Officer ceases to be a Local Officer.
- 38.5 Local Officers shall be deemed to be "major Association office holders" for the purposes of Section 22 of the Education Act.
- 38.6 At the same time as commencing the term of office, each Local Officer will enter into a contract of employment with the Association for a term to be determined by the Schedules. The duties and method of remuneration of each Local Officer shall be as set out in the Schedules.
- 38.7 A Local Officer shall be removed from office if they:
 - 38.7.1 resign or die;
 - 38.7.2 are removed from office by a motion of no confidence: this is passed by a simple majority of the Student Members and/ or Student Associate Members voting in a Referendum, provided that at least 200 Student Members and/ or Student Associate Members cast a vote in the Referendum. Such a motion shall only be triggered by a Secure Petition of no confidence signed by at least 100 Student Members and/ or Student Associate Members;
 - 38.7.3 provided that, such removal shall be subject to the Association having first carried out any steps it is required to take under the Elected Officer's contract of employment and/or the applicable disciplinary procedure and otherwise in accordance with good employment practice.



Part Six Decision Making by Trustees

DECISION-MAKING BY TRUSTEES

39. Trustees to take decisions collectively

Any decision of the Trustees must be either a majority decision at a meeting or a decision taken in accordance with Article [49] (Majority decisions without Trustees' meeting).

40. Trustees' meetings

40.1 The Trustees shall hold a minimum of four meetings in any Academic Year.

40.2 Guests or observers can attend meetings of the Trustees at the discretion of the Chair of the meeting.

41. Calling a Trustees' meeting

Two Trustees may, and the Association's Senior Manager at the request of two Trustees, shall call a Trustees' meeting.

42. Length of Notice

A Trustees' meeting shall be called by at least seven clear days' notice unless either:

42.1 all the Trustees agree to shorter notice; or

42.2 urgent circumstances require shorter notice.

43. Contents of Notice

Every notice calling a Trustees' meeting shall specify:

43.1 the place, day and time of the meeting;

43.2 the general particulars of all business to be considered at such meeting; and

43.3 if it is anticipated that Trustees participating in the meeting will not be in the same place, how it is proposed that they should communicate with each other during the meeting.

44. Service of Notice

Notice of Trustees' meetings shall be given to each Trustee, but need not be in writing. Notice of Trustees' meeting may be sent by Electronic Means to an address provided by the Trustee for the purpose.

45. Participation in Trustees' meetings

45.1 Subject to the Articles, Trustees participate in a Trustees' meeting, or part of a Trustees' meeting, when:

45.1.1 the meeting has been called and takes place in accordance with the Articles; and

45.1.2 they can each communicate to the others any information or opinions they have on any particular item of the business of the meeting.

45.2 In determining whether Trustees are participating in a Trustees' meeting, it is irrelevant where any Trustee is or how they communicate with each other.

45.3 If all the Trustees participating in a meeting are not in the same place, they may decide that the meeting is to be treated as taking place wherever any of them is.



46. Quorum for Trustees' meetings

- 46.1 At a Trustees' meeting, unless a quorum is participating, no proposal is to be voted on, except a proposal to call another meeting.
- 46.2 The quorum for Trustees' meetings may be fixed from time to time by a decision of the Trustees, but it must never be less than four. Unless otherwise fixed, the quorum shall be four and such quorum must include at least one Cross-Campus Officer Trustee. Where the resolution or issue under discussion concerns a matter in respect of which some or all of the Trustees have a conflict of interest, the quorum shall be four.
- 46.3 If the total number of Trustees for the time being is less than the quorum required, the Trustees must not take any decision other than a decision to increase the number of Trustees, including by calling An All Student Meeting (ASM) so as to enable Student Members and/ or Student Associate Members to ratify further Student Trustees or External Trustees, or by calling an election so as to enable the Student Members and/ or Student Associate Members to elect further Cross-Campus Officer Trustees.

47. Chair and Deputy Chair

- 47.1 The Trustees shall appoint an External Trustee to be the Chair of the Trustees and may at any time remove them from office.
- 47.2 The Student President shall be the Deputy Chair of the Trustees.
- 47.3 In the absence of the Chair and the Deputy Chair, another Trustee appointed by the Trustees present shall preside as chair of the meeting.

48. Casting vote

Questions arising at a Trustees' meeting shall be decided by a majority of votes. In the case of an equality of votes, the chair of the meeting shall be entitled to a casting vote in addition to any other vote they may have.

49. Majority decisions without Trustees' meeting

- 49.1 The Trustees may, in the circumstances outlined in this Article, make a simple majority decision without holding a Trustees' meeting.
- 49.2 If:
 - 49.2.1 a Trustee has become aware of a matter on which the Trustees need to take a decision;
 - 49.2.2 that Trustee has taken all reasonable steps to make all the other Trustees aware of the matter and the decision;
 - 49.2.3 the Trustees have had a reasonable opportunity to communicate their views on the matter and the decision to each other; and
 - 49.2.4 simple majority of the Trustees vote in favour of a particular decision on that matter;a decision of the Trustees may be taken by a majority and shall be as valid and effectual as if it had been taken at a Trustees' meeting duly convened and held.
- 49.3 Trustees participating in the taking of a majority decision otherwise than at a Trustees' meeting in accordance with this Article:
 - 49.3.1 may be in different places, and may participate at different times; and
 - 49.3.2 may communicate with each other by any means.
- 49.4 No decision shall be taken by the Trustees in accordance with Article [49] unless a quorum participates in the decision-making process. The quorum for Trustees' decision-making in accordance with Article [49] shall be the same as the quorum for Trustees' meetings as set out in Article [46].
- 49.5 The Chair or such other Trustee as shall be appointed by the Trustees shall be the chair of the process of decision-making in accordance with Article [49]. The process shall include:



- 49.5.1 circulation of the proposed decision with an indication of the time period for discussion and the date by which Trustees are asked to cast their votes;
 - 49.5.2 the nomination of a person to whom all Trustees' votes must be communicated;
 - 49.5.3 if a majority of the Trustees vote in favour of the decision, the nominated person shall communicate the decision to all the Trustees and the date of the decision shall be the date of the communication from the nominated person confirming formal approval; and
 - 49.5.4 the nominated person must prepare a minute of the decision in accordance with Article [55].
- 49.6 In the case of an equality of votes in any decision-making process in accordance with this Article, the chair shall be entitled to a casting vote in addition to any other vote they may have but this does not apply if, in accordance with the Articles, the chair or specified Trustee is not to be counted as participating in the decision-making process for quorum, voting or agreement purposes.

50. Trustee interests and management of conflicts of interest

Declaration of interests

- 50.1 Unless Article [50.2] applies, a Trustee must declare the nature and extent of:
- 50.1.1 any direct or indirect interest which they have in a proposed transaction or arrangement with the Association; and
 - 50.1.2 any duty or any direct or indirect interest which they have which conflicts or may conflict with the interests of the Association or their duties to the Association.
- 50.2 There is no need to declare any interest or duty of which the other Trustees are, or ought reasonably to be, already aware.

Participation in decision-making

- 50.3 If a Trustee's interest or duty cannot reasonably be regarded as likely to give rise to a conflict of interest or a conflict of duties with or in respect of the Association, they are entitled to participate in the decision-making process, to be counted in the quorum and to vote in relation to the matter. Any uncertainty about whether a Trustee's interest or duty is likely to give rise to a conflict shall be determined by a majority decision of the other Trustees taking part in the decision-making process.
- 50.4 If a Trustee's interest or duty gives rise (or could reasonably be regarded as likely to give rise) to a conflict of interest or a conflict of duties with or in respect of the Association, they may participate in the decision-making process and may be counted in the quorum and vote unless:
- 50.4.1 the decision could result in the Trustee or any person who is connected with them receiving a benefit other than:
 - 50.4.1.1 any benefit received in their capacity as a beneficiary of the Association (as permitted under Article [6.3.1]) and which is available generally to the beneficiaries of the Association;
 - 50.4.1.2 the payment of premiums in respect of indemnity insurance effected in accordance with Article [5.29];
 - 50.4.1.3 payment under the indemnity set out at Article [60]; and
 - 50.4.1.4 reimbursement of expenses in accordance with Article [6.3.2]; or
 - 50.4.2 a majority of the other Trustees participating in the decision-making process decide to the contrary; in which case they must comply with Article [50.5].
- 50.5 If a Trustee with a conflict of interest or conflict of duties is required to comply with this Article [50.5], they must:
- 50.5.1 take part in the decision-making process only to such extent as in the view of the other Trustees is necessary to inform the debate;
 - 50.5.2 not be counted in the quorum for that part of the process; and
 - 50.5.3 withdraw during the vote and have no vote on the matter.



Continuing duties to the Association

- 50.6 Where a Trustee has a conflict of interest or conflict of duties and the Trustee has complied with their obligations under these Articles in respect of that conflict:
- 50.6.1 the Trustee shall not be in breach of their duties to the Association by withholding confidential information from the Association if to disclose it would result in a breach of any other duty or obligation of confidence owed by them; and
 - 50.6.2 the Trustee shall not be accountable to the Association for any benefit expressly permitted under these Articles which they or any person connected with them derives from any matter or from any office, employment or position.

51. Register of Trustees' interests

The Trustees shall cause a register of Trustees' interests to be kept.

DRAFT



Part Seven

Administrative Arrangements and Miscellaneous Provision

52. Schedules

The Trustees and the membership (via either an Annual All Student Meeting (AASM) or an All Student Meeting (ASM)) shall have the power from time to time to jointly make, repeal or amend Schedules as to the management of the Association and its working practices provided that such Schedules shall not be inconsistent with these Articles.

53. Communications by and to the Association

Methods of communication

53.1 Subject to the Articles and the Companies Acts, any document or information (including any notice, report or accounts) sent or supplied by the Association under the Articles or the Companies Acts may be sent or supplied in any way in which the Companies Act 2006 provides for documents or information which are authorised or required by any provision of that Act to be sent or supplied by the Association, including without limitation:

53.1.1 in Hard Copy Form;

53.1.2 in Electronic Form; or

53.1.3 by making it available on a website.

53.2 Where a document or information which is required or authorised to be sent or supplied by the Association under the Companies Acts is sent or supplied in Electronic Form or by making it available on a website, the recipient must have agreed that it may be sent or supplied in that form or manner or be deemed to have so agreed under the Companies Acts (and not revoked that agreement). Where any other document or information is sent or supplied in Electronic Form or made available on a website the Trustees may decide what agreement (if any) is required from the recipient.

53.3 Subject to the Articles, any notice or document to be sent or supplied to a Trustee in connection with the taking of decisions by Trustees may also be sent or supplied by the means which that Trustee has asked to be sent or supplied with such notices or documents for the time being.

Deemed delivery

53.4 A Member present in person or by proxy at a meeting of the Association shall be deemed to have received notice of the meeting and the purposes for which it was called.

53.5 Where any document or information is sent or supplied by the Association to the Members:

53.5.1 where it is sent by post it is deemed to have been received 48 hours (excluding Saturdays, Sundays, and Public Holidays) after it was posted;

53.5.2 where it is sent or supplied by Electronic Means, it is deemed to have been received on the same day that it was sent;

53.5.3 where it is sent or supplied by means of a website, it is deemed to have been received:

53.5.3.1 when the material was first made available on the website; or

53.5.3.2 if later, when the recipient received (or is deemed to have received) notice of the fact that the material was available on the website.

53.6 Subject to the Companies Acts, a Trustee or any other person (other than in their capacity as a Company Law Member) may agree with the Association that notices or documents sent to that person in a particular way are deemed to have been received within a specified time, and for the specified time to be less than 48 hours.

Failed delivery

53.7 Where any document or information has been sent or supplied by the Association by Electronic Means and the Association receives notice that the message is undeliverable:

53.7.1 if the document or information has been sent to a Company Law Member and is notice of a Company Law Meeting of the Association, the Association is under no obligation to send a Hard Copy of the document or information to the Company Law Member's postal address as shown in the Association's register of Company Law Members, but may in its discretion choose to do so;



- 53.7.2 in all other cases, the Association shall send a Hard Copy of the document or information to the Member's postal address as shown in the Association's register of Members (if any), or in the case of a recipient who is not a Member, to the last known postal address for that person (if any); and
- 53.7.3 the date of service or delivery of the documents or information shall be the date on which the original electronic communication was sent, notwithstanding the subsequent sending of Hard Copies.

Exceptions

- 53.8 Copies of the Association's annual accounts and reports need not be sent to a person for whom the Association does not have a current address.
- 53.9 Notices of Company Law Meetings need not be sent to a Member who does not register an address with the Association, or who registers only a postal address outside the United Kingdom, or to a Company Law Member for whom the Association does not have a current address.

Communications to the Association

- 53.10 The provisions of the Companies Acts shall apply to communications to the Association.

54. Secretary

- 54.1 A Secretary may be appointed by the Trustees for such term at such remuneration and upon such conditions as they may think fit, and may be removed by them. If there is no Secretary:
 - 54.1.1 anything authorised or required to be given or sent to, or served on, the Association by being sent to its Secretary may be given or sent to, or served on, the Association itself, and if addressed to the Secretary shall be treated as addressed to the Association; and
 - 54.1.2 anything else required or authorised to be done by or to the Secretary of the Association may be done by or to a Trustee, or a person authorised generally or specifically in that behalf by the Trustees.

55. Minutes

- 55.1 The Trustees shall cause minutes to be made:
 - 55.1.1 of all appointments of officers made by the Trustees;
 - 55.1.2 of all resolutions of the Association and of the Trustees; and
 - 55.1.3 of all proceedings at meetings of the Association and of the Trustees, and of committees of Trustees, including the names of the Trustees present at each such meeting

and any such minute, if purported to be signed (or in the case of minutes of Trustees' meetings signed or authenticated) by the chair of the meeting at which the proceedings were had, or by the chair of the next succeeding meeting, shall, as against any Student Member or Trustee of the Association, be sufficient evidence of the proceedings.
- 55.2 The minutes referred to in Article [55.1] above must be kept for at least ten years from the date of the meeting, resolution or decision.
- 55.3 The minutes of the meetings referred to in Article [55.1] above shall normally be considered open and shall be available to the Student Members on the Association's website, except where those minutes relate to any reserved or confidential matters, including without limitation staff-related or disciplinary matters. Copies of the minutes shall also be kept in the Association's offices

56. Records and accounts

- 56.1 The Trustees shall comply with the requirements of the Companies Acts and of the Charities and Trustee Investment (Scotland) Act 2005 as to maintaining a Company Law Members' register, keeping financial records, the audit or examination of accounts and the preparation and transmission to the Registrar of Companies and the Office of the Scottish Charity Regulator (OSCR) of:
 - 56.1.1 annual reports;



- 56.1.2 annual returns; and
- 56.1.3 annual statements of account.
- 56.2 Both Student Members and Student Associate Members of the Association have the right to ask the Trustees questions in writing about the content of any documents referred to in Article [56.1].

57. Irregularities

The proceedings at any meeting or on the taking of any poll or the passing of a written resolution or the making of any decision shall not be invalidated by reason of any accidental informality or irregularity (including any accidental omission to give or any non-receipt of notice) or any want of qualification in any of the persons present or voting or by reason of any business being considered which is not specified in the notice unless a provision of the Companies Acts specifies that such informality, irregularity or want of qualification shall invalidate it.

58. Patrons

The Trustees may appoint and remove any individual(s) as patron(s) of the Association and on such terms as they shall think fit. A patron shall have the right to be given notice of, to attend and speak (but not vote) at any Annual All Student Meeting (AASM) or All Student Meeting (ASM) as if a Student Member and shall also have the right to receive accounts of the Association when available to Student Members.

59. Exclusion of model articles

The relevant model articles for a company limited by guarantee are hereby expressly excluded.

60. Indemnity

TRUSTEES' INDEMNITY

Without prejudice to any indemnity to which a Trustee may otherwise be entitled, every Trustee shall and every other officer or auditor of the Association may be indemnified out of the assets of the Association against any liability incurred by them in defending any proceedings, whether civil or criminal, in which judgment is given in their favour or in which they are acquitted or in connection with any application in which relief is granted to them by the court from liability for negligence, default, breach of duty or breach of trust in relation to the affairs of the Association, and against all costs, charges, losses, expenses or liabilities incurred by them in the execution and discharge of their duties or in relation thereto.



ORKNEY
ISLANDS COUNCIL

Item: 4

Education, Communities and Housing Committee: 9 September 2026.

School Placing Request Policy.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents the School Placing Request Policy which establishes a clear framework for assessment and determination of school placing requests, for approval.
- 1.2. Each year the Education Service receives a number of placing requests from parents, carers, children and young people seeking admission to a school other than their catchment school. While legislation provides a right to make a placing request, the Council also has a statutory responsibility to manage school capacity, staffing, accommodation and resources effectively.
- 1.3. The proposed School Placing Request Policy, attached as Appendix 1 to this report, has been developed to provide a consistent, transparent and legally compliant framework for the assessment and determination of placing requests. The Policy reflects the requirements of the Education (Scotland) Act 1980, the Education (Additional Support for Learning) (Scotland) Act 2004 and associated Scottish Government guidance and the United Nations Convention on the Rights of the Child (Incorporation) (Scotland) Act 2024.
- 1.4. The Policy:
 - Clarifies the process for making and determining placing requests.
 - Defines the roles and responsibilities of officers, schools, parents, carers and young people.
 - Establishes a clear decision-making framework supported by evidence.
 - Provides guidance on the statutory grounds for refusal and the evidence required to support decisions.
 - Sets out arrangements for communication with families and appeals processes.
 - Reflects current legislative requirements relating to additional support needs, equality and children's rights.

- 1.5. The introduction of a formal policy will improve consistency across the Education Service, ensure decisions are robust and evidence-based, and provide greater clarity for families when making placing requests.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
- i. Approve the School Placing Request Policy, attached as Appendix 1 to this report.

3. Legislative Framework

- 3.1. Parents and carers have a statutory right to make a placing request for their child to attend a school other than their catchment school. Children and young people may also make placing requests in their own right where they have the capacity to do so. Education authorities are required to grant requests unless one or more statutory grounds for refusal apply.
- 3.2. The principal legislative framework is contained within:
- Education (Scotland) Act 1980.
 - Standards in Scotland's Schools etc. Act 2000.
 - Education (Additional Support for Learning) (Scotland) Act 2004, as amended.
 - Equality Act 2010.
 - Relevant Scottish Government guidance and Codes of Practice.
 - The Education (Placing in Schools Etc – Deemed Decisions) (Scotland) Regulations 1982.
 - United Nations Convention on the Rights of the Child (Incorporation) (Scotland) Act 2024.
- 3.3. At present, placing requests are considered in accordance with statutory requirements and national guidance. However, there is no standalone Council policy that brings together the process, decision-making criteria, evidence requirements and appeal arrangements into a single framework document.
- 3.4. The Policy establishes:
- Timescales for submission and determination of placing requests.
 - Procedures for acknowledging and processing applications.
 - A decision-making framework based on statutory requirements and operational evidence.

- Guidance regarding reserved places for future catchment pupils.
 - Additional support needs considerations.
 - Arrangements for appeals and complaints.
 - Requirements relating to equality, children's rights and data protection.
- 3.5. The policy also introduces a decision-making checklist to support consistency and transparency in officer decision making.
- 3.6. Parental consultation has occurred including those who have requested placing requests and parent council chairs.

For Further Information please contact:

Wendy Bowen, Head of Education, extension 2436, Email wendy.bowen@orkney.gov.uk.

Implications of Report

1. **Financial** – None directly relating to the recommendations in this report. Any additional costs associated with this policy will need to be met within existing resources.
2. **Legal** – The policy supports the Council in meeting its statutory duties under the Education (Scotland) Act 1980 and related legislation.
3. **Corporate Governance** – None directly relating to the recommendations in this report.
4. **Human Resources** – None directly relating to the recommendations in this report.
5. **Equalities** – An Equality Impact Assessment has been undertaken and is attached as Appendix 2 to this report.
6. **Island Communities Impact** – An Island Communities Impact Assessment has been undertaken and is attached as Appendix 3 to this report.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☒ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☒ Local Equality.

☐ Improving Population Health.

9. **Environmental and Climate Risk** – None directly relating to the recommendations in this report.
10. **Risk** – The policy reduces the risk of inconsistent decision making and supports compliance with statutory requirements.
11. **Procurement** – None directly relating to the recommendations in this report.
12. **Health and Safety** – None directly relating to the recommendations in this report.
13. **Property and Assets** – None directly relating to the recommendations in this report.
14. **Information Technology** – None directly relating to the recommendations in this report.
15. **Cost of Living** – None directly relating to the recommendations in this report.

List of Background Papers

Education (Scotland) Act 1980.

Education (Additional Support for Learning) (Scotland) Act 2004.

Supporting Children's Learning: Code of Practice (2026).

Choosing a School: A Guide for Parents (Scottish Government).

School Placing Requests and Appeal Hearings: Guidance for Local Authorities (2025).

The Education (Placing in Schools Etc – Deemed Decisions) (Scotland) Regulations 1982.

Appendices

Appendix 1 – School Placing Request Policy.

Appendix 2 – Equality Impact Assessment.

Appendix 3 – Island Communities Impact Assessment.



Education, Communities and Housing

School Placing Requests Policy

Version Control

Document Reference.	Revision.	Issue Date.	Reason for Issue.	Reviewer.
ECH037.	00.	September 2026 (To be reviewed in April 2029).	New Policy.	Head of Education

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1. Introduction

This policy sets out how Orkney Islands Council's (the Council) Education Service will receive, assess and determine school placing requests. It applies to the annual placing requests for entry at the start of a school session such as entry to P1, in year requests and requests involving children or young people with additional support needs.

The policy does not apply to ordinary catchment enrolment where no placing requests are required.

Early Learning and Childcare placing requests and split placing requests are covered by the Early Learning and Childcare policy.

The policy aims to provide clarity on the decision-making process. The policy should be read alongside the School Transport Policy and the Allocations Policy for Papdale Halls of Residence.

2. Context

The school which is closest to the child's home address is called a catchment school. The Council recognises that parents and carers may wish their child to attend a school other than the local school. Should parents wish to do this, a placing request is required.

Parents do not have to send their children to a local authority school. Some parents may choose to send their children to an independent school and others may choose to educate them at home. See Policy and Guidance on Home Education, Flexi-schooling and Part-time timetables.

3. Legislative background for exclusion and National Guidance Framework

Scottish legislation gives parents and carers the right to make a written placing request and places a duty on education authorities to grant such requests wherever possible. Children and young people may make placing requests, unless the authority determines that they lack the capacity to do so.

However, this duty is not unlimited. The Council must also secure efficient education for all children and young people, which means that the Council must manage schools' capacity responsibly, protect the interests of catchment pupils and ensure decisions are based on evidence.

There are therefore certain legal requirements laid down in statute which must be complied with. The Education (Scotland) Act 1980 establishes the statutory grounds for refusal of placing requests.

Parents and Schools should also refer to [Choosing a School: A Guide for Parents, Scottish Government](#)

4. Roles and Responsibilities

Role	Responsibilities
Parents/ Carers	To submit written applications – provide accurate information and respond promptly where further information is required.
Children and Young People	May make placing requests in their own right unless the authority determines that they lack capacity to do so. Children and young people's views should be sought where the child has capacity.
Business Support – Central Team Orkney Islands Council	Receives applications, acknowledges receipt, logs dates, maintains records, issues standard communications and supports the administration of an Appeals panel should it be required to be convened.
Headteacher of requested school	Provides factual evidence of school roll, capacity, accommodation, staffing, class organisation, curriculum, health and safety and operational implications. The Headteacher will make recommendations and advise the Service Manager.
Catchment school Headteacher, where relevant	Provides information on continuity of education, catchment place, transition issues and relevant wellbeing or ASN information.
Service Manager or delegated senior officer	Assesses the application against legislation, reviews evidence, considers statutory grounds and prepares the decision record. The Service Manager will make the final decision. In difficult cases, a recommendation will be prepared for the Head of Education. They may attend an appeals panel.
Head of Education or delegated senior officer	Quality assures complex cases and refusal decisions, ensures consistency and oversees appeal preparation. Will provide a decision. Attends the appeals panel.
Education Appeals Committee	Will hear appeals and make a final decision should the initial request be disputed. The Committee is independent of the original decision makers.

5. Making a Placing Request and timescales

A placing request must be made in writing and must specify the school requested. The Council application form should be used (see Appendix 1). A written request that clearly identifies the child and the specified school should be treated as a placing request.

In-year requests may be submitted at any point. Decisions should normally be made within two months. If for any reason the service fails to make a decision within the two-month period, this is deemed legally as having been refused and can be subject to appeal.

Applications for a placing request that are for enrolment at the start of a school session should be submitted within the Council's published annual timescales normally on or before 15 March. (This refers to placing requests to a school out with the catchment area for entry into P1.) Timescales for P1 enrollment may be published locally and through schools and nurseries.

Should a decision not be reached by 30 April, these decisions should be deemed legally as having been refused. This non decision can be subject to appeal.

Young people may make a placing request in their own name unless the authority determines that they lack the capacity to do so. Any question of capacity will be considered having regard to the individual circumstances of the child or young person and any relevant professional advice.

All applications for placing requests will receive notification of the decision in writing.

6. Processing a Placing Request

On receiving a Placing Request, the Council will aim to acknowledge receipt within 3 working days. Further communication within 7 working days will confirm the named Service Manager and explain expected timescales. We will aim to complete the request within 20 working days.

The Service Manager and Headteacher will be asked to gather the evidence needed to make a decision.

The placing request assessment should be child-centered and should take account of the child's views, where these can reasonably be obtained, relevant professional advice, the child's assessed needs, current support, reasonable adjustments, suitability of the requested placement and the ability of the Council to provide appropriate support.

Once a decision has been reached the Service Manager will write to the families with the outcome of their placing request. Families should receive full information about their appeal rights when a request is refused.

7. Decision Making Framework

The starting point is that the Council should grant a placing request unless statutory grounds for refusal apply and it is appropriate, in all circumstances, to refuse the request.

The following aspects need to be taken into consideration when considering a placing request to a school.

- Current school roll and projected roll at the requested school.
- Capacity of the school and of the relevant stage or year group.
- Class organisation, including composite classes in primary settings.
- Staffing establishment and whether an additional teacher would be required.
- Accommodation, including teaching areas, specialist spaces, toilets, dining and circulation areas.
- Curriculum entitlement, timetabling and subject choice in secondary settings.

- Health and safety, supervision and pupil wellbeing.
- Additional support for learning needs and reasonable adjustments. (Note that this does not include Papdale Halls of Residence)
- Reserved places required for pupils who are likely to move into the catchment area.
- Impact on the efficient provision of education for existing pupils.

The decision should include a short balancing exercise. This means recording both the family's preference and the Council's statutory and operational responsibilities. A checklist (see Appendix 2) should be completed by the officer.

8. Statutory Grounds for Refusal and Evidence Required

Refusal can only be considered where one or more statutory grounds apply. The following table is an operational guide to the statutory grounds for refusal.

Statutory grounds		Evidence expected
Capacity exceeded	Granting the request would exceed the school's pupil capacity.	Agreed capacity, room use evidence, stage capacity and current/projected roll.
Additional teacher required	Granting the request would require the Council to employ an additional teacher.	Roll projections, staffing formula, class organisation and timetable evidence.
Future additional class or teacher	Granting a primary request would lead to a possible future need for an additional class, composite class or teacher.	Projected roll by stage, future class models and stated assumptions.
Significant accommodation expenditure	Granting the request would require significant expenditure on extending or altering accommodation or facilities.	Property assessment, cost estimate, accommodation evidence.
Reserved places	The child is outwith catchment and granting the request would prevent places being retained for likely catchment pupils.	Housing data, demographic information, known movements, roll projection and rationale.
Continuity of the child's education	The move would be seriously detrimental to the continuity of the child's education.	Educational chronology, assessment evidence such as child plan and transition analysis.
Order and discipline	Granting the request would be likely to be seriously detrimental to order and discipline.	Risk assessment, professional evidence, support planning and safety analysis.

Statutory grounds		Evidence expected
Educational wellbeing of pupils	Granting the request would be likely to seriously affect the educational wellbeing of pupils already attending the school.	Learning and wellbeing impact evidence, class composition, supervision and support evidence.
Age, ability or aptitude	The education normally provided at the school is not suited to the child.	Curriculum/ASN evidence, professional advice and alternative provision analysis.
Previous discontinuance	The child has already been required to discontinue attendance at the specified school.	Formal records and legal advice where appropriate.
ASN special provision issues	For ASN requests, specific statutory exceptions may apply, including enhanced resource and cost/suitability tests.	Professional advice, CSP or child plan, suitability and cost comparison.

9. Prioritising Requests Where Places Are Limited

Where there are more placing requests than available places, the Council may need to rank applications.

The placing request criteria are as follows:

- Siblings already on the roll of the receiving school or relatives permanently e.g. stepsibling living at the same address as part of an extended family.
- Exceptional medical or social reasons that would be best met in the requested school, such as care experienced children and young people, supported by evidence.
- Exceptional family circumstances that are supported by evidence.

Where a place can be offered to one child but not another, the decision record should explain how the criteria were applied. Personal information about other applicants must not be disclosed.

10. Reserved Places

Reserved places are intended to ensure that schools can accommodate children and young people likely to become residents in the catchment area. Due to our geography, it is important that spaces are left for new residents to be able to access their local school. From time-to-time schools may have a cap placed on them by the local authority to ensure that places are available. This will be reviewed annually.

The evidence used will include the location of the school, known housing development, school roll trends, sibling patterns.

11. Additional Support Needs

Where a child or young person has additional support needs, the Council must consider whether the request falls under the Education (Additional Support for Learning) (Scotland) Act 2004. The Supporting Children's Learning Code of Practice 2026 confirms that education authorities must comply with placing requests relating to additional support needs unless one or more statutory exceptions applies. The Council will also have regard to the presumption of mainstream education where relevant.

For the purposes of this policy, enhanced provision means the additional specialist educational provision available at designated schools within Orkney. Further information is contained in the Enhanced Provision Placing Guidelines.

Mainstream education refers to education which is within the general classroom with peers of the same age and stage.

Enhanced provision refers to a more specialist or bespoke provision. Only Glaitness School and Kirkwall Grammar School provide this enhanced provision. See Enhanced Provision Placing Guidelines.

Young people may make a request in their own name unless the authority determines that they lack capacity as more particularly referred to in section 5.

Officers must check whether the request involves a request for a coordinated support plan (CSP) or whether the child or young person has a current CSP or a child plan.

It is important to establish whether there is a need to attend an enhanced provision either at Glaitness School or Kirkwall Grammar School. Should a request be made for enhanced provision this is covered by the Enhanced Provision Placing Guidelines and is not covered within the scope of this policy.

12. Transport and Attendance Implications

The Council does not provide transport for those pupils in receipt of a placing request. Parents must take this into consideration when making a placing request. Parents must accept full responsibility for the organisation and cost of transport for their child travelling to and from school.

Where an island or inter-island journey is involved, officers should ensure that families understand realistic travel patterns, weather disruption, supervision arrangements and any limits on transport entitlement. This information is provided to assist families in making informed decisions and does not affect their right to submit a placing request.

A successful placing request to Kirkwall Grammar School does not create entitlement to a place at Papdale Halls of Residence.

A placing request may be granted even where a place at Papdale Halls of Residence is unavailable. Families should take this into account when deciding whether to submit a placing request.

The availability of accommodation is considered separately under the Allocations Policy for Papdale Halls of Residence.

13. Communication with Families

Communication should be clear, timely and written in plain English.

Appendix 3 should be used as a template letter to communicate to families the facts of who is dealing with the request, the expected timescale, what information is being considered and what appeal rights apply if the request is refused.

Where a request is approved, Appendix 4 should be used to support the framework of the letter.

Where a request is refused, the framework set out in Appendix 5 should be used to construct the letter. Reasons for the refusal must be clearly identified with a brief explanation. The right to appeal the decision and appeal rights must be provided within this letter.

The Council will not disclose confidential information about other children or staff. Where capacity, class organisation or staffing evidence is summarised, this should be done in a way that explains the decision without compromising personal data. Sensitivity should be taken when describing small schools.

14. Appeals

Where a placing request is refused, applicants have a statutory right of appeal. The decision letter must explain the appropriate appeal route and timescale. See Appendix 6 Parent Guide to Appeals.

Letters of appeal should be submitted to the Head of Education.

In general, appeals are heard by the Education Appeal Committee. This will be convened by Orkney Islands Council.

Where the request relates to certain Additional Support Needs matters, appeal rights may instead be referred to the First-tier Tribunal for Scotland (Health and Education Chamber).

Where an appeal committee confirms a refusal, the requesters have further appeal rights depending on the circumstances of the case and the applicable legislation.

Appeal papers should include the application, decision letter, decision record, Headteacher evidence, roll and capacity information, any relevant Additional Support Needs evidence and the Council's case statement. Officers should ensure that the Council's position is capable of being understood by the appeal body and by the family.

15. Complaints, Reviews and Appeals

A placing request refusal can only be challenged through the statutory appeal route rather than the Council Complaints Procedures.

The complaints process may consider administrative issues, such as delay, poor communication or failure to follow procedure. Appeals against the actual decision must be dealt with through the appeals process.

Where a family raises both a complaint and an appeal, officers should clarify which issues are being handled under which process. Families should not be disadvantaged because they have used the wrong wording in correspondence.

16. Equality, Children's Rights and Data Protection

The Council will comply with the Equality Act 2010, including duties relating to disability, reasonable adjustments and non-discrimination. Decisions should consider whether the policy or an individual decision may have a disproportionate impact on a child or family with a protected characteristic.

The Council will also have regard for children's rights and wellbeing. Consideration of children's rights does not mean that every placing request must be granted, but it does require the Council to consider the child's interests seriously and to ensure that decisions are lawful, proportionate and explained.

Personal information will be processed only for lawful purposes connected to the placing request and any appeal. Records will be stored securely and retained in accordance with the Council's records management arrangements.

17. Monitoring and Review

The Education Service will monitor placing requests annually, including the number received, granted and refused, statutory grounds relied upon, appeals lodged, appeal outcomes and any themes arising. This will support consistency across schools and inform improvement in guidance, application forms, decision records and communication with families.

This policy will be reviewed every three years or earlier where legislative change, national guidance, appeal decisions or local audit indicate that review is required.

18. References

- Education (Scotland) Act 1980.
- Education (Placing in Schools etc. – Deemed Decisions) (Scotland) Regulations 1982.
- Standards in Scotland's Schools etc. Act 2000.
- Education (Additional Support for Learning) (Scotland) Act 2004, as amended.
- Supporting Children's Learning: Code of Practice, fourth edition, Scottish Government, 2026.
- Choosing a School: A Guide for Parents, Scottish Government, revised 2016.
- School Placing Requests and Appeal Hearings: Guidance for Local Authorities, Scottish Government, updated 2025.
- Equality Act 2010, Human Rights Act 1998, UNCRC (Incorporation) (Scotland) Act 2024, UK GDPR and Data Protection Act 2018.

Appendix 1 – Application Form

Education, Communities and Housing

Placing Request Application Form

Session 2026/2027



Please complete in BLOCK CAPITALS.

Child's Details

Full Name:			
Date of Birth:		Gender:	Male. ☐ Female. ☐
Are you completing a form for any other children?		Yes. ☐	No. ☐
Additional Children's Names and Dates of Birth:			

Parent/Carer Details

Title:		Full Name:		
Address:				
Telephone Contacts: (in priority order.)	1.		Postcode:	
	2.		Email:	
	3.			

Requested School

School Requested:			
Catchment School:			
(This is the designated school for your child's address, leave blank if unknown.)			
For P1 applications, have you also submitted an admission form to the catchment school?			Yes. ☐ No. ☐
Current School/Nursery:			
Requested Start Date:		Year/Stage on Start Date (e.g. P1):	

Additional Support Needs

Does your child have any additional support need?		Yes. ☐	No. ☐
If yes, please specify:			
Does your child have an individualised education programme (IEP) or a co-ordinated support plan (CSP)?			
IEP:	Yes. ☐	No. ☐	CSP: Yes. ☐ No. ☐

Support with English Language – for children whose first language is not English

What is the first language of your child?	
Does your child need support with English language?	Yes. ☐ No. ☐

Reasons for Application

Please explain why you wish your child to attend requested school.

--

Sibling(s) Attending School

Please give details of any brothers and sisters already attending the requested school.

Full Name:	Year/Stage on Requested Start Date:

Declaration

I declare that the information provided above is correct. I understand that failure to provide accurate information may result in my child's application being refused. I understand that I will be responsible for the arrangement and cost of transport for my child to and from the requested school. (Transport is not provided for children attending a school out with their catchment area.)

Signature of Parent/Carer:		Date:	
----------------------------	--	-------	--

Please complete and return this form by email to: education.leisure@orkney.gov.uk or send to Education Resources Manager, Education, Communities and Housing, Council Offices, Kirkwall, KW15 1NY.

The Data Protection Act

The information on this form is processed electronically for administrative purposes and is subject to the terms of the Data Protection Act 1998.

For Office Use Only

Date Received:		Reference:	
Outcome:		Date Letter Sent:	
Comments:			

Appendix 2 – Officer Decision making Checklist

Statutory Grounds Considered	Applies	Evidence
Capacity Exceeded	Yes/No	
Additional Teacher Required	Yes/No	
Future Additional Class Required	Yes/No	
Significant Accommodation Costs	Yes/No	
Reserved Places Required	Yes/No	
Continuity of Education	Yes/No	
Order and Discipline	Yes/No	
Educational Wellbeing	Yes/No	
Age, Ability or Aptitude	Yes/No	
Previous Discontinuance	Yes/No	
ASN Exception	Yes/No	
Council Considerations balanced against Parental Preference		
Recommendation		
Grant		
Refuse		
Reason		
Officer Signature:		
Date:		
Communications sent to family	Yes / No	
Date:		

Appendix 3 – Initial Acknowledgement Letter

Dear Parent/Carer

Thank you for your placing request application for: [Name] to attend [School]

The application was received on [Date]. Your application is currently being considered. The lead officer managing your request is: [Service Manager]. They can be contacted on email on the following address [Email]

We will gather relevant information from schools and officers before reaching a decision.

We aim to notify you of the outcome by [Date].

Yours sincerely

[Service Manager]

Appendix 4 – Decision Letter (Approved)

Dear Parent/Carer

Outcome of Placing Request

I am pleased to confirm your placing request for [Name] to attend [School].

has been approved. The placement will begin on [Date].

The school will contact you regarding induction and transition arrangements.

Please note that approval of a placing request does not entitle your child to school transport. A separate application is required to be submitted for residential accommodation at Papdale Halls of Residence. Families should refer to the relevant Council policy.

Yours sincerely

Service Manager

Appendix 5 – Decision Letter (Refused)

Dear Parent/Carer

Outcome of Placing Request

After careful consideration, I regret to inform you that your placing request for [Name] to attend [School] has been refused.

Reasons for Refusal

The request has been assessed in accordance with the Education (Scotland) Act 1980 and the Council's School Placing Requests Policy.

The statutory ground(s) relied upon are: (select the grounds)

- Capacity Exceeded.
- Additional Teacher Required.
- Future Additional Class Required.
- Significant Accommodation Expenditure.
- Reserved Places Required.
- Continuity of Education.
- Order and Discipline.
- Educational Wellbeing.
- Age, Ability or Aptitude.
- Previous Discontinuance.
- ASN Statutory Exception.

Additional explanation is required and insert case specific reasons.

Appeal Rights

You have a statutory right of appeal against this decision. Details of the relevant appeal process and timescales are enclosed.

Yours sincerely

Service Manager

Appendix 6 – Parent Guide to Appeals

If Your Request Is Refused

You have a right to appeal.

Education Appeal Committee

Most placing request appeals are heard by the Education Appeal Committee. This is a formal process.

The Committee is independent of the original decision-makers and will hear representations from both the Council and the family. A representative of the Council will explain the reasons for the decision. Both the Council and the family will have an opportunity to present information to the appeal body before a decision is made.

ASN Cases

Where the request relates to certain Additional Support Needs matters, appeal rights may instead be referred to the First-tier Tribunal for Scotland (Health and Education Chamber).

The Education Appeal Committee Hearing

You will be notified by email of the date of the hearing. Prior to the hearing you may submit further written evidence.

At the hearing you can bring a representative or supporter to the hearing.

You can ask the Council directly about the Council's case. It may be helpful to prepare some questions in advance.

Outcomes

The appeal panel will deliberate on the cases presented and they will have the option to either uphold the Council's decision or they may overturn the decision and grant the request.

Further rights of appeal may be available depending on the circumstances of the case and the applicable legislation.



Equality Impact Assessment

The purpose of an Equality Impact Assessment (EqIA) is to improve the work of Orkney Islands Council by making sure it promotes equality and does not discriminate. This assessment records the likely impact of any changes to a proposal or changes by anticipating the consequences and making sure that any negative impacts are eliminated or minimised and positive impacts are maximised.

Should you have any questions or wish for your draft EqIA to be reviewed by our Equality, Diversity and Inclusion Adviser, please contact OD@orkney.gov.uk.

1. Identification of the Proposal or Change

Name of proposal or change being assessed.	School Placing Requests
Responsible Service and Directorate.	Education, Communities and Housing
Date of assessment.	3 July 2026
Is the proposal or change existing? (Please indicate if the service is to be deleted, reduced or changed significantly).	Create new policy

2. Primary Information

What are the intended outcomes of the proposal or change?	The policy aims to: • Ensure placing requests are handled fairly, consistently and transparently. • Meet statutory duties under Scottish education legislation. • Balance parental choice with the Council's responsibility to manage school capacity and provide efficient education.
Is the proposal or change strategically important?	Strategic plans include major investment plans, new strategic frameworks or plans such as annual budgets, locality plans or corporate plans. Where a proposal is identified as

	strategic, evidence relating to socio-economic impacts and inequalities will be required in the relevant section No.
State who is or may be affected by this proposal or change, and how?	Families who wish their children to attend a different school other than the child's own school. Children from the age of 5 – 18 who wish to attend a Local Authority School.
How have stakeholders been involved in the development of this proposal or change?	Discussion with parents going through the appeals Chairs of the Parent Council.
Is there any existing data and / or research relating to equalities issues in this policy area? Please summarise. E.g. consultations, national surveys, performance data, complaints, service user feedback, academic / consultants' reports, benchmarking.	Choosing a school: a guide for parents revised November 2016. Supporting Children's Learning code of practice: consultation Published 19 June 2017. Education (Scotland) Act 1980. Enquire Placing Requests. There have been a small number of placing request appeals over the last 2 years. The numbers are too low to report.
Is there any existing evidence relating to socio-economic disadvantage and inequalities of outcome in this policy area? Please summarise. E.g. For people living in poverty or for people of low income. See The Fairer Scotland Duty Guidance for Public Bodies for further information.	This section is required for all proposals relating to strategic decisions.

Could the proposal or change have a differential impact on any of the following equality areas?	Please provide any evidence – positive impacts / benefits, negative impacts and reasons:
1. Race: this includes ethnic or national groups, colour and nationality.	No differential impact anticipated. Applications are assessed against statutory criteria which apply equally to all applicants regardless of race.
2. Sex: a man or a woman.	No differential impact anticipated. Applications are assessed against statutory criteria that apply equally.
3. Sexual Orientation: whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes.	No differential impact anticipated. Applications are assessed against statutory criteria that apply equally.
4. Gender Reassignment: the process of transitioning from one gender to another.	No differential impact anticipated. Applications are assessed against statutory criteria that apply equally.
5. Pregnancy and maternity.	No differential impact anticipated. Applications are assessed against statutory criteria that apply equally.
6. Age: people of different ages.	The policy specifically applies to children and young people of school age. Any differences in treatment arise from statutory education legislation and are objectively justified.
7. Religion or beliefs or none (atheists).	No differential impact anticipated. Applications are assessed against statutory criteria that apply equally.

8. Disability: people with disabilities (whether registered or not).	The policy may have a differential impact on disabled children and young people because placing requests are sometimes linked to ASN provision. However, the policy includes specific consideration of ASN legislation, professional advice, reasonable adjustments and the suitability of provision. This is expected to have a positive impact by ensuring consistent and transparent decision-making.
9. Marriage and Civil Partnerships.	No differential impact anticipated.
10. Caring responsibilities	No differential impact anticipated.
11. Socio-economic disadvantage.	The policy does not alter entitlement to transport or other financial support. While some families may face greater transport costs when seeking a non-catchment placement, these arrangements already exist and are not created by this policy
12. Care experienced	Potential positive impact. Care experienced children and young people may benefit from the prioritisation arrangements within the policy where supported by evidence.

3. Impact Assessment

Does the analysis above identify any differential impacts which need to be addressed?	None
Does the analysis above identify any potential negative impacts?	No. The assessment found no evidence that the policy discriminates against individuals or groups with protected characteristics. The policy promotes transparency, consistency and compliance with education and ASN legislation. Particular consideration has been given to disabled children and young people, those with ASN and care experienced children. No additional mitigating actions are required at this stage, although the implementation of the policy will be monitored through annual review of placing request outcomes.
Do you have enough information to make a judgement? If no, what information do you require?	Yes

4. Equality Impact Assessment Action Plan

Please complete the following action plan where you have identified any differential impacts or potential negative impacts in Section 3 of the Equality Impact Assessment.

Impact Identified	Action to be taken	Owner	How will it be monitored	Date Action to be completed

5. Sign and Date

Signature:	
Name:	Wendy S Bowen
Date:	8 July 2026

Island Communities Impact Assessment

Placing Request Policy - Education

Preliminary Considerations	Response
Please provide a brief description or summary of the policy, strategy or service under review for the purposes of this assessment.	This draft policy sets out how Orkney Islands Council will manage and decide requests for children and young people to attend a school other than their catchment school. It applies to annual entry requests, in-year transfers and requests involving additional support needs (ASN).
Step 1 – Develop a clear understanding of your objectives	Response
What are the objectives of the policy, strategy or service?	The policy aims to: • Ensure placing requests are handled fairly, consistently and transparently. • Meet statutory duties under Scottish education legislation. • Balance parental choice with the Council's responsibility to manage school capacity and provide efficient education.
Do you need to consult?	Parent Council Chairs Parents who have been involved in the placing request appeal process
How are islands identified for the purpose of the policy, strategy or service?	Orkney's educational establishments are located across the entire archipelago. Junior High Schools within Sanday Stronsay and Westray, Peedie Schools, Rousay, Eday, Papay, Shapinsay, North Ronaldsay and North Walls are all schools linked either only by boats or planes.

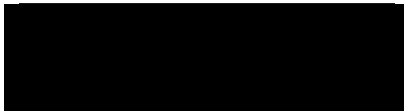
What are the intended impacts/outcomes and how do these potentially differ in the islands?	Through this policy, Orkney Islands Council aims to: • Ensure all placing requests are considered fairly, consistently and transparently. • Comply with statutory duties and national guidance. • Balance parental choice with the efficient use of educational resources. • Support children's rights, wellbeing and educational needs. • Provide clear information and accessible appeal routes for families. • Monitor decisions to support continuous improvement in service delivery. Within islands the context of the geography is vital to consider. Placing requests whilst rare to island schools needs to be balanced with the requirements on the island and the consequence of supporting a placing request on balance with the capacity of the school.
Is the policy, strategy or service new?	New policy
Step 2 – Gather your data and identify your stakeholders	Response
What data is available about the current situation in the islands?	There are rare exceptions when a placing request is asked of an island school. There have been no placing requests to islands in the last five years. Placing requests are most likely to occur within mainland Orkney.
Do you need to consult?	Parent Council Chairs – August 2026 should they request further consultation with their councils this will be managed.
How does any existing data differ between islands?	Size of school on the islands can vary. The island communities can be subject to population changes. The curriculum available to

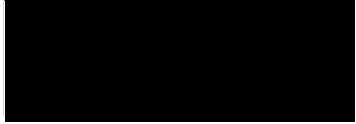
	Secondary young people varies between islands and can reduce young peoples options in S4.
Are there any existing design features or mitigations in place?	Schools within islands work creatively to enhance the curriculum as much as they can. This may mean considering qualification pathways. Parent Councils and schools are used to engaging online. Consideration and flexibility may be required when digital connectivity is not working so well. The policy does not alter existing transport eligibility arrangements. The Council recognises that transport considerations may be more significant for island families; however, the policy merely reflects existing statutory arrangements and does not introduce any new transport barriers.
Step 3 – Consultation	Response
Who do you need to consult with?	Parent Council Chairs
How will you carry out your consultation and in what timescales?	The parent council chairs meet regularly online. This is always done at their request in the late evening. A good attendance from island communities occurs.
What questions will you ask when considering how to address island realities?	As placing requests are rare the consideration of questions will not be different from mainland.
What information has already been gathered through consultations and what concerns have been raised previously by island communities?	Island communities are concerned when schools have no children on roll and the school is mothballed. Movement into schools is normally accommodated and if additional staff are required as the children and young people live within the catchment this accommodated. Placing requests to islands where additional staff would be required could be refused as on mainland Orkney.

Is your consultation robust and meaningful and sufficient to comply with the Section 7 duty?	Yes
Step 4 – Assessment	Response
Does your assessment identify any unique impacts on island communities?	No The assessment has identified some island-specific considerations, including transport arrangements, small school rolls, staffing implications and curriculum availability. However, these factors are already reflected within existing educational arrangements and the policy itself does not create any significantly different impact for island communities.
Does your assessment identify any potential barriers or wider impacts?	No Some islands have easier access to the mainland than other islands. School size varies. School communities are small and there are challenges around anonymity and confidentiality
How will you address these?	N/A
You must now determine whether in your opinion your policy, strategy or service is likely to have an effect on an island community, which is significantly different from its effect on other communities (including other island communities). If your answer is No to the above question, a full ICIA will NOT be required and you can proceed to Step 6. If the answer is Yes, an ICIA must be prepared and you should proceed to Step 5. To form your opinion, the following questions should be considered: • Does the evidence show different circumstances or different expectations or needs, or different experiences or outcomes (such as different levels of satisfaction, or different rates of participation)? • Are these different effects likely? • Are these effects significantly different? • Could the effect amount to a disadvantage for an island community compared to the Scottish mainland or between island groups?	

Step 5 – Preparing your ICIA	Response
In Step 5, you should describe the likely significantly different effect of the policy, strategy or service:	
Assess the extent to which you consider that the policy, strategy or service can be developed or delivered in such a manner as to improve or mitigate, for island communities, the outcomes resulting from it.	
Consider alternative delivery mechanisms and whether further consultation is required.	
Describe how these alternative delivery mechanisms will improve or mitigate outcomes for island communities.	
Identify resources required to improve or mitigate outcomes for island communities.	
Stage 6 – Making adjustments to your work	Response
Should delivery mechanisms/mitigations vary in different communities?	None expected. Use of online consultation and communication. Individual consideration of island circumstances during decision making. Monitoring of island placing requests. Consideration of travel and accommodation at Papdale Halls of Residence placement through existing policies.
Do you need to consult with island communities in respect of mechanisms or mitigations?	No

Have island circumstances been factored into the evaluation process?	Yes – any placing requests from islands will be gathered to understand. Engagement with the schools and parents will be done as flexibly as possible using technology.
Have any island-specific indicators/targets been identified that require monitoring?	Review the number of placing request per island.
How will outcomes be measured on the islands?	Feedback from island communities
How has the policy, strategy or service affected island communities?	It is envisaged that if anything this policy will be enacted less within the isles than in mainland Orkney.
How will lessons learned in this ICIA inform future policy making and service delivery?	Continue to ensure that islands are carefully considered when writing policy.
Step 7 – Publishing your ICIA	Response
Have you presented your ICIA in an Easy Read format?	No, but this would be possible on request.
Does it need to be presented in Gaelic or any other language?	No
Where will you publish your ICIA and will relevant stakeholders be able to easily access it?	Attached as an appendix to the Placing Request Policy which will go to the Education Communities and Housing Committee.
Who will signoff your final ICIA and why?	James Wylie – Director of Education, Communities and Housing.

ICIA completed by:	Wendy S Bowen
Position:	Head of Education
Signature:	
Date complete:	8 July 2026

ICIA approved by:	James Wylie
Position:	Director
Signature:	
Date complete:	21 August 2026

Item: 5

Education, Communities and Housing Committee: 9 September 2026.

Community Learning and Development Partners Plan.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents the 2026 Orkney Community Learning and Development Partnership Plan Progress and Evaluation Report, for noting, together with the revised Orkney Community Learning and Development Partnership Plan 2024-2027, for approval.
- 1.2. The Scottish Government Strategic Guidance for Community Planning Partnerships 2012 sets out the main purpose of Community Learning and Development as “empowering people, individually and collectively, to make positive changes in their lives and in their communities, through learning”.
- 1.3. The Requirements for Community Learning and Development (Scotland) Regulations 2013 place a statutory duty on local authorities to produce a plan every three years outlining how they will co-ordinate and secure “adequate and efficient” Community Learning and Development (CLD) provision in the local authority area, with other sector partners.
- 1.4. Overall responsibility for CLD planning sits with the local authority as Education Authority but includes a range of partners active in the planning, delivery and evaluation of CLD provision. In Orkney, CLD planning is conducted through the Community Learning and Development Partnership, a multi-agency partnership comprising Orkney Islands Council, NHS Orkney, Police Scotland, UHI Orkney, Voluntary Action Orkney, Highlands and Islands Enterprise and Skills Development Scotland.
- 1.5. The CLD Partners Plan affects all partners involved in CLD delivery which covers a broad range of practice including youth work, adult learning, family learning, volunteering support and community development.

- 1.6. The Orkney Community Learning and Development Partnership Plan 2024-27 was created by the Community Learning and Development Partnership and recommended for approval by the Education, Leisure and Housing Committee on 11 September 2024, insofar as it related to the Council.
- 1.7. The 2026 Progress and Evaluation Report of the Orkney Community Learning and Development Partners Plan 2024-27, attached as Appendix 1, summarises what has been achieved during the previous 12 months.
- 1.8. An updated version of the Orkney Community Learning and Development Partners Plan is attached as Appendix 2.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
 - i. Note the 2026 Orkney Community Learning and Development Partnership Plan Progress and Evaluation Report, attached as Appendix 1, insofar as it relates to the remit of this Council.
 - ii. Approve the revised Orkney Community Learning and Development Partnership Plan 2024-2027, attached as Appendix 2, insofar as it relates to the remit of the Council.

3. Review of the Community Learning and Development Plan 2024-27

- 3.1. During the second year, the CLD Partners Plan 2024-27 was regularly monitored, reviewed and evaluated to ensure effective progress was being made, as detailed in the 2026 Progress and Evaluation Report, attached as Appendix 1.
- 3.2. From the 19 actions set out in the plan, 9 actions have been completed, 9 actions are on track for completion within the set timescales and one action is partially completed with some minor issues or delays.
- 3.3. Key successes over the 2025/26 period include the following:
 - The Community Development Forum has strengthened effective collaboration and coordination of community development support.
 - CLD partners delivered a wide range of extracurricular opportunities and early intervention support.
 - An Adult Learning Forum has been created to better coordinate adult learning opportunities across Orkney.

- An array of free learning activities was delivered by CLD partners through adult learning, youth work and community development.
 - A new CLD sector training needs analysis is underway.
 - Following the first training needs analysis, 22 training opportunities were organised providing localised training for 234 people.
 - CLD partners secured and dispersed substantial amounts of funding to support community priorities.
 - Across 15 Community Local Led Development funded projects in 2025/26 the social return on investment was £3.37 for every £1 spent.
- 3.4. Through regular monitoring, evaluation and scrutiny, partners identified key strengths and areas for improvement which have been incorporated into an updated version of the Community Learning and Development Partners Plan to ensure it remains relevant and adaptable to new and emerging needs.
- 3.5. Nine completed actions have been removed from the revised version of the plan. Nine actions have been carried forward into the final year of the plan's cycle, with language and timescales updated to ensure the plan remains relevant and effective. No new actions have been added to the plan. The revised plan is attached as Appendix 2.

For Further Information please contact:

Kerry Spence, Service Manager (Community Learning, Development and Employability), extension 2425, Email: kerry.spence@orkney.gov.uk.

Implications of Report

1. **Financial:** None arising directly from this report. Any additional costs that might arise from the plan would have to be funded within existing resources.
2. **Legal:** Scrutiny of this report assists the Council to meet its statutory duties.
3. **Corporate Governance:** Not applicable.
4. **Human Resources:** None arising directly from this report.
5. **Equalities:** The Equality Impact Assessment undertaken last year has been updated accordingly and attached as Appendix 3 to this report.
6. **Island Communities Impact:** The Island Communities Impact Assessment undertaken last year has been updated accordingly and attached as Appendix 4 to this report.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☒ Growing our economy.

- ☒ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
- 8. Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
- ☒ Cost of Living.
 - ☒ Sustainable Development.
 - ☒ Local Equality.
 - ☐ Improving Population Health.
- 9. Environmental and Climate Risk:** An action to raise awareness and support for climate challenge activities and opportunities has been moved from the unmet needs section into the updated plan for delivery this year.
- 10. Risk:** Not applicable.
- 11. Procurement:** Not applicable.
- 12. Health and Safety:** Not applicable.
- 13. Property and Assets:** Not applicable.
- 14. Information Technology:** Digital skills training and support are central elements within Community Learning and Development support and provision.
- 15. Cost of Living:** The cost of living remains a priority area in the Community Learning and Development Partners Plan 2024-2027.

List of Background Papers

[CLD Partners plan 2025 Update](#)

[Minute of Education, Leisure and Housing Committee, 11 September 2024](#)

[Scottish Government Strategic Guidance for Community Planning Partnerships \(2012\): Community Learning and Development](#)

[Community Learning and Development: Guidance for 2024 to 2027](#)

Appendices

Appendix 1: 2026 Progress and Evaluation Report – Community Learning and Development Partners Plan 2024-2027.

Appendix 2: Updated Community Learning and Development Partners Plan 2024-2027 (2026).

Appendix 3: Updated Equality Impact Assessment.

Appendix 4: Updated Island Communities Impact Assessment.

Orkney

2026 Progress and Evaluation Report of the Community Learning and Development Partners Plan 2024-2027



**Orkney
Community
Learning &
Development
Partnership**



2026

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Introduction

Orkney Islands Council has a statutory duty under the Community Learning & Development (Scotland) Regulations, 2013, to produce a plan with partners every 3 years to *secure adequate and sufficient provision of Community Learning & Development (CLD) in our area*. The plan should provide a clearly defined framework for coordinating, planning and delivering CLD with partners who contribute to work supporting:

- **Improved life chances for people of all ages, through learning, personal development and active citizenship; and**
- **Stronger, more resilient, supportive, influential and inclusive communities.**

CLD is delivered by many partners within Orkney including Orkney Islands Council (OIC); Highlands and Islands Enterprise (HIE); UHI Orkney; Voluntary Action Orkney (VAO) and the third sector organisations it represents; NHS Orkney (NHSO); Police Scotland; Skills Development Scotland (SDS); Development Trusts; and other independent groups and charitable organisations who sit on the Orkney Community Learning and Development Partnership. A full list of the CLD Partnership members can be found at the end of this document.

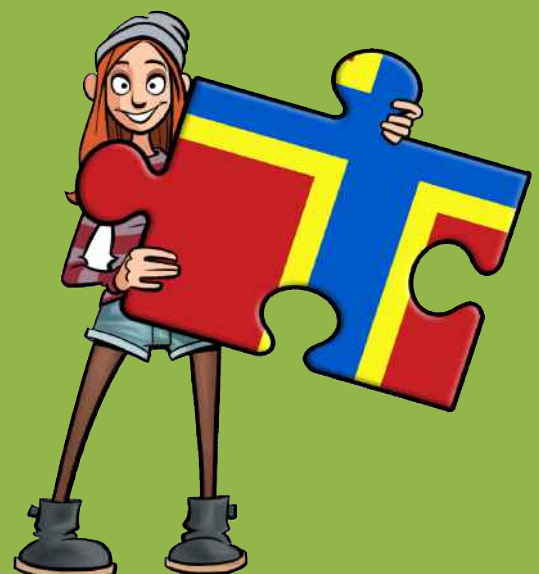
All partners involved in the delivery of CLD aim to deliver these objectives through:

- community development
- youth work, family learning and other early intervention work with children, young people and families
- community-based adult learning, including adult literacies and English for speakers of other languages (ESOL)
- Learning for vulnerable & disadvantaged groups in the community
- Learning support and guidance in the community
- volunteer development

It is the task of the CLD Partnership, and this plan, to ensure that people in Orkney, especially those that are disadvantaged, have appropriate access to the CLD support they need.

What is Community Learning and Development (CLD)?

Community learning and development is a way of working with individuals and communities which helps empower those individuals and groups to address issues of importance to them and promote learning and social development.



Quality Assurance

Orkney's 3-year partnership plan for Community Learning and Development (CLD), was produced by Orkney's CLD Partnership, which is a partnership of public, private and third sector organisations who are delivering CLD support and activities across Orkney.

The plan for the 2024-27 period was developed through community and learner consultation and engagement, to ensure CLD services are planned for, and delivered in a strategic and collaborative way to meet local needs.

Many developments have been made since the requirement for a CLD partnership plan was introduced back in 2015, including improved governance, increased stakeholder involvement and more formal links with other partnerships including Orkney's Community Planning Partnership and Children Service Strategic Group.

The plan is monitored, reviewed and evaluated regularly throughout the year to ensure effective progress is made on key actions in the plan. A formal report on progress and an updated version of the plan is presented to the Community Planning Partnership and the Education, Communities & Housing Committee annually, to ensure appropriate scrutiny and quality assurance.

As an inclusive and effective partnership, the work of the CLD Partnership is guided by 4 overarching principles:

- Work collaboratively to meet local needs with a clear focus on continuous improvement
- Challenge inequalities and promote equity of opportunities and access to services
- Provide achievement opportunities (to reduce the attainment gap) and improve life chances for all ages
- Ensuring CLD principles and values are understood, promoted and embedded in partnership plans and practice

By maintaining this standard of practice across settings, participants will experience improved and more consistent practice, whether they are involved in youth work, volunteering, adult learning or community development.



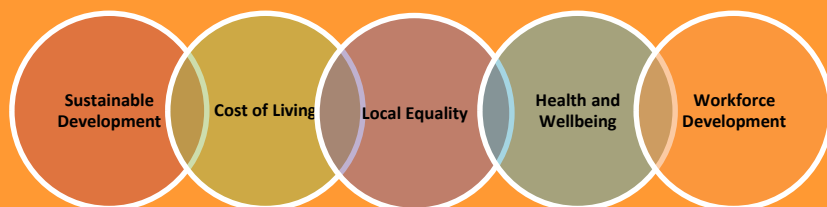
What is the purpose of community learning and development?

The purpose of CLD is recognised as supporting people, individually and collectively, to make positive changes in their lives and in their communities, through learning.



Overview of the CLD Plan during 2025-2026

In September 2024, a new three-year CLD Partners Plan for Orkney was published by the CLD Partnership, to help partners plan together to avoid duplication, strengthen co-ordination and improve understanding of the needs of the community.



Although it is for a 3-year period, the plan is reviewed and updated annually to ensure it remains relevant and responsive to emerging needs.

Significant progress has been made on many of the actions in year two of this plan. From the **19** actions set out in the plan, **9** actions have been completed (blue), **9** are on target to be completed on time (green), and **1** action remains partially completed with some minor issues (amber).

Key successes over this year included:

- *The Community Development Forum ensured that more effective collaboration and support is in place for local community development.*
- *CLD partners delivered a range of extracurricular opportunities and early intervention support.*
- *An Adult Learning Forum has been created to better coordinate adult learning opportunities across Orkney.*
- *An array of free learning activities were delivered through adult learning, youth work and community development.*
- *A new CLD sector training needs analysis is underway.*
- *Following the first training needs analysis, 22 training opportunities were organised for 234 people.*
- *CLD partners secured and dispersed substantial amounts of funding to support community priorities.*
- *Across 15 CLLD funded projects in 2025-26 the social value engine estimated a return on investment of £3.37 for every £1 spent.*

In accordance with the regulations, the plan also identifies needs that may not be met during the lifetime of the plan. Encouragingly, during this time, further progress has also been made on the 4 unmet need actions, including further collaboration with the Housing Service, work on childcare and climate challenges, and increased family learning activities although a joint strategy has not been completed.

BRAG code:

Blue	Action is complete
Red	Action not achieved / Action not on track with major issues
Amber	Action partially completed / Action mainly on track with some minor issues
Green	Action is on track

What has happened in the last year?

During 2025-2026 the CLD Partnership worked collaboratively to progress all 19 actions in the plan, alongside their other work priorities.

Actions were monitored and reviewed at regular intervals throughout the year to ensure adequate progress was being made through partnership approaches.



Progress Report on CLD Partners Plan during 2025-2026

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.

Key action	Progress made during 2025-26
1) Promote and support community organisations to develop local development action plans / place plans as required	CLD partners have provided an array of support to community organisations to help fund, progress and develop projects and development opportunities. The Community Development Forum, a subgroup of the CLD Partnership, is focused on improving and coordinating community development support in Orkney. An audit of area-based community development support was completed to clarify support available and identify gaps and areas of duplication. Initially, the Community Development Forum took the lead in coordinating the fast-moving progress of Place Plans across Orkney. Work to monitor the development of Place Plans is now led by a specific Place Plan Partnership Group comprising of a range of partners including Planning; Economic Development; CLDE; Orkney Health & Care and The Orkney Fund. Place Plans have been completed in 5 areas including Dounby, Stenness and Birsay. Kirkwall and Stromness already have Place Plans and work is underway to update both these plans. A further 10 communities are underway with creating Place Plans, 2 areas have just received funding and are starting the process, 3 areas are in the process of looking for funding and 3 other community areas have no current plans to develop Place Plans. The Community Local Led Development fund (CLLD) has provided £35,000 in funding towards the development of 5 Place Plans during 2025-26. The writing of Place Plans or Development Plans cannot be the end of the story. Communities need to be assured that CLD partners will be on hand to support and work with the community on delivering some of the actions identified in these plans. The Community Development Forum will continue to work collaboratively to ensure the sharing of resources and effective support for local communities.
2a) Undertake a strategic review of youth accreditation and awards offered by CLD partners to ensure effective delivery of appropriate awards based on need	The Youth Workers' Forum, who have a representative on the CLD Partnership, are progressing this priority. During 2025-2026 the Youth Workers Forum designed a questionnaire to map awards delivered for young people locally. Due to a limited response to the Microsoft Forms survey, partners are now being contacted individually, including uniformed organisations, to clarify what youth accreditation opportunities are available and how young people can get involved. This will then be compiled into an online booklet detailing local accreditation opportunities. It is hoped this will be hosted on a local site such as Growing Up In Orkney, with links to the Awards Network for more information on the awards. https://www.awardsnetwork.org/awrads/organistions The Annual Youth Awards Ceremony, held in March each year, is jointly organised by Voluntary Action Orkney and Community Learning Development & Employability Service (CLDE), with support from the Youth Workers Forum. This event demonstrates the amazing work and achievements of young people and the volume and high standard of youth work, accreditation and achievement opportunities that are available in Orkney. On the night, 100 young people were present, to received 25 different types of awards. During 2025-26 the CLDE Service supported young people to achieve 305 accredited awards.

Progress Report on CLD Partners Plan during 2025-2026

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.

Key action	Progress made during 2025-26
2b) Work with Education and wider CLD partners to explore opportunities to better track the achievements of young people	CLDE staff regularly attend the Council's Education Service Managers meetings to ensure relevant areas of joint working are progressing effectively. Tracking young people's achievements has been agreed as a joint priority in a bid to improve the tracking of young people's attainment and achievement. Significant work has taken place with schools to raise awareness of accredited awards. CLDE Youth Services are working with Stromness Academy to further develop the tracking of achievement. For the first time, Youth Services are delivering the Participatory Democracy Certificate (PDC) with some senior pupils. Stromness Academy are now utilising some of their Pupil Equity Funding to employ a Pupil Engagement Worker for a few hours each week to support with attendance and wider achievement opportunities. Youth Services staff also worked in partnership with Papdale Primary School to pilot the early stages of a Youthlink Scotland tracking achievement project. Following on from that a new national Youth Work Skills Track project is now to be piloted nationally testing a new digital tool designed to help young people and youth work organisations recognise, evidence and articulate the skills developed through youth work. A member of the CLDE Service has also worked with Skills Development Scotland and Education Scotland nationally, on the creation of a digital learner profiling platform, to better recognise young people's achievements.
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 data showed a slight increase in local antisocial offences from 56 in 2023-24 to 61 in 2025-26. As a result, Orkney Islands Council and Police Scotland are preparing a community safety focused bid for the Orkney Fund. CLD partners have also offered a range of diversionary activities and support in the local community during this time. CLDE have worked with Community Justice to offer any required support. Sport & Leisure coordinated a programme of Summer of Sport activities. Housing has an anti-social behaviour policy and acceptable behaviours contract. Community Local Led Development (CLLD) and Crown Estates Community Led Development Fund (CECLDF) have funded a range of extracurricular activities in the community, including projects from the Orkney Youth Choir, Rowing Club, Westside Cinema, Sailing Club and various play park projects. CLDE, in partnership with the Picky Centre and Action for Children, offered free Friday afternoon activities during 2025-26. 206 different young people attended the Picky sessions with an average attendance of 50 young people per week. 85 different young people attended the Stromness drop-ins, with an average of 24 attending each week. CLDE offer a wide range of opportunities and activities including the Fireskills Course and Best of You Programme. They also ran the Safe Islanders event, which is delivered to all S1 pupils. CLDE staff also undertake street work, engaging with young people including at key events such as the County Show and the Saturday night of Stromness Shopping Week, to support with the safety and wellbeing of young people. CLDE have arranged No Knives Better Lives training and have also secured 10 spaces with the Ocean Youth Trust, sailing programme, which aims to reach those involved in, or at risk of becoming involved in anti-social / risky behaviours.

Progress Report on CLD Partners Plan during 2025-2026

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.

Key action	Progress made during 2025-26
3a) Development of the Adult Learning Forum to review and coordinate adult learning provision in Orkney	The Adult Learning Forum has been established, and the group have met a number of times. At the first meeting, which included representatives from CLDE, UHI Orkney, and Orkney Library, it was agreed to undertake an audit of what adult learning provision is available across Orkney. The Adult Learning Forum are looking to focus on the relevant adult learning actions in the CLD Partners Plan, namely, to create a baseline and increase the wider accreditation opportunities for adults. Going forward, the group are keen to apply for funding as a group and have each partner take a different level of responsibility in project development and delivery.
3b) Create a baseline and increase the wider accreditation opportunities for adults	This action is being progressed by the Adult Learning Forum who are looking to collect partnership wide data on local accreditation opportunities. The Council's CLDE Service collects key performance data on accreditation opportunities. During 2025-26, 737 adults engaged in CLDE activities with 108 accredited awards achieved. Wider achievement opportunities offered by CLDE increased by 18% from 34 in 2024-25 to 40 opportunities during 2025-26. The Learning Link offered 32 qualifications in 2025-26, an increase on the 18 offered in 2024-25. Two Sector-based Work Academy Programmes (SWAPs) were delivered in hairdressing and administration during this period. These 6-to-8-week programmes were developed through the Local Employability Partnership, to incorporate accredited learning into practical tasters of the work and skills needed in different industries. In total 13 individuals engaged with the programmes. 6 out of the 13 participants, gained their Emergency First Aid at Work qualification, whilst 5 of the individuals completed a Personal Development Unit; Practical Abilities at SCQF level 5. No One Left Behind funding has also enabled UHI Orkney to continue their outreach service, delivering qualifications out in the community rather than in the confines of the UHI Orkney campus. CLDE also continued their needs-based offer of free accredited and non-accredited training offer for the ferry linked Isles. Following success in Eday and Shapinsay, the recent Westray training event supported 66 participants, with 23 people receiving accreditation. Training visits to Stronsay and Sanday have also been scheduled for later this year.
3c) Develop opportunities for a collaborative adult returner learning programme	UHI Orkney and the Council's CLDE Service worked together to design an adult returners programme, which was delivered in September 2025. This 4-week evening programme entitled 'Passport to Learning' focused on supporting adults to develop the skills and confidence needed for returning to education and learning, including skills identification and goal setting; communication; and digital skills. The 4 people who completed the course provided very positive feedback on the informal and informative nature of the course. Participants appreciated the opportunity to find out about possible learning opportunities and about the support available, to help them decide on the best next steps for them.

Progress Report on CLD Partners Plan during 2025-2026

Cost of Living

We will support individuals, children, and families by 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.

Key action	Progress made during 2025-26
4) Develop a partner's baseline and increase free learning opportunities including delivery of life skills courses, financial literacies and budgeting	An initial baseline has been created. A vast range of free one-to-one and group work activities have been delivered by CLD partners through adult learning, youth work and community development, to support people to build their skills, resilience and confidence and enable them to improve their outcomes. Orkney Library offered 12 different free learning opportunities over this period including: Yap and Yarn; Book Clubs; Nature Events; Writing Groups; Gaming Sessions; Mindfulness Sessions and Palaeography. The number of free learning opportunities delivered by the CLDE Service increased from 39 in 2024/25, to 43 in 2025/26. In addition to the regular offer, new learning opportunities included: Kindred Clothing, Fast Track courses, Creative Writing, Planning for the Future, Best of You Programme, Safe Islander, SAMH - Ahead of the Game, the Picky Family Day and much more. CLDE also continued with the visits to different isles to deliver free training, based on local need. Skills Development Scotland (SDS) and Developing the Young Workforce (DYW) run the Bridge Programme, which 4 people completed. The Communities Mental Health and Wellbeing Fund, managed by Voluntary Action Orkney, supported many projects which provided free learning opportunities in the community. Voluntary Action Orkney delivered 5 free training events including cyber resilience training and trustee training. Multiply funding, procured through Voluntary Action Orkney, provided financial support to over 25 community organisations through a mix of one-off assistance, multi-session training and ongoing advisory support. Multiply funding enabled tailored, responsive financial and numeracy skills support to address the needs of community organisations, increasing confidence in strengthened financial governance and improved organisational resilience, leaving participants better equipped to manage finances independently and to make informed financial decisions. Community Led Local Development, Crown Estates and the Youth Local Area Action Group (YLAG) funding has supported many projects which provide free learning opportunities including an agri-support and training roadshow, music and culture projects, Community Hubs and Loch of Ayre seating and activity programme which included birdwatching, yoga and art workshops. Orkney Community Planning Partnership's Islands Cost Crisis Emergency Fund also funded free baby weaning and paediatric first aid training.

Progress Report on CLD Partners Plan during 2025-2026

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.

Key action	Progress made during 2025-26
5a) Promote and embed the continuous involvement of those with lesser heard voices and priority groups within consultation and in matters that affect them	To ensure that community and learner voices are central to the strategic planning and coordination of CLD activities across Orkney, the CLD Partnership has community, young people and learner representatives as members of the CLD Partnership. In addition, partners use a variety of methods to engage with service users and the community including user group panels; surveys; focus groups; stakeholders' groups; and service user attendance at Board meetings. A new Membership and Engagement Officer role has been created at Voluntary Action Orkney. The Youth Forum informs youth work practice, and the Third Sector Forum helps shape voluntary sector support. The Jedi Council attend and provide valuable support to the Local Employability Partnership, including the development of an online 'Pathways to Employment' resource. Members also participated in a consultation with Scottish Government. Youth voice in Orkney is evident through a variety of channels including: the Youth Forum; Scottish Youth Parliament; the Young Islanders Network; Pupil Councils; and the Youth Local Action Group (YLAG). CLDE organised a Youth Conference, focused on Mental Health, in response to feedback from young people at the Chamber Debate earlier in the year. In terms of involving the wider community, the CLDE Picky Family Day, allowed for consultation and engagement with 481 individuals who attended. The vast number of Place Plans that are been developed, based on community consultation and engagement, are a good example of active engagement and consultation practices, helping ensure the local community are central in highlighting, and addressing, the matters which affect them. Following Orkney Matters 2, a "You Said We Did" report has been developed to ensure feedback is provided to highlight what has happened on the important issues and priorities raised by the community since that consultation in 2024. More recently, the Community Planning Equality Group has worked with 12 community representatives from the non-linked isles to start developing a new Locality Plan for the ferry linked isles, based on local needs, the plan will be focused on community resilience.
5b) Provide strategic leadership and direction in the development of a relevant, coordinated and representative youth voice structure	Whilst there are lots of routes and opportunities for young people to be heard, there is a lack of youth voice coordination both locally and nationally and the landscape is getting ever more saturated and disjointed. Greater strategic buy-in is required from partners to ensure that youth voice structures are more coordinated and representative of young people in Orkney, and that the voices and opinions of young people are not dilute. The Youth Forum are currently focused on increasing membership and improving engagement with young people across Orkney. The Youth Forum also received funding to distribute to youth-led community projects. The Youth Leader Action Group (YLAG) receives some Community Local Led Development funding to allow a small group of young people to allocate funding to relevant youth related projects.

Progress Report on CLD Partners Plan during 2025-2026

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.

Key action	Progress made during 2025-26
5b) continued. Provide strategic leadership and direction in the development of a relevant, coordinated and representative youth voice structure	The Young Islanders Network, is another group of young people, supported by Youth Scotland, to build a network for young people to ensure the National Islands Plan works for young islanders. There are two elected members of the Scottish Youth Parliament, committed to ensuring young people are heard by the decision makers of Scotland and who campaign on the issues which matter most to Scotland's young people. Both were involved in engagement on free ferry travel. There are also other groups including the Rural Youth Parliament, Rural Youth Action Network and more. CLDE organised a variety of events to engage and gather the views of a wider range of young people, including the Youth Conference and the Chamber Debate. CLDE are currently investigating funding opportunities to employ a Youth Participation Officer, to better coordinate all the different youth voice structures that are being developed locally.
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 Youth Services have a "Youth Work Offer" that is accessible to all P7+ across Orkney. This year, as well as delivery on the mainland, the team delivered youth work programmes in Rousay, Westray and Stronsay. CLDE also delivered an Isles training weekend in Westray, delivering training to 66 people, including: sewing sessions; digital skills; Level 2 Food Hygiene; Emergency First Aid at Work (UHI Orkney); a DJing course; and family learning opportunities. The Learning Link also delivered digital skills to Westray Development Trust staff to allow them to run a Digital Hub on the island. The Employability Team worked with Sanday Development Trust to establish a post supported by an Employer Recruitment Incentive. As young people from Westray could not get in for the Youth Conference in Kirkwall, Youth Services arranged for SAMH to visit Westray, to deliver Mental Health Awareness sessions for the young people there. CLDE have a variety of youth clubs running across communities in Orkney, although recruiting to some posts continues to be a challenge. A number of Development Trusts now have specialist conference cameras, which improves opportunities to access meetings and training online. During 2025-26, Round 4 of the Community Mental Health & Wellbeing Fund funded 22 projects. This year, the funding was allowed to fund some projects for two years rather than just one. The total amount of £89,500 has so far funded 12 projects for 2 years, and 7 projects were awarded 1-year funding. The fund will be reopened for applications in September 2026. Funded projects included: equipment purchases; small capital improvements; support for lunch clubs; wellness sessions; gentle exercise and peer tech training for older people; social activities; activities for the LGBTQ+ community; counselling support; and mental health support staff. Various CLD partners are also working on an addressing depopulation project which is focused on the ferry linked isles access to activities and opportunities on the mainland.

Progress Report on CLD Partners Plan during 2025-2026

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.

Key action		Progress made during 2025-26
6) continued. 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		Community Led Local Development and Crown Estates funding supported a range of projects over the last year which provide training and development opportunities for marginalised communities, including Place Plans; restoration works at Burnmouth Bothy; Longhope Sailing Club; Papay Heritage Centre Viking Exhibition; and various community and craft hubs. The Orkney Community Planning Partnership supported various activities through the Island Cost Crisis Emergency Fund, to ensure that children and families with limited income, can participate fully in opportunities, both in and out of school, including the School Participation Fund, free snacks for CLDE led activities, sewing and upcycling sessions and a Warm Hub in Stronsay. CLDE provide community development support to all geographical areas of Orkney. This included working with Westray Community Association on a kitchen refurbishment, North Walls Centre Committee on their MUGA project and supporting Flotta Community Association to apply for Cost-of-Living funding to sustain their Senior Warm Hub. The CLDE Service have worked in partnership with UHI Orkney to ensure consistent English for speakers of other languages (ESOL) provision and support is provided locally. CLDE continues to work with Orkney Blide Trust to deliver a weekly group for care-experienced young people and their friends. Sport and Leisure Services manage a range of facilities across Orkney including Healthy Living Centers, swimming pools and play areas. The Outdoor Education Service and Active Schools provision is offered to all schools, and the Summer of Sports programme has provided a range of opportunities across Orkney.

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.

Key actions		Progress made during 2025-26
7a) Increase collaborative family support provision across Orkney		Family support and provision are provided across all areas of the CLDE Service. During 2025-26 the number of family learning opportunities offered by the CLDE Service increased by 50% with the Service providing 15 different family learning opportunities compared to 10 opportunities offered last year. Family learning activities during 2025-26 included: family pop-up picnics; holiday programmes; the Solihull training programme for Dads; Parent Council sessions; Sewing Together; the Picky Family Day; Sunday Funday, in collaboration with The Yard; Binscarth Woods Family Learning activity days; Westray training weekend family sessions; Kirbister Farm Family Day; Science of Food; and The Body family activity days.

Progress Report on CLD Partners Plan during 2025-2026

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.

Key actions	Progress made during 2025-26
7a) <i>continued.</i> Increase collaborative family support provision across Orkney	Specific and holistic family support is provided through the Family Engagement Team utilising early intervention and prevention approaches. CLDE staff also ran The Nest baby group, which supported parents with personal and parenting support. CLDE Employability staff arranged Neurodiversity training as a direct result of the feedback received from parents, which highlighted a lack of training and support for parents and carers following an Autism or attention deficit hyperactivity disorder (ADHD) diagnosis within their family. 55 parents/carers and 36 volunteers/professionals attended the training. Community Local Led Development and Crown Estates funding supported a range of family learning opportunities including outdoor community spaces, the Youth Achievement Group, Cosy Café and other community hub projects.
7b) Identify and test a shared approach to measuring improvements to mental health and wellbeing outcomes through CLD activity	The CLD Partnership has a Data & Intelligence subgroup which is considering improvements in the gathering and collating of information and statistics across the Partnership. The challenge is that each partner organisation gathers and collates different data, at different times, for different purposes. Community Led Local Development, use the Social Value Engine to monitor and report on the social impact and return on investment from the projects they fund. From 2025-2026 it has been agreed that mental health and wellbeing will be a measure reported on through the Social Value Engine tool. Community Led Local Development also provided funding to Voluntary Action Orkney to pilot the use of the Social Value Engine with the Community Mental Health & Wellbeing Fund, which will enable the collection of mental health and wellbeing outcomes data from projects funded through this scheme. This can also be shared across the Partnership. Based on feedback from young people at the Youth Chamber Debate, this year's Youth Conference focused on mental health awareness and support, with a strong focus on early intervention and prevention.
*7c) Work with all partners, including the Integrated Joint Board, to deliver on the joint actions from the Orkney Physical Activity and Wellbeing Strategy	Limited progress has been made on the delivery of specific priorities in the Physical Activity and Wellbeing Strategy. However, partners continue to develop and deliver specific activities and programmes linked to physical activity and wellbeing. These include: - GP referral pathways - NHS Orkney/ Pickaquoy Centre Trust and Orkney Islands Council - Roll out of the Good Boost Programme - Summer of Sport Activities - Completion of Manse Park play area - Delivery of Bike Ability programme across primary schools Partners will have to revisit the current priorities of the Physical Activity and Wellbeing strategy to ensure the priority actions are still correct, and to agree next steps.

Progress Report on CLD Partners Plan during 2025-2026

Workforce Development

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.

Key actions	Progress made during 2025-26
8a) Explore and expand opportunities and pathways into and within the CLD profession through collaborative work with regional and national partners	Nationally, the number of qualified CLD professionals is falling steadily and it is becoming increasingly difficult to fill qualified CLD positions. Due to this, and in an effort to futureproof CLD, and maintain the highest standards, the CLDE Service has put significant effort into the “grow our own” approach. CLDE currently have 3 staff working towards their CLD degree, another has achieved their CLD Diploma, and 4 staff have completed the Professional Development Award in Youth Work. One member of the team is now undertaking a CLD related qualification through UHI Orkney, and another member of staff is looking to complete their CLD postgraduate qualification which will start later this year. The CLD Partnership is working with the CLD Standards Council and CLD Managers Scotland, to improve the clarity and effectiveness of CLD pathways. We are fortunate in Orkney to have a member of the CLDE Service appointed to the CLD Managers Scotland Executive Group. Another member of staff sits on the CLD Standards Council, as Executive Committee Vice Chair, and also as Chair of the Risk and Resourcing Group. A third member of the team has recently been selected to become a CLD Associate Assessor for His Majesties Inspectors of Education. This representation nationally, ensures the voices of the sector in rural areas and specifically Orkney, are well represented nationally. The number of people registered with the CLD Standards Council in Orkney has increased from 19 last year, to 20 in 2026. During 2025-26, several CLD partners attended various community and in-school events, to showcase the CLD profession as a worthwhile career. A vast and varied selection of CLD-related training opportunities are continually shared effectively across the Partnership, including the CLD Standards Council Professional Induction Programme, an online Reflective Practice course and Making CLD Partnership Working More Effective programme through Scottish Community Development Scotland, which was funded through Learn North. Voluntary Action Orkney and CLDE are both partners on Learn North, which is a regional partnership focused on training and support for the CLD sector. Education Scotland have also developed nine professional learning activities which has been shared with CLD partners and are free to attend.
8b) *Use different methods to increase awareness of the CLD sector and the outcomes that can be achieved through CLD delivery	The governance structures in place for the CLD Partnership ensures that the partners plan is visible, monitored and scrutinised effectively. Each year a summary of the progress and evaluation report is created in leaflet form to increase awareness in the community, about the work of the CLD Partnership. The CLD Partnership and the various subgroups consistently use the CLD Partnership logo to brand their joint work and activities, which has helped raise the profile and gain recognition for the collaborative work of the Partnership. The CLDE Service are committed to increasing awareness and recognition of CLD within the community, through presence at public events. During 2025-2026, 2920 people were reached through one-off promotional events. Short films are being produced by CLDE to help demonstrate the impact and positive outcomes that can be achieved through adult learning and youth work. Short films have already been produced by the Local Employability Partnership. The use and reach of Facebook is improving, but young people have stressed that many people their age, do not use it, and so they struggle to find out about CLD opportunities. The use of other social media platforms has been explored but it raises security concerns for the Council and other public bodies.

Progress Report on CLD Partners Plan during 2025-2026

Workforce Development

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.

Key actions	Progress made during 2025-26
9a) Undertake a training needs audit of the CLD sector	In July this year, the CLD training subgroup issued a second CLD sector training needs audit. An analysis of the findings will be undertaken shortly, and a training plan developed, for delivery in the final period of this plan. A report on the previous training needs analysis and the training programme that resulted from the findings, was circulated widely with the new survey. This allows the CLD Partnership to raise awareness of the effective work that has taken place to meet continuous professional development and training needs, locally. https://www.orkney.gov.uk/our-services/community-learning-and-development/
9b) Deliver a training programme for the CLD workforce and volunteers, based on needs identified through a new training needs analysis	Overall, in the period from September 2023 to March 2026 the CLD Partnership Training Subgroup organised 22 training sessions, which were attended by 234 people, helping to meet local demand for training and development, across the CLD Sector in Orkney. Mental health awareness was the most requested training, so a 3-tiered approach was agreed with NHS Orkney staff, comprising of Informed Level (suitable for anyone), Skilled Level (for staff and volunteers likely to be dealing with mental health support) and Enhanced Level (for staff dealing with significant mental health requirements). In total the CLD Partnership delivered 9 training sessions focused on mental health awareness to 76 people. The training subgroups delivered a variety of training to meet the needs identified in the initial training needs analysis. In the last 12 months, the CLD Training Subgroup have organised 6 training sessions including: Save a Life; Mentally Healthy Workplace Training; and Neurodiversity Awareness training. For the next programme the Training Subgroup have agreed to utilise the Ticket Tailor platform to better promote training opportunities. Each year Voluntary Action Orkney and CLDE organise an Annual Halls Event, for all the hall committees in Orkney. Hall committee members themselves, specify the training required. In 2025, training was delivered on the changes to the PVG Scheme, Charities Law, Prevent and Martyn's Law. A total of 28 volunteers from 16 halls across Orkney attended the event. In addition, partners effectively share and circulate information on various training opportunities which can be accessed across the CLD Partnership, including the CLDE Annual Youth Worker Training Programme, which is open to all partners, and delivers a range of training for the youth work sector. Voluntary Action Orkney (VAO) also delivered 5 training events during this period, including cyber resilience training and trustee training.

Progress Report on CLD Partners Plan during 2025-2026

Workforce Development

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.

Key actions	Progress made during 2025-26
10) Improve the quality of the data that we are sharing across the partnership to better understand local CLD needs and outcomes	The Data & Intelligence Subgroup are reviewing how data is coordinated and collated collectively. The subgroup is focused on gathering data on the following 4 key performance indicators: • The number of groups receiving capacity building support • The number of people reached through one off engagement • The number of people taking part in influencing and engagement activities • The number of people with improved mental health and wellbeing outcomes Collaborative meetings have been held with Highlands & Islands Enterprise, Voluntary Action Orkney, Skills Development Scotland and across Orkney Islands Council to ensure similar data is gathered and shared. An audit of community development support has been completed, providing key data and understanding of local community requirements. The data subgroup is also working collaboratively on the use of the Social Value Engine to demonstrate the value of CLD input. Community Local Led Development and Voluntary Action Orkney are currently using the Social Value Engine to demonstrate the social value and impact that various pots of funding are having on the community. Projects are monitored and reported through the Social Value Engine, which allows the non-financial impact of these funding streams to be recorded. During 2025-26, 15 of the projects funded through the Community Local Led Development had a monetary value of £493,243.16 but the value of that is calculated at £1,664,679.20 and the impact is valued at £1,722,942.97. Overall, for every £1 spent the social return equates to £3.37. Going forward, all Third Sector Interfaces (TSI) across Scotland will be reporting on a variety of short- and medium-term outcomes through “Telling Our Story” – the TSI Network Improvement Project which will be shared across the CLD Partnership and may influence what new data is gathered collectively across the CLD sector locally.

Progress Report on CLD Partners Plan during 2025-2026

Unmet needs during this period (2024-2027)

At a time of changing national policy, realignment of priorities and ever reducing resources, it is clear 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:

Key actions	Progress made during 2025-26
Develop partnership work with Housing partners to explore opportunities around tenant participation	Similarly to last year, increased partnership work has taken place with Housing over this time, despite this being detailed in the unmet needs section of the plan. A variety of housing projects continue to be developed by a number of Development Trusts across Orkney. Orkney Islands Council's Housing Service has a Tenant Participation Officer who is meeting with many CLD partners and speaking to a variety of partnership groups, to increase partnership working and promote tenant participation. CLD partners continue to input into the Council tenant's monthly newsletters, increasing awareness of support and opportunities available through the CLD sector.
Creation of a collaborative family learning strategy and plan	As anticipated, this action to create a collaborative family learning strategy and plan was not directly progressed by the CLD Partnership during this period. However, there has been a clear focus on family learning and as a result there has been an 11% increase in family learning opportunities offered by CLDE in 2025-26, compared to the previous year. CLDE offered a range of family learning activities from the Picky Family Day and family activity sessions in Westray to the regular Sunday Funday. This year CLDE also offered the Solihull training programme specifically for Dads. The number of adults engaged in CLDE family learning in 2024-25 was 104. This increased to 324 in 2025-26 - an increase of over 200%.
Increased access to affordable childcare including breakfast club and after school provision	The Council's Early Learning & Childcare Service continue to work closely with the Local Employability Partnership, who are funding childminder training and registration for 7 individuals, through the Scottish Childminding Association (SCMA). 5 individuals have so far registered for the training. Promotion is underway to fill the two final training slots. A Breakfast Club and after school clubs ran in Papdale Primary School as part of the CLDE Pupil Engagement Team offer, funded through Pupil Equity Funding. Education secured £35,000 from the Bright Start Breakfast fund, to adapt the breakfast club model to work in a rural context. Although not additional childcare, 6 island communities are currently providing this complimentary breakfast offer.
Climate challenge related opportunities and actions	Green Grant funding is offered through Highlands & Islands Enterprise. Community Local Led Development and Crown Estates Community Led Development Fund, have funded a variety of growing projects and agriculture related projects in 2025-26. Development Trusts across Orkney are involved in a wide range of climate challenge and sustainability initiatives. Eday, Papa Westray, Sanday, Shapinsay and Westray Development Trusts, participated in the Carbon Neutral Islands Replicability Project, and have developed Community Climate Action Plans for their islands. Other Development Trusts are actively engaged in climate action through initiatives such as the Island Community Action Network (iCAN) and the Rural Climate Hubs programme, helping communities to reduce emissions, build resilience and support a just transition to a net zero future. In Sanday, the Trust's Land and Sea project is exploring nature-based approaches to coastal adaptation.

CLD Partners Plan, Review and Evaluation 2025-2026

The Community Learning and Development Plan is continuously monitored, reviewed and evaluated throughout the year.

Alongside quarterly monitoring and the annual review of the plan, the CLD Partnership also undertakes cyclical self-evaluation activities, including the use of the How Good Is Our Community Learning and Development 4 (HGIOCLD4), a framework that includes a common set of quality and performance indicators.

The findings from all the monitoring and evaluation work feed into the updated version of the CLD Plan, along with the vital input from partners, learners and the wider community.

Recent evaluation and self-evaluation activity identified the following strengths and areas for improvement:

Key strengths:

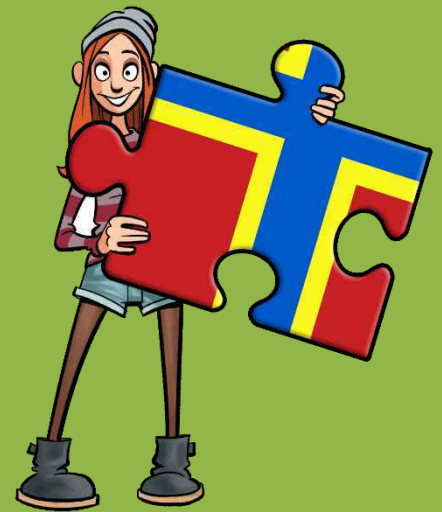
- Improved use of data to evidence progress
- Increased collaboration, including sharing of resources to improve delivery and achieve outcomes
- Focused approach of the Partnership to identify gaps and reduce duplication in CLD provision
- Robust planning, monitoring, evaluation and governance
- High levels of joint training and development opportunities

Areas for development:

- Continue to improve the sharing of data across the Partnership to inform planning
- Raise awareness of CLD and the work of the CLD Partnership through increased promotional activity
- Continue to lobby against cuts across the CLD sector and the continued reliance on short term funding which negatively impacts CLD delivery
- Streamline the number of partnerships and plans that exist to declutter the strategic landscape.

The findings of the monitoring and evaluation work, alongside input from partners, service users and the public, have supported the creation of the updated CLD Partners Plan for the final year of this three-year planning cycle. All completed actions have been removed, and the remaining actions updated.

One additional action has been added to the plan for the final year. The action focused on raising awareness and support within the community for climate challenge activities has been moved, from the unmet need section, into the delivery plan for 2026-27.



CLD Partners Plan, Review and Evaluation 2025-2026

Within the context of this document, the acronyms used stand for:

ADHD – Attention deficit hyperactivity disorder
ASSIST – Applied Suicide Intervention Skills Training
CLD – Community Learning & Development
CLDE – Community Learning, Development & Employability Service
CLDSC – CLD Standards Council
CLLD - Community Led Local Development
CPD – Continuous Professional Development
CECLDF – Crown Estates Community Led Development Fund
DTAS – Development Trusts Association Scotland
DofE – Duke of Edinburgh Award
DYW - Developing the Young Workforce
DYA – Dynamic Youth Awards
ECH - Education, Communities & Housing
ESOL - English for Speakers of Other Languages
HIE – Highlands & Islands Enterprise
HGIOCLD4 – How Good Is Our Community Learning & Development 4
iCAN - Island Community Action Network
IT - Information Technology
KPI – Key Performance Indicators
LEP – Local Employability Partnership
MSYP - Member of Scottish Youth Parliament
MUGA – Multi Use Games Areas
NHSO – National Health Service, Orkney
NOLB – No One Left Behind
OCP – Orkney Community Planning Partnership
OHAC – Orkney Health & Care
OIC – Orkney Islands Council
OPAWS – Orkney Physical Activity & Wellbeing Strategy
PDC – Participatory Democracy Certificate
PDA – Professional Development Award
QR Code – Quick Response Code
SAMH – Scottish Action for Mental Health
SCQF - Scottish Credit and Qualifications Framework
SCMA – Scottish Child Minders Association
SVE – Social Value Engine
SQA - Scottish Qualification Authority
SVQ - Scottish Vocational Qualification
SDS – Skills Development Scotland
SWAPS – Sector based Work Academy Programme
THAW – Tackling Household Affordable Warmth
TRICE - Tri-Community Exchange
UHIO – University of the Highlands & Islands Orkney
VAO – Voluntary Action Orkney
YAA – Youth Achievement Awards
YLAG - Youth Local Action Group
YWF - Youth Workers Forum



Glossary of frequently used terms

Within the context of this document, the terms used mean:

Adult Learning - In its broadest sense, adult learning encompasses all 16+ post- compulsory education, taking place in a variety of settings including community venues, workplaces, colleges, universities, online and at home. It is life-long, life- wide, and learner-centered. It includes community-based adult learning, which is built around learner needs, is flexible and delivered in local community settings. It is one strand of Community Learning and Development.

Community Development - Community Development is a process where people come together to take action on what's important to them. It helps communities to organise, and identify the issues they want to address, or the opportunities they want to explore. This can be done by communities of place or communities of interest. Community Development is about making a fairer, just and more inclusive society and includes building the skills of community groups and organisations. It is one strand of Community Learning & Development.

Community Learning and Development (CLD) - CLD is a field of professional practice that enables people to identify their own individual and collective goals, to engage in learning and take action to bring about change for themselves and their communities. Education Authorities in Scotland have a statutory duty to secure CLD provision with young people, adult learners and community groups/ organisations in their area. CLD methodologies may also be used by practitioners in other sectors to engage with communities.

Family Learning - Family Learning encourages family members to learn together, with a focus on intergenerational learning. Family Learning activities can also be specifically designed to enable parents to learn how to support their children's learning.

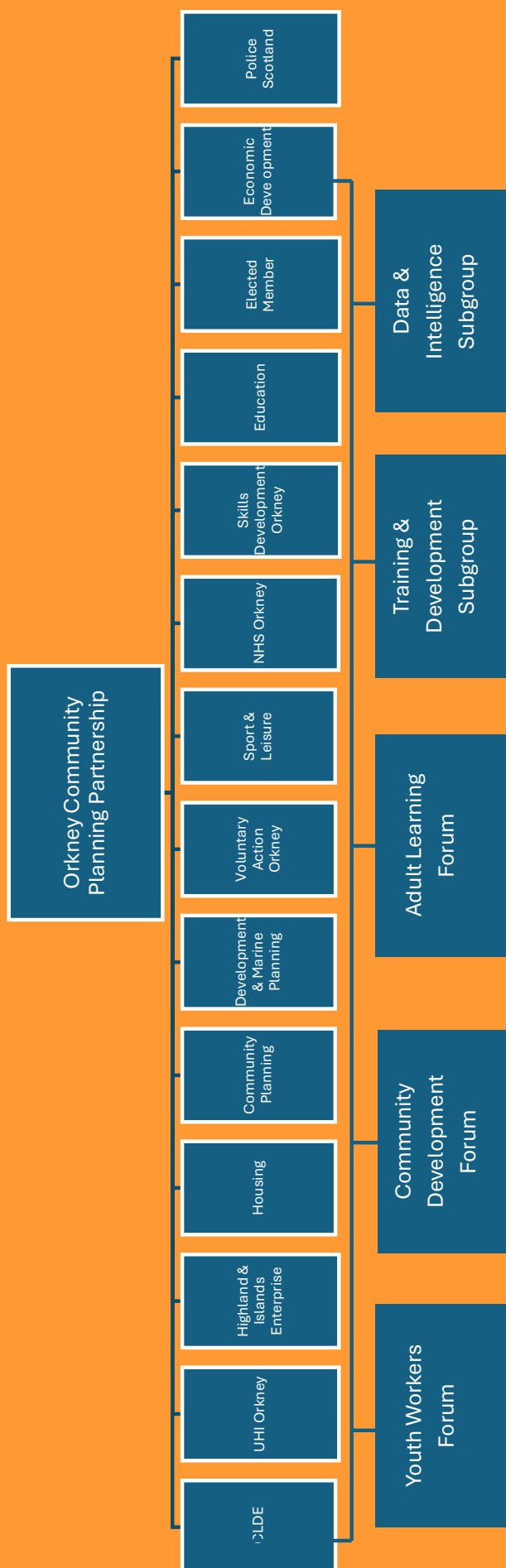
Learners - This term covers any recipient of the services of a partnership or partner delivering CLD provision. It includes, but is not limited to, people you may call, clients, customers, children, young people, adults, stakeholders, families, volunteers, community activists and community members.

Workforce Development - This includes all the learning and development activities that both staff and volunteers engage in. It includes but is not limited to training, career long professional learning, shadowing, mentoring, coaching, secondment, undertaking awards/qualifications.

Youth Work - Youth Work is non-formal educational activities which help older children and young people to learn about themselves, others and society. Youth work activities involve enjoyment, challenge and learning. It supports young people in their personal, social and educational development and to influence decisions about their lives and their communities. It takes place in a range of settings, such as youth centers, schools or outdoors; and is delivered by youth workers, many of whom are volunteers. It is one strand of Community Learning and Development.



CLD Partnership Membership





**POLICE
SCOTLAND**
Keeping people safe
POILEAS ALBA

**Skills
Development
Scotland**

CHI | ORKNEY



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean



ORKNEY
ISLANDS COUNCIL



Orkney



The Orkney Partnership
Working together for a better Orkney



Orkney Community Learning & Development Partnership 2026



CLD Partners Plan

2024-2027

(2026 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 coordination and expansion of youth achievement opportunities and pathways to ensure young people progress and reach their full potential.	1a) Undertake a strategic review of youth accreditation and awards offered by CLD partners and create promotional materials to raise awareness of different awards available.	CLDE, VAO, (Youth Workers Forum)	September 2027	- Awards e-booklet created by September 2027 - Annual youth awards data collection established - Increased youth awards offered by Sept. 2027	- Minutes and Agendas - Youth Awards e-booklet - Increase in youth awards - Annual data of all youth awards - Number of accredited and non-accredited awards - Review completed
	1b) 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	- Pilot established by March 2027 - Review of tracking completed by March 2027 - Improvement plan developed by Sept. 2027	- Minutes and Agendas - Review of tracking systems - Improvement plan - Improved tracking system developed in pilot school
	1c) 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	September 2027	- Partnership projects agreed - Funding secured - Engagement with the local community - Identify baseline of anti-social behaviour	- Projects undertaken - Funding applications - Funding secured - Programme of delivery - Numbers engaged - Feedback and evaluations - Decrease in reported anti-social behaviour

Outcome	Action	Lead	Target Date	Milestones	Evidence
2. Increased coordination and expansion of adult learning opportunities and pathways to ensure learning is lifelong, life-wide and learner centered.	Increase the wider accreditation opportunities for adults.	CLDE, UHIO, (Adult Learning Forum)	September 2027	- Adult learning provision baseline created by December 2026 - Increase in wider accreditation opportunities by September 2027	- Number of adult learners - Number of accreditation and non-accreditation awards - Number of qualifications - Number of ESOL learners
3. Raise awareness and support within the community for climate challenge activities and opportunities.	Weave climate challenge engagement work into CLD opportunities, where possible.	HIE, Development Trusts, (Community Development Forum)	September 2027	- Climate challenge initiatives and opportunities offered - Green funding available - Community climate action plans developed	- Evaluation / feedback - Number of opportunities - Amount of green funding secured - Number of climate action plans produced

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
4. People have increased confidence and opportunities to express their views and influence decision making and service design.	4a) 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	- Support the streamlining of community consultation and engagement - Utilise findings of Place Plans to update relevant partnership plans	- Working group minutes and agendas - Evaluation / feedback - Number of lived experience groups - Number of Place Plans

Outcome	Action	Lead	Target Date	Milestones	Evidence
	4b) Provide strategic leadership and direction in the development of a relevant, coordinated and representative youth voice structure.	CLDE, VAO, (Youth Workers Forum)	September 2027	- Task group created - Develop youth engagement and participation infrastructure and action plan by March 2027	- Records of meetings - Youth engagement infrastructure developed - Action plan agreed and delivered

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
5. 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.	Work with partners, including the Integrated Joint Board, to deliver joint actions from the Orkney Physical Activity and Wellbeing Strategy.	CLDE, Sport & Leisure, UHI Orkney, Education, VAO, NHSO	September 2027	- 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	- Presentation of the Physical Activity & Wellbeing Strategy to CLD Partnership - Relevant actions agreed by CLD Partnership - Progress and reporting on key actions

Workforce Development

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
6. Increased visibility and awareness of CLD as a recognised profession.	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	- Partnership case studies - Social media posts - Identify funding for marketing - A short CLD film created 2 case study films created - CLD Partners webpage developed	2 partner case studies created - CLD Partnership website created 2 films created on CLD outcomes - Number of views or likes to the webpage
7. Orkney has a skilled, trained, and confident CLD workforce with a shared understanding of relevant national occupational standards, CLD values and competences.	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	- Programme of training is developed - Training offered - Universal evaluation undertaken after every training session - Review evaluation findings	- Number of training courses delivered - Attendance numbers - Number of organisations benefiting - Participant feedback - Annual progress report
8. Effective and consistent gathering, analysis and reporting of data for planning and reporting on outcomes.	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 2027	- 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	- 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

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.



Equality Impact Assessment

The purpose of an Equality Impact Assessment (EqIA) is to improve the work of Orkney Islands Council by making sure it promotes equality and does not discriminate. This assessment records the likely impact of any changes to a function, policy or plan by anticipating the consequences, and making sure that any negative impacts are eliminated, or minimised and positive impacts are maximised.

1. Identification of Function, Policy or Plan	
Name of function / policy / plan to be assessed.	Community Learning and Development (CLD) Partners Plan 2024-27 (2026)
Service / service area responsible.	Education, Communities and Housing
Name of person carrying out the assessment and contact details.	Kerry Spence 01856 873535 ext. 2425 kerry.spence@orkney.gov.uk
Date of assessment.	21/07/26
Is the function / policy / plan new or existing? (Please indicate also if the service is to be deleted, reduced or changed significantly).	Existing

2. Initial Screening	
What are the intended outcomes of the function / policy / plan?	There is a statutory requirement to produce a CLD Partners Plan to demonstrate how partners within the CLD field will work together to: • Improve life chances for people of all ages, through learning, personal development and active citizenship; and • Help build stronger, more resilient, supportive, influential and inclusive communities.
Is the function / policy / plan strategically important	Yes. The CLD Partners Plan is a statutory responsibility to ensure partners are working

	strategically to provide adequate and efficient CLD support.
State who is, or may be affected by this function / policy / plan, and how.	All Orkney residents who engage in community learning and development will benefit from improved and co-ordinated community learning and development services and provision.
How have stakeholders been involved in the development of this function / policy / plan?	Various community and learner consultation and engagement exercises have been undertaken to inform the plan alongside intensive consultation and evaluation work with strategic partners and CLD practitioners. The results of the consultations, reviews and inputs have been integral to the development of the plan. Following year one, the plan has been reviewed and actions added as required to ensure it is addressing new and emerging needs.
Is there any existing data and / or research relating to equalities issues in this policy area? Please summarise. E.g. consultations, national surveys, performance data, complaints, service user feedback, academic / consultants' reports, benchmarking (see equalities resources on OIC information portal).	The overall aims of the Community Learning and Development Plan are to improve life chances for people of all ages, through learning, personal development and active citizenship. The activities in the plan are intended to lead to positive outcomes such as re-engagement of learners, improving wellbeing and enabling the development of skills for learning, life and work, so people can achieve their full potential. The plan aims to achieve positive impacts particularly for those individuals and groups that are most vulnerable, disengaged and disadvantaged in our community. Findings from the independent review of CLD have been incorporated into the plan and following consideration of the recommendations by Ministers and CoSLA any future requirements will be included in future reiterations of the plan. Local and national data is gathered, monitored and reviewed annually to ensure a clear understanding of changing local needs.
Is there any existing evidence relating to socio-economic disadvantage and inequalities of outcome in this policy area? Please summarise. E.g. For people living in poverty or for people of low income. See The Fairer Scotland Duty Interim	No The overall focus of the Community Learning and Development plan is to work with people of all ages who are most disadvantaged and in need of support. The activities in the plan are intended to lead to improved life chances through learning, personal development and active citizenship. A key element of CLD work is to support people to achieve positive outcomes such as engagement

Guidance for Public Bodies for further information.	of learners, improving wellbeing and enabling the development of skills for learning, life and work so people can achieve their full potential. The plan aims to achieve positive impacts particularly for those groups that are most marginalised and disadvantaged in our community including those facing social and economic disadvantage. One key priority area in the plan is “Cost of Living” which is focused on targeted support for those facing hardship, through learning, training and personal development opportunities.
Could the function / policy have a differential impact on any of the following equality strands?	(Please provide any evidence – positive impacts / benefits, negative impacts and reasons).
1. Race: this includes ethnic or national groups, colour and nationality.	Yes, potential positive impact for people who have English as a second language. Part of the delivery outcomes for Community Learning and Development include community-based adult literacies and English for speakers of other languages (ESOL). An action around adult learning specifically mentions a focus on ESOL provision.
2. Sex: a man or a woman.	No
3. Sexual Orientation: whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes.	No
4. Gender Reassignment: the process of transitioning from one gender to another.	No
5. Pregnancy and maternity.	No
6. Age: people of different ages.	Yes, potential positive impact for children and young people and also adults. The delivery actions in the plan include focused actions around youth work, family learning and early intervention work with children, young people and families needing support. The plan also includes actions focused on adult learning, community-based adult learning and engagement with those most isolated in our community.
7. Religion or beliefs or none (atheists).	No

8. Caring responsibilities.	No
9. Care experienced	Yes. Potential positive impact for care experienced people as CLD provision includes targeted learning and youth work provision in the community for those most in need of support.
10. Marriage and Civil Partnerships.	No
11. Disability: people with disabilities (whether registered or not).	Yes. Potential positive impact for people with disabilities as provision includes learning for vulnerable and disadvantaged groups in the community.
12. Socio-economic disadvantage	Yes. Potential positive impact for those facing socio-economic disadvantage as the outcomes of the plan include targeted provision to engage and support those facing hardship and those most in need of support. The plan is focused on the removal of barriers and increasing access to opportunities for those that are disadvantage. The 2024-27 plan includes Cost of Living as one of the five priority areas, detailing how CLD partners will support the mitigation of social and economic challenges through targeted learning and community support.

3. Impact Assessment

Does the analysis above identify any differential impacts which need to be addressed?	No, any impacts identified are likely positive impacts.
How could you minimise or remove any potential negative impacts?	N/A
Do you have enough information to make a judgement? If no, what information do you require?	Yes

4. Conclusions and Planned Action

Is further work required?	Yes
What action is to be taken?	CLD Partners Plan will be implemented and monitored
Who will undertake it?	Officers within Education, Leisure & Housing
When will it be done?	The plan will be reviewed and updated annually

How will it be monitored? (e.g. through service plans).	The plan will be monitored, reviewed and evaluated regularly throughout the year and updated accordingly to ensure it remains active and relevant. A report on progress will be submitted annually by the Community Learning & Development Partnership to the Education, Communities & Housing Committee and to the Orkney Partnership's Local Equality Delivery Group for scrutiny.
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Signature: 

Date: 21/07/26

Name: KERRY SPENCE

(BLOCK CAPITALS).

Please sign and date this form, keep one copy and send a copy to HR and Performance. A Word version should also be emailed to HR and Performance at hrsupport@orkney.gov.uk

Island Communities Impact Assessment

[Orkney Community Learning & Development Partners Plan 2024-2027 (2026 update)]

Preliminary Considerations	Response
Please provide a brief description or summary of the policy, strategy or service under review for the purposes of this assessment.	Orkney Islands Council has a statutory duty (Community Learning & Development (Scotland) Regulations 2013) to produce a plan with partners every 3 years in order to “<i>secure adequate and sufficient provision of Community Learning & Development (CLD) in our area</i>”. The plan should provide a clearly defined framework for coordinating, planning and delivering CLD with partners who contribute to work supporting: • Improved life chances for people of all ages, through learning, personal development and active citizenship. • Stronger, more resilient, supportive, influential and inclusive communities. Orkney’s 3-year partnership plan for Community Learning and Development (CLD), was produced by Orkney’s Community Learning & Development Partnership, which is a partnership of public, private and third sector organisations who are delivering CLD support and activities across Orkney.
Step 1 – Develop a clear understanding of your objectives	Response
What are the objectives of the policy, strategy or service?	To ensure more coordinated delivery and support to improve life chances for people of all ages, through learning, personal development and active citizenship and help develop stronger, more resilient, supportive, influential, and inclusive communities.

Do you need to consult?	Yes. There is a requirement within the CLD Regulations guidance which details the need to reinforce the role of communities and learners in the assessment, planning and evaluation processes, enabling them to shape CLD provision. We also have a process of continuous engagement and consultation with learners and community groups through the work of partners and agencies on the CLD Partnership.
How are islands identified for the purpose of the policy, strategy or service?	The plan covers the whole of Orkney and recognises that the needs are different in each of the isles, and indeed, across all the communities and parishes on the Orkney mainland. The plan has a key focus on targeting support for the following groups and individuals: Those who are experiencing poverty or hardship Those that are socially / geographically isolated Those facing significant barriers to participation and inequality of provision Community groups and organisations working to make a positive difference. There is a specific action in the plans focused on increasing opportunities for those marginalised communities, including the ferry linked isles, to participate in training and development opportunities and reduce isolation.
What are the intended impacts/outcomes and how do these potentially differ in the islands?	The plan provides a clearly defined framework for coordinating, planning, and delivering CLD with partners to: • Ensure communities - particularly those who are disadvantaged - have access to the CLD support they need.

	• Strengthen co-ordination between the full range of CLD providers, ensuring that Community Planning Partnerships, local authorities and other providers of public services respond appropriately to the expectations set by the <i>CLD Strategic Guidance</i> • Reinforce the role of communities and learners in the assessment, planning and evaluation processes, enabling them to shape CLD provision. • Make the role and contribution of CLD more visible.
Is the policy, strategy or service new?	No, the requirement for a CLD Partners Plan was introduced in 2015, with a new plan required every 3 years
Step 2 – Gather your data and identify your stakeholders	Response
What data is available about the current situation in the islands?	Alongside partner, learner and community input, this plan comes from a broad evidence base gathered from local and national information including data on population, health, crime, unemployment, income, living costs, education, the economy and much more. Understanding the challenges in Orkney, including those issues specific to the nonlinked isles, allows us to build a CLD Partners Plan relevant to local need. The priorities have been identified through direct engagement with learners and the local community, local research and analysis of relevant data and partner knowledge in their CLD related field of expertise.
Do you need to consult?	Yes, there is a requirement for involving learners and the community in the development of the plan. The priorities agreed in the CLD Partner Plan 2024-27 sets out our shared vision, values and priorities over the next three years and are based on a full understanding of local need. A collective understanding of community and learner needs was developed and stakeholder input into the plan was assured through

	partner inputs and direct engagement with communities and stakeholders through a variety of one-to-one sessions, focus group activity, findings from Orkney Matters 2 and more recently through the development of Place Plans. Feedback was also sought through a specific CLD consultation designed for Orkney residents, strategic partners, CLD practitioners, community groups, adult learners and young people. Work has also been undertaken to ensure learner and community voices are represented on the CLD Partnership, with an adult learner, young persons, Community Associations and Development Trust representatives all identified to sit on the CLD Partnership as equal partners to develop, monitor and progress the CLD Partners Plan.
How does any existing data differ between islands?	Data and priorities differ from island to island but as this is an Orkney wide plan the most common areas and issues were used to determine the priorities for the overall plan. Demographic information is difficult to capture for smaller areas which is often why you only get larger data / demographic information. To resolve this, we have close links and continuous engagement with Community Councils, Community Associations, Development Trusts and other community organisations and continue to monitor needs and review feedback. The expansion of Tri-Community Exchange (TRICE) meetings demonstrates this commitment to work collaboratively with individual communities to find local solutions to local issues.

Are there any existing design features or mitigations in place?	This three-year plan is updated annually to ensure it remains relevant and that the CLD workforce continues to be responsive to emerging needs. This also ensures our plans and ambitions align with updated policies and frameworks, both local and national, to provide the CLD support and services needed, reflecting any changes identified in the planning and review process. The plan is not designed as a 3-year static plan, by updating it will be responsive to existing and emerging needs. Partnership approaches help feed in the different requirements and changing needs of specific communities. Whilst the plan has incorporated a number of key actions related to the CLD review Learning: For All. For Life. A report from the Independent Review of Community Learning and Development (CLD) - gov.scot (www.gov.scot) any resulting actions that emerge following consideration of the report and recommendations, by Scottish Government Ministers and CoSLA, will be included in future iterations of the plan. It is also hoped that the long-awaited National Youth Work Strategy which has not been updated since the 2014-19 version, will be published and will result in future actions being added to the CLD Partners Plan as required.
Step 3 – Consultation	Response
Who do you need to consult with?	The Orkney Community. Partners are clear about the need to ensure that we involve those that are harder to reach and that a continuous approach is developed rather than relying on one-off consultative methods. Partners and the community are also clear that there needs to be more coordination of consultations to avoid consultation fatigue which is a significant issue in Orkney. That is why CLD partners were supportive of the Orkney Matters concept and now with the

	development of Place Plans, with initial findings being used to direct the priority areas in the plan. CLD partners also designed a CLD specific questionnaire, undertook one-to-one consultations and group work activities to help identify priorities and actions for the plan.
How will you carry out your consultation and in what timescales?	A collective understanding of community and learner needs was developed and stakeholder input into the plan was assured through partner inputs and direct engagement with stakeholders through alignment with various community consultations. Due to restrictions the initial consultations were heavily weighted towards digital and online processes. Annual updates of the plan include continuous learner and community input from various consultation and other engagement opportunities. Continual input and engagement will be assured through the appointment of youth, community and learner representatives who now sit on the CLD Partnership.
What questions will you ask when considering how to address island realities?	Consultations are focused on identifying the key areas of learning, development and support required for people in Orkney. There are specific questions about people's awareness of CLD, their learning and development needs, improvement outcomes and participation and community voice. The same questions were asked county wide.
What information has already been gathered through consultations and what concerns have been raised previously by island communities?	The plan is utilising existing consultations and data including Orkney Matters 2 which visited every island community and community council parishes on the mainland. The Orkney Matters 2 lesser heard voices arts-based consultation was also utilised in the design of the plan.

	Community resilience, housing, connectivity, access to jobs / training, socio-economic disadvantage and poverty were all raised as areas of concern. The CLD specific questionnaire identified the key areas where CLD support is required was: Physical and mental wellbeing, youth opportunities, employability skills, digital skills, financial inclusion, community development support, English speakers of other languages provision and community / learner voice.
Is your consultation robust and meaningful and sufficient to comply with the Section 7 duty?	The amount of consultation undertaken was agreed to be adequate and meaningful and the feedback gathered was used directly to determine the actions and priorities in the plan. Partners also pulled on a huge amount of data and information to ensure effect consultation, data analysis and community involvement.
Step 4 – Assessment	Response
Does your assessment identify any unique impacts on island communities?	Some potential positive impacts for the isles as the plan included actions that support all communities across Orkney. There are various actions in the plan which will have a key focus on our more rural and island communities such as: - Work collaboratively to increase the opportunities for those in excluded communities, including those in the ferry linked isles, to participate in training and development opportunities Many actions and priority areas are Orkney-wide, but a key element will be on ensuring that services and support are available in the island communities as well as the mainland.
Does your assessment identify any potential barriers or wider impacts?	It is recognised, that access to some specialist services, including some learning and development opportunities will be more limited in more rural areas. A key focus of the collaborative work across CLD

	is to ensure that partners work together to ensure that offers are as inclusive as possible and learners and communities in rural areas do not miss out on opportunities. Although in some areas the issues and concerns of people in the isles can be different from those on the mainland, overall, in terms of CLD support required, it is clear that similar issues affect people across mainland and island communities of Orkney.
How will you address these?	Specialist service delivery remains a challenge in more rural island communities. Despite this, the plan is focused on all of Orkney, and it is not expected that the plan will have significantly different effects on the isles compared to the mainland of Orkney. The Council's CLDE Officers all cover set geographical areas to ensure all communities whether island or mainland have equity of support. It is a focus of wider CLD partners to ensure effective support is accessible for all. The plan is intrinsically built on an islands-proof approach. There may be difference between islands but also difference between mainland areas of Orkney. The mechanism to review and refresh the plan takes into consideration alternative delivery mechanisms mitigating negative outcomes for island communities, identifying resources and opportunities to work with a partnership approach to deliver what our communities need. The CLD approach is very much about equality and working with those that are most disadvantaged. By working and reporting up through the Local Equality Delivery Group we will continue to focus on ensuring reduced inequality for island residents. More robust data analysis and new methods of engaging with the community are part of the plans and this will strengthen the community voice, from all a range of areas and circumstances,

	monitoring, evaluation and reporting mechanisms as we move forward. CLD have built geographical support into our structure so that we ensure equity in the way we deliver our CLD support.
You must now determine whether in your opinion your policy, strategy or service is likely to have an effect on an island community, which is significantly different from its effect on other communities (including other island communities). If your answer is No to the above question, a full ICIA will NOT be required and you can process to Step 6. If the answer is Yes, an ICIA must be prepared, and you should proceed to Step 5. To form your opinion, the following questions should be considered: Does the evidence show different circumstances or different expectations or needs, or different experiences or outcomes (such as different levels of satisfaction, or different rates of participation)? Are these different effects likely? Are these effects significantly different? Could the effect amount to a disadvantage for an island community compared to the Scottish mainland or between island groups?	
Step 5 – Preparing your ICIA	Response
In Step 5, you should describe the likely significantly different effect of the policy, strategy or service:	
Assess the extent to which you consider that the policy, strategy or service can be developed or delivered in such a manner as to improve or mitigate, for island communities, the outcomes resulting from it.	
Consider alternative delivery mechanisms and whether further consultation is required.	
Describe how these alternative delivery mechanisms will improve or mitigate outcomes for island communities.	

Identify resources required to improve or mitigate outcomes for island communities.	
Stage 6 – Making adjustments to your work	Response
Should delivery mechanisms/mitigations vary in different communities?	Yes, and they do, depending on the needs of the community / learner. Offering a range of deliver methods for courses and opportunities, which continues to be developed through feedback.
Do you need to consult with island communities in respect of mechanisms or mitigations?	Contact with wide range of agencies, community groups and organisations provide vast opportunity for capturing feedback and review. How we deliver is key. Improvements in digital skills and services support will have positive impacts. Mitigations currently heavily focused around investment and support with digital skills - isolation, skills development etc.
Have island circumstances been factored into the evaluation process?	Partnership approach is representative, and the feedback and knowledge of community and learners are a key part of the evaluation process. The CLD Partnership now has an adult learner, a young person, a Development Trust representative and a Community Association representatives sitting on the CLD Partnership, one of these representatives is from the ferry linked isles.
Have any island-specific indicators/targets been identified that require monitoring?	One action in the plan is specific focused on the ferry linked isles.
How will outcomes be measured on the islands?	Overall outcomes will be measured and monitored quarterly then a formal analysis and review presented to Education Communities & Housing Committee and the Community Planning Partnership Local Equality Delivery Group annually.

	Outcomes around specific groups will be monitored, as the focus is on outcome by experience not necessarily by location. Qualitative and quantitative data will be gathered to ensure a rounded and full measure of impacts can be made.
How has the policy, strategy or service affected island communities?	The plan will be monitored through feedback, evaluation and regular monitoring process. It is presumed that any actions will have a positive effect on our communities and learners as that is the key focus of the plan.
How will lessons learned in this ICIA inform future policy making and service delivery?	Reviewed as part of the evaluation process.
Step 7 – Publishing your ICIA	Response
Have you presented your ICIA in an Easy Read format?	Yes - The ICIA has been written as straightforward as possible and will be published. This has not been completed as a tick box exercise but has been completed to ensure we are developing the plan to be inclusive and relevant to local needs.
Does it need to be presented in Gaelic or any other language?	No
Where will you publish your ICIA and will relevant stakeholders be able to easily access it?	The ICIA will be published on the Orkney Islands Council website and can also be shared on request.
Who will sign off your final ICIA and why?	Garry Burton, Head of Active Communities and also Chair of the Community Learning and Development Partnership.

ICIA completed by:	Kerry Spence
Position:	CLDE Service Manager
Signature:	

Date complete:	21/07/26
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ICIA approved by:	Garry Burton
Position:	Head of Active Communities
Signature:	
Date complete:	21/07/26



ORKNEY
ISLANDS COUNCIL

Item: 6

Education, Communities and Housing Committee: 9 September 2026.

Strategic Housing Investment Plan.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents the Strategic Housing Investment Plan for the period 2027/28 to 2031/32, for approval.
- 1.2. The Strategic Housing Investment Plan is Orkney's five-year development plan for affordable housing provision and is updated yearly in line with Scottish Government guidance. This Strategic Housing Investment Plan (SHIP) also takes a longer vision for new housing supply for the next 10 years, due to Orkney's significant housing supply requirements, driven by household growth and its rapid economic development context. Following the Council's consideration, the Plan is submitted to Scottish Government to secure funding to enable affordable housing supply.
- 1.3. The Council is the Strategic Housing Authority, the role of which is to assess need and demand across tenure, to prioritise sites for affordable housing, and to co-ordinate activity across all housing providers to meet that need and demand. The Strategic Housing Investment Plan reinforces the role of the local authority as the Strategic Housing Authority by informing Scottish Government housing investment decisions and Local Programme Agreements.
- 1.4. The Strategic Housing Investment Plan, attached as Appendix 1, sets out plans and projects to deliver the affordable house build programme in Orkney over the next 5 to 10 years across a range of housing developers/providers; mainly the Council, Orkney Housing Association Limited, Places for People Scotland and Development Trusts.
- 1.5. The Strategic Housing Investment Plan sets out the amount of housing required, the developers, housing tenure, specialist housing projects, timescales and the amount of funding required from the Scottish Government.

- 1.6. The Housing Supply Target, as detailed in the Local Housing Strategy 2024-2029, sets out a requirement for at least 60 affordable homes each year. The Strategic Housing Investment Plan sets out the plan for 408 affordable housing approvals and 288 completions over the next 5 years. The higher number of approvals reflect the flexibility of land and projects built into the plan, and the fact that there is a lag between approvals and completion.
- 1.7. Monitoring of the delivery of the house build programme continues through monthly meetings with affordable housing developers, and through the Local Housing Strategy monitoring process – reporting to the Housing Market Partnership on a quarterly basis, the Council and the Scottish Government on an annual basis. There is also a specific annual meeting offered to Orkney's construction industry to outline the programme and future opportunities for the industry.
- 1.8. In addition, the current Local Development Plan, and the review of the Local Development Plan continues to support delivery of the housing programme.
- 1.9. Progress on actual delivery of affordable housing supply has been very positive in the first full financial year since approval of the Council's Local Housing Strategy in 2024. In 2025/26 there were a total of 76 approvals and 47 completions. Orkney's 2025/26 total affordable housing programme spend was £6.57m against a Scottish Government Resource Planning Assumption of £4.08m – this represents a 61% increase in spend against the planning assumption and is the first time in ten years that Orkney has exceeded its annual Scottish Government funding allocation. This demonstrates strong project delivery and confidence in Orkney's housing programme. The programme outlined in this SHIP, designed to meet Orkney's housing needs, means that Scottish Government Affordable Housing Supply funding is required at a higher rate of around £6m to £7m per annum, compared to the Scottish Government's committed level of funding of approximately £4m per annum over the next four years.
- 1.10. On 26 June 2025, the Policy and Resources Committee recommended that, in principle, a pipeline of Council land be made available for sale to all affordable housing providers, including Orkney Housing Association Limited and Places for People Scotland, in line with the Strategic Housing Investment Plan in order to achieve the Housing Supply Target.

- 1.11. The Policy and Resources Committee also recommended that powers be delegated to the Director of Education, Communities and Housing to enter into, on behalf of the Council, Strategic Co-operation Agreements with Places for People Scotland and Orkney Housing Association Limited, to deliver housing on terms and conditions to be determined by the Head of Corporate Governance.
- 1.12. A Strategic Co-operation Agreement was entered with Places for People Scotland in November 2025, and it is now making positive progress with their first sites at the former Papdale Halls of Residence and Weyland. Progress is ongoing with Orkney Housing Association to agree a Strategic Co-operation Agreement which will set the framework for cooperation, governance and joint working between Orkney Islands Council and Orkney Housing Association for the delivery new affordable housing supply in Orkney.

2. Recommendation

- 2.1. It is recommended that members of the Committee:
 - i. Note that the proposed Strategic Housing Investment Plan includes proposals for affordable housing and mixed tenure housing developments for five years, with a vision for 10 years.
 - ii. Note that this continues 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.
 - iii. Approve the Strategic Housing Investment Plan for the period 2027/28 to 2031/32, attached as Appendix 1 to this report, for submission to the Scottish Government.
 - iv. Agree that the Chair of the Education, Communities and Housing Committee should make representations to Scottish Government senior officials and Scottish Ministers seeking an increase in its Resource Planning Assumptions for Affordable Housing Supply funding for Orkney, to be in line with Orkney's housing requirements as determined through the Housing Supply Target, as set out in the Strategic Housing Investment Plan.

3. Strategic Housing Investment Plan

- 3.1. The draft Strategic Housing Investment Plan 2027/28 to 2031/32 (SHIP), attached as Appendix 1 to this report, outlines the continuing programme for new housing supply. The Local Housing Strategy, approved in June 2024, sets out the Housing Supply Target of 103 units per annum for 10 years with a ratio of 60:40

affordable/private housing split, resulting in 60 affordable new homes target completions each year.

- 3.2. The SHIP sets out a range of projects over 10 years which provide a mix of housing to provide choice to a range of households and housing needs. Many of the projects will provide mixed tenure developments and will include housing for independent living, for essential/key workers and specialist housing provision.
- 3.3. Consultation on this year's SHIP has been undertaken by issuing a 'call for SHIP affordable housing proposals' to all Housing Market Partnership members, with a statement on how the Strategic Housing Authority will prioritise sites. Affordable housing developers were asked to respond with information on the amount and type of provision proposed, the planning application/decision status and any constraints. Meetings were held and/or correspondence entered with the affordable housing developer to gather further information. Feedback was provided to the developers on whether the proposals would be included in the SHIP, timing for development and their RAG (red, amber, green) status assessed by the Strategic Housing Authority. Consultation has also been undertaken with the Scottish Government More Homes team.
- 3.4. Should the Council approve the SHIP, it will be discussed with the local construction industry to ensure all companies are aware of the upcoming opportunities to tender for construction of the affordable housing developments.
- 3.5. The Council's Strategic Housing Authority role in achieving this housing target is to work with Scottish Government to secure funding for affordable housing, to prioritise sites for development and to co-ordinate the activity of housing developers/providers. The Council, as a social housing landlord, is also one of these developers/providers. The other affordable housing developers are Orkney Housing Association Limited, Places for People Scotland and the Island Development Trusts. Some private developers also use affordable housing funding to provide low-cost housing for sale or Mid-Market rent. In April 2026, the Council, as Strategic Housing Authority, published a [Guidance Note on Requirements for SHIP New Build Developments](#) setting out how affordable housing developers should liaise with the Council's Housing Authority and Planning Authority in developing affordable housing proposals.

- 3.6. In April 2026, the Housing Market Partnership discussed the definition of Affordable Housing, and following consultation with the Planning Authority, the Council, as Strategic Housing Authority, then issued further guidance. This [Affordable Housing guidance](#) is published on the Council's website and is in line with National Planning Framework 4 (NPF4). This must be used by all affordable housing providers in making proposals for affordable housing sites and potential Affordable Housing Supply funding. The guidance states that Affordable Housing in Orkney is:
- Social rented housing.
 - Mid-market rented.
 - Shared-ownership.
 - Shared-equity.
 - Housing sold at discount (including plots for self-build).
 - Self-build plots with subsidy / public sector enabling resources.
 - Low cost housing for sale with subsidy, or without subsidy depending on construction costs and values.
- 3.7. NPF4 also encourages mixed tenure developments and the provision of affordable homes on all sites.
- 3.8. The 40% private (or market) element of the Housing Supply Target will comprise private rent and housing for sale with no subsidy.
- 3.9. The SHIP sets out the volume of housing planned for the next five years with 408 approvals and 288 completed homes, with a breakdown by tenure, provider and area for completions as follows:

Completions – Projected 5-year estimated between 2027/28 and 2031/32

Tenure.	2027/2028 to 2031/2032.
Social rent.	205.
Mid-market rent.	41.
Shared equity / affordable housing for sale.	17.
Total to 2030/31.	288.*
Number of projects.	18.

*The total includes 25 homes for the Development Trusts, tenure to be confirmed.

Housing Market Area.	2027/2028 to 2031/2032.
Kirkwall.	151.
Stromness.	39.
East Mainland and linked south isles.	16.
West Mainland.	32.
The Isles.	25.
Total to 2031/32.	288.*

*The total includes 25 off-the shelf acquisitions, locations for which are to be confirmed

Provider.	2027/2028 to 2031/2032.
Orkney Islands Council.	60.
Orkney Housing Association Ltd.	143.
Places for People.	60.
Isles Development Trusts.	25.
Total to 2031/32.	288.

- 3.10. The SHIP also sets out the ambition for the next 10 years for new affordable housing supply amounting to a total of 644 completed homes. This is in line with the overall Housing Supply Target of 60 affordable homes per annum. Critically, the Plan also identified the long-term sites and projects. Some of these sites are challenging, may not happen, or will be delayed, and so additional longer term and speculative sites have also been identified and included in the Plan to allow for sites falling out of the programme.
- 3.11. Implementation of the SHIP in practice is under continual review. The Housing Service team meets with Orkney Housing Association Limited, Places for People Scotland and Scottish Government More Homes team on a monthly basis to monitor process on site development. The Housing Service also discusses projects with Development Trust representatives to assist in the funding of projects. In addition, Housing Services meets monthly with the Planning Service to discuss planning applications that relate to developments in the Strategic Housing Investment Plan and to discuss where any blockages can be alleviated.

- 3.12. The SHIP outlines the Affordable Housing Supply Programme grant resources required to support delivery of the SHIP. This amounts to £6 million per annum over the next 5 years, and £6.75 million over the next 10 years. This should be compared to the Resource Planning Assumption for Orkney which is £4 million per annum. Orkney has benefited from the fact that Scottish Government More Homes Area Team has the flexibility to re-allocate funding across the Highlands and Islands Area. Orkney welcomes the continued support to increase the allocation on an annual basis where funding across the area allows. However, the Council considers that an improved long-term funding allocation is required from Scottish Government to provide certainty and enable Orkney's housing delivery partners to plan accordingly.
- 3.13. The SHIP also includes two additional projects which are not funded through the Affordable Housing Supply Programme. The repurposing of St Rognvald House for Orkney Health and Care (OHAC) agency staff will commence during 2026/27 to be completed in 2027/28 and will be partly funded by the Scottish Government's Islands Programme. The temporary Houton site is a housing legacy where funding from SSEN will open up a housing site at Houton, with SSEN paying for infrastructure costs. Thereafter the Council will seek approval for a permanent housing site, with use of Scottish Government Affordable Housing Supply funding for social housing, and serviced sites for self-build.

For Further Information please contact:

Frances Troup, Head of Strategic Housing, Housing Operations and Homelessness, extension 2450, Email frances.troup@orkney.gov.uk.

Implications of Report

1. **Financial** – Any of the proposed Council projects would require the standard Capital Project Appraisal procedure to be completed prior to development. Each individual project would be required to be financially justifiable through a combination of government grants, internal resources and/or borrowing.
2. **Legal** - There is a legal requirement on the Local Authority to produce both a Local Housing Strategy and a Strategic Housing Investment Plan, as set out in section 89 of the Housing (Scotland) Act 2001. The Council's adherence to these requirements is demonstrated through approving the Strategic Housing Investment Plan as recommended in this report.
3. **Corporate Governance:** The establishment and review of policies and schemes to exercise the Council's functions in respect of housing is a referred matter to the Education, Communities and Housing Committee, as defined in the Scheme of Administration.

4. **Human Resources:** The lack of available affordable housing in Orkney is presenting a significant barrier to recruitment of staff across the Council. The successful delivery of the SHIP will hopefully have a positive impact in the long term.
5. **Equalities** – An Equality Impact Assessment was undertaken for the Local Housing Strategy and a separate one is not required for the SHIP which underpins the Local Housing Strategy.
6. **Island Communities Impact** – An Island Communities Impact Assessment was undertaken for the Local Housing Strategy and a separate one is not required for the SHIP which underpins the Local Housing Strategy. The house build programme support new supply across all Orkney communities.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☒ Growing our economy.
 - ☒ Strengthening our Communities.
 - ☒ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☒ Cost of Living.
 - ☒ Sustainable Development.
 - ☒ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk** - All new housing is built in line with Planning and Building Regulations.
10. **Risk** - Failure to deliver sufficient housing for Orkney has an economic risk and societal risk and impacts on the viability of communities.
11. **Procurement** - Will be required for specific council house build projects.
12. **Health and Safety** – None specifically relating to the recommendations in this report.
13. **Property and Assets** - As the SHIP is realised the Council's portfolio of housing stock will increase.
14. **Information Technology** - Over the life of the SHIP, increased capacity will be required to service the additional housing units.
15. **Cost of Living** - The provision of more affordable homes which meet modern energy efficiency standard will contribute to easing the cost of living burden.

List of Background Papers

Housing Need and Demand Assessment (2023).

Local Housing Strategy (2024-2029).

Essential Workers Housing Strategy (2024).

Strategic Housing Investment Plan Report (2025).

Appendix

Appendix 1 – Strategic Housing Investment Plan 2027/28 to 2031/32.



Strategic Housing Investment Plan 2027/28 to 2031/32

September 2026



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1. Purpose of the Strategic Housing Investment Plan

The Strategic Housing Investment Plan (SHIP) is Orkney's five-year operational plan to drive the delivery of affordable housing provision. It must align with the Orkney Local Housing Strategy and related housing policies and is updated yearly in line with [Scottish Government guidance](#). The Orkney Islands SHIP also takes a longer vision for new housing supply for the next 10 years, due to Orkney's significant housing supply requirements, driven by household growth and its economic development context.

The SHIP reinforces the role of the local authority as the strategic housing authority by:

- Informing Scottish Government investment decisions; and
- Informing the preparation of a Strategic Local Programme Agreement that sets out the planned programme across the local authority and, where required, informs the preparation of Programme Agreements to individual providers setting out their planned programme.

Orkney Islands Council's duties in relation to assessing and meeting housing needs are set out in legislation:

- **Housing (Scotland) Act 1987** - Duty to consider needs of their area for further housing accommodation, including the power to acquire land for housing.
- **Housing (Scotland) Act 2001** – Duty to assess the housing needs of all persons in the area – through the Housing Need and Demand Assessment, and to develop strategies to meet those needs through the Local Housing Strategy. The duty is across housing tenure.
- **Islands (Scotland) Act 2018** - Scottish Government has a statutory duty to produce a National Islands Plan. Housing is one of the seven Strategic Objectives included in the new Plan and this SHIP highlights the distinct housing needs of Orkney's communities.

2. Consultation on the Strategic Housing Investment Plan

The [Orkney Housing Market Partnership](#) oversaw the development of the Housing Need and Demand Assessment 2023, the Local Housing Strategy 2024 and the Essential Workers Housing Strategy 2024. The Partnership includes stakeholders from across the public, private and third sectors with an interest in the supply, access and improvement of housing in Orkney. The Partnership also includes Orkney Islands Council elected members.

The Housing Market Partnership also monitors the progress of implementation of the Local Housing Strategy and the SHIP through quarterly meetings. The Council also hosts an additional meeting held annually to inform the construction industry on the approved SHIP projects and pipeline to help inform their business and operational planning, with the aim of increasing capacity in the local construction industry.

Consultation on the SHIP for 2027 onwards has been undertaken by issuing a 'call for SHIP affordable housing proposals' to all Housing Market Partnership members,

with a statement on how the Council will prioritise SHIP sites. Affordable housing developers were asked to respond with information on the amount and type of provision proposed, the Planning application/decision status and any constraints. Meetings were held/and or correspondence entered with the affordable housing developer to gather further information. Feedback was provided to the developers on whether the proposals would be included in the SHIP, timing for development and their RAG (red, amber, green) status assessed by the Council.

3. Orkney Local Housing Strategy and Community Plan

The SHIP is underpinned by the [Orkney Local Housing Strategy 2024-2029](#) (LHS) which is now in its third year of implementation. The LHS is underpinned by the [Orkney Housing Needs and Demand Assessment 2023](#) and the [Orkney Community Plan 2025-2030](#) which incorporates the Local Outcomes Improvement Plan.

The Local Housing Strategy was developed through the Orkney Housing Market Partnership which meets quarterly to monitor implementation through the LHS Action Plan. This is reported on the [Housing Market Partnership webpage](#).

The Orkney Local Housing Strategy vision is:

“Orkney has a wide range of good quality, sustainable homes that are affordable and meet the current and future needs of individuals, families and local communities across the Orkney Islands.”

A summary of key aspects from the relevant housing and wider strategies is:

- The Local Housing Strategy has three strategic priorities: More Homes; Quality Warm Homes and Access and Choice of Housing for All.
- The Community Plan has four strategic priorities, with the most relevant to housing strategy being Cost of Living; Sustainable Development and Inequalities.
- The Council Plan and Council Delivery Plan 2023-2028 states under ‘Developing Our Infrastructure’ that ‘We will invest in homes supporting choice, inclusion and economic growth’ with the outcomes of ‘more quality homes to rent or buy in various locations, providing more choice’.
- The Housing Need and Demand Assessment (HNDA) – assessed as ‘Robust and Credible’ by the Scottish Government in October 2023. This is the foundation of all strategic housing planning and is required for both the Local Housing Strategy and the Local Development Plan (LDP). The review of the Local Development Plan is currently underway and will support delivery of the affordable housing programme.
- The Essential Workers Housing Strategy 2024 – this sets out the particular circumstances in Orkney in relation to the acute need and demand for housing for essential workers (key workers and others essential to support Orkney’s communities and local economy).

4. Orkney’s economy, and housing need and demand

The [Housing Need and Demand Assessment 2023](#) (HNDA) sets out Orkney’s housing market drivers, underpinned by a unique economic position. This is driven

by Orkney's key position to support transition to renewable industries, with the Scottish Government's National Planning Framework 4 (NPF4) identifying the proposed new infrastructure in Orkney as one of Scotland's National Developments. These are significant developments of national importance that will help to deliver Scotland's spatial strategy, with Orkney identified in the Energy Innovation on the Islands National Development. This includes harbour developments in Scapa Flow and at Hatston, offshore renewable energy generation, renewable low and zero carbon fuel production, infrastructure and shipping, and associated opportunities in the supply chain for fabrication, research and development. SSEN currently has a significant presence in Orkney through the installation of the new Finstown Interconnector Substation which is key to unlocking Orkney's future renewable industry development. Orkney has a very buoyant tourist industry – this is positive economically for many of Orkney's households, but it also increases pressure on housing supply due to the increase of Short-term lets.

Orkney is characterised by higher than average population and household growth and 2022 based household projections suggests this growth will continue. Orkney has had a high level of net migration in recent years and in addition, significant temporary migration among the 'supplementary' workforce who live on Orkney on a rotational, agency and interim basis. This workforce is essential to support Orkney's communities, but it puts considerable additional pressure on the housing market. This pressure is evidenced by increasing house prices, and rental prices, and lack of availability of private rented housing, increasing homelessness and increasing length of stay in temporary accommodation for homeless households.

5. Orkney's Housing Supply Target

The Orkney Housing Supply Target (HST) as approved through the Local Housing Strategy is:

- 1035 new houses across tenure over 10 years across all of Orkney Islands, or 103 per annum.
- This is split 60% affordable and 40% private housing: equating to around 60 affordable homes per annum.
- The SHIP is concerned with driving the 60% new affordable housing supply.

5.1. Location

Orkney's housing system comprises five Housing Market Areas which represent reasonably self-contained areas in which people move and purchase housing. The area with the highest population, and the highest need and demand is Kirkwall followed by West Mainland, Stromness, East Mainland and the Linked South Isles, and the Isles. This SHIP therefore identifies projects to meet needs in line with these geographic demands.

5.2. Housing type, size and tenure

The Housing Need and Demand Assessment (HNDA) identifies the growth of ageing, and smaller households. At the same time, the Local Housing Strategy, Essential Workers Housing Strategy and Community Plan identify the requirement to support Orkney's communities by ensuring there is a good supply of affordable

housing for new, emerging households including families, and incoming Essential Workers. This includes temporary agency workers who are critical to support essential statutory services. There is also a need for a small number of larger social rented family homes (four of five bedrooms) in Kirkwall and proposals are included in this SHIP for two OIC properties to be developed within the next two years.

The size, type and tenure of housing will therefore be considered on a site-by-site basis, considering evidence from the HNDA, waiting list and local community intelligence. The Council published a [Guidance Note on Requirements for SHIP New Build Developments](#) in April 2026 which set out the process required of all affordable housing developers to discuss potential development proposals with the Strategic Housing Authority to agree the needs being met and housing mix (type, size and tenure). This guidance is consistent with National Planning Framework 4 (NPF4) in promoting and facilitating the delivery of choice across tenures. This guidance also sets out design guidance on the maximum house size standards to ensure value for money in delivery of new affordable housing supply, and therefore to maximise the Affordable Housing Supply funding available and increase the number of new affordable houses built.

5.3. Specialist provision

The Council's approach in relation to specialist needs is to enable people to live independently and safely at home or in a homely setting in their own community. Over the last 20 years the highest population growth rate has been in those aged 65 plus (70%, compared to Scotland 33%) and looking forward, while there will be growth in working age households, the most significant growth will be in those aged over 75 years. This means that new supply must cater for older people's needs and those with mobility needs. The Council's approach to housing for new supply for older people, those with mobility limitations and disabled people is to ensure new supply is accessible and integrated into communities. There will also be new accessible housing located close to the current/new care homes at Stromness, Dounby and Soullisquoy.

There is also a requirement for putting in place supported housing/care provision for those with learning disabilities and those with enduring mental health. There is ongoing consideration on how to best meet the housing needs of those with enduring mental health.

Most sites will include wheelchair provision (estimated requirement of five houses per year) where this is appropriate to the site to ensure the full range of needs are catered for. OHAL has also identified the opportunity to convert some of its amenity provision to full wheelchair standards.

6. Orkney's Definition of Affordable Housing

In April 2026, the Housing Market Partnership discussed the definition of Affordable Housing, and the Council then issued guidance. This [Affordable Housing guidance](#) is in line with National Planning Framework 4 (NPF4) and must be used by all affordable housing providers in making proposals for affordable housing sites and potential Affordable Housing Supply funding. The guidance states:

Affordable Housing in Orkney is:

- Social rented housing.
- Mid-market rented.
- Shared-ownership.
- Shared-equity.
- Housing sold at discount (including plots for self-build).
- Self-build plots with subsidy / public sector enabling resources.
- Low cost housing for sale with subsidy, or without subsidy depending on construction costs and values.

NPF4 also encourages mixed tenure developments and the provision of affordable homes on all sites. The 40% private (or market) element of the Housing Supply Target will be built with no subsidy. This will comprise private rent and housing for sale with no subsidy.

7. Affordable housing developers and land for housing

New affordable housing supply is developed in Orkney by:

- Orkney Islands Council.
- Orkney Housing Association Limited (OHAL).
- Places for People Scotland (PFP).
- Development Trusts.
- Private developers who can develop mid-market rent and affordable housing for sale.

On 1 July 2025, the Council made the decision that a pipeline of Council land will be made available for sale to all affordable housing providers in line with the Strategic Housing Investment Plan in order to achieve the Housing Supply Target. The decision enables the sale of Council land in line with the Council's Best Value duty, determined through independent valuation (market value for affordable housing).

Council land will be available for sale as follows:

- PFP for 500 homes over the next 10 years – initially focusing on Kirkwall, and possibly Stromness in future years.
- OHAL at least 200 homes over the next ten years, after taking into consideration its current land holding - including Kirkwall, Stromness and smaller settlements according to demand and landbank.
- The Council will also develop up to 150 social homes over the same period on its own land - including all settlements, with development sizes typically being medium or smaller.
- Isles Development Trusts will continue to build / redevelop across the Isles.

This committed land supply for housing is greater than the 600 affordable Housing Supply Target over 10 years and is intended to provide sufficient land supply capacity and flexibility for all affordable housing developers to meet the Housing Supply Target. This is confirmed in [guidance published by the Council](#) in April 2025. Through the SHIP process, and in consultation with affordable housing developers,

the Council takes an overview of all the land available for housing and will consider which affordable housing provider is best placed to develop which sites to ensure the best use of housing land. This consideration includes all affordable housing providers' existing landbank funded through the Scottish Government Affordable Housing Supply funding. In considering the land available for affordable housing supply, the Council may, in line with its statutory powers, facilitate the assembly of land, and the acquisition or transfer of interests in land, where it is considered appropriate to achieve the Local Housing Strategy objectives, and the Housing Supply Target.

7.1. Strategic Co-operation Agreements

The Council decision on 1 July 2025 also agreed to enter into strategic co-operation agreements with both PFP and OHAL to set a new framework to drive new housing supply delivery over the next ten years.

- The PFP Strategic Co-operation Agreement was entered in November 2025.
- The OHAL Strategic Co-operation Agreement is under discussion and will set the framework for further affordable housing development sites by the Association.

7.2. Local Development Plan Housing Land Audit

The Housing Land Audit (HLA) is conducted annually to track all housing development that is within a formal housing allocation or support through the policies of the Local Development Plan. The HLA records remaining (notional) capacity within formal housing allocations alongside any identified constraints. It is acknowledged that some constraints may only become apparent on receipt / assessment of a planning application or a development brief.

When comparing the current effective land supply against the HNDA estimates this shows that the provision under the Orkney Local Development Plan 2017 (OLDP2017) remains sufficient to cover both scenarios. The OLDP2017 is currently under review but remains, along with National Planning Framework (NPF4), material planning consideration until a new Plan is adopted.

NPF4 has introduced a change in policy which strengthens the previous approach to flood risk and now requires consideration of flood risk to also make an appropriate allowance for the effects of climate change and sea level rise. The Council's Engineering Service (The Flood Authority) with assistance from the Planning Service are in discussions with SEPA about this new requirement and are taking forward workstreams to support the development process. This includes Kirkwall Surface Water Management Plan, Coastal Change Adaptation Plan and the Kirkwall Flood Wall Overtopping Study. Work here is drawing to a close and will be reported separately to the Council and will include details on SEPA's position. The Council, SEPA and Scottish Water are committed to joint working in the management of flood risk and coastal change.

8. Methodology used to prioritise sites for the SHIP

The SHIP call for sites issued to all Housing Market Partnership partners set out the way in which affordable housing projects would be prioritised by the Council.

Submissions were requested to set out:

- Site location.
- Ownership arrangements.
- Proposed development type and indicative number of homes.
- Indicative tenure mix.
- Current planning status, including any pre-application discussions.
- Known infrastructure, servicing, planning or delivery constraints.
- Indicative delivery timescales.
- Any other relevant supporting information.

Projects have broadly been prioritised using a RAG system as follows:

- **Green** – Sites in the ownership of the Council, a Registered Social Landlord (RSL) or another affordable housing developer, where the proposal will meet identified affordable housing need and demand, planning consent is in place (or positive pre-planning discussions have taken place) and suitable governance arrangements are in place to allow progression.
- **Amber** – Sites in the ownership of the Council, a Registered Social Landlord (RSL) or another affordable housing developer, where the proposal will meet identified affordable housing need and demand but further work is required. This may include sites without planning consent, sites with planning or infrastructure issues to resolve, or sites of significant scale or complexity.
- **Red** – Sites in private ownership and/or where there are known planning difficulties, infrastructure constraints, ownership issues or other significant delivery risks, but which may still have longer-term potential to meet identified affordable housing need and demand.
- **Not Suitable for Inclusion in the SHIP** – Proposals which do not demonstrate an identified affordable housing need or demand.

In addition, through this year's SHIP review process, the Council has also identified '**long-term**' which are sites where timing may go beyond 10 years but are still considered to be future SHIP sites.

There are also more '**speculative**' sites which have not been included as active SHIP sites as their status is unclear, but which will be kept under active review as potential future SHIP sites. These may come into use within the 5-year, or the 10-year programme if circumstances change.

9. Progress since Local Housing Strategy approval

The Local Housing Strategy approved in 2024 included the Housing Supply Target and objective to deliver 60 affordable homes per annum for 10 years.

The first full financial year 2025/26 post approval of the Housing Supply Target resulted in:

- Affordable Housing Supply Programme - 74 approvals, 58 site starts, 40 completions.
- Key worker Fund - 2 approvals, 2 site starts, 7 completions.

In total this equates to 47 completions in 2025/26 against a target of 60 affordable homes per annum. The number of approvals is a very strong improvement on previous years and will make a good contribution to achieving the target number of completions over the next two years.

Orkney's 2025/26 total affordable housing programme spend was £6.57m against a Resource Planning Assumption of £4.08m – this represents a 61% increase in spend against the planning assumption and is the first time in ten years that Orkney has exceeded its annual Scottish Government funding allocation. This demonstrates strong project delivery and confidence in Orkney's housing programme.

10. SHIP 5-year programme 2027/28-2031/32

The tables below show projected Scottish Government Affordable Housing Supply project approvals and completions. Approvals occur just before the site is acquired and/or site starts. Then there is a lag while houses are built and let or sold. Depending on the size of the development this can typically take between 6 and 36 months in Orkney before a housing development is completed, although for larger sites there will be phased release of completed homes for let or sale.

The tables show that the 5-year approvals are projected to be at a healthy level at 408 homes, but the completions will only be around 288 over the next five years, against a 10-year Housing Supply Target of 600 affordable homes, showing the lag between approvals, the building process and completions. There are also approvals from 2026/27 that do not appear in the SHIP, but where the completions are counted in this SHIP 2027-2031.

10.1. Approvals

Projected 5-year estimated between 2027/28 and 2031/32

Tenure.	2027/28 to 2031/2032.
Social rent.	216.
Mid-market rent.	86.
Shared equity / affordable housing for sale.	81.
Total to 2031/32.	408.*
Number of projects.	14.

*The total includes 25 homes for the Development Trusts, tenure to be confirmed.

Housing Market Area.	2027/28 to 2031/2032.
Kirkwall.	310.
Stromness.	14.
East Mainland and Linked South Isles.	2.
West Mainland.	32.
The Isles.	25.

Total to 2031/32.	408.*
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*The total includes 25 off-the-shelf acquisitions, locations to be confirmed.

Provider.	2027/28 to 2031/2032.
Orkney Islands Council.	35.
Orkney Housing Association Limited.	88.
Places for People Scotland.	260.
Development Trusts.	25.
Total to 2031/32.	408.

Sites RAG Status.	2027/28 to 2031/2032.
Red.	46.
Amber.	312.
Green.	25.

*The RAG status excludes homes for Development Trusts.

10.2. Completions

Projected 5-year estimated between 2027/28 and 2031/32

Tenure.	2027/28 to 2031/2032.
Social rent.	205.
Mid-market rent.	41.
Shared equity / affordable housing for sale.	17.
Total to 2031/32.	288.*
Number of projects.	18.

*The total includes 25 homes for the Development Trusts, tenure to be confirmed.

Housing Market Area.	2027/28 to 2031/2032.
Kirkwall.	151.
Stromness.	39.
East Mainland and Linked South Isles.	16.
West Mainland.	32.
The Isles.	25.
Total to 2031/32.	288.*

*The total includes 25 off-the-shelf acquisitions, locations to be confirmed.

Provider.	2027/28 to 2031/2032.
Orkney Islands Council.	60.
Orkney Housing Association Limited.	143.
Places for People Scotland.	60.
Development Trusts.	25.
Total to 2031/32.	288.

Sites RAG Status.	2027/28 to 2031/2032.
Red.	46.
Amber.	112.
Green.	105.

*The RAG status excludes homes for Development Trusts.

The tables in Annex 1 show the housing sites prioritised for the next five years. It should be noted that all of the programme is dependent on the availability of Scottish Government Affordable Housing Supply Programme funding for the main programme, and Rural Housing and Islands Fund (RHIF) grant for Development Trusts. Occasionally RHIF is also used by private developers supplying Mid-Market Rent. Potential delivery constraints for these sites are discussed in the tables in the Annex.

11. Other 5-year housing projects

There are two other key housing projects being implemented by the Council, but which are not funded by the Scottish Government Affordable Housing Supply Programme and therefore are not included in the tables above, or in the annex.

Repurposing of St Rognvald's House – the previous care home recently vacated is being repurposed for temporary accommodation for Orkney Health and Care (OHAC) agency staff. There are currently 63 agency staff used by OHAC and this figure is likely to increase. They use private rented accommodation or short-term lets for accommodation when on island for weeks or months at a time which puts pressure on the wider housing system. By repurposing this accommodation for up to 41 agency workers, it will release mainstream private rented housing for permanent residents, while delivering a value for money solution for accommodation for agency workers. This is temporary accommodation let on an occupancy agreement basis and so is not eligible for Affordable Housing Supply grant, but funding through the Islands Programme has been approved. This project will be started in 2026/2027 and completed in 2027/28. The building has an estimated life of 10 years, after which time it is planned for demolition and redevelopment with neighbouring council land which is in the long-term SHIP. The Council is also discussing the potential development of the NHS Orkney old Balfour Hospital site which could involve a combination of uses including for essential / key worker housing.

Houton site – the Council has been working with SSEN to achieve a housing legacy for Orkney while the company has a significant presence on the islands. Approval from both SSEN and the Council has been achieved to open up a housing site at Houton, with SSEN paying for infrastructure costs and using the site on a temporary basis for overspill accommodation for its workers. SSEN will be using the site for a maximum of one year and then the site is included in the SHIP under the Affordable Housing Supply Programme to be taken forward through the planning process for a total of six permanent housing units – three social rent and three serviced sites for self-build/home ownership. SSEN is making a significant funding contribution to service the site.

12. SHIP 10-year vision and longer-term sites

Taking a longer-term view enables to the Council, the affordable housing developers and the local construction industry to plan a pipeline of housing development. The Council and affordable housing developers, and NHS Orkney have identified a range of long-term sites for affordable housing development. Some of these are more speculative or have particular constraints which have to be overcome over the medium term.

Considering the long-term supply of land and potential projects, these sites should provide a very good level of flexibility to deliver up to 839 approvals and 644 completions over 10 years, which compares to the Orkney Housing Supply Target of 600 affordable homes over 10 years. The higher estimated approvals mean there will be continued flexibility of land, projects and eventual supply. However, there are constraints on some of these sites which will be worked through over the medium term, and some projects may not happen. This is why it is critical to have more land supply and potential projects than required. Annex 1 summarises the long-term and more speculative sites.

12.1 Completions

Projected 10-year estimated between 2027/28 and 2036/37

Tenure.	2027/28 to 2036/2037.
Social rent.	360.
Mid-market rent.	122.
Shared equity / affordable housing for sale.	112.
Total to 2036/37.	644.*

*The total includes 50 homes for the Development Trusts, tenure to be confirmed.

Housing Market Area.	2027/28 to 2036/2037.
Kirkwall.	451.
Stromness.	39.
East Mainland and Linked South Isles.	22.

Housing Market Area.	2027/28 to 2036/2037.
West Mainland.	32.
The Isles.	50.
Total to 2036/37.	644.*

*The total includes 50 off-the-shelf acquisitions, locations to be confirmed.

Provider.	2027/28 to 2036/2037.
Orkney Islands Council.	79.
Orkney Housing Association Limited.	155.
Places for People Scotland.	360.
Development Trusts.	50.
Total to 2036/37.	644.

13. Affordable Housing Supply Programme funding requirement

Based on the detailed draft proposed new supply projects to be submitted with the SHIP through the Scottish Government Housing and Regeneration Programme (HARP¹) system, and assuming current estimated development costs and Scottish Government funding benchmark rates, the programme outlined for affordable homes will require:

- Estimated £30.08m over 5 years or £6.02m per year by completions.
- Estimated £67.81m over 10 years or £6.78m per year by completions.

This compares to Orkney's Scottish Government Affordable Housing Supply Programme Resource Planning Assumption (RPA) of £4.068m. The Scottish Government has confirmed that the RPA is planned to continue at this level for the next four years:

- £3.933m for 2026/27.
- £4.051m for 2027/28.
- £4.172m for 2028/29.
- £4.297m for 2029/30.

Orkney's actual spend in 2025/26 was £6.57m, over 60% above the Scottish Government's RPA. It is expected that the spend requirement in 2026/27 will be similar to the higher 2025/26 level of over £6m.

Orkney's 10-year requirement for affordable housing funding will continue to be at a higher level in the region of £6m to £7m per annum, rather than the lower Scottish Government's RPA of £4m per annum. This should be seen in the light of an

¹ HARP is the Scottish Government's administration IT system for monitoring projects and spend.

inequitable position of the comparator island authorities, both of which have lower requirement for new housing supply than Orkney, but which have higher funding levels than Orkney:

- Shetland has similar household projection increases and a similar annual Housing Supply Target for affordable housing of 54 per annum, compared to Orkney's 60, but has a higher Resource Planning Assumption of around £6m per annum - £2m per annum higher than Orkney.
- Western Isles has a long-term projected decline in households and a lower Housing Supply Target for affordable housing of 30 per annum, half of Orkney's 60, but has a much higher Resource Planning Assumption of around £9m per annum - £5m per annum higher than Orkney.

The formula used to determine the share of the Affordable Housing Supply Programme is the Strategic Housing Investment Framework which was agreed 14 years ago between Scottish Government and COSLA in 2012. Orkney Islands Council believes this formula requires urgent review to increase the funding allocation for Orkney. Orkney has experienced considerable household growth over the last 20 years, resulting in significant housing market pressure and unmet housing need. Recent National Records of Scotland 2022 based household projections show that household growth in Orkney will continue over the next 10 years.

Orkney has benefited from the fact that Scottish Government More Homes Area Team has the flexibility to re-allocate funding across the Highlands and Islands Area. Orkney welcomes the continued support to increase the allocation on an annual basis where funding across the area allows. However, the Council considers that an improved long-term funding allocation is required from Scottish Government to provide certainty and enable Orkney's housing delivery partners to plan accordingly.

13.1. Infrastructure funding

Orkney has not made use of the Scottish Government infrastructure fund. However, the demolition of the Former Papdale Halls is a significant infrastructure constraint for an important Kirkwall town centre housing site. Discussions are ongoing with the Scottish Government More Homes Division over the availability of funding for this demolition.

13.2. Use of Council Tax funds for new housing supply

The Council charges a levy on Second Homes and Empty Homes. Of the funds raised from the Second Homes Surcharge, £200k is used to support the Council's Island and Rural Housing Fund, while £242k raised from the Empty Homes Surcharge is transferred to the Housing Revenue Account.

14. Empty Homes, second homes and short-term lets

The Council has developed an Empty Homes Project in partnership with the Scottish Empty Homes Partnership. The Council employs a Development and Empty Homes Officer who works with households and development trusts to try and bring empty properties back into use. This role has historically been part-time, but funding has now been secured through the Empty Homes Partnership to make this role full time.

To date 123 empty homes have been brought back into use since 2017. The annual rate of homes brought back into use has increased over the last three years from 14 in 2023/24, to 16 in 2024/25 and 23 in 2025/26. In 2025/26, 11 of these became private lets, 8 became owner occupied homes and 4 became short-term lets.

The Council has now approved and launched an empty homes loan scheme, with £1m committed from the 'Orkney Strategic Reserve Fund', for up to £25,000 per property, or up to 40 empty home loans. The loans will support empty homeowners bring properties back into use, with conditions of the Orkney Islands Council Loan requiring the home to be let to essential workers for at least five years.

The Council also entered into a working partnership with SSEN to use their capital investment to bring empty homes back into use for occupation by their workers for the period of the SSEN infrastructure development work. This, therefore, is helping to mitigate the impact on the current housing system. A total of three homes were brought back into use through this scheme, with lessons learned from this experience being used for the Orkney Islands Council Empty Homes Loans Scheme.

The use of permanent homes as short term lets is a significant problem in some of Orkney's communities, especially Stromness and parts of Kirkwall. Quarterly monitoring of the short term lets through the Housing Market Partnership shows an increasing trend in all Housing Market Areas with the exception of East Mainland. Stromness shows the highest level of short term lets at over 10% of dwellings. The review of the Local Development Plan is considering how Planning or other policy /mechanisms can be used to manage the scale of short term lets, particularly for new build housing. A pilot will be conducted through the Stromness Place Plan to consider all empty homes, second homes and short term lets in the round, and thereafter consider what interventions are required. In addition, when the Council is selling land for housing it will include mechanisms to prohibit short term lets and ensure housing is used for primary residency through the sale contract.

15. Essential and key workers

In addition to significant need and demand from current residents, there is demand from people moving into Orkney, based on recent migration trends. The Essential Workers Housing Strategy showed strong demand from households that have recently moved to Orkney for work or study (keyworkers, other essential workers across the private and public sectors, and students). They mainly demand private, or Mid-Market Rented (MMR) housing, with demand also for home ownership. The need for transitional and short-term housing is due to the increasing use of interim and agency staff across the public sector due to workforce pressure. The availability of housing for essential incoming workers will be increased through the Empty Homes Loan Scheme, and through the repurposing of St Rognvald House (see above). New homes required for this demand group will be built with a mix of housing type, size and tenure, and the Council and a range of public sector partners are discussing the potential development of the NHS Orkney old Balfour Hospital site which could be development for a combination of uses including for essential / key worker housing.

The Essential Workers Housing Strategy and the Council's MMR policy defines Essential Workers as:

- Social care staff – employees of Orkney Islands Council and employees of agencies providing social care services on behalf of Orkney Islands Council.
- Council staff required to deliver essential public services.
- Health staff – employees of NHS Orkney and employees of agencies providing health services on behalf of NHS Orkney.
- Other employees or contractors required to deliver essential public services.
- Construction workers required to support Orkney's local economy.
- Hospitality workers required to support Orkney's local economy.
- Other workers that can demonstrate their working status is essential to help sustain Orkney's communities and local economy.

The Scottish Government has made available up to £25 million over the next five years from the Affordable Housing Supply Programme to make affordable homes available for key workers. The fund allows suitable properties, including those that lie empty, to be turned into affordable homes for key workers and others to allow for local housing needs to be met. The Council and OHAL have already made use of this fund and will continue to do so through the life of the SHIP.

16. Islands (Scotland) Act 2018

The Islands (Scotland) Act 2018 requires public agencies to ensure that their policies and strategies are not detrimental to island areas. As an island authority Orkney Islands Council strives to provide quality services to all households.

The delivery of affordable housing in Orkney's ferry-linked islands is focused on the Islands Housing Fund, with the Council and Highlands and Islands Enterprise providing support to island development trusts to develop affordable housing of different tenures that will help meet housing need on each island.

17. Rural Housing Fund and Islands Housing Fund

The Scottish Government's Rural and Islands Housing Fund offers opportunities for affordable housing development in Orkney. The fund allows partner agencies, that had limited access to affordable housing funding prior to the Islands Housing Fund, the chance to develop individual affordable housing projects that will help their area. The fund provides excellent flexibility around tenure type and delivery and is ideal for areas that require a flexible approach.

Orkney Islands Council's Housing Service has assisted 9 island development trusts, one co-housing group and 5 private developers preparing applications to the Rural and Islands Housing Fund. 14 projects supported through the Fund's main funding programme have now been completed, delivering 36 homes. A further 10 housing projects have secured main funding and are either under construction or expected to commence soon. These projects are located in: Eday; Kirkwall; North Ronaldsay; Papa Westray; Rousay; Shapinsay; Stromness; and Westray. Several additional projects are undertaking feasibility work or remain at an early stage of development and have yet to apply to the Rural and Islands Housing Fund's main funding programme.

The SHIP identifies the requirement for 50 more homes of the outer isles over the next 10 years.

18. Modern Methods of Construction

Orkney College, in partnership with Orkney Construction Training Group (OCTG), is currently developing a project to test the use of modular build and at the same time using the project to train college students in modular build. The pilot has been awarded £75,000 by SSEN's Regional Fund to build two demonstrator student bedroom modules using Joinery apprentices at the college. Governance processes are currently being explored.

19. Child Poverty Strategy

The [Orkney Child Poverty Strategy 2022-2026](#) set out actions in relation to 'Pockets, Prospects, Places, Prevention and Priorities'. The alignment between Orkney's affordable housing projects and Orkney's Child Poverty Strategy relates to access to affordable housing, addressing fuel poverty and moving to net zero as far as possible in the new housing supply across Orkney. Monitoring and reporting of the [Local Child Poverty Action Plan Report 2024-25](#) was undertaken by the Orkney Partnership's Cost of Living Task Force. This 2024-25 report was the final in the 2022-2026 Child Poverty Strategy reporting window. From 2026/27, the Local Child Poverty Strategy is included within the Children's Services Strategy, with monitoring and reporting through the Education, Communities and Housing Committee, the Integrated Joint Board (IJB), the NHS Orkney Health Board and the Orkney Community Planning Partnership.

20. Rapid Rehousing Transition Plan

The key priority of the Rapid Rehousing Transition Plan that links with the SHIP is: 'ensure that Orkney has a sufficient range, number and type of houses to meet demand and need and offers a suitable range of housing options'. As well as increasing the supply of housing, particularly in this case social rented housing by Orkney Islands Council, Orkney Housing Association, Places for People Scotland and the Development Trusts to increase the number of properties that are available to rent to households in housing need, prevention of homelessness is also key. Improved housing options and early intervention leading to reduced periods of time in temporary accommodation, with the provision of housing support as required.

21. Housing for Gypsy/Travellers

Specific housing or pitches for Gypsy/Travellers are not provided in Orkney due to the fact that, historically, there has been very little evidence of Gypsy/Travellers staying in Orkney outside the summer months. This will continue to be monitored, with findings from the most recent Census examined to assess any need.

22. Annex 1 – SHIP Projects

Summary of SHIP projects over the next 5 years 2027/28 to 2031/32

The following summarises the key sites over the first 5 years of the SHIP, including the site status and development constraints.

Estimated Approval.	Estimated Completion.	Development.	Developer.	RAG status.	Tenure.	LDP ref.	Number homes.	Summary of position.
2025/26.	2027/28.	Walliwall Phase 10, Kirkwall.	OHAL.	Green.	Mixed tenure.	NA.	41.	On site.
2025/26.	2027/28.	Coplands Road, Stromness.	OIC.	Green.	Social rent.	STR8.	25.	Positive pre-planning discussions. Contract awarded.
2026/27.	2027/28.	Graeme Park, St Mary's.	OHAL.	Green.	Social rent.	STM5.	6.	Design stage. Will meet need, OHAL land, pre-planning discussions have been positive.
2027/28.	2028/29.	Toab.	OHAL.	Red.	Social rent.	TB4	2	Two 2-bedroom social rented homes on OHAL-owned land. Scottish Water capacity constraint.
2026/27.	2027/28.	Laird's Road, Burray.	OHAL.	Green.	Social rent.	BV3.	8.	Design stage. Will meet need, OHAL land, positive pre-planning discussions. Includes small piece of OIC land for two houses which is planned for sale to OHAL to develop as one scheme.

Estimated Approval.	Estimated Completion.	Development.	Developer.	RAG status.	Tenure.	LDP ref.	Number homes.	Summary of position.
2026/27.	2027/28.	Former Papdale Halls demolition.	OIC.	Amber.	-	K28.	-	In-depth surveys completed, procurement process underway. Council decision September 2026. Part funding being sought from Scottish Government.
2027/28.	2028/29.	Houton (permanent).	OIC.	Amber.	Mixed tenure.	HT1.	6.	SSEN has funded infrastructure for this site for temporary use. Post SSEN exit, Council/Scottish Government approval will be sought for permanent housing development.
2027/28.	2028/29.	Reid Crescent, Kirkwall.	OIC.	Amber.	Social rent.	Infill.	2.	Need for two larger family homes. Council/Scottish Government approval will be sought during 2027/28.
2027/28.	2028/29.	Dounby.	OIC.	Amber.	Social rent.	DY2.	10.	Council has approved CPA Stage 1. Positive pre-planning discussions and now at design stage.
2027/28.	2029/30.	Evie School (Phase 1)	OHAL.	Amber.	Mixed tenure.	ES3.	5.	Positive pre-planning discussions. Consultation and design work required with community.

Estimated Approval.	Estimated Completion.	Development.	Developer.	RAG status.	Tenure.	LDP ref.	Number homes.	Summary of position.
2027/28.	2028/29.	Burnmouth Road.	Orkney Builders.	Red	Social rent.	NA.	5.	Private development which will require 25% affordable housing. SEPA objection to the Planning application and is now with Scottish Government on appeal.

Approval.	Completion.	Development.	Developer.	RAG status.	Tenure.	LDP ref.	Number homes.	Summary of position.
2027/28.	2028/29.	K9, Kirkwall (Phase 1)	Orkney Builders/ OHAL.	Red.	Mixed tenure.	K9.	20	Planning application re-submitted in June 2026 for complex site. If planning permission is granted, this site will fulfil high level of housing need/demand in Kirkwall, with other sites in Kirkwall taking longer to deliver, or which are more speculative. There is a need for further discussions with the Strategic Housing Authority on housing needs to be met, house size, type and space standards. Two phases.
2028/29.	2028/29.	Wellington Street Infill.	OHAL.	Amber.	Social rent.	Infill.	4.	Early discussions with Planning for infill site.

Approval.	Completion.	Development.	Developer.	RAG status.	Tenure.	LDP ref.	Number homes.	Summary of position.
2028/29.	2030/31.	Midgarth, Stromness.	OHAL.	Amber.	Social rent.	ST17.	14.	OHAL land, initial discussions with Planning. The site is in the Stromness South Masterplan. Some anticipated constraints on surface water and roads.
2028/29.	2030/31.	Former Papdale Halls.	PFP.	Amber.	Mixed tenure.	K28.	60.	Awaiting demolition of the former Papdale Halls which will potentially take longer than originally anticipated – possibly 12 months until October 2027. Planning application cannot be submitted until 2028 after demolition and final site investigations complete. Constraints are potential diversion of private drainage (OIC) and Scottish Water drainage capacity.
2029/30.	2030/31.	Evie School (Phase 2).	OHAL.	Amber.	Mixed tenure.	ES3.	5.	Positive pre-planning discussions. Consultation and design work required with community.
2030/31.	2031/32.	K9, Kirkwall. (Phase 2).	Orkney Builders/ OHAL.	Red.	Mixed tenure.	K9.	19.	Phase 2 – See above.

Approval.	Completion.	Development.	Developer.	RAG status.	Tenure.	LDP ref.	Number homes.	Summary of position.
2029/30.	2034/35.	Weyland.	PFP.	Amber.	Mixed tenure.	K15.	200.	Large housing development area. Potential constraint is Scottish water capacity.
2030/31.	2031/32.	Flett's Park, Dounby.	OHAL.	Amber.	Social rent.	NA.	6.	Proposed later as OIC is developing in Dounby over next couple of years.
2033/24.	2035/36.	Soulisquoy (OIC site).	PFP.	Red.	Mixed tenure.	K6.	100.	Currently planned for land assembly. Subject to discussion on future development options on neighbouring OHAL site.
Ongoing.		Off the Shelf purchases.	OIC.	Green.	Social rent.	NA.	25.	Ongoing purchases off the open market as suitable opportunities arise.
Ongoing.		Isles projects.	OIC.	Various.	Mixed tenure.	NA.	25.	Ongoing developments as opportunities arise.

Summary of additional long-term SHIP sites and speculative sites

The following summarises other sites and will be kept constantly review to bring forward. There are two types of site:

- **Long term SHIP sites** – included in the SHIP and can be brought forward at any time if other earlier sites do not work.
- **Speculative sites** - at this stage are not considered to be included in the SHIP as status is unclear, but brought into the SHIP if circumstances change.

Long term SHIP sites

Site.	Developer.	Tenure.	LDP ref.	Estimated homes.	Summary of position.
Soulisquoy (OIC site).	PFP.	Mixed tenure.	K6.	100.	Currently planned for land assembly. Subject to discussion on future development options on neighbouring OHAL site.
Berstane, Kirkwall.	PFP.	Mixed tenure.	K14.	250.	Long term, large housing development area.
St Margaret's Hope.	OIC.	TBC.	SMH3.	6.	Status of the Hope Co-housing proposal unclear.
St Rognvald House and land.	OIC.	Social rent.	NA.	25.	In the short-term St Rognvald House is being repurposed by OIC for Orkney Health and Care agency staff accommodation. The building has a maximum 10-year life, with demolition and re-development for new supply planned for the longer term.
Grainbank – OIC owned.	OHAL.	Mixed tenure.	K3.	95.	Large housing development area, with capacity for up to 95. Pre-planning discussion with OHAL has taken place.

Speculative sites

Site.	Developer.	Tenure.	LDP ref.	Estimated homes.	Summary of position.
Former Balfour Hospital site.	NHS Orkney.	Mixed tenure.	NA.	To Be Confirmed.	Early concept and pre-planning. At this stage uses being defined but may include a mix of housing (including for key/essential workers) and non-housing accommodation. This may require AHSP funding.
Grainbank - Private site.	OHAL.	Mixed tenure.	K3.	35.	Private site subject to current planning application by a private developer for private housing. Pre-planning discussions suggest site capacity of 35.
Soulisquoy (OHAL site).	OHAL.	Mixed tenure.	K6.	60.	Prospective developers are advised to check access and services.
Sunnybank, Stromness (phase 1 and 2).	OHAL.	Mixed tenure.	STR2.	70.	There are considerable access constraints to this site. This OHAL site was acquired with Scottish Government funds in 2006, OIC's preference is for OHAL to consider this site in light of the emerging Stromness Place Plan and if alternative access cannot be secured soon, consider potential alternative uses to make best use of the site. This could potentially include sale for private housing with much lower density, therefore result in less access constraints, and then recycle Scottish Government grant for other OHAL developments in the SHIP.

Item: 7

Education, Communities and Housing Committee: 9 September 2026.

Housing Service – Annual Assurance Statement.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents the Annual Assurance Statement, for approval.
- 1.2. The Council is required to submit an Annual Assurance Statement to the Scottish Housing Regulator by 31 October. The Annual Assurance Statement must provide assurance that the Council, in delivering its services in relation to social housing, is compliant with all aspects of legislation, including housing and also health and safety and meets appropriate performance and quality assurance standards.
- 1.3. The Scottish Housing Regulator enhanced its requirements in respect of assurance in relation to equalities, as well as tenant and resident safety, for Assurance Statements to be submitted after 31 October 2023. Further enhancements were made in relation to damp and mould for Assurance Statements to be submitted by 31 October 2025.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
 - i. Approve the Annual Assurance Statement, together with supporting Annexes, attached as Appendix 1 to this report, for submission to the Scottish Housing Regulator.

3. Performance Structures

- 3.1. Members have previously been advised of the broad range of performance measures that are in place across Housing Services, with the following performance reports presented annually to the Education, Communities and Housing Committee:
 - Homelessness update.
 - Energy Efficiency Standard for Social Housing.

- Housing Performance.
- 3.2. A broad range of returns are submitted by Housing Services including:
- Quarterly submission of homelessness returns to Scottish Government (HL1, HL2, HL3 and Prevent 1).
 - Completion of quarterly and annual returns for Scotland's Housing Network.
 - Completion of annual return to Scottish Government "Housing Statistics Annual Return".
 - Membership of Scotland's Housing Network and benchmarking against peer authorities and also national benchmarking.
- 3.3. Housing Services undergo a range of inspections including:
- Care Inspectorate – Sheltered Housing.
 - Care Inspectorate – Homelessness and Housing Support Services.
 - National Standards for Information and Advice Providers (nationally recognised accreditation).
 - Until 2019, Housing Services, in common with other Council Services, undertook How Good is our Council Self-Assessment. This process will be replaced with a suitable corporate alternative following approval by the Council's Corporate Leadership Team and the Extended Corporate Leadership Team.
- 3.4. The outcome of inspections, together with action plans where required, are reported to the relevant committee.
- 3.5. Additionally, the following are in place across Housing Services:
- Housing Services is subject to an annual assessment against eight specific criteria to determine the level of risk posed by relevant services and consequently any need for an internal audit.
 - An annual pre-submission audit of the Council's Annual Return against the Charter is undertaken by an independent organisation.
 - A quarterly meeting of key staff to consider, analyse and discuss improvements relating to the performance across Housing Services in relation to the indicators underpinning the Annual Return against the Charter.
- 3.6. The above are in addition to corporate processes such as the monitoring of indicators through the Council's corporate performance monitoring system, Pentana.

- 3.7. Some areas of Housing Services' performance are regulated and required by the Scottish Housing Regulator, including:
- Submission of Annual Return against the Charter.
 - Publication of Annual Report for Tenants.
 - Three Yearly Customer Satisfaction Survey with specific questions and requires a 40% return rate.
- 3.8. While required on a three yearly basis, the Council undertakes its Customer Satisfaction Survey every two years to ensure views collected are representative of the current tenant base. This was undertaken in April 2026 and is being reported to this cycle of meetings.
- 3.9. The Scottish Housing Regulator has published its Regulatory Framework and associated guidance relating to housing services' performance.
- 3.10. The Scottish Housing Regulator has produced an engagement plan for all social housing providers. Individual engagement plans highlight performance indicators which the Scottish Housing Regulator has identified as being areas where they may initiate some engagement with the organisation concerned. The engagement plan for Orkney Islands Council is available [here](#).

4. Annual Assurance Statement

- 4.1. The Annual Assurance Statement requires to be submitted annually between April and October and it is necessary for the Education, Communities and Housing Committee to be assured that performance structures and assessments are appropriately robust.
- 4.2. The Scottish Housing Regulator has produced [guidance](#) which requires that the Annual Assurance Statement should be completed and agreed by the relevant local authority committee and should:

“Confirm that you have appropriate assurance that you comply with:

- 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”.

- 4.3. Although the Scottish Housing Regulator has provided a prescriptive template to be submitted, the Regulator has not been prescriptive in respect of the structure of the information to accompany this. Attached as Appendix 1 to this report is the completed template.
- 4.4. Given that the appropriate Council committee is required to issue assurance on the performance of the Housing Service to the Scottish Housing Regulator, it is crucial that Elected Members are provided with information to be satisfied that performance processes are sufficient.
- 4.5. Annex 1 draws out the salient points in respect of performance areas, highlighting where performance has declined or would warrant additional explanation.
- 4.6. The onus is on the Council to highlight areas where it recognises its performance could be improved or where there are contextual factors which would limit its ability to compete at a national level. This information is also contained in Annex 1.
- 4.7. Scotland's Housing Network, the organisation which provides benchmarking services and good practice guidance to the housing sector has developed an action plan which organisations may choose to complete as part of their assurance process, ahead of submission. Attached as Annex 2 to this report is the action plan completed with local statistics and comments.
- 4.8. Annual Assurance Statements are required by the Scottish Housing Regulator for all social housing providers, namely both local authorities and registered social landlords. Consequently, some areas covered in Annex 2 are corporate responsibilities as opposed to being limited to those within Housing Services.

For Further Information please contact:

Frances Troup, Head of Strategic Housing, Housing Operations and Homelessness, extension 2450, Email: frances.troup@orkney.gov.uk.

Implications of Report

1. **Financial:** None arising directly from this report.
2. **Legal:** None arising directly from this report.
3. **Corporate Governance:** None arising directly from this report.
4. **Human Resources:** None arising directly from this report.
5. **Equalities:** An Equality Impact Assessment is not required for performance reporting.
6. **Island Communities Impact:** An Island Communities Impact Assessment is not required for performance reporting.

7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
- ☐ Growing our economy.
 - ☐ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
- ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☐ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk:** None arising directly from this report.
10. **Risk:** None arising directly from this report.
11. **Procurement:** None arising directly from this report.
12. **Health and Safety:** Compliance with legislation including health and safety legislation is central to this report. Appendix 1, Annex 2, clearly states the Council's position in relation to compliance with health and safety legislation in Council properties.
13. **Property and Assets:** This report relates directly to Council housing.
14. **Information Technology:** None arising directly from this report.
15. **Cost of Living:** None arising directly from this report.

Background Papers

None.

Appendix

Appendix 1: Annual Assurance Statement.

Appendix 1 to Annual Assurance Statement Report

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
- We are compliant with all aspects of tenant and resident safety.

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 9 September 2026.

Signed

Chair of Education, Communities 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 2025/26 has been completed for Orkney Islands Council and was submitted to the Scottish Housing Regulator by 31 May 2026. 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 2026. 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 are being presented to the Council’s Education, Communities and Housing Committee in September 2026, along with an action plan for improvement. The survey was carried out by an independent contractor so tenants could respond openly. A mix of telephone and postal methods was used, with more phone surveys than before to ensure parity with the approach used by most social landlords. While it is slightly more expensive, the cost benefit analysis is positive in that stronger data is obtained. 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 continues to focus on increasing tenant involvement and improving communication. This has included working with Orkney Housing Association Ltd on events at community groups, starting up an armchair panel, and producing a leaflet to help promote it. A social media page has also been developed to help make information more accessible across the island group and to different age cohorts.

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 financial year 2025/26, 28 stage 1 complaints and 12 stage 2 complaints were received during the year. There were 4 stage 2 complaints carried over from 2024/25. There were 3 open stage 2 complaints at the end of the year which will be carried forward

into 2026/27. The average response times for both stage 1 and 2 have increased on last year. Stage 1 complaints increased from 3.38 to 6.93 days this year. The average for stage 2 complaints rose from 17.40 to 30.08 days. The longest response time recorded at stage 1 was 43 days and at stage 2 it was 89 days. The stage 1 complaint was initially handed to the wrong department which caused the long response time.

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.

During 2025/26, 374 emergency repairs were completed with an average completion time of 7.23 hours and a median of 3.58 hours. This is a decrease from last year's average of 9.72 hours. The majority (95.71%) of emergency repairs were completed within target timescales, with 282 completed in under 7 hours (75.40%).

A total of 16 repairs exceeded the 24-hour limit, with 3 taking more than 30 hours. The longest repair (48.5 hours) related to a heat pump, where completion was delayed due to severe weather conditions impacting access.

Overall, delays were limited and generally due to external factors or the need for more complex repairs. Performance has improved compared to the previous year, with faster average completion times and a high proportion of repairs completed within target.

At 31 March 2026, there were 6 open emergency repairs. Continued monitoring and regular engagement with building inspectors and contractors supports early intervention and helps maintain performance.

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, during 2025/26, 1704 were completed with a total of 24,877 working days, resulting in an average completion time of 14.60 days. This is a decrease from 2024/25, when the average was 15.62 days.

The majority of repairs were completed within target timescales, with 1,300 (76.29%) completed within 20 working days and 764 (44.84%) delivered within the first 7 days, demonstrating continued efficiency in service delivery.

A total of 404 repairs exceeded 20 working days, with 7 taking longer than 100 days to complete. The longest repair took 172 days and related to a wet room floor repair, where works were delayed due to capacity issues with the flooring contractor.

Longer-duration repairs were limited and generally related to access constraints, contractor scheduling, or cases requiring additional coordination or approvals. These represent a small proportion of overall activity but have a disproportionate impact on average completion times. Overall, performance has improved compared to the previous year, with reduced average completion times and the majority of repairs delivered within target. Continued monitoring and engagement with contractors supports ongoing performance management and timely completion of works.

As regards the indicator on “Right First Time” (RFT), during 2025/26, a total of 1,677 reactive repairs were completed, of which, 1,209 were recorded as completed right first time, giving an overall right first time rate of 72.09%. The accuracy of this measure is dependent on consistent reporting and appropriate use of follow-on orders where additional works are required. A review of data at the 9-month stage of the year by Scotland’s Housing Network / CD Consultancy highlighted concerns around how right first time data was being recorded and the need for clearer links between initial repairs and any subsequent visits. In response, a manual review of recorded right first time jobs has been carried out to identify discrepancies, particularly where follow-up work may not have been properly linked. Targeted in-house training is being delivered to reinforce how best to categorise repairs and record right first time outcomes, particularly in light of new Annual Return against the Charter requirements relating to damp and mould. The training needs of staff are kept under review to ensure staff have the knowledge and confidence to apply these definitions consistently. This work will support improved reporting accuracy in future years.

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.

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 with Police Scotland 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 9 cases of anti-social behaviour, during financial year 2025/26 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 from another provider.

A total of 82 tenancies were sustained for more than a year – 29 from the waiting list, 10 existing tenants and 43 homeless households. This was from a total of 90 tenancies, being 34 from the waiting list, 10 existing tenants and 46 homeless households. Of the tenancies which were not sustained for longer than a year, 3 were as a result of death, 4 were renunciations, and 1 was rehoused by OIC. In percentage terms these were as follows:

- Existing tenants - 100%.
- Homeless households – 93.48%.
- Waiting list – 85.29%.
- Overall tenancy sustainment – 91.11%.

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 £66,946 in 2024/25 to £80,517, representing an increase in the amount of rent due to properties being empty and a percentage increase from 1.47% to 1.65%. There were 69 relets in 2025/26, compared to 71 in the previous year. This reflects the reality of managing a dispersed rural stock and a small number of long-term, low-demand voids and challenges around availability of contractors.

Regarding the indicator on the average length of time taken to relet properties, a total of 69 properties were relet during the financial year 2025/26. The time taken to relet properties increased. The total number of calendar days they were empty was 5,360, resulting in an average relet time of 77.68 days. This represents a significant increase from the previous financial year 2024/25, where the average relet time was 60.65 days. There were two complex voids which took 511 days and 231 days to be relet, this will have impacted the average relet time.

We again experienced a small number of voids with extended relet times due to low demand, particularly in isles stock. There were three properties categorised as low demand which took a combined 812 days to relet. Excluding the five longest properties, the adjusted average relet time would be 59.47 days, compared to 50.81 days the previous year. 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 2025/26. The figures at year-end show an increase to 12.12% from 9.43% in 2024/25. 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 2025/26 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 99.07% compared to 98.84% for financial year 2024/25. The number of households for which the Council received housing cost payments directly decreased to 460, down from 479 in 2024/25. However, the total value increased to £1,834,872 from £1,708,909 the year before, 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. The automation of this process has very recently been completed, which 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.

The percentage of former tenant arrears (Indicator C7) decreased to 0%, down from 18.26% in 2023/24. 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 Service 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

Enhanced information is now required for the area of tenant and resident safety. Specific information is required 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. A total of 13 EICRs were out of compliance at some point during the year, one fell out of compliance during the year and 6 remained out of compliance at the end of the financial year – all as a result of other issues. Many of those who had otherwise been out of compliance, were as a result of being purchased during the year. Just one LD2 fell out of compliance during the year and four were non-compliant at year end – again due to other issues preventing works from being undertaken. This included 2 new properties undergoing works, 1 in abeyance due to hoarding and 1 abandonment due to legal issues.

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 and a procurement process is being undertaken accordingly. It is anticipated that the stock condition survey will be undertaken over a period of around 3 years.

We will continue to maintain ongoing evidenced assessment of at least 10% of total stock per year following the conclusion of the full stock condition survey.

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 1,045 properties which were in scope for the Scottish Housing Quality Standard (SHQS).

One-criterion fails: A total of 40 properties failed on a single SHQS criterion (3.83% of total stock). Of these, 37 relate to Energy Performance Certificates (EPC), 1 relates to LD2 smoke and heat alarm compliance, 1 relates to secure common front door entry and 1 relates to rising or penetrating damp.

Two-or-more-criteria fails: A further 5 properties fail on two or more SHQS criteria (4.31% of total stock). These include combinations such as EICR (electrical installation condition reports), LD2 alarms, bathroom standard and lead-free pipework.

In addition, 11 properties are recorded as being in abeyance, and 8 are recorded as exempt. The exemptions consist of three 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 and four where disproportionate costs are stopping compliance works.

These figures represent our final reported position for year-end, following a comprehensive internal review and a 9-month data audit conducted by Scotland's Housing Network / CD Consultancy in 2025/26. 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 2026 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 2026 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 stock quality and tenant and resident safety where they have indicated they wish to engage with the Council.

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

- 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 undertake a stock condition survey starting from 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.

Accordingly, the Council must:

- Send the Scottish Housing Regulator information required in relation to its stock condition survey and approach to asset management.
- Provide regular updates on progress to validate and improve the quality of its data used to report compliance with the SHQS and send monthly updates on its progress with completing legionella risk assessments and any required actions in its homes.

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 Strategic Housing, Housing Operations and Homelessness and Data Analysts.	October 2026.	Green.	Committee report and appendices to be presented to Education, Leisure and Housing Committee on 9 September 2025.
Submit Annual Assurance Statement to Scottish Housing Regulator between April and October each year.	Data Analysts.	October 2026.	Green.	On target to be submitted by October 2026.
Make Annual Assurance Statement available to tenants and other service users.	Data Analysts and Tenant Participation Officer.	October 2026.	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 Strategic Housing, Housing Operations and Homelessness 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	Head of Strategic Housing, Housing Operations and Homelessness and Team	Ongoing.	Green	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

Requirement.	Who.	When.	RAG.	Comments.
and human rights, and tenant and resident safety.	Manager (Maintenance and Heritage).			are scheduled for re-accreditation during 2026/27. 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. 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.

Requirement.	Who.	When.	RAG.	Comments.
				During 2021 we undertook a review of our equalities policy and the processes 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. 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: • Gas safety is not applicable as Orkney has no mains gas;

Requirement.	Who.	When.	RAG.	Comments.
				- As regards electrical safety, we have in place a 5 yearly rolling programme to carry out EICRs and address any remedial works identified from them. An issue arose which affected this in December 2022 and by 31 March 2025 just 9 properties required to have an EICR completed. As at 31 March 2026 our 5 year rolling programme for EICR is in place, up to date and routinely monitored. 6 EICRs remained to be completed, all properties had other issues making completion difficult. - Fire safety - We are also working through a programme of implementing the residual aspects of our contract on interlinked smoke alarms. At 31 March 2026, just 4 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

Requirement.	Who.	When.	RAG.	Comments.
				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 specifically different to the fitting of LD2. As at 31 March 2026, 68 of the original 588 properties remained where evidence required to be collected. By 16 July 2026 a total of 33 remain outstanding (92% completion) and currently arrangements are being made with the tenants to ensure access can be facilitated. • 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 began during 2025/26. As at 16 July 2026, 627 risk assessments have been completed which equates to 60% of our stock. • Asbestos – The amount of asbestos in our properties is low and is largely

Requirement.	Who.	When.	RAG.	Comments.
				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 updated as asbestos is managed / removed, and historical data maintained. During 2026/27 we have procured a new asbestos contactor and the contract covers a three year term. The new contractor is underway with completing surveys locally. 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

Requirement.	Who.	When.	RAG.	Comments.
				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. This had risen to 11 by 2025/26, the increase relating to additional properties purchased. Appointments for access have been set up with tenants so that the contractor can undertake the surveys between 5th and 7th August 2026. • 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 considered duty holders under the Control of Asbestos Regulations (CAR). • Radon – we previously carried out radon gas testing to 56% of our properties which generated remedial works to 18 properties that have been

Requirement.	Who.	When.	RAG.	Comments.
				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. In June 2026 a Radon Contractor was contracted - (Radon Scotland) who will begin work later in 2026. • The data will be picked up from 10 years ago with any properties situated in areas of high readings revisited along with a sample of other areas. • Damp and mould – a policy on damp and mould was approved by our Education, Leisure and Housing Committee in September 2023 and relevant Council 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.

Requirement.	Who.	When.	RAG.	Comments.
				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. • Damp and mould reporting was introduced as a new reporting requirement for 2025/26. During the year, 44 damp and mould cases were resolved, comprising 33 condensation cases, 2 structural cases and 9 cases attributed to other causes. The average time taken to resolve cases was 28.86 working days. Resolution times include delays where access had to be arranged with tenants. All reported cases involved a joint inspection by a Housing Officer and Building Inspector to identify the underlying cause and agree the appropriate remedial works. Follow-up visits are normally arranged approximately six months after

Requirement.	Who.	When.	RAG.	Comments.
				completion to ensure the issue has been satisfactorily resolved. At 31 March 2026, there were 9 open damp and mould cases, all of which were being actively managed. We will continue to develop our recording and monitoring arrangements to ensure consistent application of the Scottish Housing Regulator's Technical Guidance and to support continuous service improvement. • Tenants are provided with clear and concise advice on damp and mould at tenancy signup and whenever damp and mould issues are identified within existing properties. The aim is to minimise the occurrence of these issues wherever possible and to ensure that any instances that do arise are addressed promptly and effectively. • On 6 October 2026, the Investigation and Commencement of Repair (Scotland) Regulations 2026 (Awaab's Law) comes into force, establishing new requirements for the investigation,

Requirement.	Who.	When.	RAG.	Comments.
				categorisation and remediation of damp and mould issues. • In line with forthcoming legislation, all reported cases are prioritised for investigation within 10 working days of identification, with tenants receiving a written statement of the findings within 3 working days of the investigation's conclusion. Any necessary remedial works will commence within 5 working days of the investigation being completed. • This approach ensures compliance with the legislative requirements while also enabling remedial action to be taken as quickly as possible, helping to safeguard tenants' health, wellbeing and enjoyment of their homes. Where health risks are identified; proactive inspections of similar property types or neighbouring homes are undertaken. Where a case is found, data from other relevant cases is used to inform

Requirement.	Who.	When.	RAG.	Comments.
				targeted investment in extractor fans, insulation upgrades and cold-spot treatment etc. This approach ensures a swift response, improvements to the consistency of monitoring processes and use of data to reduce the risk of repeat issues for tenants. • Lift safety – this is not applicable in an Orkney situation as the Council has no social housing which is fitted with lifts. Going forward revised structures will be implemented around monitoring of preventative, protective maintenance.
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 Strategic Housing, Housing Operations and Homelessness / Head of Property, Asset Management and Facilities and Team Manager (Maintenance and Heritage).	In place.	Green.	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. We have policies covering issues such as Asbestos and procedures in place regarding Radon / Legionella etc. Our

Requirement.	Who.	When.	RAG.	Comments.
				Infrastructure and Organisational Development Directorate undertakes property inspections and ensures 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 Strategic Housing, Housing Operations and Homelessness and Data Analysts.	May 2026.	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 Strategic Housing, Housing Operations and Homelessness 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 Strategic Housing, Housing Operations and	May 2026.	Green.	Submitted by 31 May 2026.

Requirement.	Who.	When.	RAG.	Comments.
	Homelessness and Data Analysts.			
Involve tenants, and where relevant service users, in the preparation and scrutiny of performance information. • 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.	Tenant Participation Officer.	In place.	Green.	• Residents' Panel involved in development of annual report as standard. • 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.
Report performance to tenants and other service users no later than October each year: • 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,	Head of Strategic Housing, Housing Operations and Homelessness 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.
other landlords and with national performance. • Set out how we intend to address areas for improvement. • 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 Strategic Housing, Housing Operations and Homelessness 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 Strategic Housing, Housing Operations and Homelessness 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 Strategic Housing, Housing Operations and Homelessness 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.	- 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.
				• 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 Strategic Housing, Housing Operations and Homelessness	In place.	Green.	• 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.
				been sought in relation to existing tenants also. This is sought along with information relating to requirements for information in a range of formats. As regards staff, our Human Resources Service collect information relating to 9 protected characteristics for staff when they apply for any post 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 Strategic Housing, Housing Operations and Homelessness.	In place.	Green.	- 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.

Item 8

Education, Communities and Housing Committee: 9 September 2026.

LGBT Inclusive Education Implementation Plan.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. The purpose of this report is to provide an overview of the work being carried out in relation to the implementation of LGBT Inclusive Education in line with national guidance, for noting.
- 1.2. In accordance with national expectations, LGBT-inclusive education is being implemented through Curriculum for Excellence as part of wider work to promote inclusion, equality, wellbeing and respectful relationships. The LGBT Inclusive Education Implementation Plan, attached as Appendix 1 to this report, is intended to support implementation of national guidance, promote effective practice, and ensure that relevant equality, inclusion, wellbeing and children's rights considerations are reflected in educational practice.
- 1.3. The implementation plan outlines progress to date, work now underway and a three-year implementation plan to support a consistent and proportionate approach to the delivery of LGBT-inclusive education in Orkney's educational settings.
- 1.4. Inclusion is a central principle of Scottish education. Local authorities are required to discharge their duties under the Equality Act 2010, including the Public Sector Equality Duty.
- 1.5. In exercising their education functions, local authorities must also have regard to children's rights and wellbeing as reflected in the Children and Young People (Scotland) Act 2014 and the Getting It Right For Every Child (GIRFEC) wellbeing indicators: Safe, Healthy, Achieving, Nurtured, Active, Respected, Responsible and Included. These duties are further reinforced by the United Nations Convention on the Rights of the Child (Incorporation) (Scotland) Act 2024 and the requirement for public authorities to act compatibly with the UNCRC requirements.

- 1.6. National Guidance on LGBT Inclusive Education supports local authorities and schools in discharging these responsibilities. LGBT Inclusive Education ensures that LGBT themes, experiences and contributions are reflected appropriately within learning experiences and that prejudice and prejudice-based bullying are actively addressed. The Implementation Plan has therefore been developed to support schools and settings to deliver age and stage appropriate learning in accordance with national expectations and statutory equality duties.
- 1.7. The Council also recognises the important role of parents and carers in their children's education. In implementing national guidance and discharging its statutory duties, the Council will continue to engage with parents and carers and provide information regarding curriculum delivery and educational practice.
- 1.8. The Implementation Plan is intended to support consistency of practice across educational establishments by providing staff with a common understanding of national expectations and available resources. This assists schools in delivering learning in a manner that is age-appropriate, evidence-based and consistent with the Council's duties in relation to equality, inclusion and children's rights, while continuing to engage with parents and carers on matters of curriculum delivery.
- 1.9. The Implementation Plan has been informed by:
- Scottish Government Guidance on LGBT Inclusive Education.
 - Scottish Government Guidance on the Delivery of Relationships, Sexual Health and Parenthood Education in Scottish Schools.
 - Respect for All: The National Approach to Anti-Bullying for Scotland's Children and Young People (Update 2024).
 - Advice and support provided by Time for Inclusive Education (TIE).
- 1.10. The Implementation Plan sets out a three-year programme of development and implementation from September 2026 to August 2029, including:
- Professional learning opportunities for staff.
 - Engagement and information sessions for parents and carers.
 - Development of school-based improvement activity.
 - Creation of an Equality in Education Working Group.
 - Increased learner access to inclusive curriculum experiences and support resources.

1.11. The approach seeks to ensure that:

- Learners see themselves represented positively within the curriculum, while having the opportunity to learn about diverse groups of people in our society and communities
- Learners understand prejudice and prejudice-based bullying as part of a proactive and preventative educational approach.
- Learners gain an understanding of diversity, equality and inclusion. Staff have the confidence and knowledge to support and deliver LGBT Inclusive Education in line with national guidance.
- Parents and carers have opportunities to engage with and understand the national policy context and review examples of the national curriculum resources being used to deliver learning and have access to specific information for parents and carers.
- Equality in Education Working Group to be established to enhance and develop wider aspects of equality such as racism and gender-based violence.

1.12. Learning establishments are supported to implement national guidance consistently across Orkney.

1.13. The Education Service will oversee implementation through existing improvement planning arrangements, supported by Time for Inclusive Education (TIE), Head Teachers and the proposed Equality in Education Officer Working Group made up of officers and staff based in learning establishments.

1.14. Within the Scheme of Delegation, the Director of Education, Communities and Housing has the delegated power to exercise operational management of the Council's function as an Education Authority. This includes the provision of school education and the making of arrangements to secure improvements in the quality of school education.

1.15. As a result of the interest such topics attract, the Education Service has chosen to take the Implementation Plan to Committee.

2. Recommendations

2.1. It is recommended that members of the Committee:

- i. Note the LGBT Inclusive Education Implementation Plan 2026-2029, attached as Appendix 1 to this report

3. Background

- 3.1. LGBT Inclusive Education refers to learning that reflects the lives, histories and experiences of lesbian, gay, bisexual and transgender people. National guidance highlights that such learning should be integrated across curriculum areas and delivered in a manner appropriate to learners' age and stage of development.
- 3.2. The Scottish Government identifies LGBT Inclusive Education as a proactive means of addressing prejudice and prejudice-based bullying while promoting equality, inclusion and respect for diversity. Learners should be able both to recognise their own experiences within learning and to gain an understanding of the experiences of others.
- 3.3. The Implementation Plan seeks to ensure a consistent approach across settings whilst recognising local circumstances and the varying needs of learners across different stages of education.

For Further Information please contact:

Wendy Bowen, Head of Education, extension 2475, Email wendy.bowen@orkney.gov.uk.

Implications of Report

1. **Financial** - None directly relating to the recommendations in this report. Any additional costs associated with this Implementation Plan will need to be met within existing resources.
2. **Legal** - The Council must exercise its education functions in accordance with the Equality Act 2010, including the Public Sector Equality Duty, and have regard to children's rights and wellbeing as reflected in the Children and Young People (Scotland) Act 2014 and the United Nations Convention on the Rights of the Child (Incorporation) (Scotland) Act 2024. The Implementation Plan supports a consistent and proportionate approach to the discharge of these duties.
3. **Corporate Governance** - None directly relating to the recommendations in this report.
4. **Human Resources** - None directly relating to the recommendations in this report.
5. **Equalities** - An Equality Impact Assessment has been undertaken and is attached at Appendix 2 to this report.
6. **Island Communities Impact** - An Island Communities Impact Assessment has been undertaken and is attached at Appendix 3 to this report.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.

- ☒ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
- 8. Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
- ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☒ Local Equality.
 - ☒ Improving Population Health.
- 9. Environmental and Climate Risk-** None directly relating to the recommendations in this report.
- 10. Risk-** There is a risk that inconsistent implementation or misunderstanding of national guidance could give rise to concerns regarding equality, children's rights, parental engagement or curriculum delivery. The Implementation Plan seeks to mitigate these risks by promoting a consistent, curriculum-led and proportionate approach across educational settings, supported by national guidance, staff development, approved learning resources, appropriate engagement and ongoing review of practice.
- 11. Procurement-** None directly relating to the recommendations in this report.
- 12. Health and Safety-** None directly relating to the recommendations in this report.
- 13. Property and Assets-** None directly relating to the recommendations in this report.
- 14. Information Technology-** Online learning platforms and digital resources support delivery of aspects of the Implementation Plan.
- 15. Cost of Living -** None directly relating to the recommendations in this report.

List of Background Papers

[Scottish Government Guidance on LGBT Inclusive Education.](#)

[Scottish Government Guidance on the Delivery of Relationships, Sexual Health and Parenthood Education in Scottish Schools.](#)

[Anti-bullying guidance for adults working with children and young people](#)

Appendices

Appendix 1 - LGBT Inclusive Education Implementation Plan 2026-2029.

Appendix 2 - Equality Impact Assessment.

Appendix 3 - Island Communities Impact Assessment.



Education, Communities and Housing

LGBT Inclusive Education Implementation Plan 2026 - 2029

Version Control

Document Reference.	Revision.	Issue Date.	Reason for Issue.	Reviewer.
ECH038.	00.	September 2026.	New Implementation Plan.	Head of Education.

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Background

As part of discharging the public sector equality duty under the Equality Act 2010, Orkney Islands Council requires a consistent implementation plan for learning establishments to deliver LGBT (Lesbian, Gay, Bisexual, Transgender) Inclusive Education. Inclusion is the central ethos of Scottish education and helps us ensure that children develop the four capacities of successful learning, confident individuals, effective contributors and responsible citizens.

The implementation plan is intended to ensure that everyone is supported and confident to deliver LGBT Inclusive Education.

LGBT Inclusive Education refers to integrating the teaching of LGBT themes into learning pathways across stages. Learning is carefully tailored to the needs of the various ages and stages of learning. This work is a proactive way to address prejudice and prejudice-based bullying. Central to this is ensuring that themes which relate to the lives, histories and experiences of LGBT people are included across curriculum areas within contextually relevant learning. Learners should be able to see a reflection of their own lives and experiences as a “mirror” and to have a view into the lives of others through “windows” of learning.

The purpose of LGBT Inclusive Education is to ensure schools address stereotypes, social stigma and inequalities that can often lead to prejudice or prejudice-based bullying. The learners may or may not be part of the LGBT community but may be perceived to be. They may have LGBT family members. Additionally young people may use pejorative language using phrases such as “that’s so gay” or derogatory slurs. This behaviour whilst not targeted is prejudice-based.

Children and young people are likely to engage with topics related to equality and identity and encounter information about diverse groups of people in society. This may be through social media or the internet where they may encounter harmful content and disinformation.

It is important that the curriculum provides children and young people with opportunities to learn about these topics in a safe and factual learning environment.

This implementation plan provides a framework within which parents and learning establishments can engage with the national resources. The plan provides opportunities for training for staff teams so that they can meaningfully introduce progressive learning experiences which permeate and enhance the ongoing work of the curriculum.

The following guidance documents have been used whilst creating this implementation plan.

- o [Guidance on LGBT Inclusive Education](#)
- o [Guidance on the Delivery of Relationships, Sexual Health & Parenthood \(RSHP\) Education in Scottish Schools](#)
- o [Anti-bullying guidance for adults working with children and young people](#)

It should be noted that Scotland's national approach to LGBT Inclusive Education is set out in policy and guidance. Resources and professional development for schools are available through the Scottish Government lgbteducation.scot.

Local Authority

Actions	Deadline
To engage with Time for Inclusive Education (TIE) to raise awareness and engage with parents, elected members, staff, partners and professional associations regarding LGBT inclusive education.	September 2026
All Headteachers will engage with the following guidance documents: Guidance on LGBT Inclusive Education Guidance on the Delivery of Relationships, Sexual Health & Parenthood (RSHP) Education in Scottish Schools	December 2026
All schools will use the Implementation and Evaluation Toolkit to support their journey of implementation of LGBT inclusive education.	September 2026 onwards
Establish an Equalities in Education working group.	October 2026
Establish a programme of continued professional learning for all staff to complete stage 1 e-learning module.	June 2028
Establish a programme of continued professional learning for all staff to complete stage 2 module.	June 2029

Parents/ Carers

Actions	Deadline
Virtual meeting with TIE directors for Parent Council Chairs to provide opportunities for parents and carers to engage directly with the Time for Inclusive Education (TIE) Directors and with the available resources which can be found online on the national platform lgbteducation.scot to understand what LGBT inclusive education means.	19 March 2026
Appropriate communication channels utilised to inform parents/carers as widely as possible of open sessions - Ticket Tailor booking required for attendance at sessions.	17 – 24 August 2026
TIE in person parent/carer sessions to raise awareness of Guidance on LGBT Inclusive Education Guidance on the Delivery of Relationships, Sexual Health & Parenthood (RSHP) Education in Scottish Schools Equality Act (2010) / PSED (2011)	25 – 28 August 2026
Update signposting for parents and carers online platforms which include Time for Inclusive Education and lgbteducation.scot National Guidance documents to be uploaded to OIC website (LGBT section)	August 2027

Children and Young People

Actions	Deadline
Learning and teaching will include learning themes relating to LGBT inclusive education antibullying and diverse families. Resources from LGBT Education.scot to be used.	September 2026 onwards
Children and young people to experience improved signposting in schools to relevant in-school support, including pastoral care, and local and national services that support LGBT learners and those experiencing prejudice or bullying, relevant to and differentiated for age and stage.	December 2026



Equality Impact Assessment

The purpose of an Equality Impact Assessment (EqIA) is to improve the work of Orkney Islands Council by making sure it promotes equality and does not discriminate. This assessment records the likely impact of any changes to a proposal or changes by anticipating the consequences and making sure that any negative impacts are eliminated or minimised and positive impacts are maximised.

Should you have any questions or wish for your draft EqIA to be reviewed by our Equality, Diversity and Inclusion Adviser, please contact OD@orkney.gov.uk.

1. Identification of the Proposal or Change

Name of proposal or change being assessed.	LGBT Inclusive Education Implementation Plan
Responsible Service and Directorate.	Education, Communities and Housing
Date of assessment.	3 July 2026
Is the proposal or change existing? (Please indicate if the service is to be deleted, reduced or changed significantly).	Create new LGBT Inclusive Education Implementation Plan

2. Primary Information

What are the intended outcomes of the proposal or change?	• To ensure engagement with the national guidance pertaining to LGBT inclusive education. • To strategically plan for all learning establishments to develop high quality and LGBT inclusive learning experiences. • To ensure that equalities education is represented within the curriculum. • To provide an implementation plan for parental, staff and OIC engagement with TIE directors. • To provide a plan for delivery of training.
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Is the proposal or change strategically important?	Strategic plans include major investment plans, new strategic frameworks or plans such as annual budgets, locality plans or corporate plans. Where a proposal is identified as strategic, evidence relating to socio-economic impacts and inequalities will be required in the relevant section No.
State who is or may be affected by this proposal or change, and how?	Children and young people will experience awareness raising of LGBT themes within learning contexts. They will be encouraged to consider prejudicial behaviours and attitudes. Parents / Carers – will have opportunities to attend information sessions regarding LGBT Inclusive education. School staff – knowledge of the guidance and adaptations to teaching experiences to ensure diversity when teaching, fulfilling their General Teaching Council Standards.
How have stakeholders been involved in the development of this proposal or change?	Parent Council Chairs meeting led by Education Department and TIE (Time for Inclusive Education) Directors. Inservice day training for teaching staff A week of consultation around the resources and approaches used within LGBT Inclusive education 25- 28 August which includes meeting with OIC Corporate Leadership Team, Council Members and a range of staff and parents.
Is there any existing data and / or research relating to equalities issues in this policy area? Please summarise. E.g. consultations, national surveys, performance data, complaints, service user feedback, academic / consultants' reports, benchmarking.	• Guidance on LGBT Inclusive Education • guidance-delivery-relationships-sexual-health-parenthood-rshp-education-scottish-schools.pdf • Implementation and Evaluation Toolkit – LGBT Inclusive Education National Platform • Education Report 2023: Life in Scotland for LGBT Young People - Children and Young People's Evidence Bank

Orkney Islands Council Equalities Mainstreaming Outcomes Report (2023-2027)

<https://www.orkney.gov.uk/media/po1kgzwi/equalities-mainstreaming-and-outcomes-report-2023-2027.pdf> includes the following:

- Page 12: **Outcome** - Pupils have a greater sense of belonging and safety in schools.
Measures - Increased awareness in schools of gender-based bullying and harassment.
Increased awareness in schools of LGBTQ+ based bullying and harassment.

- Page 22: *"The Youth Forum have also highlighted a need for better education around LGBT+ identities and issues, in order to eliminate stigma and misunderstanding of LGBT+ people in our community. It is recognised that LGBT+ young people can have a particularly difficult time in Orkney and may experience homophobic, biphobic and / or transphobic bullying, may feel excluded, disrespected and even unsafe."*

The LGBT Inclusive Education Implementation Plan outlines and distils best practise as identified within the policy area.

Guidance on LGBT Inclusive Education (2024)

This guidance from the Scottish Government provides key information for schools, education settings, and local authorities regarding the delivery of LGBT inclusive education as a prevention measure for prejudice-based bullying.

<https://www.gov.scot/binaries/content/documents/govscot/publications/advice-and-guidance/2024/12/guidance-lgbt-inclusive-education/documents/lgbt-inclusive-education-guidance/lgbt-inclusive-education-guidance/govscot%3Adocument/lgbt-inclusive-education-guidance.pdf>

This includes background, citations, and guidance for local authority implementation and education settings.

“LGBT inclusive education has been developed to be implemented and align with Curriculum for Excellence and reflect the educational policy landscape that develops the four capacities for learning; successful learners, confident individuals, effective contributors, responsible citizens. Implementing LGBT inclusive education contributes to this learning and teaching and also supports schools to fulfil their responsibilities under the Public Sector Equality Duty (PSED), as part of the Equality Act 2010. Appropriate consideration of protected characteristics - including sexual orientation and gender reassignment in curriculum development and delivery, and more widely in policies and practices that take account of the needs of LGBT pupils and staff - can help schools to address the PSED.”

• **LGBT Inclusive Education Report to the Scottish Ministers (2018):**
<https://www.gov.scot/binaries/content/documents/govscot/publications/independent-report/2018/11/lgbti-inclusive-education-working-group-report/documents/lgbti-inclusive-education-working-group-report-scottish-ministers/lgbti-inclusive-education-working-group-report-scottish-ministers/govscot:document/00542171.pdf>

This includes some background on the context of the recommendations which now form the national framework being taken forward in the plan:

“These recommendations represent efforts to embed approaches to tackling prejudice towards LGBTI young people throughout the education system. Research published in the last five years indicates that homophobia, biphobia, and transphobia remain an issue within education settings, and LGBTI young people themselves note feeling excluded from or underrepresented in their learning experience.”

• **LGBT Inclusive Education Evaluation Report (2023)**, national collected data from learners and teachers over a nine month period:
<https://lgbteducation.scot/evaluation/> from page 29 there is data from secondary and primary aged children:

- 82% of secondary learners hear homophobic language and slurs at school
- 49% of secondary learners had witnessed or experienced homophobic bullying at school (n=341)
- 87% of secondary learners reported a stronger understanding of the impact of homophobia after engaging with LGBT Inclusive Education (n=341) and 90% reported an improved understanding of prejudice affecting communities more broadly, including how it can arise and escalate (n=341)
- 90% of secondary learners reported that they would no longer use homophobic language or slurs after participating in the learning (n=341)

- 95% of primary learners (P6-P7) felt that scenarios about the harmful impact of gender stereotypes on boys and girls felt “very relatable” to their own experiences (n=93)
- 96% of primary learners (P6-P7) felt that scenarios about the use of homophobic language at school felt “very relatable” to their own experiences (n=93), with children themselves identifying pejorative terms like “that’s gay” to slurs including “poof”, “lesbo”, and “gaydo”

- ***Social and emotional learning in practice: An instructional case study of Scotland’s approach to address gender stereotypes and homophobia in upper primary schools*** (2026) is a published academic paper from Dariusz M. Ciszek of University of California, Los Angeles (UCLA) which includes research on the impact of LGBT Inclusive Education at the primary school setting:
<https://www.sciencedirect.com/science/article/pii/S2773233926000094>

- Need for inclusive education:**

- “In their qualitative study of high school students in Argyll and Bute local education authorities, [Craig & Irvine \(2023\)](#) found that Scottish LGBT youth reported a lack of early LGBT-inclusive curriculum, negative attitudes from peers and teachers, and bullying through derogatory language as key concerns. Students emphasized the need for zero-tolerance policies, earlier LGBT-inclusive education in primary school, integrating LGBT

content across the curriculum, and ensuring trusted staff and safe spaces for LGBT students and allies.”

- “From an LGBT-inclusion standpoint, empirical research also underscores the need for developmentally safe school spaces as youth routinely experience social and emotional adversity ([Kosciw et al., 2022](#), [Myers et al., 2020](#)).”

- “At the school level, [Snapp et al. \(2015\)](#) found that LGBT-inclusive curricula were positively associated with students’ self-reported perceptions of safety, especially when rated as more supportive of LGBT issues.”

Impact of inclusive education:

- “This study demonstrates how LGBT-inclusive education can serve dual pedagogical purposes by addressing social justice education and facilitating students’ social and emotional learning during middle childhood.”

- “Based on empirical evidence, the study’s central claim is that TIE’s LGBT-inclusive workshops offer valuable opportunities for students to practice their maturing social and emotional competencies. Incorporating LGBT content themes into SEL programming also helps educators instruct students about gender-based stereotypes and constructive ways to address homophobia.”

- “The vignettes from TIE’s LGBT-inclusive workshops demonstrate strong engagement with SEL competencies ([Chart 2](#), Figure a), reflecting an instructional focus on social-emotional literacy. Through carefully designed lessons that center on diverse families, peer relationships, gender stereotypes, homophobic language, conflict resolution, students practice, to varying degrees, eighteen SEL capacities (C1-C18) ([Chart 2](#), Figure b). Notably, the workshops appear particularly effective at creating spaces for practicing social awareness capacities (15 out of 37 code assignments or 40.5%). The

frequency of codes also highlights that reflecting on emotions (C1), understanding social norms (C9), understanding systemic influences on behavior (C10), and perspective-taking (C6) are especially salient SEL skills that emerged in the TIE workshops (Chart 2, Figure b)."

* original charts and figures are included in the academic paper*

- "TIE's workshop model illustrates the benefits of combining LGBT-inclusive education with SEL principles in an age-appropriate way. Specifically, the workshops address concerns raised by Craig & Irvine (2023), who report that LGBT Scottish high school students requested that LGBT-inclusive content be included in the curriculum before secondary school. This supports TIE's decision to start lessons in upper primary school, a time when youth have the social-cognitive skills to engage with these topics while still needing support to make sense of their emerging identities and those of their peers, and to foster healthy interpersonal relationships. As such, programs delivered during middle childhood might demonstrate more sustained impacts given this period's sensitivity to the onset of advanced social cognition and nascent peer relationships (Bosacki, 2016, Bosacki, 2021, Cappella et al., 2025, Devine and Lecce, 2021, Harris et al., 2025, Nesdale, 2017)."

• ***Homophobic and transphobic online harassment***, Rivers et al (2023) in *Cyberbullying and Online Harms*: <https://www.taylorfrancis.com/chapters/edit/10.4324/9781003258605-8/homophobic-transphobic-online-harassment-ian-rivers-jordan-daly-liam-stevenson> highlights that children and young people across Scotland experience homophobia and other forms of prejudice across online spaces, and that this increased during the onset of the COVID-19 pandemic.

Is there any existing evidence relating to socio-economic disadvantage and inequalities of outcome in this policy area? Please summarise. E.g. For people living in poverty or for people of low income. See The Fairer Scotland Duty Guidance for Public Bodies for further information.	This section is required for all proposals relating to strategic decisions.
Could the proposal or change have a differential impact on any of the following equality areas?	Please provide any evidence – positive impacts / benefits, negative impacts and reasons:
1. Race: this includes ethnic or national groups, colour and nationality.	This implementation plan aims to promote anti-discrimination in all forms. An Equalities in Education working group will be formed as part of this plan. The terms of reference should include the wider themes of Equalities with an initial focus on LGBT, followed by Anti Racism and Gender Based Violence. The professional learning provided through lgbteducation.scot equips teachers and educators with knowledge and understanding of anti-prejudice pedagogy and preventing prejudice-based bullying which will positively benefit learners experiencing broad forms of prejudice, including racism or misogyny.
2. Sex: a man or a woman.	As above
3. Sexual Orientation: whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes.	This implementation plan promotes anti-discrimination and an opportunity for learners to see themselves reflected in their education and develop experiences of diverse experiences. LGBT people, relationships, histories and experiences are appropriately represented across the curriculum. This plan recognises that LGBT children and young people, Trans and non-binary learners, Children from LGBT families and staff who identify as LGBT exist. Its purpose is to promote equality, inclusion, understanding and respect for diversity. Staff should support respectful dialogue and inclusion for all protected characteristics.

4. Gender Reassignment: the process of transitioning from one gender to another.	As above.
5. Pregnancy and maternity.	No differential impact anticipated.
6. Age: people of different ages.	National resources used within the plan are developed by education stakeholders and teaching professionals and classroom materials are suitable for the age and developmental stage of learners. Teachers plan learning according to age and stage, curriculum context and context of the class and school. Teacher professional judgement is required.
7. Religion or beliefs or none (atheists).	Some individuals may hold differing religious beliefs. The plan is based on statutory duties under the Equality Act 2010 including the Public Sector Equality Duty and national guidance. The Council recognises that individuals may hold a range of protected religious or philosophical beliefs. The implementation of LGBT inclusive curriculum does not seek to alter or disadvantage those beliefs. Its purpose is to promote equality, inclusion, understanding and respect for diversity. Staff should support respectful dialogue and inclusion for all protected characteristics.
8. Disability: people with disabilities (whether registered or not).	No differential impact anticipated.
9. Marriage and Civil Partnerships.	This plan promotes anti-discrimination.
10. Caring responsibilities	No differential impact anticipated.
11. Socio-economic disadvantage.	No differential impact anticipated.
12. Care experienced	This plan aims to promote anti-discrimination in all forms care-experienced learners may benefit from a safer and more inclusive learning environment.

3. Impact Assessment

Does the analysis above identify any differential impacts which need to be addressed?	None
Does the analysis above identify any potential negative impacts?	No.
Do you have enough information to make a judgement? If no, what information do you require?	Yes

4. Equality Impact Assessment Action Plan

Please complete the following action plan where you have identified any differential impacts or potential negative impacts in Section 3 of the Equality Impact Assessment.

Impact Identified	Action to be taken	Owner	How will it be monitored	Date Action to be completed

5. Sign and Date

Signature:	
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Name:	Wendy S Bowen
Date:	8 July 2026

Island Communities Impact Assessment

LGBT Inclusive Education Implementation Plan 2026-2029

Preliminary Considerations	Response
Please provide a brief description or summary of the policy, strategy or service under review for the purposes of this assessment.	The LGBT Inclusive Education Implementation Plan provides a framework for Orkney Islands Council's education settings to embed LGBT-inclusive education across all stages of learning, from Early Years to Senior Phase. The plan aims to promote inclusion, equality, respect and safety for all learners while addressing prejudice and prejudice-based bullying.
Step 1 – Develop a clear understanding of your objectives	Response
What are the objectives of the policy, strategy or service?	The implementation plan seeks to: • To discharge the public sector equality duty. • Ensure all schools and education settings implement LGBT-inclusive education consistently. • Support learners to see their own experiences reflected in education while developing understanding of other people's lives and experiences. • Embed equality, diversity and inclusion across the curriculum. • Equip staff, parents and learners with the knowledge, confidence and resources needed to support inclusive education.
Do you need to consult?	Engagement has occurred with Parent Council Chairs, opportunities for parents and carers to engage with Time for Inclusive Education Directors. Members and OIC staff.

How are islands identified for the purpose of the policy, strategy or service?	Orkney's educational establishments are located across the entire archipelago. Junior High Schools within Sanday Stronsay and Westray, Peedie Schools, Rousay, Eday, Papay, Shapinsay, North Ronaldsay and North Walls are all schools linked either only by boats or planes.
What are the intended impacts/outcomes and how do these potentially differ in the islands?	• Local Authority and schools to discharge the public sector equality duty. • Children and young people experience inclusive learning environments where they feel safe, respected and represented. • Educational establishments demonstrate increased capacity and confidence to deliver LGBT-inclusive education. • Parents and carers have an informed understanding of LGBT-inclusive education and opportunities to engage with schools. • Incidents of prejudice-based discrimination and bullying are reduced across educational settings. • Equality, diversity and inclusion are embedded within curriculum planning, school improvement activity and educational leadership. • Learners develop greater understanding, empathy and respect for diversity, preparing them to be responsible citizens. There would be no difference on islands context.
Is the policy, strategy or service new?	New LGBT Inclusive Education Implementation Plan
Step 2 – Gather your data and identify your stakeholders	Response

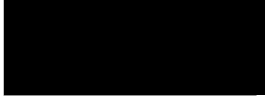
What data is available about the current situation in the islands?	Schools within islands regularly engage with online training which is provided. When online courses are offered island schools participate as well as mainland schools. Schools from islands are able to participate in face to face meetings when planned well in advance. Wednesdays are scheduled for Heads of Establishment meetings to allow for island staff to have cover and to be able to access transport arrangements.
Do you need to consult?	Consultation occurred online during Parent Council meetings so that all could access. Parents information events are also being run online for island communities to attend. Headteachers and school staff. There were no island specific feedback provided during this session.
How does any existing data differ between islands?	Some islands have easier access to the mainland than other islands. School size varies so the numbers of staff to be trained is variable. School communities are small and there are challenges around anonymity and confidentiality
Are there any existing design features or mitigations in place?	Ensuring that training and consultation events are offered online. The first part of the national training is delivered to all online. Future events may be offered on individual islands with Junior High Schools where necessary. Equalities working group to meet online.
Step 3 – Consultation	Response
Who do you need to consult with?	Engagement with parent councils has taken place. A week of engagement with parents, elected members, staff and partners took is planned with TIE.
How will you carry out your consultation and in what timescales?	n/a

What questions will you ask when considering how to address island realities?	n/a
What information has already been gathered through consultations and what concerns have been raised previously by island communities?	n/a
Is your consultation robust and meaningful and sufficient to comply with the Section 7 duty?	Yes
Step 4 – Assessment	Response
Does your assessment identify any unique impacts on island communities?	No The implementation plan has been assessed as unlikely to have a significantly different effect on island communities compared with other communities.
Does your assessment identify any potential barriers or wider impacts?	No Potential barriers relating to geography, travel and access to training have been identified and mitigated through the use of online engagement, professional learning and consultation opportunities. No evidence has been identified to indicate that the implementation plan would disadvantage learners, staff or families in island communities.
How will you address these?	N/A
You must now determine whether in your opinion your policy, strategy or service is likely to have an effect on an island community, which is significantly different from its effect on other communities (including other island communities). If your answer is No to the above question, a full ICIA will NOT be required and you can proceed to Step 6. If the answer is Yes, an ICIA must be prepared and you should proceed to Step 5.	

To form your opinion, the following questions should be considered: • Does the evidence show different circumstances or different expectations or needs, or different experiences or outcomes (such as different levels of satisfaction, or different rates of participation)? • Are these different effects likely? • Are these effects significantly different? • Could the effect amount to a disadvantage for an island community compared to the Scottish mainland or between island groups?	
Step 5 – Preparing your ICIA	Response
In Step 5, you should describe the likely significantly different effect of the policy, strategy or service:	
Assess the extent to which you consider that the policy, strategy or service can be developed or delivered in such a manner as to improve or mitigate, for island communities, the outcomes resulting from it.	
Consider alternative delivery mechanisms and whether further consultation is required.	
Describe how these alternative delivery mechanisms will improve or mitigate outcomes for island communities.	
Identify resources required to improve or mitigate outcomes for island communities.	
Stage 6 – Making adjustments to your work	Response
Should delivery mechanisms/mitigations vary in different communities?	. Flexibility through the provision of online training may required so that everal opportunities for engagement are provided due to availability of people
Do you need to consult with island communities in respect of mechanisms or mitigations?	No

Have island circumstances been factored into the evaluation process?	Engagement with parents, elected members, staff and partners is scheduled.
Have any island-specific indicators/targets been identified that require monitoring?	Review of the numbers of staff attending training will occur over Orkney. It will be important to ensure that being on an island is not a barrier to being trained – online opportunities provided.
How will outcomes be measured on the islands?	Numbers of those engaged will be captured, participation rates by island schools, parent engagement rates by island community.
How has the policy, strategy or service affected island communities?	It is not envisaged that it will have a different impact on the isles than elsewhere in Orkney.
How will lessons learned in this ICIA inform future policy making and service delivery?	Continue to ensure that island communities are not disadvantaged re access to information and training.
Step 7 – Publishing your ICIA	Response
Have you presented your ICIA in an Easy Read format?	No, but this would be possible on request.
Does it need to be presented in Gaelic or any other language?	No
Where will you publish your ICIA and will relevant stakeholders be able to easily access it?	Attached as an appendix to the LGBT Inclusive Education Implementation Plan 2026-2029 which will go to the Education Communities and Housing Committee.
Who will sign off your final ICIA and why?	James Wylie – Director of Education, Communities and Housing.

ICIA completed by:	Wendy S Bowen
Position:	Head of Education
Signature:	
Date complete:	8 July 2026

ICIA approved by:	Director of Education, Communities and Housing
Position:	Director
Signature:	
Date complete:	21 August 2026

Item: 9

Education, Communities and Housing Committee: 9 September 2026.

Developing the Young Workforce.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents key activities of Developing the Young Workforce Orkney during 2025/26, for noting.
- 1.2. Developing the Young Workforce (DYW) Orkney is responsible for improving the link between education and the world of work, increasing young people's career awareness and skills development. This is done by developing employer engagement opportunities for young people, including work placement opportunities, workplace visits, employer talks and careers events. All of this is to help young people better understand their options, the various pathways into careers and enable them to make informed decisions about their future.
- 1.3. DYW Orkney comprises a Project Manager, an Administrative Assistant and three DYW School Co-ordinators who work in the two Secondary Schools and three Junior High Schools. The DYW School Co-ordinators work closely with Skills Development Scotland, their respective school's Senior Leadership Team and Guidance staff, as well as other partners, to support young people into positive post-school destinations.
- 1.4. The DYW School Co-ordinators develop employer engagement activities to suit the needs of their individual schools and the school's demographic.
- 1.5. During financial year 2025/26, DYW Orkney has delivered employer engagement activities to 3,975 young people, supported by 110 employers. DYW Orkney is fully funded by the Scottish Government.
- 1.6. Appendix 1, attached to this report provides an overview of the key activities undertaken by DYW Orkney during 2025/26.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
 - i. Note the key activities of Developing the Young Workforce Orkney during 2025/26, as detailed in Appendix 1 attached to this report.

3. Next Steps

- 3.1. DYW Orkney has been provided with a full year of funding from the Scottish Government, up to 31 March 2027 of £238,601.
- 3.2. This funding will enable the planning and delivery of two more years of activity, including the fourth Orkney Careers Fair in 2026.
- 3.3. DYW Orkney will continue to build on the work undertaken in 2025/26, offering more young people the opportunity to take part in targeted employer engagement activity.
- 3.4. The team will continue to work with local schools, Skills Development Scotland, UHI Orkney, Community Learning, Development and Employability and other key employability partners to develop and deliver employer engagement activity to meet the needs of individuals.

For Further Information please contact:

Rachel Scarth, Project Manager, DYW Orkney, telephone 01856 569 352, Email rachel.scarth@uhi.ac.uk.

Implications of Report

1. **Financial** – DYW Orkney received a grant of £238,601 from the Scottish Government for financial year 2025/26. This funding covers the salaries of all DYW Orkney staff and the activities developed and delivered by the team.
2. **Legal** – DYW activity supports the Council's wider education, employability and Community Learning and Development functions and is consistent with the Council's statutory obligations. The proposals contained in this report do not give rise to any legal issue
3. **Corporate Governance** – Not applicable.
4. **Human Resources** – Not applicable.
5. **Equalities** – Not applicable.
6. **Island Communities Impact** – Not applicable.

- 7. Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
- ☒ Growing our economy.
 - ☐ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
- 8. Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
- ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☒ Local Equality.
 - ☒ Improving Population Health.
- 9. Environmental and Climate Risk** – Not applicable.
- 10. Risk** – Not applicable.
- 11. Procurement** – Not applicable.
- 12. Health and Safety** – Not applicable.
- 13. Property and Assets** – Not applicable.
- 14. Information Technology** – Not applicable.
- 15. Cost of Living** – Not applicable.

List of Background Papers

None.

Appendix

Appendix 1 – DYW Orkney Annual Report.



ORKNEY
ISLANDS COUNCIL

Appendix 1 – DYW Orkney Annual Report

1. Island Legacy

- 1.1. During 2025, Skills Development Scotland undertook a Skills Challenge Pilot to address a recommendation from the 2023 Careers Review that schools should offer experiential careers learning which is practical, work-related and skills focused. Orkney was one of three areas identified to take part in the pilot.
- 1.2. Established as a co-design project, Orkney's pilot included partners from Kirkwall Grammar School, Developing the Young Workforce (DYW) Orkney and the local Skills Development Scotland team. Six second year pupils from Kirkwall Grammar School volunteered to take part in the co-design and during a two-day process, they came up with a concept for the type of careers learning they would like to take part in. This concept was then developed by partners into the final event, Island Legacy, which was delivered to all S2 pupils over two days.
- 1.3. 'Island Legacy' is a choose your own adventure game, where pupils are stranded on an island and work in teams to either try to escape, or remain, survive and thrive. During the game, teams move around the island gathering resources, encountering obstacles or gaining advantages as they try to escape or remain and build a community.
- 1.4. Alongside the game element, pupils took part in five experiences which helped them to develop transferrable skills and explore a variety of careers. Each experience had a competitive element and the points gained could be used to buy resources and help their progress in the game.
- 1.5. The experiences pupils took part in were delivered by the UHI STEM Co-ordinator, the Moredun Institute, staff from Skills Development Scotland and DYW Orkney. Experiences delivered included an engineering challenge to build a communications tower, a STEM activity to identify and manage disease in animals and a design activity to create a flag for their team. Pupils also took part in team-building activities to help with their team-working, problem solving and communication skills.
- 1.6. The pilot was supported by careers guidance inputs from Skills Development Scotland Careers Advisers who worked with pupils before and after the event to help them identify the skills they developed.
- 1.7. The pilot was so successful in Orkney that it was delivered again in May 2026, with plans for it to be an annual event for S2 pupils at Kirkwall Grammar School.

2. Isles Careers Roadshow

- 2.1. Developed by the DYW School Co-ordinator for the Junior High Schools, the Isles Careers Roadshow gave pupils who live on Sanday, Stronsay and Westray the chance to meet local employers and learn more about the careers available across Orkney.
- 2.2. Held in each of the Junior High Schools, the events were targeted to pupils in upper primary (Primary 5-7) and secondary school (Secondary 1-4). Pupils were able to speak to employers and ask questions, learning more about what their business does, the variety of jobs available and some of the routes into careers including apprenticeships, further training and education. There was also a chance to try out some fun activities and some of the equipment used in different jobs.
- 2.3. The islands' Development Trusts also attended their local event, helping young people know more about the role they play on the island and showcasing some of the local job opportunities with the development trust. In addition, at Westray Junior High School, the Parent Council also attended to explain how they add to school life.
- 2.4. DYW Orkney and Careers Advisers from Skills Development Orkney were also on hand with information about apprenticeships, courses available at UHI Orkney and support for anyone who may need help to take the next step on their career journey.
- 2.5. Across the three events, 14 different businesses and organisations attended, including NHS Orkney, Police Scotland, the Pickaquoy Centre and BAM Nuttall.

3. Construction Careers Event

- 3.1. Following a successful event in 2023, Orkney Construction Training Group and the Construction Industry Training Board (CITB) held their second construction career event in October to showcase the variety of careers available in the industry.
- 3.2. DYW Orkney supported the event and facilitated school attendance for all S3 and S4 pupils. Pupils had a chance to 'have a go' at some of the trades, with ten stations dedicated to different areas of the industry including joinery, painting and decorating, plumbing, stonemasonry and, architecture and CAD drawing. There was also a chance to see some heavy plant machinery.
- 3.3. Some of the activities pupils could try out included bricklaying, taping and filling and wiring a light switch. There was also a chance to try out operating a crane and climb some scaffolding.

- 3.4. Thirteen employers within the construction industry supported the event, along with staff from UHI Orkney, the CITB Apprenticeship Officer in Orkney and staff from Orkney Construction Training Group, who organised the event.
- 3.5. Employers were on hand to speak to attendees, answering their questions about working in the construction industry. They also explained how to undertake the activities on offer and provided advice and support to attendees while they tried their hand at some of the activities.
- 3.6. As a result of the event, many pupils have undertaken work placement opportunities with local construction businesses, some of which have resulted in apprenticeship opportunities.

4. Stromness Academy Careers Week

- 4.1. Careers Week is an annual week of activity held at Stromness Academy. Now in its seventh year, it was developed to support S3 pupils as they make their subject choices for fourth year.
- 4.2. Throughout the week, pupils learn about some of the careers available to them in Orkney and hear about the different pathways they can take to achieve their future career. The aim of the week is to inspire pupils and help them make more informed choices for the subjects they want to study in S4 and beyond.
- 4.3. The week's activity included an opening assembly where they heard from an inspirational speaker, took part in games to help them explore careers, and learnt about the support available to them as they prepare to move on from school to further education, training or employment.
- 4.4. A series of workplace visits were offered throughout the week, with pupils choosing from a visit to a construction site, a tour of Kirkwall Airport, a visit to a local nursery or a tour of Northlink Ferries's Hamnavoe. All visits gave pupils a chance to see 'behind the scenes' of a workplace and learn more about the different careers available.
- 4.5. Four 'Lunch with an Employer' sessions were also held, offering a variety of activities to help pupils learn more about some of the skills they may need in a particular business. Employers included NHS Orkney and Hamnavoe House; Kyloe Partners; Katy Firth, the Ness of Brodgar Education Officer, and Freedom Group.
- 4.6. Pupils also took part in a Medical Insight Session when a GP and two medical students from Heilendi Medical Practice visited the school to deliver a skills

workshop, showing pupils how to deal with a choking incident and how to use a defibrillator. They also had a chance to test their suturing skills and listen to a talk about working as a GP. All pupils in S3 and those in S4 and S5 who are studying two or more sciences, were given the opportunity to attend this session.

- 4.7. The week concluded with a careers fair held in the school which was attended by 12 exhibitors and open to all S3-S6 pupils, with S1 and S2 pupils attending a drop-in session over break-time.
- 4.8. Throughout the week, S3 pupils had the opportunity to engage with 20 different businesses and organisations, learning about a variety of careers and pathways.

5. Other Activity

- 5.1. In addition to the above activities, the DYW Orkney team supported 95 pupils to undertake a work placement, supported by 51 employers. This included placements to facilitate apprenticeship or training opportunities when they leave school and placements to give pupils an insight into their preferred career, or to gain experience to help them apply for a job, apprenticeship, college or university course.
- 5.2. The school leavers' programme, Planning for the Future, is delivered in partnership with Skills Development Scotland and offered to pupils who planned to leave school at the end of the academic year. Delivered as a two-day intensive programme, with sessions in Stromness and Kirkwall, the programme helps pupils explore their options, identify their skills and provides them with the tools to write a CV, complete an application form and prepare for an interview. The programme ends with a mock interview session with local employers. This year, 27 pupils attended the programme.
- 5.3. A Health and Wellbeing event was held at Kirkwall Grammar School for a second year. Developed to support senior pupils as they prepare to complete final assessments, sit their exams and get ready to leave school, the event reminds pupils to take care of their physical and mental wellbeing, ensuring they have some balance alongside the pressures of schoolwork. An introductory assembly let pupils hear from three speakers – Councillor Jean Stevenson; local athlete and Midwife, Tayla Paterson and, Cameron McConnachie from the Orkney Drug and Alcohol Partnership. Pupils then attended a marketplace in the school Dance Studio where 16 local organisations were on hand to promote the support that is available to help young people navigate this stage of life. Finally, over lunch Orkney Rugby Club ran a taster session for all school pupils.

- 5.4. An Apprenticeship Marketplace was held at Kirkwall Grammar School in November as part of Scottish Careers Week. The event was aimed at senior phase pupils to help them understand the breadth of opportunities available with local businesses. Seven businesses attended along with CITB, UHI Orkney and Skills Development Scotland, while DYW Orkney staff provided information about the three apprenticeship levels available in Scotland.
- 5.5. A Maritime Pathways event was delivered to S3 pupils at Stromness Academy, to help them learn more about the wide range of careers available in the Maritime sector. Delivered by the Scottish Maritime Cluster as part of a national programme, the event let the pupils take part in hands-on activities that brought industry roles to life, while also equipping them with key skills such as team work, problem-solving and creativity. They were also able to speak to industry professionals to gain an insight into their job roles.
- 5.6. A group of pupils from Stromness Academy took part in a programme to gain an insight into a career as a Midwife, which was developed and delivered in partnership with NHS Orkney. The programme aims to help them learn more about the role of a midwife and help them gain knowledge that will be beneficial of a college, UCAS or job application and interview. Pupils first take part in the Solihull Approach for Young People, which is delivered by the OIC's Early Years Team. They are then able to observe Parentcraft classes, which are delivered by a midwife and attended by expectant mums and their partners. The programme concluded with a tour of the Maternity Unit where pupils were able to see the clinical environment midwives work in and learn more about some of the activities they undertake as part of their duties. Pupils were also able to ask questions and learn more about the different routes into a career as a midwife.
- 5.7. Pupils from Stromness Academy and Kirkwall Grammar School have taken part in Save a Life Scotland Training, which was organised by their DYW School Co-ordinators. The Heartstart Course taught them life-saving CPR skills, how and when to use a defibrillator and how to deal with a choking incident. They were also taught how to deal with an emergency situation, learning who to call and what to say in an emergency, how to place someone in the recovery position and how to check if someone is breathing properly. A total of 76 pupils across both schools took part, all receiving certificates in recognition of their participation and completion of the course.

Item: 10

Education, Communities and Housing Committee: 9 September 2026.

Local Housing Strategy – Annual Report.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report summarises progress over the second completed year of the Local Housing Strategy (LHS), for members' information.
- 1.2. The LHS was approved in July 2024. There is a requirement to report annually to the Council, the Orkney Housing Market Partnership and the Scottish Government.
- 1.3. The Strategy has three strategic priorities:
 - More Homes.
 - Quality Warm Homes.
 - Access and Choice of Housing for All.
- 1.4. This annual report shows the considerable progress that has been made to set a new framework for housing supply delivery in Orkney over the next ten years, with the focus of activity being to drive new affordable housing supply. In addition, progress has also been made in relation to the two other strategic objectives as set out in this report and monitoring action plan.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
 - i. Note progress in implementation of the Local Housing Strategy, as detailed in Appendix 1 to this report, including the following:
 - Consultation and ongoing engagement undertaken with the Housing Market Partnership and the wider construction sector during 2025 and 2026.
 - Publication of guidance and briefing notes on the Council's definition of affordable housing and the Strategic Housing Investment Plan.
 - ii. Note amendments to the Action Plan, as detailed in section 5 of this report.

3. Background

- 3.1. The Housing (Scotland) Act 2001 places a statutory duty on local authorities to assess the housing needs of all persons in the area, across all housing tenures, and to develop strategies to meet those needs. This requires the production of the Housing Need and Demand Assessment (HNDA) and Local Housing Strategy (LHS). The Strategy sets out the priorities and actions required for housing supply, housing quality, and access to housing.
- 3.2. The Orkney Housing Market Partnership encompasses the Council's Member Officer Working Group for the Local Housing Strategy and involves a range of stakeholders including a range of internal Council Services and external organisations including Orkney Housing Association (OHAL), Places for People Scotland (PfP), UHI Orkney, Development Trusts' representatives, Highland and Islands Enterprise (HIE), housebuilders, NHS Orkney, Scottish Government More Homes Division and Scottish Water.
- 3.3. The Partnership is led by the Council and has responsibility for developing and monitoring the LHS implementation on behalf of Orkney Islands Council. There must also be an annual report to the Council, and the Scottish Government.
- 3.4. Ongoing consultation on implementation of the Local Housing Strategy continues through quarterly meetings with the Housing Market Partnership. The Housing Market Partnership met in October 2025, March 2026 and June 2026. In addition, a special meeting was held with the construction industry where all private developers and contractors were invited to a meeting in December 2025 where the approved Strategic Housing Investment Plan (2026 onwards) was discussed with the sector.
- 3.5. An update on the Local Housing Strategy progress achieved to June 2026 was presented to the Housing Market Partnership at its meeting on 25 June 2026. The content of that update is included in this annual report.

4. Progress with the Local Housing Strategy

- 4.1. Unless otherwise stated, progress relates to the first two years of implementation from June 2024 to June 2026 (as the LHS was approved in June 2024).

Housing Market Drivers

- 4.2. The key housing market drivers that underpin the original Housing Need and Demand Assessment (2023) and the Local Housing Strategy (2024) remain unchanged. The new 2022 based household projections (based on the 2021 census) shows that household numbers will continue to grow in Orkney, that average house prices in Orkney are higher than Scottish average and prices continue to increase at a faster rate. This is an indication of housing market pressure, and housing demand/supply imbalance.
- 4.3. This means the Housing Supply Target of 103 per annum, 60 affordable, continues to be relevant, and that a mix of affordable housing is required, made up of social rent; mid-market rent; and low-cost housing for sale. This will seek to address the housing needs of those with average or lower household income.

More Homes

- 4.4. The key focus of activity over the first two years of LHS implementation has continued to be the implementation of the More Homes priority.
- 4.5. The Housing Supply Target is 1030 over 10 years, or 103 per annum with a 60/40 affordable/private split.
- 4.6. Progress in delivering more homes during the period June 2025 to June 2026 included:
 - 79 new homes have been built in Orkney against a Housing Supply Target of 103 (60/40 affordable/private). This is an improvement on last year's total of 69 new build completions across tenures.
 - 32 homes were affordable – delivered by the Council, Orkney Housing Association Limited (OHAL), Partnership Support for Regeneration (housing for sale) and New Supply Shared Equity.
 - The tenure split achieved over the year was 40% affordable / 60% private, which is the reverse of the 60% affordable / 40% private target.
 - However, there has been considerable progress in driving a pipeline of new affordable homes. Scottish Government statistics on the Affordable Housing programme shows for the financial year 2025/26 that there were 76 affordable housing approvals, 58 site starts and 40 completions. This provides a very healthy pipeline for completions over this year and next year.
 - As a result, the 2025/26 financial year position showed record investment in new affordable housing in Orkney. The actual Scottish Government Affordable Housing Supply grant in Orkney for new affordable housing was £6.57m

compared to the Resource Planning Assumption (budget) of £4.068m. This is 61% more than budget and is the first time in ten years in Orkney that spend has been more than the Scottish Government budget allocation. Projections for 2026/27 show a higher spend relative to budget which will convert into more homes being built.

- In addition to new build housing, there were 25 ‘off the shelf’ acquisitions by the Council and OHAL to be provided for social rent.
- Key affordable new build sites have included Walliwall (OHAL), Moar Drive in Kirkwall and Copland’s Road in Stromness (both Council).
- Isles Development Trusts have a current pipeline for ten additional homes across North Ronaldsay, Papa Westray, Westray, Eday, Rousay and Shapinsay.
- Work is ongoing to repurpose St Rognvald House on a temporary basis for agency worker accommodation. When it is vacated by current residents, the aim is that this will release mainstream private rented sector housing for Orkney residents. A bid for funding for the repurposing works has been made to the Scottish Government Islands Programme.
- Planning permission was granted for a housing site at Houton funded by SSEN. This is a significant community benefit investment in servicing a housing site for SSEN’s short-term temporary use, and long-term permanent housing development.
- The number of empty homes being brought back into use has increased to 23 in 2025/26 and the Empty Homes Loan Scheme has been funded up to £1m over five years by the Strategic Reserve Fund. Procedures are being completed for application to be invited from the public in late summer.
- Additional resources have been obtained from the Scottish Government for the Empty Homes Officer from 2026/27 so that this part-time role can become a full-time role.
- Three briefings were issued to the Housing Market Partnership in 2026 which provides guidance to all stakeholders on the definition of affordable housing, on the Strategic Housing Investment Plan, and how any Council owned land can be used to support delivery of the SHIP:
 - o [Guidance Note on Requirements for SHIP New Build Developments.](#)
 - o [Briefing on Affordable Housing.](#)
 - o [Briefing on the Strategic Housing Investment Plan \(SHIP\) and Land for Housing.](#)
- Work is ongoing on the development of the new Local Development Plan which will align to the Housing Needs and Demand Assessment, and the Local Housing Strategy.

- 4.7. A key action identified in the LHS was to enable delivery of the Housing Supply Target of 1030 houses by improving the capacity for more new affordable housing supply in Orkney. To that end, a Strategic Co-operation Agreement has now been entered into with Places for People Scotland for the Registered Social Landlord to develop and manage 500 affordable homes over the next ten years. Four Council-owned sites have been identified for their development, starting with the former Papdale Halls of Residence site, and Weyland. Other sites include Council-owned housing land at Soullisquoy and Berstane. Any Council land sold to any housing development is sold in line with the Council's Best Value duty, sold at Market Value for affordable housing, which will be valued independently in line with the current Royal Institution of Chartered Surveyors (RICS) guidance.
- 4.8. The Council is in the process of procurement for the demolition of the former Papdale Halls of Residence, with contract award expected during financial year 2026/27. At the same time, Places for People Scotland is undertaking due diligence for new housing development on this site, and the Weyland site.
- 4.9. The Council's decision in July 2025 was that Strategic Co-operation Agreements be entered into with both Places for People Scotland and Orkney Housing Association to drive forward the requirement for more homes. Discussions with Orkney Housing Association are ongoing with a commitment for land to be available for at least 200 homes over ten years, taking into consideration its existing land bank.
- 4.10. The Council's Housing Service and Planning Service meet on a monthly basis to consider implementation of the SHIP programme and to identify any barriers to housing supply and agree potential solutions. This relates to current and potential future planning applications in respect of housing developments included in the SHIP and identifies any issues affecting the determination of those, with the overall aim of meeting the SHIP programme and housing supply target.

Quality Warm Homes

- 4.11. The findings of the Scottish House Condition Survey, published on 26 May 2026, on fuel poverty has shown that Orkney residents suffer from the highest level of fuel poverty and extreme fuel poverty when compared to Scotland generally. Fuel poverty is experienced by 51% of households in Orkney compared to 31% in Scotland overall. Extreme fuel poverty is suffered by 34% of Orkney households compared to 17% in Scotland overall. This is driven by factors outwith the control of the Council and its partners, energy prices and Orkney's climate. The worst performance is in private properties.

- 4.12. There are mitigations the Council and its partners undertake and will continue to take including improvements in stock, the Heat and Energy Efficient Scotland: Area Based Schemes (HEES: ABS) programme for the private sector, and advice on income maximisation. HEES: ABS continues to be an important mechanism to improve energy efficiency in the private sector through £1.97m funding, supporting 127 households with 199 energy efficiency measures projected to be installed. There still requires, however, to be better targeting in the private sector, which will be actioned over the next year.
- 4.13. The two existing social housing providers continue to invest in homes to maintain the Scottish Housing Quality Standard (SHQS) and Energy Efficiency Standard for Social Housing (EESH).

SHQS performance for financial year 2025/26 shows:

- 93.88% compliance for the Council.
- 99.88% compliance for Orkney Housing Association.

Energy efficiency performance for financial year 2025/26 shows:

- 94.64% compliance for the Council.
- 100% compliance for Orkney Housing Association.

The difference in compliance reflects the different age and stock profile of the two landlords. Confirmation on requirements of the Social Housing Net Zero Standard (SHNZ) is still awaited from Scottish Government.

- 4.14. The Council has now commissioned its housing stock condition survey. This will inform the Council's housing stock improvement programme going forward, including energy efficiency and net zero requirements.

Access and Choice of Housing for All

- 4.15. There has been a reduction in the number of people on the social housing waiting list. This reduction, however, does not represent a reduction in housing need. The peak in the waiting list in 2023/24 was influenced by administrative issues with applicants remaining on the register when they no longer had housing need.
- 4.16. Unfortunately, at the same time, critical housing need evidenced through homelessness has been increasing in terms of homeless presentations, and the duty to house. There have also been increases in the time homeless households have been living in temporary accommodation.

- 4.17. It should be noted that Orkney's housing crisis is no longer affecting only those traditionally considered most vulnerable. Rising house prices, limited private rented accommodation and a shortage of affordable homes mean increasing numbers of working households and older people are now seeking assistance through homelessness services. This is why the drive for 'More Homes' is essential to increase permanent housing supply.
- 4.18. A significant proportion of social lets go to those who have experienced homelessness, but this varies by provider; 54% of all Council housing lets, and 36% for OHAL.
- 4.19. Key actions that have been taken forward in relation to Access and Choice of Housing for All over the last year have included:
- Moving forward with digital housing management and application administrative improvements.
 - Continued discussion with Orkney Housing Association to increase lets to homeless households through the use of Section 5 of the Housing (Scotland) Act 2001, which is a mechanism to require a Registered Social Landlord to provide accommodation to homeless households.
- 4.20. In relation to enabling people to live independently, the development at Moar Drive, Kirkwall, has now started on site and provides important reprovisioning on the current provision. The proposed new build at Copland's Road in Stromness will also provide accessible housing suitable for a range of household types and needs including, but not limited to, independent living for older people.

5. Next steps

- 5.1. As a result of two years' implementation experience, there are a number of actions in the LHS Action Plan that are proposed for change as follows:

More Homes

Action	Proposed amendment
Create a Council-sponsored approach to new supply for mid-market rent to complement other supply.	Remove this action due to the Strategic Co-operation Agreement entered with Places for People Scotland who can deliver mid-market rent, and Orkney Housing Association's intention also to provide mid-market rent through its private subsidiary.

Action	Proposed amendment
Continually monitor the number of Short Term Lets (STLs) and review the experience of STL control areas from other areas in Scotland to assess their impact and relevance to Orkney.	Change to: Continually monitor the number of Short Term Lets (STLs) and second homes and review the experience of STL control areas from other areas in Scotland and the use of other mechanisms and assess their impact and relevance to Orkney. Take a Place-based pilot approach in Stromness analysing short-term lets, second homes and empty homes to develop proposals for intervention if required. (Note that there are other actions in the LHS relating to long term empty homes that are not second homes).
Review the Council's serviced site policy to ensure these are targeted for households with primary residency, identifying key eligibility criteria e.g. first time buyers, essential workers etc.	Additional action.
Create a new policy in relation to use of the Affordable Housing Supply Programme Partnership Support for Regeneration Grant (housing for sale) so that it is targeted for households with primary residency, identifying key eligibility criteria e.g. first time buyers, essential workers etc and where possible retain this housing for sale as affordable.	Additional action.

Quality Warm Homes

Action	Proposed amendment
Use Energy Performance Certificate (EPC) data, Heat and Energy Efficiency Scotland: Area Based Schemes (HEES: ABS) programme information and other local housing data to better target fuel poverty and energy efficiency support, particularly towards lower-performing	Additional action.

Action	Proposed amendment
private sector homes and areas where poorer energy performance is more concentrated.	

- 5.2. Implementation of the LHS will continue with ongoing monitoring and consultation through the Housing Market Partnership on a quarterly basis, with an annual update provided to the wider housing development and construction industry on the approved Strategic Housing Investment Plan.

For Further Information please contact:

Laura Baillie, Team Manager (Housing Strategy, Development and Data), extension 3388, Email laura.baillie@orkney.gov.uk.

Implications of Report

- 1. Financial:** The LHS is implemented within existing resources and budgets, and any new build resourced within housing providers' business plans and Scottish Government Affordable Housing Supply Programmes Grant.
- 2. Legal:** The Council has a duty under the Housing (Scotland) Act 2001 to assess the housing needs of all persons in the area, across all housing tenures, and to develop strategies to meet those needs. Approving the recommendations in this report will assist the Council in discharging that duty.
- 3. Corporate Governance:** Not applicable.
- 4. Human Resources –** The proposed increase to full time for the Empty Homes Officer post will require to have governance approval via the Change in Establishment process and will then be subject to appointment in line with the Recruitment and Selection Policy and Procedure.
- 5. Equalities -** An Equality Impact Assessment is not required for performance monitoring.
- 6. Island Communities Impact -** An Island Communities Impact Assessment is not required for performance monitoring.
- 7. Links to Council Plan -** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☒ Growing our economy.
 - ☒ Strengthening our Communities.
 - ☒ Developing our Infrastructure.
 - ☐ Transforming our Council.

- 8. Links to Local Outcomes Improvement Plan** - The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
- ☒ Cost of Living.
 - ☒ Sustainable Development.
 - ☒ Local Equality.
 - ☐ Improving Population Health.
- 9. Environmental and Climate Risk:** Not applicable.
- 10. Risk:** Not applicable.
- 11. Procurement:** Not applicable.
- 12. Health and Safety:** Not applicable.
- 13. Property and Assets:** Not applicable.
- 14. Information Technology** - Not applicable.
- 15. Cost of Living:** Not applicable.

List of Background Papers

[Housing Need and Demand Assessment \(2023\).](#)
[Local Housing Strategy \(2024\).](#)
[Essential Workers Housing Strategy \(2024\).](#)
[Strategic Housing Investment Plan \(2025\).](#)
[Guidance Note on Requirements for SHIP New Build Developments \(January 2026\).](#)
[Briefing on Affordable Housing \(April 2026\).](#)
[Briefing on the Strategic Housing Investment Plan \(SHIP\) and Land for Housing \(April 2026\).](#)

Appendix

Appendix 1: LHS Monitoring Tables.

Appendix 1: LHS Monitoring Tables

Priority: More Homes Summary: The Housing Supply Target is 1030 homes over 10 years (103 per annum). The Council will shift its focus to develop its housing strategic and enabling role to support the housing supply system to deliver this target across tenure and by different providers (affordable and private). Additional affordable housing providers will be required to achieve housing targets. All new housing supply will be built in line with the principles of good placemaking and sustainability. Other local plans and priorities: Community Plan – Sustainable Development, Local Equality. Council Plan – Growing our Economy, Developing our Infrastructure. Local Development Plan. Orkney Strategic Housing Investment Plan. Essential Workers Housing Strategy.
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Outcome: More homes are supplied for rent or to buy across Orkney Islands communities. Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.												
YEAR 1 / ONGOING.															
Introduce a ‘More Homes’ strategic programme delivery approach to create a longer term and more certain pipeline to enable supply of 103 homes per annum over 10 years. Target of 60/40 affordable/private. The enabling approach will include master planning, infrastructure first and land assembly where required to facilitate development. The More Homes Programme includes new	Baseline – existing SHIP sub-group. Target – 103 homes per annum (60/40 affordable/private), 1030 homes, 10 years.	https://www.gov.scot/publications/housing-statistics-for-scotland-new-house-building/ Progress – Calendar year - Latest data Q4 2025. <table><tr><th>2025 Q2</th><th>2025 Q3</th><th>2025 Q4</th><th>2026 Q1</th><th>YTD</th><th>Annual target</th></tr><tr><td>26</td><td>11</td><td>24</td><td>18</td><td>79</td><td>103</td></tr></table> Scottish Government reporting: Records show 79 new-build completions in 2025/26. Approximately 60% were private sector homes, with the remaining 40% delivered through a range of affordable housing routes, including: Council and Orkney Housing	2025 Q2	2025 Q3	2025 Q4	2026 Q1	YTD	Annual target	26	11	24	18	79	103	Team Manager (Housing Strategy, Development and Data).
2025 Q2	2025 Q3	2025 Q4	2026 Q1	YTD	Annual target										
26	11	24	18	79	103										

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
housing across all Orkney islands communities, and for supported housing.		Association developments; Partnership Support for Regeneration (PSR); New Supply Shared Equity (NSSE) schemes; and Development Trust projects. Local Building Control data: 77 homes completed in 2025/26 including 9 conversions. 31 homes (40%) affordable – delivered by the Council, Orkney Housing Association Limited, Partnership Support for Regeneration (PSR) and New Supply Shared Equity (NSSE) schemes and Isles Development Trusts. Based on Building Control completion certificates, showing homes completed and ready for occupation by 31 March 2026. Performance against target: Total completions: 77% of the annual target of 103 homes. Tenure split: 40.5% affordable / 59.5% private.	
Implement the Essential Workers Housing Strategy to deliver 220 homes for essential workers over 10 years including: • OIC securing 20 properties through private sector leasing. • Enabling 150 new build houses for Mid Market Rent.	Target - 220 homes over 10 years. At least 110 first 5 years. Within overall More Homes programme above.	2024/25 – 14 homes secured to support essential workers A total of 14 homes were secured during 2024/25 to support the delivery of the Essential Workers Housing Strategy, comprising Yorston Drive, Stromness (3), Nicolson Street, Kirkwall (4), and Albert Street and Laing Street, Kirkwall (7) by Orkney Islands Council. These acquisitions were supported through Scottish Government funding and have increased the supply of housing available to essential workers in Orkney. 2025/26 – 12 homes secured to support essential workers	Team Manager (Housing Strategy, Development and Data).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
- Enabling 85 acquisition for Mid-market rent. - Enabling 40 empty homes brought back into use targeted for essential workers.		A total of 12 homes were secured during 2025/26 to support the delivery of the Essential Workers Housing Strategy, comprising Albert Street and Laing Street, Kirkwall (9) by Orkney Islands Council, and homes acquired by Orkney Housing Association Limited (3). These acquisitions were supported through Scottish Government funding and have increased the supply of housing available to essential workers in Orkney.	
Undertake acquisitions of individual properties in the existing market or from developers for social rent or MMR where the properties can be brought up to relevant standards.	Baseline – get average over 5 years purchases off the shelf.	2024/25 – 14 off-the-shelf properties acquired A total of 14 off-the-shelf properties were acquired during 2024/25. These homes have already been reported above as secured for essential workers and comprise Yorston Drive, Stromness (3), Nicolson Street, Kirkwall (4), and Albert Street and Laing Street, Kirkwall (7). 2025/26 – 25 off-the-shelf properties acquired A total of 25 off-the-shelf properties were acquired during 2025/26. This comprised 12 homes already reported above as secured for essential workers — Albert Street and Laing Street, Kirkwall (9), and Orkney Housing Association Limited acquisitions (3) — together with 13 further homes acquired for social rent, comprising Walliwall, Kirkwall (6), Cairston, Stromness (2), individual off-the-shelf acquisitions by Orkney Islands Council (3), and Orkney Housing Association Limited (2).	Team Manager (Housing Strategy, Development and Data).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		The acquisition programme continued beyond the year end, with a further six homes at Cairston, Stromness progressing towards acquisition in 2026/27.	
Identify and appraise options/feasibility for developing new accommodation and repurposing existing buildings for shorter-term accommodation for essential workers and students.		St Rognvald House remains included in the Strategic Housing Investment Plan (SHIP) (Years 5–10) for future permanent housing use. A proposal to repurpose the building for short-term essential worker accommodation was approved by the Policy and Resources Committee following consideration of the Capital Project Appraisal (CPA) Stage 1 Outline Business Justification Case. The approved proposal will enable the development of temporary accommodation for essential workers while retaining the long-term option for permanent housing use. The project will now progress through the next stage of the Capital Project Appraisal (CPA) process, with detailed design, feasibility and option appraisal to be developed as part of the CPA Stage 2 process.	Team Manager (Housing Strategy, Development and Data).
Work with new infrastructure developers to understand their temporary accommodation requirements, mitigate risks to the existing market and maximise legacy for future housing supply.		Discussions have been ongoing with SSEN since 2024/25 to obtain housing legacy: • SSEN has approved provision of serviced site at Houton for eventual housing development after their spillover workers site use. • Houton site works contract has been awarded with completion projected for September 2026.	Team Manager (Housing Strategy, Development and Data).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		The Empty Homes scheme funded by SSEN has progressed, with contracts issued for 3 properties. This meets SSEN's need for manager accommodation.	
Use the Council's 'Rural Housing Body' status so that where new homes are built on council land and building apply a primary residence burden on housing property (and potential affordability criteria).	Target - All housing built on OIC land/property.	OIC Legal Services has explored Rural Housing Body (RHB) status for disposing of Council land for housing. RHB places a legal burden on the land, ensuring that any housing developed must be used as a primary residence, helping to safeguard against second home use and support sustainable communities. However, initial research shows that the mortgage lender market is inexperienced with this approach which places a legal burden for sales in a whole area rather than specific houses and may make properties unmarketable. Instead, the Council could use prohibition on the use of land for second homes through the sales contract/missive. This could be required when the Council is selling land for housing, whether individual plots, or large sites. Shapinsay Development Trust was formally approved as a Rural Housing Body in 2024/25. This enables them to acquire land for community-led housing with long-term protections in place, supporting the delivery of affordable, permanent homes for local people.	Team Manager (Housing Strategy, Development and Data).
Ensure principles of good placemaking and sustainability are adopted on all new housing sites across all Orkney	All new housing developments approved from Year 1.	Ongoing through Planning processes.	Service Manager (Development

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
communities i.e. mixed communities, housing choice, quality homes, in the right location and of the right tenure and size. (Will be considered through the review of the Local Development Plan).			and Marine Planning).
Increase density in towns and key villages where relevant. This will be in line with National Planning Framework 4 and the review of the Local Development Plan.	Increase density to 20-35 density per hectare.	Ongoing through Planning processes and review of the Local Development Plan.	Service Manager (Development and Marine Planning).
Provide serviced sites and a design guide for self-build and develop a register for those interested in self-build. Consider within the More Homes programme where demand for self-build can be satisfied.		Through the review of the Local Development Plan joint working with the Housing Service and Development and Marine Planning Service will investigate locations for serviced sites for self-build. The establishment of a register is a provision in the recent changes to the planning system which the Development and Marine Planning Service lead on. This register will ask key information such as locations where members of the public would like to build.	Service Manager (Development and Marine Planning).

Outcome: The capacity to deliver more affordable homes is increased by attracting new housing providers to Orkney, and/or by creating new affordable housing supply mechanisms.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Undertake discussions with at least one established affordable housing provider with track record and financial capacity to supply new housing in Orkney.		Orkney Islands Council has entered into a Strategic Cooperation Agreement with Places for People Scotland for the supply of 500 homes over 10 years.	Director (Education, Communities and Housing) and Head of Strategic Housing, Housing Operations and Homelessness.
Create a Council-sponsored approach to new supply for mid-market rent to complement other supply.		Orkney Islands Council has entered a Strategic Cooperation Agreement with Places for People Scotland for the supply of 500 homes over 10 years.	Director (Education, Communities and Housing) and Head of Strategic Housing, Housing Operations and Homelessness.

Outcome: Housing supply processes are more efficient within the Council, and across partners and to enable value for money new supply.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Review the Council's Capital Project Appraisal process as it relates to new Council housing to ensure it is sufficiently agile.		Complete. Guidance has been issued by OIC to all OIC internal and external stakeholders on the affordable housing development programme funded through the Affordable Housing Supply Programme. This sets out requirements on process and space standards guidance to ensure fundability and efficiency.	Capital Projects and Programme Management Officer.
The review of the Local Development Plan will be completed in line with National Planning Framework 4. The Service is proposing to provide within a new Local Development Plan infrastructure and design information for settlements and allocated land to enable appropriate development.		LDP is under review.	Service Manager (Development and Marine Planning).
Where there are workforce constraints e.g. in new housing design, regulatory approval and construction sector, make use of		Ongoing.	Team Manager (Housing Strategy,

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
the wider supply chain to provide greater capacity and agility to deliver the More Homes programme.			Development and Data).
YEAR 2.			
Consider use of modular build and modern methods of construction where relevant.		Progress ongoing through UHI Orkney. UHI Orkney has been awarded funding from SSEN to progress a programme for very small modular units, initially for student use, particularly for ferry-linked island students. These will be built by the Construction department.	Team Manager (Housing Strategy, Development and Data).
Develop a common affordable housing specification to improve efficiency and design out cost.		Guidance has been issued by OIC to all OIC internal and external stakeholders on the affordable housing development programme funded through Affordable Housing Supply Programme setting out requirements on process and space standards guidance to ensure fundability and efficiency. At this stage, this does not involve a common housing specification but outlines expectations on minimum and maximum space standards, and process.	Team Manager (Housing Strategy, Development and Data).
Adopt a partnership approach to new mixed housing developments where one partner leads on design and procurement and transfers ownership at the end of development. Test through implementation of site K9.		K9 on hold meantime.	Team Manager (Housing Strategy, Development and Data).

Outcome: Empty homes are brought back into use for Orkney residents and essential incoming workers.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Encourage homeowners to bring empty homes back into use through information and advice.	Baseline - 70 homes since 2016 – average 10 per annum. Target - 15 per annum.	Empty homes activity continued to exceed expectations. 2024/25 – 16 empty homes brought back into use. 2025/26 – 23 empty homes brought back into use. This represents an increase of 44% compared with the previous year and continues to make a significant contribution to increasing housing supply and reducing the number of long-term empty properties across Orkney. During 2025/26, the Council developed and approved an Empty Homes Loan Scheme to support owners of long-term empty properties to undertake renovation and improvement works. The scheme will launch in 2026/27 and provides repayable loans to help bring empty homes back into use, increasing housing supply and supporting delivery of the Local Housing Strategy.	Development and Empty Homes Officer.
Incentivise more empty homes being brought back into use through local authority grant (Housing (Scotland) Act 2006).			
Bring empty homes back into use through acquisition for social rent or MMR where the properties can be brought up to relevant standards.			
Understand the scope of empty homes that can be used for infrastructure workers – undertake empty home-owners survey and work with infrastructure developers	Baseline – 0. Target - 10 homes while infrastructure works ongoing	Empty Homes scheme funded by SSEN has progressed, with contracts issued for three properties.	Development and Empty Homes Officer.

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
through the 'matchmaker style scheme' to match properties to temporary residents.	(10 in addition to above).		
Achieve legacy from empty homes that are brought back into use for infrastructure workers by working with homeowners to continue offering the property for let or sale for primary residence once infrastructure workers have left Orkney.	Baseline – 0. Target - 10 properties added to residential housing stock.	As above – The Empty Homes scheme funded by SSEN has progressed, with contracts issued for three properties.	Development and Empty Homes Officer.
Liaise with Scottish Empty Homes Partnership to lobby UK/Scottish Government directly and through existing networks on additional resources to improve energy efficiency for private sector housing, to revise VAT on repairs and maintenance works, including funding for empty homes (also in Quality Warm Homes below).		Additional resources have been obtained for the Empty Homes Officer from 2026/27.	Service Manager (Resources).

Outcome: The number of Short-Term lets (STLs) and second homes are monitored to understand the impact on Orkney's housing system, and where necessary the number of STLs are controlled.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.																																										
YEAR 1 / ONGOING.																																													
Continually monitor the number of Short Term Lets (STLs) and review the experience of STL control areas from other areas in Scotland to assess their impact and relevance to Orkney.	Baseline - At May 2023; 400 STLs. Monitor change annually.	Short term let OIC register June 2026 - Licensed short-term lets: 621 - Applications pending: 9 - Total including pending: 630 Of the 621 licensed short-term lets, 515 are secondary letting properties (entire homes). Further work is ongoing between Housing Services and Planning Services to examine Short Term let data sources in detail and establish any overlaps between empty homes, second homes and short term lets. <table><tr><th></th><th>Dwellings (NRS)</th><th>Short term lets* (OIC register) Dec 2024</th><th>Short term lets* (OIC register) May 2026</th><th>% STLs to dwellings</th><th>Change (no.)</th></tr><tr><td>East Mainland</td><td>2,898</td><td>87</td><td>87</td><td>3.0%</td><td>0</td></tr><tr><td>Isles</td><td>1,721</td><td>49</td><td>59</td><td>3.43%</td><td>+10</td></tr><tr><td>Kirkwall</td><td>3,299</td><td>200</td><td>225</td><td>6.82%</td><td>+25</td></tr><tr><td>Stromness</td><td>1,114</td><td>101</td><td>114</td><td>10.23%</td><td>+13</td></tr><tr><td>West Mainland</td><td>2,526</td><td>123</td><td>136</td><td>5.38%</td><td>+13</td></tr><tr><td>Total</td><td>11,558</td><td>560</td><td>621</td><td>5.37%</td><td>+61</td></tr></table>		Dwellings (NRS)	Short term lets* (OIC register) Dec 2024	Short term lets* (OIC register) May 2026	% STLs to dwellings	Change (no.)	East Mainland	2,898	87	87	3.0%	0	Isles	1,721	49	59	3.43%	+10	Kirkwall	3,299	200	225	6.82%	+25	Stromness	1,114	101	114	10.23%	+13	West Mainland	2,526	123	136	5.38%	+13	Total	11,558	560	621	5.37%	+61	Team Manager (Housing Strategy, Development and Data).
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Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		* STLs geography is different to NRS dwelling geography, best fit has been applied. Source: OIC Short Term Let Register.	
Consider the introduction of a new Planning Housing Policy to enable holiday accommodation to change to long-term residential use where appropriate.		OIC working group established on Planning or other policies required for Short Term Lets, to be considered by Council as part of the LDP review process.	Service Manager (Development and Marine Planning).
Consider the full range of mechanisms available to safeguard primary residency including the use of the Council's Rural Housing Body status (as above), STLs control areas, use of Scottish Government Housing Grant in affordable new build, and potential housing policies in the reviewed Local Development Plan.	Baseline - Only primary residency mechanism used currently is when Scottish Government grant is provided.	Housing and Development and Marine Planning have undertaken initial analysis of the impact of short-term lets, second homes and empty homes on local housing supply. Discussions have taken place with elected members regarding a place-based approach, particularly in Stromness where the concentration of these property types is highest. The Council will continue to monitor short-term lets, secondary letting and second homes as part of the Local Development Plan review process and wider housing strategy work, with a focus on understanding their impact on housing availability in Kirkwall and Stromness, with a pilot approach to be taken in Stromness through a place-based approach considering short term lets, second homes and empty homes.	Team Manager (Housing Strategy, Development and Data). Service Manager (Development and Marine Planning). Legal Services.

Priority: Quality, Warm Homes

Summary: The quality and energy efficiency of homes across tenure is improved, and fuel poverty is reduced across all Orkney Island communities through a just transition to Net Zero. New homes optimise sustainability standards.

Other local plans and priorities: Community Plan – Cost of Living, Sustainable Development, Local Equality. Council Plan – Growing our Economy, Strengthening our Communities, Developing our Infrastructure. Orkney Child Poverty Strategy. Local Development Plan. Sustainable Orkney Energy Strategy. Carbon Management Plan.

Outcome: The quality and energy efficiency of social housing is improved through the use of up-to-date technology, and construction methods.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Continue investment across social housing to meet the Scottish Housing Quality Standard.	Baseline - OIC – 53%. OHAL – 98%. Target - OIC – 94%. OHAL – 99%.	ARC data – https://www.housingregulator.gov.scot/landlord-performance/statistical-information/ Progress: 2023/2024: OIC – 80.4% OHAL – 96.9%. 2024/2025: OIC – 95.82% OHAL – 98.83%. 2025/2026: OIC – 93.88% OHAL – 99.88%. Reduction in OIC SHQS due to acquisitions - improvement works underway.	Team Manager (Housing Strategy, Development and Data).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
Undertake an independent stock condition survey of Council housing to establish up to date costs of 30 years component replacement and energy efficiency improvements.	Baseline – Current OIC costs.	Procurement work has started to commission the independent OIC stock condition survey. Planned start summer 2026. Update from OHAL on its Stock Condition Survey.	Team Manager (Housing Strategy, Development and Data).
Continue investment across social housing to meet the new Social Housing Net Zero standard.	Baseline - OIC – 96%. OHAL – 97%. Target – OIC – 96%. OHAL – 99%.	ARC data – https://www.housingregulator.gov.scot/landlord-performance/statistical-information/ EESSH 1: 2023/2024: OIC – 96% OHAL – 97%. 2024/2025: OIC – 97.4% OHAL – 99.06%. 2025/2026: OIC – 94.64% OHAL – 100%. Confirmation on requirements of SHNZ awaited currently and likely to be confirmed during 2026.	Team Manager (Housing Strategy, Development and Data).
Work with schools, colleges, universities, HIE and local contractors to promote careers and develop the local workforce in repairs, maintenance and energy efficiency works including accreditation in the insulation sector (across housing sectors).		Dialogue ongoing through HEES: ABS work.	Service Manager (Resources).
		UHI Orkney working with the Orkney Construction Training Group (OCTG) – awarded £75,000 by SSEN's Regional Fund to build 2 demonstrator student bedroom modules using	UHI Orkney.

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
Establish forum through HMP to drive forward.		Joinery apprentices at the college. Governance processes being explored currently.	

Outcome: The quality and energy efficiency of existing private housing is improved through information, advice and grant support.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Review the approach and implement guidance to provide information and advice for homeowners and private landlords on home repair and maintenance, including energy efficiency (Energy Efficiency Standard for private landlords).	-	Information on OIC website and HEES: ABS work. What further work be done/could be enhanced? Further ideas through HMP. No change.	Service Manager (Resources).
Review the approach for private landlord registration and enforcement.	Baseline - Currently in Housing Options team.	Currently no plans for change due to resources. No change.	Heads of Service.
Continue to increase the resources available through Heat and Energy Efficient Scotland: Area Based Scheme (HEES: ABS) by bidding for additional resources.	Baseline - £2million (2023/24). Target - £4million by Year 3.	The Scottish Government reverted to COSLA methodology for their HEES: ABS funding distribution across Scotland, from 2024/25. The Council was initially allocated only £1.21m for 2024/25, a significant reduction from the £2m spent in 2023/24. However, through ongoing discussions and lobbying efforts, additional funding was successfully secured	Fuel Poverty Officer.

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		leading to a total of £1.51m for 2024/25 and £1.97m for 2025/26. The bid for 2026/27 has recently been submitted. No change.	
Create a framework and measure the impact of HEES: ABS and report annually through the LHS Annual Report.		HEES: ABS 2025/26 is near to completion, with a projected programme of 199 energy efficiency measures installed for 127 participating households. The programme continues to make a significant contribution towards improving the energy efficiency of private sector housing and reducing carbon emissions. Work is ongoing to consider how the impact of HEES investment can be measured more consistently through the Local Housing Strategy monitoring process. Future work will explore opportunities to use EPC data and programme information to assess changes in housing energy efficiency and better understand the contribution that energy efficiency measures make towards reducing fuel poverty and improving housing quality.	Fuel Poverty Officer.
Lobby UK/Scottish Government directly and through existing networks on additional resources to improve energy efficiency for private sector housing, to revise VAT on repairs and maintenance works, including funding for empty homes.		As above.	Service Manager (Resources).

Outcome: Fuel poverty in Orkney is reduced.
Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Explore analysis framework to measure the level of fuel poverty (at a lower geographic level than Orkney) and then report annually on change to fuel poverty and extreme fuel poverty in the LHS Annual Report and to the Cost of Living Task Force.	Baseline – 31% fuel poverty. 22% extreme fuel poverty (SHCS LA analysis 2017-2019). Target - Year 1 Q4 framework in place.	https://www.gov.scot/collections/scottish-house-condition-survey/#localauthorityanalyses The Scottish House Condition Survey (SHCS) Local Authority Analysis 2022–2024 was published in May 2026 and reports that 51% of households in Orkney are fuel poor and 34% are in extreme fuel poverty, compared with Scotland averages of 31% and 17% respectively. This is partly due to the cost of electricity and the structure of the energy market. The publication of this data provides an important evidence base for this action. Previous activity focused on discussions through the Director and Head of Service to ensure housing and fuel poverty issues were reflected in wider strategic planning and Community Planning priorities. Following publication of the updated Scottish House Condition Survey data, consideration is now being given to how local datasets, including Energy Performance Certificate data, can be used to supplement national survey information and support analysis of fuel poverty at a lower geographic level than Orkney. Initial exploratory work has commenced	Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		to examine housing characteristics, energy efficiency and geographic patterns within the housing stock. This work will inform the development of a local fuel poverty analysis framework to support future reporting through the Local Housing Strategy Annual Report and the Cost of Living Task Force, as well as helping to inform the future targeting of fuel poverty interventions and support services.	
Review the approach to the provision of information and advice for individual households on energy efficiency and fuel poverty (including income maximisation) provided through the Council, third and private sectors, in collaboration with the Cost of Living Task Force.		Advice and support continue to be delivered through the Heat and Energy Efficient Scotland: Area Based Scheme (HEES: ABS) and partner organisations, including Home Energy Scotland and local advice services. Households are referred to the programme through Council services and partner organisations to access energy efficiency improvements and support. The managing agent prepares an annual report for each project year, with reports available online and signposted through the Council website. Procurement process for a managing agent is underway currently. A Members' Briefing will be prepared once the new managing agent contract is awarded.	Service Manager (Resources).
Lobby UK Government on the cost of fuel tariffs to ensure these are reduced in Orkney.		To a limited degree. Responsibility for electricity pricing and tariff structures rests with energy suppliers, the UK regulatory framework and national policy. However, the Council has supported wider efforts to highlight the disproportionate energy costs faced by island communities and continues to advocate, alongside community groups and	Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		partner organisations, for fairer energy pricing arrangements that recognise the additional costs experienced in Orkney.	
Maximise the potential benefits from Orkney renewable energy developments to reduce cost burden of energy for residents.		Delivery of the HEES: ABS programme continues, with £1.86M spent in 2023/24 and £1.48M in 2024/25. Funding of £1.97M has been secured for the 2025/26 programme, including an additional £220k allocation, increasing the number of households supported and energy efficiency measures installed. Installations are due to be completed by 31 May 2026, with quarterly reporting provided to the Scottish Government and Energy Saving Trust.	Service Manager (Resources).
YEAR 2			
Following a review of information and advice, propose and implement any action required, and measure the impact with Cost of Living Task Force.		No progress.	Service Manager (Resources).

Outcome: Carbon emissions across all housing tenure are reduced to net zero.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Mainstream and embed net-zero emissions into housing design and across tenure including taking opportunities for additional funding (e.g. ECO4 funding).	Ongoing.	Ongoing.	Service Manager (Resources). Service Manager (Development and Marine Planning).
Bring through formative Orkney best practice into a housing net zero plan for implementation.	Ongoing – Implementation from Year 3.	Ongoing.	Service Manager (Resources). Service Manager (Development and Marine Planning).
Engagement with the Council's other climate change initiatives including contributing into the OIC climate change officer working group, engaging with the	Ongoing.	Ongoing.	Service Manager (Resources). Service Manager

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
OIC 2024 net zero transition study, and seeking funding and transition opportunities, such as through the developing Islands Centre for Net Zero.			(Development and Marine Planning).

Priority: Access and Choice of Housing for all

Summary: Homelessness is prevented through a partnership housing options approach, and temporary accommodation is minimised for homeless households. Access and choice of housing is increased for all demand groups. People with specific needs are able to live independently. This priority will require close working and resources through OHAC and the Integration Joint Board.

Other local plans and priorities: Community Plan – Cost of Living, Local Equality. Council Plan – Strengthening our Communities. Local Development Plan. Homelessness Strategy. Rapid Rehousing Transition Plan. Joint Strategic Needs Assessment. Strategic Commissioning Implementation Plan.

Outcome: Homelessness is prevented as far as possible, and when it does occur, the time spent homeless is kept to a minimum.

Outcome lead: Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Review, develop and implement a refreshed Housing Options approach within a partnership service redesign which embraces national best practice (see Access to housing below) including digital approaches.	Baseline - Existing Housing Options approach. Target – Start - Year 1. Complete – Year 4.	Initial meeting taken place regarding the Council having a digital housing application form with NEC Housing Management system. A further meeting is being arranged. In the meantime a digital application form is currently in test within the Customer Services Platform and we hope to go live with this shortly. We are currently exploring with OHAL whether there could be any alignment in digital application systems which would support the use of NEC Housing's Housing Options module in partnership.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).
Review, develop and implement a refreshed approach to rehousing for homeless	2021/22 and 2022/23.	OHAL continuing to pilot the SHN Housing Options Toolkit and the OIC priority group within their Lettings Policy.	Service Manager (Housing, Homelessness)

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
households which embraces national best practice, including the proportion of lets by each social landlord.	OIC – 58%, 51%. OHAL – 27%, 24%. Targets to be agreed - Year 1.	The review of the Section 5 protocol is underway and is expected to be completed by the end of summer 2026. Proportion of lets: 2023/2024: OIC 64.5%, OHAL 22.2%. 2024/2025: OIC 50.55%, OHAL 26%. 2025/2026: OIC 53.93%, OHAL 34%.	and Schoolcare Accommodation).
Reduce the use of temporary accommodation through rehousing (as above) in line with the Rapid Rehousing Transition Plan.	Baseline - March 2023 – 72 households in temporary accommodation. Target - Year 5 - 45 households in temporary accommodation.	https://www.gov.scot/collections/homelessness-statistics/ To March 2024: 75 households in temporary accommodation. 101 households owed a duty to permanently re-house. To March 2025: 74 households in temporary accommodation. 91 households owed a duty to permanently re-house. To March 2026: 85 homeless households in temporary accommodation. 107 homeless households owed a duty to house. As of June 2026: 92 homeless households in temporary accommodation 129 homeless households owed a duty to house.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		There are currently 129 homeless households awaiting permanent accommodation. Of these, 92 households are in temporary accommodation (including B&B and self-catering accommodation), 12 households are staying with family or friends or are homeless at home, and 14 households are awaiting placement in temporary accommodation. The ability to reduce the use of temporary accommodation directly interrelates to the ability to permanently rehouse homeless households. Supply requires to be increased in order to facilitate this and this relates to the More Homes work earlier in the LHS.	
Flip properties used for temporary accommodation to permanent homes for homeless households.	Baseline - 2023 5 between OIC. Target - Annually 5 between OIC.	OIC – 4 properties in 2024/25 and 3 properties in 2025/26.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).
Review the approach to the provision of information provided on homeless households to ensure tenancy sustainment is maximised.	Baseline - Existing approach.	Tenancy sustainment: 2023/2024 OIC 95% sustainment, OHAL 94%. 2024/2025 OIC 87% sustainment, OHAL 90%. 2025/2026 OIC 91% sustainment, OHAL 94%. OIC introduced revised procedures for its own tenants and had enhanced information on Section 5 referrals. OIC	Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
		priority list is predominantly being used by OHAL for homeless households.	
Provide training across all public sector partners and social landlords on the new prevention of homelessness duty.	Target – implement following enactment of duty.	Duty has not yet been enacted. OHAL arranged a conference on the prevention duty in February 2026.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Outcome: Access to housing and choice of housing is improved for all.

Outcome lead: Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Review, develop and implement a refreshed system for access to housing through a partnership approach which meets national best practice – Housing Options, applications, housing register and allocations (including homelessness allocations – see above).	Baseline - Individual approaches. Target - Start year 1, complete Year 4.	OHAL continuing to pilot the SHN Housing Options Toolkit and the OIC priority group within their Lettings Policy. The review of the Section 5 protocol is underway and is expected to be completed by the end of summer 2026. Initial meeting taken place regarding the Council having a digital housing application form with NEC Housing Management system. A further meeting is being arranged. In the meantime, a digital application form is currently in test within the Customer Services Platform and we hope to go live with this shortly.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
Maintain dialogue with the education providers to keep options open for existing and new housing supply for students.	Baseline - Range of need 50-90 student households. Target - 50 new provision for students.	Dialogue ongoing with Heriot-Watt University regarding difficulties accessing housing in Stromness for students and staff/lecturers. UHI Orkney working with the Orkney Construction Training Group (OCTG) – awarded £75,000 by SSEN's Regional Fund to build 2 demonstrator student bedroom modules using Joinery apprentices at the college. Governance processes being explored currently. In addition, an Islands Programme funding application was submitted to purchase and refurbish two empty homes to provide student accommodation for UHI Orkney students. Two properties were acquired during March 2026.	Service Manager (Resources).

Outcome: People live independently and safely at home or in a homely setting in their own community.

Outcome lead: Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Provide supported accommodation through a core and cluster approach in the campus of each of the three care homes (with the care homes acting as the core) for mixed client groups to maximise	Baseline – Carness. Target - Develop 3 core and cluster developments associated with the	Stromness – Copland’s Road is included in the SHIP, accessible housing is being developed. The need for proportionate levels of supported housing is being considered. Dounby – in SHIP targeted for end of 10 year plan.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
efficiency and outcomes for those requiring care and support.	3 care homes within 10 years.	Soulisquoy, Kirkwall – included in the SHIP and being planned for within 5 years. Orkney Health and Care will consider a review of learning disability provisions in due course.	
Ensure the housing needs for older people are met on the isles through developments including co-housing.		Work with Development Trusts is ongoing and with other interested parties in relation to older people housing.	Service Manager (Resources).
Ensure there is sufficient provision for wheelchair provision through the More Homes programme, or through conversion of existing amenity housing.	Target – Ongoing. 50 new over 10 years – 5 per annum.	Wheelchair housing group re-instated to consider who is most appropriate based on the vacancy.	Service Manager (Housing, Homelessness and Schoolcare Accommodation). Service Manager (Resources).
YEAR 2			
Review joint adaptations protocol particularly around private housing adaptations to ensure there is equity of access across housing tenure for adaptations.	Baseline - Existing approach. Target - Year 2. Equitable approach across tenure.	Minor review completed during 2025/26, with a more detailed review of the Joint Adaptations Protocol planned for 2026/27.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).
Explore options to supplement the Orkney Housing Association adaptations budget from Orkney	Baseline - No revenue	No progress.	Orkney Health and Care / Orkney Housing

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
Health and Care, recognising the importance of timely adaptations in reducing hospital admissions.	contribution from OHAC/NHSO. Target - Year 2. Revised approach agreed.		Association Limited.
Work in partnership with NHSO/OHAC to support resourcing of Orkney Care and Repair to both aid hospital discharge and prevent hospital admission or demands on care services.	Baseline - No contribution currently from NHSO/OHAC. Target – Year 2. Revised approach agreed.	No progress.	Head of Strategic Housing, Housing Operations and Homelessness.
Ensure Orkney Care and Repair is sustainably resourced to meet the growing demand which supports independent living	Baseline - 2023 budget.	No progress.	Orkney Housing Association Limited.
Explore developing local letting initiatives, especially on the outer isles to prioritise housing to health and care staff and other essential workers.	Baseline - Existing policies.	The Council's lettings policy allows priority to be awarded to a household where there is a need to live in a given area in order to access a particular post.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).
Work with the Development Trusts to advertise vacant social homes, where local letting initiatives exist to prioritise	Baseline - Existing approach.	No progress.	Service Manager (Housing, Homelessness

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
health and care staff, or other essential workers as relevant.			and Schoolcare Accommodation).
Review current approaches to downsizing to further incentivise smaller older households to move to homes suitable for the needs.	Baseline - Existing OIC policy. Target - Year 2. Revised policy.	The Council's Removal Grant Scheme was updated in March 2026 to increase the sum available for those tenants wishing to downsize.	Service Manager (Housing, Homelessness and Schoolcare Accommodation).
Ensure supported housing / care provision is supplied for people with enduring mental health conditions to enable people living on Scottish mainland to return to Orkney.	Baseline - No provision.	Initial discussion held with Head of Health and Community Care.	Service Manager (Resources) and Head of Health and Community Care.
Review housing support in the round – enabling the third sector to provide lower level housing support and freeing up resources for more intense provision to be provided by the statutory sector.	Baseline - Existing approach.	No progress.	Service Manager (Housing, Homelessness and Schoolcare Accommodation) and Head of Health and Community Care.
YEAR 3			
Work in partnership with OHAC to enhance the existing telecare provision including provision of SMART homes.	Baseline - Existing approach.	Provision of SMART homes is not required given flexibility of modern telecare systems.	Service Manager (Housing, Homelessness and Schoolcare

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
			Accommodation) and Head of Health and Community Care.

Priority: Monitoring and Review

Outcome: The local Housing Strategy implementation is monitored, and changing drivers in the housing system (demographic, economic and housing market factors) are understood.

Outcome lead: Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
YEAR 1 / ONGOING.			
Develop a monitoring system to continually monitor and review the Local Housing Strategy implementation.	Baseline – None. Year 1 Q1.	System is developed as shown above.	Service Manager (Resources).
Hold quarterly Housing Market Partnership meetings to review progress on the LHS actions and report on any change in underlying assumptions and housing system drivers.	Baseline – None. Quarterly Year 1-5.	First update meeting December 2024, two HMP/house builder meetings held in Jan 2025 and March 2025. HMP met throughout 2025 and early 2026 and next HMP meeting is June 2026.	Service Manager (Resources).
Develop a system to regularly maintain and refresh the evidence base in the Housing Need and Demand Assessment and report change through the HMP quarterly meetings and the Local Housing Strategy Annual Report.	Baseline – None. Year 1 Q1.	Undertaken to December 2024 – to be presented at HMP meeting. Propose annual update due to lack of data. Mini update in June on housing market drivers and performance.	Service Manager (Resources).

Actions.	Baseline / Target.	Progress and Results.	Responsibility.
Provide a Local Housing Strategy Annual Report to the Housing Market Partnership and the Council on progress.	Baseline – None. Year 2-5.	Q2 for the previous financial year (September). Annual update will be presented in September 2026.	Service Manager (Resources).
Put in place staff and undertake training to undertake the LHS monitoring and review function.	Baseline - Vacancy in 0.5 FTE Housing Strategy Officer. Target – recruitment and training Year 1.	Guidance and training provided November 2024, ongoing to March 2025. Will be kept up to date now a full team is in place.	Service Manager (Resources).

Item: 11

Education, Communities and Housing Committee: 9 September 2026.

Tenant Satisfaction Survey.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents the outcome of the tenant satisfaction survey, for information.
- 1.2. A wholesale tenant satisfaction survey is required by the Scottish Social Housing Charter the process for which is detailed and prescriptive for landlords with up to 1,500 tenants and requires a return rate of 40% of the landlord's tenants.
- 1.3. The results are used by the Scottish Housing Regulator as part of the process of regulating Local Authority Housing Services.
- 1.4. Between March and May 2026, a tenant satisfaction survey was undertaken by an independent body, IBP Strategy and Research, on behalf of the Council. The results are attached as Appendix 1 to this report.
- 1.5. The results of the survey are notified to the Scottish Housing Regulator as part of the Annual Return against the Charter and linked to the Annual Assurance Statement, which is the topic of a separate report to this meeting.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
 - i. Note the results of the tenant satisfaction survey, attached as Appendix 1 to this report.

3. Tenant Satisfaction Survey

- 3.1. The Scottish Social Housing Charter, which came into effect on 1 April 2012, has twice been reviewed, most recently in 2022, includes a series of outcomes and standards against which housing services are to be regulated.

- 3.2. The Scottish Social Housing Charter includes a requirement that landlords undertake regular surveys of their tenants to assess their satisfaction with services and report the findings to the Scottish Housing Regulator.
- 3.3. The Scottish Housing Regulator, in conjunction with Ipsos MORI, has produced guidance on undertaking such surveys. The guidance is detailed and prescriptive. It requires that landlords with up to 1,500 tenants are required to survey all their tenants and that all landlords seek to achieve at least a 40% return rate, which is challenging. It also provides detail on the type of questions to be asked to ensure that the Scottish Housing Regulator can in turn receive information on certain key outcomes.
- 3.4. This survey had an overall response rate of 29%, this is considered to be a robust sample size for a survey of this nature and is broadly in line with +/- 5% set out in the Scottish Housing Regulator's Guidance.
- 3.5. It has been determined locally that it is more appropriate to undertake surveys every two years rather than every three years to ensure the data is reflective of the current tenant base. The last tenant survey was undertaken in May 2024.
- 3.6. IBP Strategy and Research, which specialises in undertaking surveys for landlords, was procured to undertake the survey. Using an independent contractor to undertake the survey allows the added advantage of being able to anonymise information and allows tenants to respond openly without the Council receiving details of individual responses.
- 3.7. The survey, which is the sixth one for Council tenants, was undertaken between March and May 2026.
- 3.8. The survey was undertaken using the main method of data gathering as a telephone interview. Tenants were also given the opportunity to request a paper copy of the questionnaire or complete the survey online. Of the responses, 4% were made by post/online and 96% by telephone interview. This compared to the survey of 2024, when 19% were by post/online and 81% by telephone. In addition, the methodology adopted for the 2024 survey allowed us to reach a higher proportion of younger tenants and in particular, working tenants.

- 3.9. The summary results of the 29% response rate by tenants (265 tenants responded) are listed below:

Indicator.	2024.	2026.
Percentage of tenants satisfied with the overall service provided by their landlord.	74%.	77%.
Percentage of tenants who feel their landlord is good at keeping them informed about their services and decisions.	77%.	75%.
Percentage of tenants satisfied with the opportunities given to them to participate in their landlord's decision-making processes.	71%.	62%.
Percentage of tenants satisfied with the quality of their home.	68%.	70%.
Percentage of tenants who have had repairs or maintenance carried out in last 12 months satisfied with the repairs and maintenance service.	84%.	80%.
Percentage of tenants satisfied with contribution to the management of the neighbourhood they live in.	59%.	68%.
Percentage of tenants who feel the rent for their property represents good value for money.	64%.	64%.

- 3.10. An action plan, attached as Appendix 2, has been developed and further evaluation and consultation will be taken in respect of this area of work.

For Further Information please contact:

Lesley Mulraine, Service Manager (Housing, Homelessness and Schoolcare Accommodation), extension 2170, email lesley.mulraine@orkney.gov.uk.

Implications of Report

1. **Financial:** The survey was undertaken by a private contractor, procured in line with the Council's Contract Standing Orders. The cost of this service was £5,338 exclusive of VAT.
2. **Legal:** The Housing (Scotland) Act 2010 section 31 introduced changes to the basis on which the Scottish Housing Regulator would be responsible for regulating housing services. As required by this section, the Scottish Social Housing Charter sets the standards and outcomes that all social landlords should aim to achieve when performing their housing activities. This includes a requirement for a regular tenants' satisfaction survey to be undertaken and for a performance report to be published.

3. **Corporate Governance:** Not applicable.
4. **Human Resources:** None directly related to the recommendations of this report.
5. **Equalities:** An Equality Impact Assessment is not required in respect of performance monitoring.
6. **Island Communities Impact:** An Island Communities Impact Assessment is not required in respect of performance monitoring.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☒ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☒ Cost of Living.
 - ☐ Sustainable Development.
 - ☒ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk:** None directly related to the recommendations of this report.
10. **Risk:** None directly related to the recommendations in this report.
11. **Procurement:** None directly related to the recommendations in this report.
12. **Health and Safety:** None directly related to the recommendations in this report.
13. **Property and Assets:** None directly related to the recommendations in this report.
14. **Information Technology:** None directly related to the recommendations in this report.
15. **Cost of Living:** The survey incorporated questions around the cost of living and the impact on council tenants in respect of their financial situation.

Background Papers

None.

Appendices

Appendix 1 – Tenant Satisfaction Survey Summary.

Appendix 2 – Tenant Satisfaction – Action Plan.



Tenant Satisfaction Survey 2026

Draft Report

May 2026



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APPENDICES (UNDER SEPARATE COVER)

- 1.0 Survey Questionnaire
- 2.0 Detailed Data Tables
 - (a) Location
 - (b) Gender, Age, Household Composition, Disability
 - (c) Employment Status, Rent Payment status
- 3.0 Listing of Open-Ended Responses

The point of contact for this report is as follows:

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SUMMARY OF KEY FINDINGS

BACKGROUND TO THE SURVEY

This document summarises the results of Orkney Islands Council Housing Service's tenant survey for 2026. The survey explores tenants' views in relation to a number of themes including: overall satisfaction with the Housing Service; communications and participation; contact with the Housing Service; complaints; the home; repairs and housing services; rent and financial issues; affordability and the impact of affordability and the cost of living; neighbourhood issues; future priorities.

Where possible, results have been compared to those from the 2024 survey and further back to the 2022 and 2020 surveys. With respect to this, the difference in methodology should be noted. For the 2026 survey, the main method of data gathering was telephone interviewing, with a small amount of requested postal and online responses. In 2024, the main method of data gathering was telephone interviewing, with a subsequent self-completion survey being issued to those tenants with an email address. In 2022, the main method of data gathering was postal self-completion survey with a follow-up telephone survey being conducted at that point to achieve the target response. The proportion of responses gathered by telephone in 2022 was, therefore, significantly lower than in 2024 and 2026.

RESPONDENT PROFILE

The profile of survey respondents in relation to gender was broadly similar to that in the Housing Service's most recent survey in 2024, with 60% of respondents being female and 39% being male.

Compared to 2024, the sample had a slightly older age profile, with 60% being aged 45 or over compared to 55% in 2024. There were slightly fewer respondents aged 16-44 compared to 2024 (36% in 2026 compared to 43% in 2024).

Most commonly respondent households were single occupancy (54%, compared with 48% in 2024) while 11% were two adult, no children households (down slightly from 13%), 14% were lone parents (up slightly from 12%) and 13% were families with children (down from 20%).

The average net monthly income per household was estimated at £1,044.23 (up from £1,013.08 in 2024).

56% of respondents say that they or someone in their household have a physical illness or mental health condition or illness expected to last 12 months or more (49% in 2024).

RESPONDENT PROFILE (CONTINUED)

Respondents were broadly split between Kirkwall (60%) and elsewhere in the Orkney Islands (40%). No location information could be identified for less than 1%. This profile was broadly similar for the 2024 survey but has a slightly higher proportion of Kirkwall tenants (57% previously).

COMMUNICATIONS AND PARTICIPATION

There has been a slight decline in the proportion of tenants who feel that the Housing Service is good at keeping them informed about their services and decisions. This figure has decreased from 77% in 2024 to 74% in 2026.

This pattern is more evident in relation to satisfaction with opportunities to take part in the Housing Service's decision making processes, which has decreased from 71% to 62% between 2024 and 2026.

CONTACT WITH THE HOUSING SERVICE

50% of respondents said that they had contacted the Council's Housing Service in the last 12 months with a query other than to pay their rent or a service charge (down from 61% in 2024).

Respondents' last method of contact with the Council was mainly by telephone (74%, down slightly from 75% in 2024) or by email (13%, up slightly from 12% in 2024). There continues to be a small minority contacting the Housing Service by any other means.

The Council continues to achieve positive ratings across a number of aspects of customer service and the extent of this has improved in relation to all aspects. 88% of respondents indicate that staff were helpful compared to 82% in 2024; 85% said it was easy to get hold of the right person compared to 80% in 2024; 79% indicated that their query was answered within a reasonable time compared to 71% in 2024; 76% expressed satisfaction with the final outcome of their query compared with 60% in 2024.

Overall, 83% of respondents had a positive view of the overall quality of customer service compared to 80% in 2024.

COMPLAINTS POLICY

The majority of respondents said they were aware of the Housing Service's complaints policy (60%, also 60% in 2024). The proportion that indicated they had made a complaint in the previous 12 months was 7%, up slightly from 5% in 2024. 56% expressed satisfaction with the final outcome of their complaint; this was substantially higher than the figure of 24% in 2024. 55% of those that said they had made a complaint expressed satisfaction with the way their complaint was handled overall, compared to 39% in 2024. It is important to note the very low base number of individuals who had made a complaint as this can mean that changes are based on responses from a very small group of people.

THE HOME

Of those that moved into their home in the last year, the majority (77%, up significantly from 58% in 2024) were satisfied with the standard of their home when they moved in.

Amongst respondents that moved into their home in the last year the majority were also satisfied with all aspects of the moving in process, with a significant improvement in the proportion of respondents that expressed satisfaction with the condition of the home when they moved in (from 58% in 2024 to 78% in 2026). A slightly higher proportion of respondents were satisfied with the process for applying for a home (87%, up from 85%). Again, the small base number of responses for this specific question means that significant percentage changes can arise based only on the views of a small number of people.

15 respondents indicated that they had had contact with the Council's homelessness and advice section over the past two years or so. Of these, 86% expressed satisfaction (down slightly from 92% in 2024). 15 people indicated that they had been provided with homeless accommodation. Of these, 66% expressed satisfaction (down from 100% in 2024).

Overall, 70% of respondents said that they were satisfied with the overall quality of their home; this was up slightly from the 68% recorded in 2024.

The majority of respondents were very or fairly satisfied with a range of specific aspects of their homes and satisfaction figures recorded in 2026 were generally comparable or slightly higher than those recorded in 2024. The exception being, satisfaction with private gardens (73%, down from 77% in 2024).

Ratings on some aspects of heating systems have shown improvement since 2024 with the majority rating most aspects as good or very good. The exception related to cost effectiveness where 42% rate it as very good or good (this is up slightly from 40% in 2024).

THE HOME (CONTINUED)

Satisfaction with a number of aspects of common areas, where relevant to the tenant, has declined between 2024 and 2026. This was the case for each of communal back / dying areas (66%, down slightly from 69%); common gardens (56% down significantly from 73%) and stair cleaning (40%, down from 44% in 2024). Again, these results are based on a small number of respondents relative to the whole sample.

REPAIRS AND HOUSING SERVICES

The majority of respondents (60%, down slightly from 61% in 2024) indicated that they had repairs carried out in their home in the last 12 months.

Amongst those that have had repairs carried out in their home in the last 12 months, 80% were satisfied with the service they received (down slightly from 84% in 2024).

The vast majority of respondents that have had repairs carried out in their home in the last 12 months were very or fairly satisfied with a range of specific aspects of the service they received; the level of satisfaction with specific aspects of service has improved slightly in relation to ease of reporting the repair (95%, up from 89% in 2024), the attitude of customer service staff (94%, up from 90%) and workers clearing up after themselves (93%, up from 87%). Conversely, a slight decline in levels of satisfaction is evident in relation to the attitude of workers (92%, down from 95%), arrangements for worker access (91%, down slightly from 92%), overall quality of work (87%, down from 92%) and the repair being done 'right first time' (80%, down slightly from 81%).

19% of respondents indicated that they had had planned maintenance improvements carried out in their home within the previous two years or so (this figure was 18% in 2024). 90% of those that had such work undertaken expressed satisfaction with it (up significantly from 78% in 2024).

Amongst all respondents, regardless of whether or not they have had repairs carried out in their home in the last 12 months, 80% were very or fairly satisfied overall with the Housing Service's repairs service (down very slightly from 81% in 2024).

RENT AND FINANCIAL ISSUES

The profile of respondents by rent payment status is broadly similar to the previous survey with 51% paying full rent (compared with 53% in 2024), 29% having all costs met through Housing Benefit or Universal Credit (30% previously) and 14% paying part rent (12% previously).

RENT AND FINANCIAL ISSUES (CONTINUED)

64% of respondents considered their rent to be good value for money (also 64% in 2024).

Overall, 54% of respondents indicated that they considered the Council's rents to be less expensive than those of other landlords (down from 61% in 2024) compared to 11% that considered them to be more expensive (down slightly from 9%).

The great majority of respondents (84%) consider that the Housing Service's approach to dealing with arrears is a reasonable one (the comparable figure in 2024 was 81%).

AFFORDABILITY AND COST OF LIVING ISSUES

There have been only slight changes in the profile of the working status of the heads of household, with 47% in employment (down from 53% in 2024) and 24% retired (up from 19%).

8% of respondents indicate that they find it fairly or very difficult to afford their rent payments (down from 12% in 2024) and a further 43% finding this "just about affordable" (up from 35%). 23% indicate that more than 30% of their net household income goes on paying rent and service charges to the Council's Housing Service (down from 27% in 2024).

76% indicate that they spend more than 10% of their net household income on household fuel use and (down from 85% in 2024), of these, 46% indicate that they spend more than 20% of their net household income on this (down very slightly from 47%).

27% indicate that more than 10% of their net household income goes on paying their Council tax and water and sewage charges (down slightly from 31% in 2024).

In terms of overall finances, it is notable that less respondents now say that they are managing either quite or very poorly. This figure was 14% in 2024 and has now reduced to 10% in 2026. However, the proportion indicating that they are just about managing financially is 58% (up from 55%).

THE NEIGHBOURHOOD

Satisfaction with the Housing Service's contribution to the management of the neighbourhood has improved from 59% in 2024 to 68% in 2026.

THE NEIGHBOURHOOD (CONTINUED)

Ratings for various aspects of the neighbourhood have remained positive particularly in relation to feeling of safety (90% very or fairly good, down very slightly from 91% in 2024), followed by the cleanliness of the neighbourhood (78%, up slightly from 77%) and the overall appearance of the neighbourhood (77%, down slightly from 78%). Ratings were lowest in relation to car parking (61%, down from 68%) and grounds maintenance (62%, down from 65%).

Further analysis of the various satisfaction figures suggests that dissatisfaction with management of the neighbourhood overall is driven by dissatisfaction with grounds maintenance, as well as wider issues relating to neighbourhood appearance and car parking to a somewhat lesser extent.

Where respondents have reported anti-social behaviour in the last 12 months, ratings for the final outcome of their complaint have improved since 2024 (50%, up from 37% in 2024) while ratings have declined slightly in relation to the way the complaint was handled generally (45%, down from 50%).

FUTURE PRIORITIES

The issues that tenants most commonly place in their “three most important issues” are the quality of respondents’ homes (65%, up slightly from 62% in 2024), the energy efficiency of the property (58%, down from 62%) and the quality of the repairs and maintenance service (48%, up significantly from 33%). In 2024, the top two issues were the same, but the third most important issue was the value for money of rents (41%).

83% of respondents (compared to 88% in 2024) feel it is important that the Housing Service make more properties available for rent.

OVERALL SATISFACTION

Overall, 77% of respondents now indicate that they are very or fairly satisfied with the service provided by the Housing Service of Orkney Islands Council. This has improved from 74% recorded in 2024.

RESULTS IN RELATION TO SCOTTISH SOCIAL HOUSING CHARTER STANDARDS

The table below sets out results for the specific questions required in relation to the Annual Return on the Charter.

Indicator from the Scottish Social Housing Charter	Relevant Question	Housing Service Performance 2026 ¹
Percentage of tenants satisfied with the overall service provided by their landlord (Charter Indicator 1)	Taking everything into account, how satisfied or dissatisfied are you with the overall service provided by the Housing Service of Orkney Islands Council?	77% ² satisfaction ³ (74%)
Percentage of tenants who feel their landlord is good at keeping them informed about their services and decisions (Charter Indicator 3)	How good or poor do you feel the Housing Service is at keeping you informed about their services and decisions?	75% rating as very or fairly good (77%)
Percentage of tenants satisfied with the opportunities given to them to participate in their landlord's decision making processes (Charter Indicator 6)	How satisfied or dissatisfied are you with opportunities given to you to participate in the Housing Service's decision making processes?	62% satisfaction (71%)
Percentage of tenants satisfied with the quality of their home (Charter Indicator 10)	Overall, how satisfied or dissatisfied are you with the quality of your home?	70% satisfaction (68%)
Percentage of tenants who have had repairs or maintenance carried out in last 12 months satisfied with the repairs and maintenance service (Charter Indicator 16)	Thinking about the LAST time you had repairs carried out, how satisfied or dissatisfied were you with the repairs service provided by the Housing Service?	80% satisfaction (84%)

¹ 2024 figures in brackets.

² In these figures (and throughout the report) we have quoted the satisfaction figure as the combination of the "very" and "fairly" satisfied responses. It should be noted that, due to the effects of rounding, the overall satisfaction figure can vary slightly from this.

³ Includes "Don't Know/No Opinion" responses as required by the Scottish Housing Regulator.

Indicator from the Scottish Social Housing Charter	Relevant Question	Housing Service Performance 2026
Percentage of tenants satisfied with contribution to the management of the neighbourhood they live in (Charter Indicator 17)	Overall, how satisfied or dissatisfied are you with the Housing Service's contribution to the management of the neighbourhood you live in?	68% satisfaction (59%)
Percentage of tenants who feel the rent for their property represents good value for money (Charter Indicator 29)	Taking into account the accommodation and the services the Housing Service provides, to what extent do you think that the rent for this property represents good or poor value for money? Is it....	64% rating a fairly or very good (64%)

Tenant Satisfaction Survey 2026

Results based on feedback from 265 tenants



77%

Overall, 77% of our tenants said that they were satisfied with overall service provided. 35% said they were “very” satisfied and 13% said they were dissatisfied.

64%

of tenants think their rent is good or very good value for money



80%

of tenants said they were satisfied with the repairs service



75%

rated us positively for keeping tenants informed and 62% were satisfied with opportunities to take part in decision-making processes.

70%

of tenants were satisfied with the quality of their home.

68%

of tenants were satisfied with our management of the neighbourhood they live in.

To access a summary of the findings please email: housing@orkney.gov.uk
(telephone 01856 873535 extension 2170)

1.0 BACKGROUND, OBJECTIVES AND METHODOLOGY

BACKGROUND

- 1.1 Orkney Islands Council is a significant social landlord in Orkney Islands with 927 rented properties spread across a number of settlements.

The Council commissioned IBP to carry out a tenant survey on its behalf to meet the requirements of the Scottish Housing Regulator as well as providing additional feedback from residents to help guide the future strategic and operational direction of the Housing Service.

OBJECTIVES

- 1.2 The Council wished to carry out a survey which would seek to determine the attitudes and satisfaction levels of tenants across a variety of issues, as described below. The following issues were explored:

- The social, economic and demographic profile of tenants
- Perceived quality of communications
- Attitudes towards tenant participation in the work of the Housing Service
- Perceptions of various aspects of contacting the Housing Service
- Awareness and satisfaction with the Housing Service's complaints policy
- Satisfaction with aspects of the home and common areas
- Perception of the repairs service and associated services
- Financial issues and issues associated with value for money of rents
- Affordability of living costs such as rent, household fuel and Council Tax and the impact of the cost of living crisis
- Perceptions of local neighbourhoods
- Priorities for future service delivery
- Overall satisfaction with the Housing Service of the Council

These issues are dealt with in detail in this report.

METHODOLOGY

- 1.3 A quantitative survey questionnaire was developed in partnership with Orkney Island Council Housing Service staff. The structured questionnaire that was devised is included as Appendix 1.⁴ A number of questions were similar to the Housing Service's previous survey conducted in 2024 and, where possible, the 2026 results have been compared to those from 2024 as well as the Housing Service's previous surveys in 2022 and 2020.
- 1.4 The questionnaire for the survey incorporates a number of "core" questions that have been included as specified by the Scottish Housing Regulator, which are required for the Council's Annual Return on the Charter (ARC). These are specifically noted as such in the body of the report.
- 1.5 Survey fieldwork took place over the period from mid-February to mid-April 2026.
- 1.6 A total of 927 tenant households were identified and all were contacted in advance to provide background information on the survey. The primary survey method for the survey was telephone interview. From the total database of tenant households provided to IBP, telephone numbers were available in a total of 813 cases.⁵ IBP were able to secure a total of 253 responses through the telephone route.

Respondents were given the opportunity to request a paper copy of the questionnaire and 2 responses were secured in this way.

A small minority of tenants requested to complete the survey online and a further 10 responses were secured in this way.

The total response level overall was, therefore, 265, of which 12 (4%) were by post / online and 253 by telephone (96%). This represents an overall response rate of 29% based on a population of 927 tenant households. An overall sample size of 265 provides data accurate to +/- 5.09%, which is a robust sample size for a survey of this nature and is broadly in line the target figure of +/- 5% set out in the Scottish Housing Regulator's guidance on survey questions pertaining to the ARC return.⁶

⁴ Appendices have been provided under separate cover.

⁵ This figure also takes account of changed / wrong numbers and opt-outs.

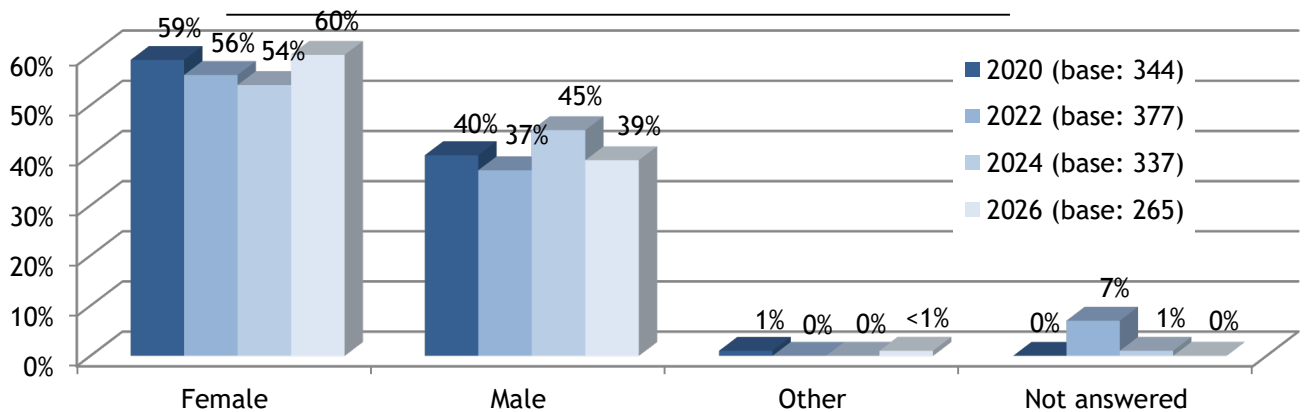
⁶ The response rate was below the target set of 40%, which would have equated to 371 responses achieving a margin of error of +/-3.94%.

- 1.7 This methodology differs somewhat from the most recent survey in 2024 where tenant households for whom no telephone number was available or who could not be contacted by telephone were contacted by email with an invitation to complete the survey online. In 2024, a total of 337 responses were secured, of which 274 were by telephone (81%) and 63 (19%) were online. In 2022, the main method of data gathering was a postal self-completion survey, including an initial mailing and reminder mailing, with a programme of follow-up telephone interviews being undertaken. A total of 377 responses were secured of which 242 were by post (64%) and 135 were by telephone (36%).
- 1.8 Throughout this report we have provided comment on the results by location (in particular, respondents from Kirkwall compared to respondents from elsewhere in the Orkney Islands). We have also commented, where appropriate, on the differences in response from different demographic groups.
- 1.9 Interviewers were able to note any specific comments made by respondents in relation to each of the survey themes. Where appropriate, we have commented on any common themes that have arisen from these open-ended comments.
- 1.10 The full cross-tabulated results are presented as Appendix 2 including a detailed breakdown of responses by various respondent criteria. Appendix 3 includes the full listing of the additional open-ended comments that were noted by interviewers.

2.0 RESPONDENT PROFILE

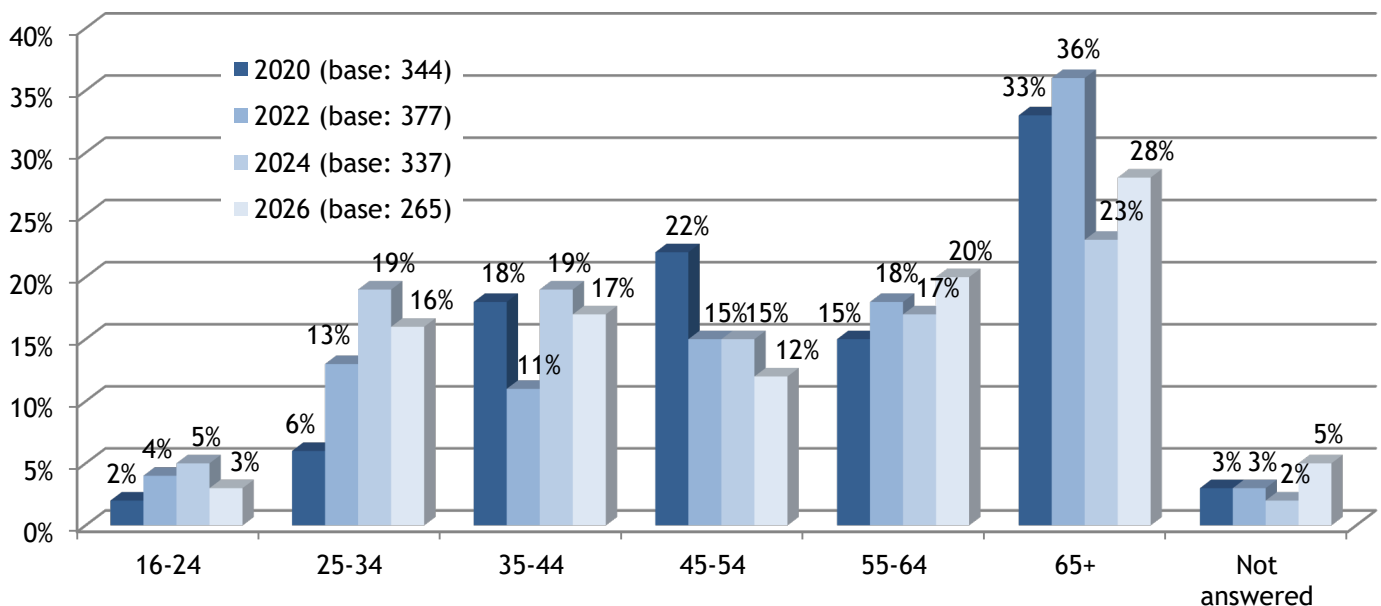
2.1 The profile of respondents by gender is illustrated in Figure 2.1. This shows a similar profile to 2024 where respondents are more likely to be female, although this has increased from 54% to 60%. This is typical in surveys of this nature.

Figure 2.2: Gender of Respondents



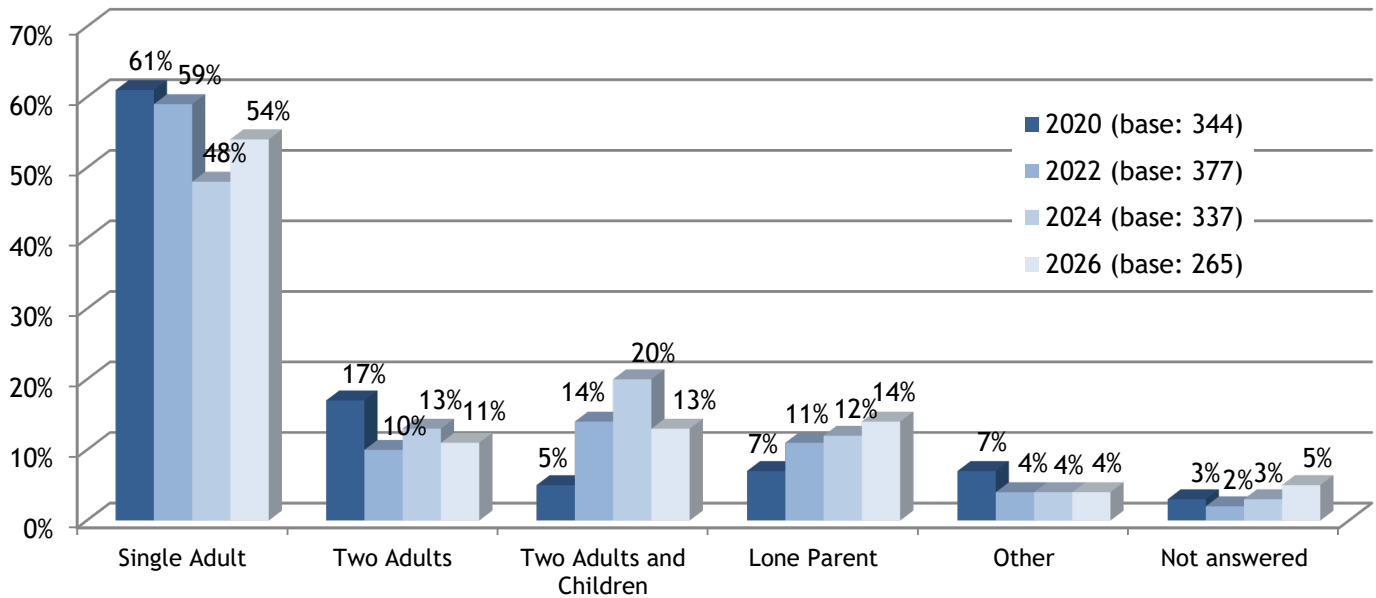
2.2 Figure 2.2 illustrates the age ranges of respondents. Compared to 2024, there is a lower proportion of tenants aged 16 to 44 (36%, down from 43%) and conversely a higher proportion of tenants aged 45 or over (60%, up from 55%).

Figure 2.4: Age of Respondent



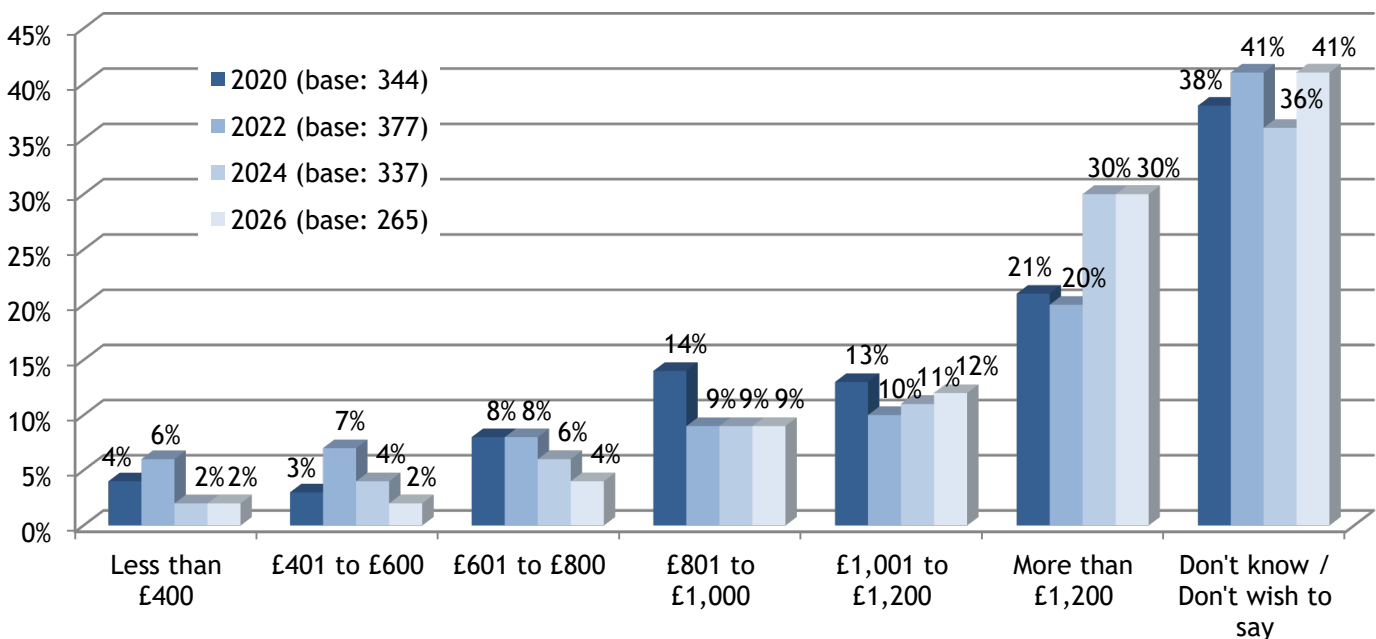
2.3 Figure 2.3 illustrates a broad range of household types with single occupancy households being the most common. This was also the case in previous surveys.

Figure 2.3: Household Composition



2.4 Figure 2.4 illustrates the monthly **net** income of households which takes into account income from employment, pensions, benefits (excluding Housing Benefit) and interest from savings. As shown, a large minority (41%) either did not know or refused to provide this information (which is common in surveys of this nature). However, 59% of respondents did provide this information.

Figure 2.4: Monthly Household Income



Taking the mid-points from the above income bands (assuming “less than £400” as “£400” and “more than £1,200” as “£1,200”) we can calculate that the minimum average net income per household is as follows:

- Average net **weekly** income per household - £240.98 (compared with £233.79 in 2024, £208.72 in 2022 and £221.99 in 2020)
- Average net **monthly** income per household - £1,044.23 (compared with £1,013.08 in 2024, £904.46 in 2022 and £961.67 in 2020)
- Average net **annual** income per household - £12,530.76 (compared with £12,157.01 in 2024, £10,853.57 in 2022 and £11,543.64 in 2020).

Although average income figures are slightly higher than the previous year, the proportion of the achieved sample being in employment is slightly lower than the previous year (i.e. 47% in either full time, part time or self-employment, compared with 53% in 2024). However, it should be noted that the above average income figures are based on information provided by 156 respondents (compared with 214 in 2024).

- 2.6 56% of respondents say that they, or a member of their household, have a physical or mental health condition or illness lasting or expected to last 12 months or more (49% in 2024). Table 2.1 illustrates the nature of the disability.⁷

Table 2.1: Nature of Disability

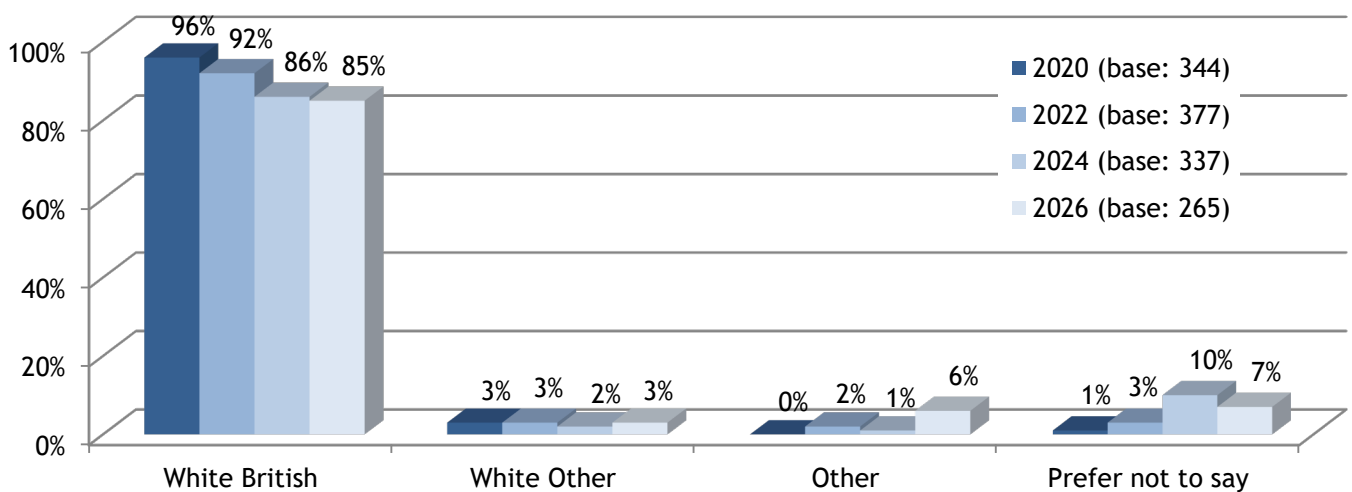
Nature of Disability	2024	2026
Physical impairment	34%	31%
Mental health issue	36%	29%
Neuro-divergent condition	21%	7%
Learning difficulties	2%	5%
Autoimmune	8%	4%
Sensory impairment: hearing	2%	3%
Sensory impairment: visual	5%	1%
Other	15%	29%
Prefer not to say	13%	14%
Base:	163	149

⁷ The options for nature of disability have been updated in 2024 and are not comparable with surveys prior to this.

Most commonly, those with a disability had a physical impairment (31%, compared with 34% in 2024) or a mental health issue (29%, compared with 36% previously). There has been a large decrease in those who have a neuro-divergent condition (7%, down from 21% in 2024).

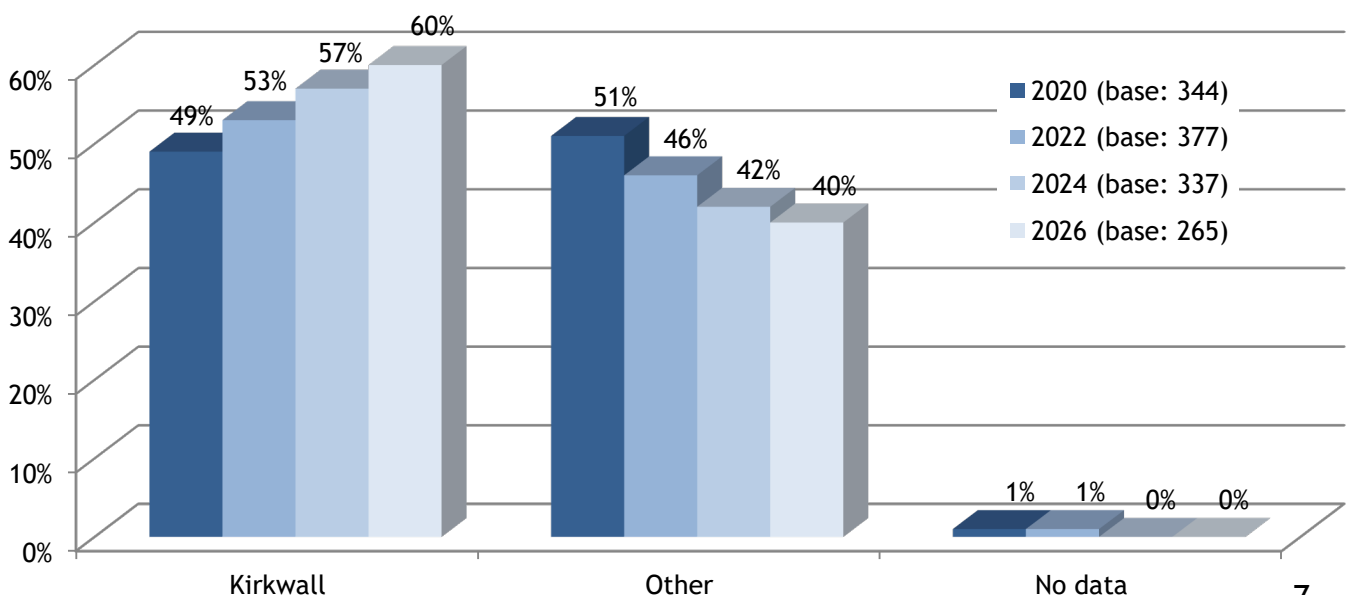
2.7 Figure 2.7 compares the ethnic origin of respondents. As shown, the vast majority of respondents (85%) are of White British origin. Again, a broadly similar profile was recorded in 2024.

Figure 2.7: Ethnic Group



2.8 The geographical profile of respondents is illustrated in Figure 2.8. This shows that respondents were broadly split between those living in Kirkwall (60%) and those living elsewhere (40%). This profile has a very slightly higher proportion of Kirkwall tenants than previously.

Figure 2.8: Geographical Profile



KEY POINTS IN RELATION TO RESPONDENT PROFILE

The profile of survey respondents in relation to gender was broadly similar to that in the Housing Service's most recent survey in 2024, with 60% of respondents being female and 39% being male.

Compared to 2024, the sample had a slightly older age profile, with 60% being aged 45 or over compared to 55% in 2024. There were slightly fewer respondents aged 16-44 compared to 2024 (36% in 2026 compared to 43% in 2024).

Most commonly respondent households were single occupancy (54%, compared with 48% in 2024) while 11% were two adult, no children households (down slightly from 13%), 14% were lone parents (up slightly from 12%) and 13% were families with children (down from 20%).

The average net monthly income per household was estimated at £1,044.23 (up from £1,013.08 in 2024).

56% of respondents say that they or someone in their household have a physical illness or mental health condition or illness expected to last 12 months or more (49% in 2024).

Respondents were broadly split between Kirkwall (60%) and elsewhere in the Orkney Islands (40%). No location information could be identified for less than 1%. This profile was broadly similar for the 2024 survey but has a slightly higher proportion of Kirkwall tenants (57% previously).

3.0 COMMUNICATIONS AND PARTICIPATION

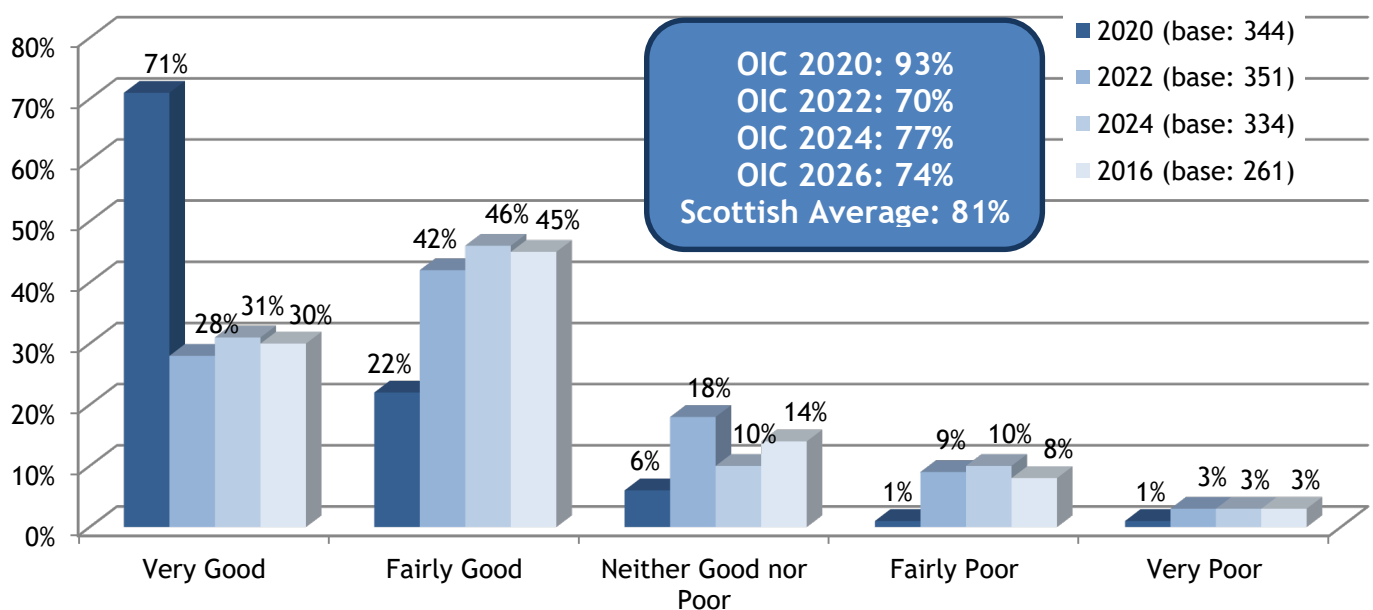
Percentage of tenants who feel their landlord is good at keeping them informed about their services and decisions (Charter Indicator 2).

3.1 The following question was posed with respect to the extent to which the Council's Housing Service is seen to keep tenants informed about their services and decisions:

"How good or poor do you feel the Housing Service is at keeping you informed about their services and decisions?"

The results are set out in Figure 3.1 below⁸.

Figure 3.1: Being Kept Informed



As shown above, 74% of tenants rate the Housing Service as very or fairly good in relation to keeping them informed about their services and decisions (down from 77% in 2024 and slightly lower than the Scottish average of 81%⁹). A small minority (11%, down slightly from 13% in 2024) rated the Council as very or fairly poor.

⁸ It should be noted that throughout the survey a small number of respondents may not have answered all questions. The base quoted in each case is the actual number of respondents. In some cases, responses may not sum to 100% due to rounding.

⁹ Scottish Average figures throughout this report are quoted from the Scottish Housing Regulator's Charter Indicators and Data by Outcomes and Standards for Local Authorities 2024-25. It should be noted that this data can date back some years and so these comparisons should be treated with caution.

Ratings for this aspect of service are lower in other areas (68%), when compared to Kirkwall (78%).

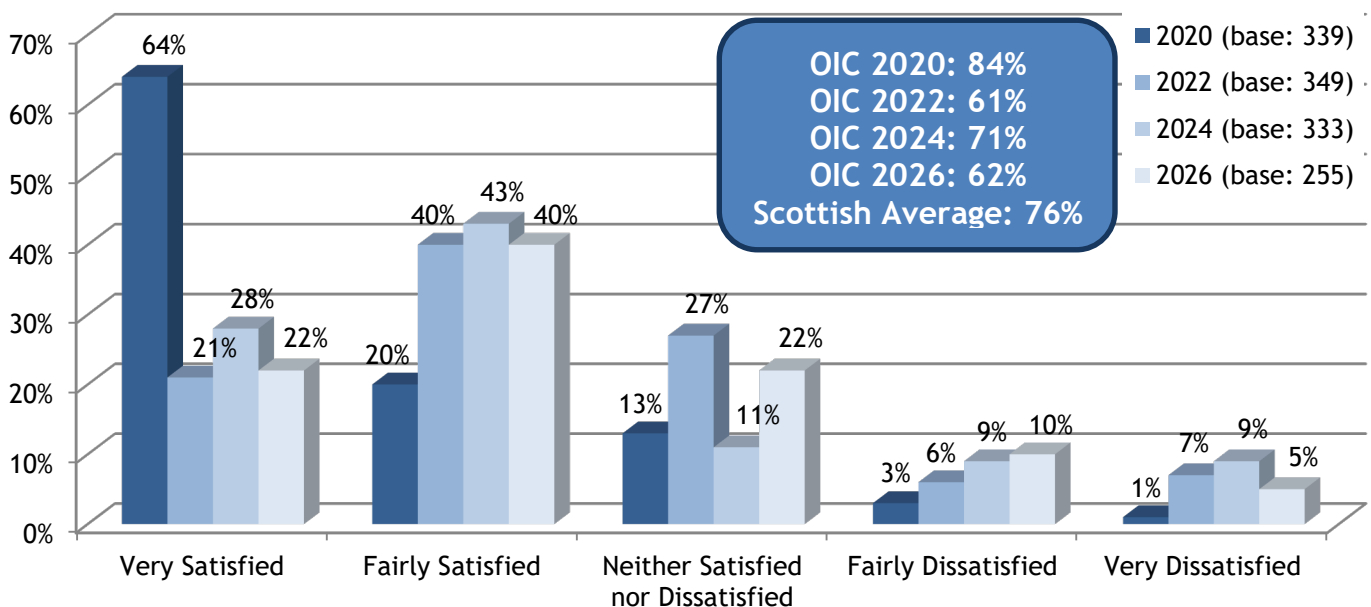
Percentage of tenants satisfied with the opportunities given to them to participate in their landlord's decision making processes (Charter Indicator 5).

3.2 The following question was posed with respect to satisfaction with the opportunities given to participate in the Housing Service's decision-making processes:

"How satisfied or dissatisfied are you with the opportunities given to you to participate in the Housing Service's decision-making processes?"

The results are set out in Figure 3.2 below.

Figure 3.2: Satisfaction with Opportunities to Take Part in the Housing Service's Decision Making Processes



The majority of respondents were very or fairly satisfied that they have the opportunity to take part in the Housing Service's decision making processes (62%, down from 71% in 2024 and lower than the Scottish average of 76%). A small minority expressed dissatisfaction (15%, down slightly from 18% in 2024).

Satisfaction levels are slightly higher than the average figure amongst respondents in Kirkwall (64%) compared with respondents in other areas (61%).

KEY POINTS IN RELATION TO COMMUNICATIONS AND PARTICIPATION

There has been a slight decline in the proportion of tenants who feel that the Housing Service is good at keeping them informed about their services and decisions. This figure has decreased from 77% in 2024 to 74% in 2026.

This pattern is more evident in relation to satisfaction with opportunities to take part in the Housing Service's decision making processes, which has decreased from 71% to 62% between 2024 and 2026.

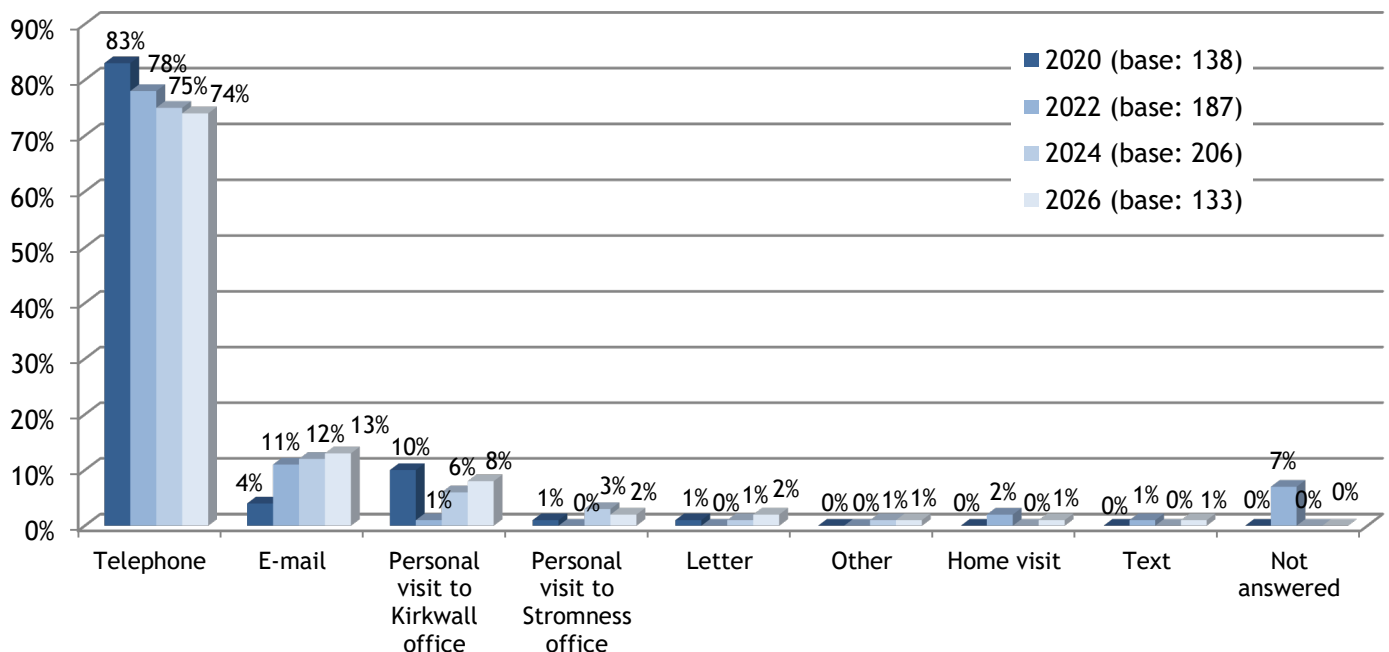
4.0 CONTACT WITH THE HOUSING SERVICE

- 4.1 50% of respondents have contacted the Housing Service in the last 12 months with a query other than to pay their rent (61% in 2024). The methods by which respondents last contacted the Housing Service are illustrated in Figure 4.1.

Figure 4.1: Method of Contact

How did you last contact the Housing Service?

Base is only those that have contacted the Council's Housing Service in the last 12 months with a query other than to pay their rent or a service charge.



As shown, respondents mainly contact the Housing Service by telephone (74%, down slightly from 75% in 2024), followed to a much lesser extent by email (13%, up slightly from 12%). Comparatively few people make contact by other means.

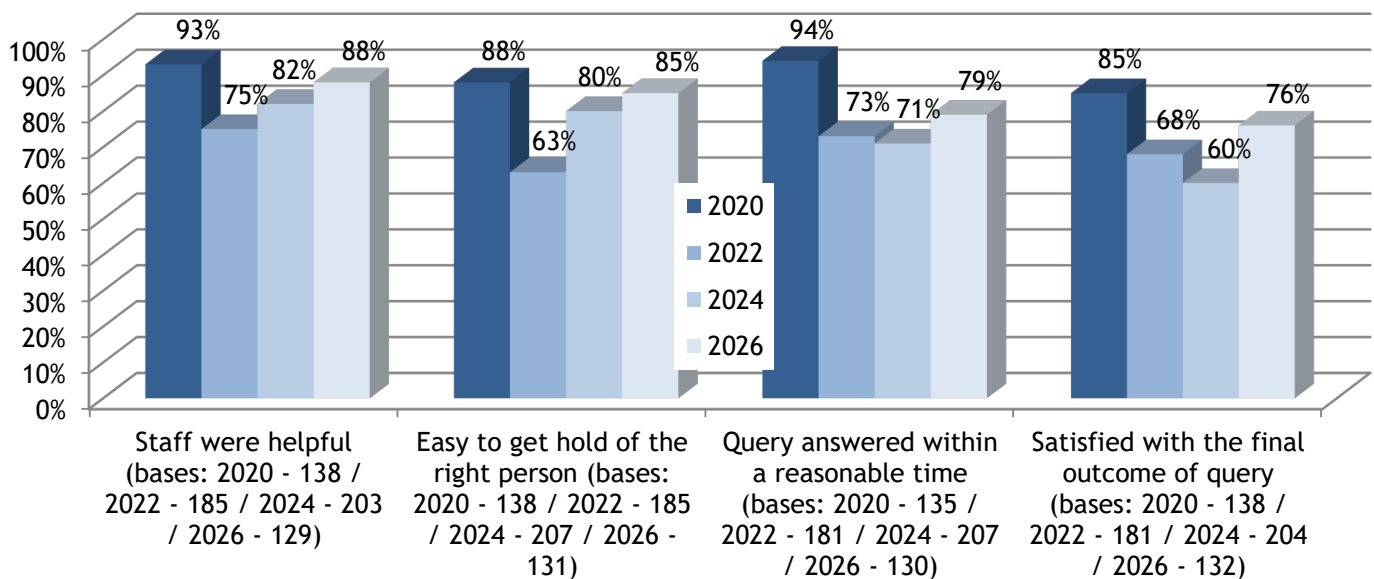
Respondents in other areas were slightly less likely to contact the housing service by telephone (67%) when compared to respondents from Kirkwall (80%). The opposite was true in relation to contacting the housing service by email (19% in other areas and 9% in Kirkwall).

- 4.2 Figure 4.2 illustrates respondents' perception of a range of aspects of customer service such as ease of getting hold of the right person, helpfulness of staff, time taken to deal with the query and satisfaction with the outcome of the query.

Figure 4.2: Aspects of Customer Service

*Was getting hold of the right person easy or difficult?
Did you find the Housing Service's staff helpful or unhelpful?
Was your query answered within a reasonable time?*

*How satisfied or dissatisfied were you with the final outcome of your query?
Bases are only those that have made contact in last 12 months and gave an answer.*



The Housing Service is rated positively in relation to all of the above aspects of customer service, particularly in relation to helpfulness of staff (88%, up from 82% in 2024) and ease of getting hold of the right person (85%, up significantly from 80%). These figures have also improved in relation to queries being answered in an acceptable time (79%, up from 71%) and satisfaction with the final outcome of the query (76%, up significantly from 60%).¹⁰

Respondents in Kirkwall were significantly more likely than respondents in other areas to provide a positive rating in relation to query being answered within a reasonable time (83%, compared to 73% in other areas), satisfaction with the final outcome of the query (80%, compared to 69% in other areas) and ease of getting hold of the right person (90%, compared to 79% in other areas). Although, in relation to staff being helpful respondents in other areas were slightly more positive (88%, compared to 87% in Kirkwall).

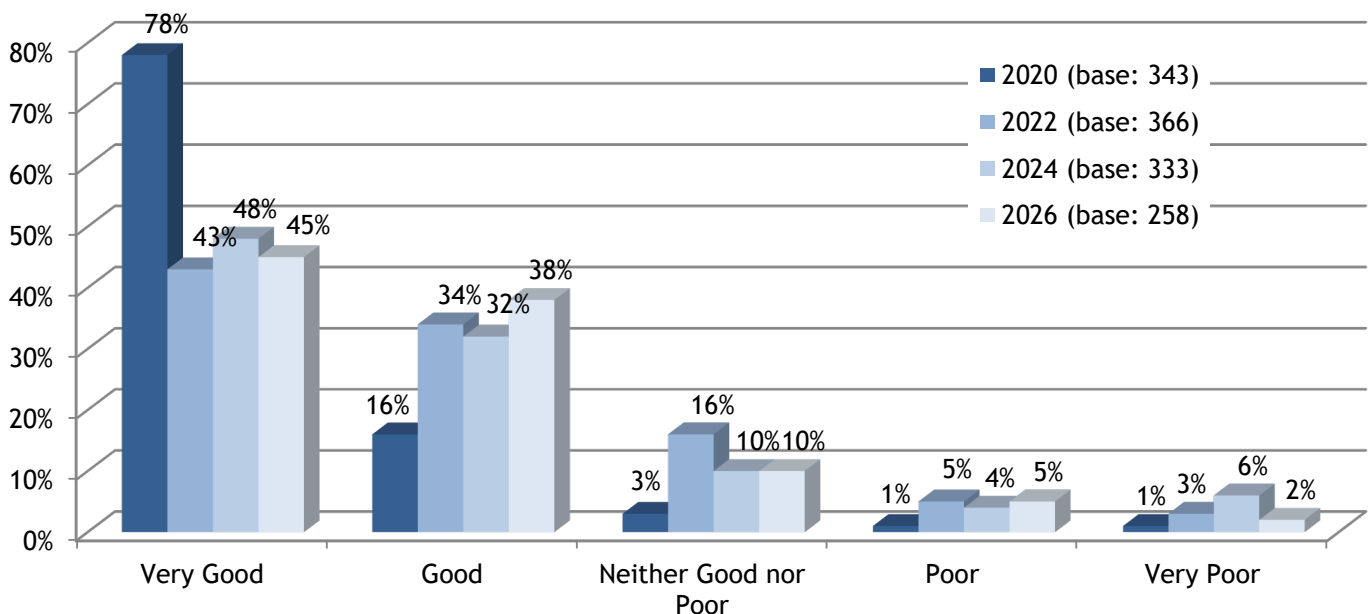
¹⁰ Throughout this report "significant" generally refers to percentage figures being 10% more or less, than 2024 figures.

- 4.3 Comments made by respondents in relation to difficulties they found getting hold of the right person mainly referred to issues getting passed between departments and calls not being answered or returned. A full list of these comments can be found in Appendix 3.
- 4.4 Figure 4.3 illustrates respondents' overall rating of the quality of customer service provided by the Council.

Figure 4.3: Overall View of Quality of Customer Service

What is your overall view of the quality of customer service provided by the Housing Service?

Base is only those that provided an answer.



The Housing Service achieves a high rating in relation to the overall quality of customer service with 83% of respondents rating it as good or very good (up from 80% in 2024). Only a small minority rated it as poor or very poor (7%, down from 10%) and the remaining 10% gave a neutral response (also 10% previously).

Respondents in Kirkwall (86%) were more likely to give a positive rating when compared with other areas (80%).

KEY POINTS IN RELATION TO CONTACT WITH THE HOUSING SERVICE

50% of respondents said that they had contacted the Council's Housing Service in the last 12 months with a query other than to pay their rent or a service charge (down from 61% in 2024).

Respondents' last method of contact with the Council was mainly by telephone (74%, down slightly from 75% in 2024) or by email (13%, up slightly from 12% in 2024). There continues to be a small minority contacting the Housing Service by any other means.

The Council continues to achieve positive ratings across a number of aspects of customer service and the extent of this has improved in relation to all aspects. 88% of respondents indicate that staff were helpful compared to 82% in 2024; 85% said it was easy to get hold of the right person compared to 80% in 2024; 79% indicated that their query was answered within a reasonable time compared to 71% in 2024; 76% expressed satisfaction with the final outcome of their query compared with 60% in 2024.

Overall, 83% of respondents had a positive view of the overall quality of customer service compared to 80% in 2024.

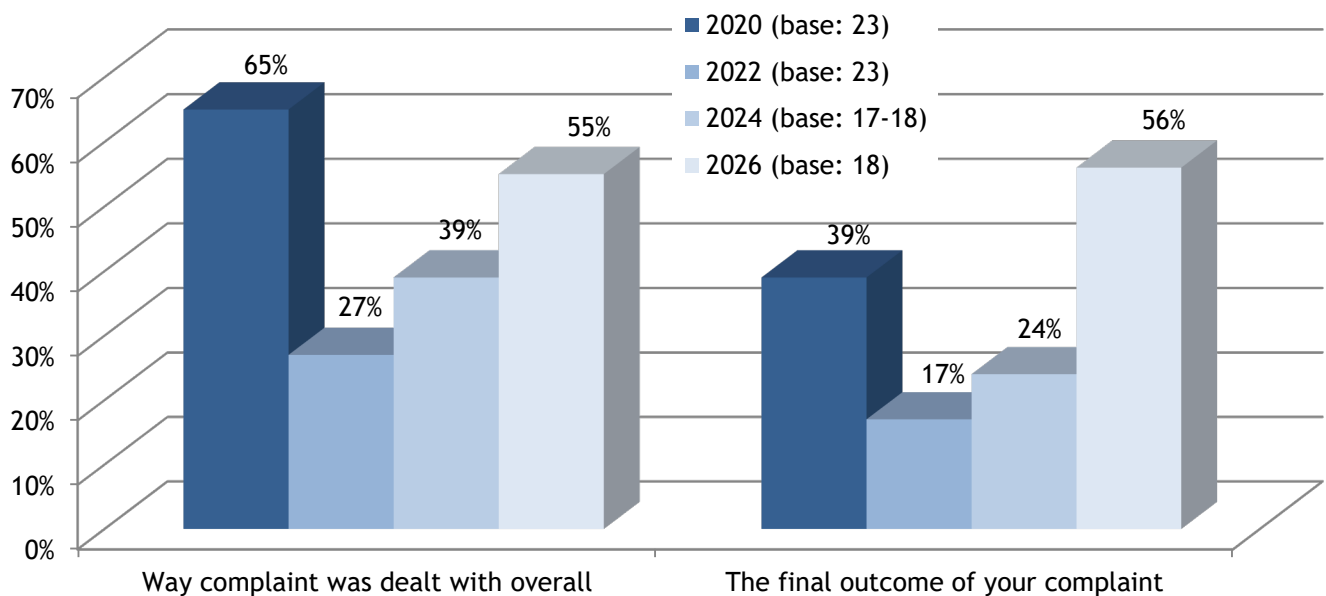
5.0 COMPLAINTS POLICY

5.1 60% of respondents are aware of the Housing Service's complaints policy (also 60% in 2024). Amongst all respondents, 7% have made a complaint to the Housing Service in the last 12 months (5% in 2024). Figure 5.1 illustrates the combined figures for very or fairly satisfied and compares this to the results from 2024, 2022 and 2020.¹¹

Figure 5.1: Satisfaction with Aspects of Complaints Service

How satisfied or dissatisfied were you with the following aspects of the complaints service?

Bases are only those that have made a complaint in the last 12 months.



Amongst respondents that have made a complaint to the Housing Service in the last 12 months (18 people), satisfaction is highest in relation to the final outcome of their complaint (56%, up substantially from 24% in 2024). The majority of tenants were very or fairly satisfied with the way the complaint was dealt with overall (55%, up significantly from 39% in 2024).

¹¹ The very low base number of responses in each case should be noted.

KEY POINTS IN RELATION TO THE COMPLAINTS POLICY

The majority of respondents said they were aware of the Housing Service's complaints policy (60%, also 60% in 2024). The proportion that indicated they had made a complaint in the previous 12 months was 7%, up slightly from 5% in 2024. 56% expressed satisfaction with the final outcome of their complaint; this was substantially higher than the figure of 24% in 2024. 55% of those that said they had made a complaint expressed satisfaction with the way their complaint was handled overall, compared to 39% in 2024. It is important to note the very low base number of individuals who had made a complaint as this can mean that changes are based on responses from a very small group of people.

6.0 THE HOME

NEW TENANTS AND MOVING IN

- 6.1 For this section, respondents were asked if they had moved into their property within the last year (that is, since January 2025). 12% (31 respondents, up from 8% / 26 respondents in 2024) said that they had done so, and the results set out below are based on only this group of respondents.¹²
- 6.2 The following question was posed with respect to satisfaction with the standard of the home when moving in:¹³

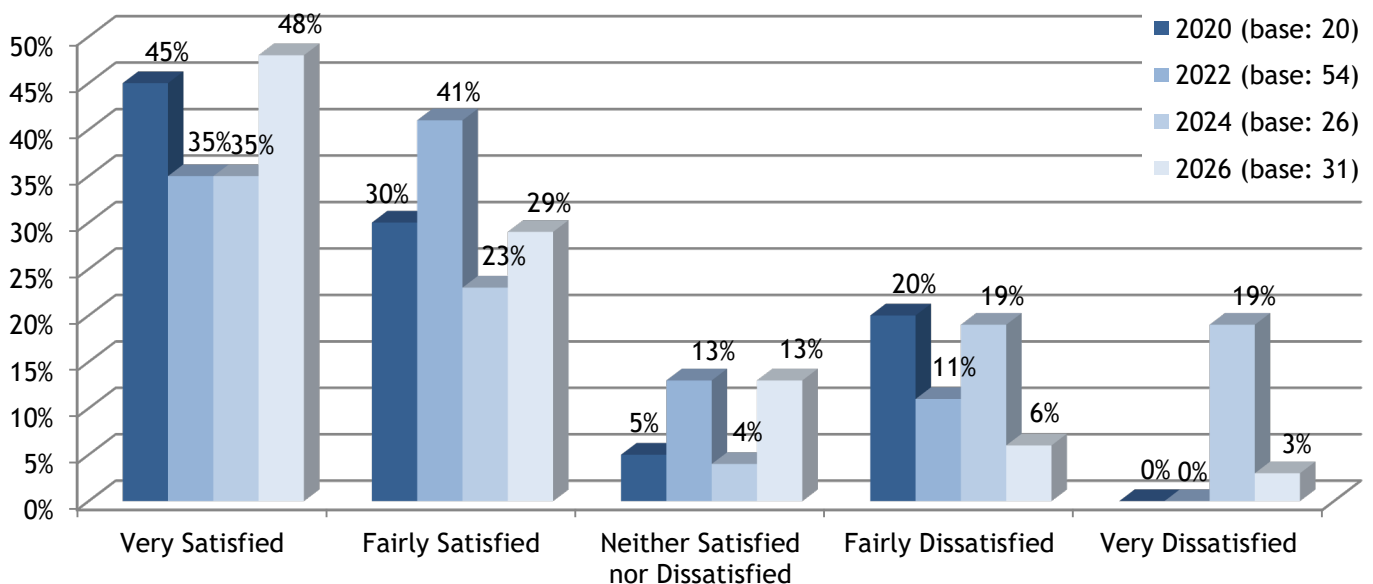
“Thinking about when you moved in, how satisfied or dissatisfied were you with the standard of your home?”

The results are set out in Figure 6.1 below.

Figure 6.1: Satisfaction with Standard of Home on Moving In

Thinking about when you moved in, how satisfied or dissatisfied were you with the standard of your home?

Base is only those that move in the last 12 months and gave an answer.



¹² It should be noted that this question was a former Charter Indicator but was removed as such by the Scottish Housing Regulator during 2019.

¹³ The questionnaire indicated that “standard of your home” meant things like general state of repair and cleanliness and tidiness.

The majority of respondents that have moved into their home within the last year were very or fairly satisfied with the standard of their home when they moved in (77%, up significantly from 58% in 2024).

This satisfaction figure is higher amongst Kirkwall respondents (80%) compared with respondents in other areas (72%).

It should, however, be noted that these results are based on a small number of respondents.

- 6.3 Respondents that moved into their home within the last year were asked to say how satisfied or dissatisfied they were with a range of aspects relating to the moving in process. Table 6.1 details the combined figures for very or fairly satisfied and compares this to the results from 2024, 2022 and 2020.¹⁴

Table 6.1: Satisfaction with Aspects of Moving In Process

How satisfied or dissatisfied were you with each of the following issues when you moved into your home?

Bases are only those that moved in the last 12 months and gave an answer.

Aspect of moving in process	Very or Fairly Satisfied			
	2020	2022	2024	2026
The process of applying for a home ¹⁵	-	76%	85%	87%
The condition of the home when you moved in ¹⁶	63%	64%	58%	78%
Bases	18-19	31-37	26	31

The majority of tenants that moved into their home in the last 12 months were very or fairly satisfied with the process of applying for a home (87%, up slightly from 87% in 2024). Fewer respondents were very or fairly satisfied with the condition of the home when they moved in (78%, up significantly from 58%).

- 6.4 48% of respondents that had moved into their home in the last 12 months (15 respondents) had contact with the Council's homelessness and advice section over the past two years (compared with 54% / 14 respondents in 2024). Amongst these respondents, the vast majority (86%, down from 92% in 2024) were very or fairly satisfied with their dealings with the Council's homelessness and advice service.

¹⁴ The low base number of responses in each case should be noted.

¹⁵ "How easy it was to apply for a property" in 2022.

¹⁶ "The decorative condition of your home on moving in" up to 2022.

- 6.5 80% of respondents that had moved into their home in the last 12 months (15 respondents) were provided with homeless accommodation (compared to 46%, 12 respondents in 2024). Amongst these respondents, 66% were very or fairly satisfied with the overall quality of the homeless accommodation they were provided with (compared with 100% in 2024).

QUALITY OF HOME

Percentage of tenants satisfied with the quality of their home (Charter Indicator 7).

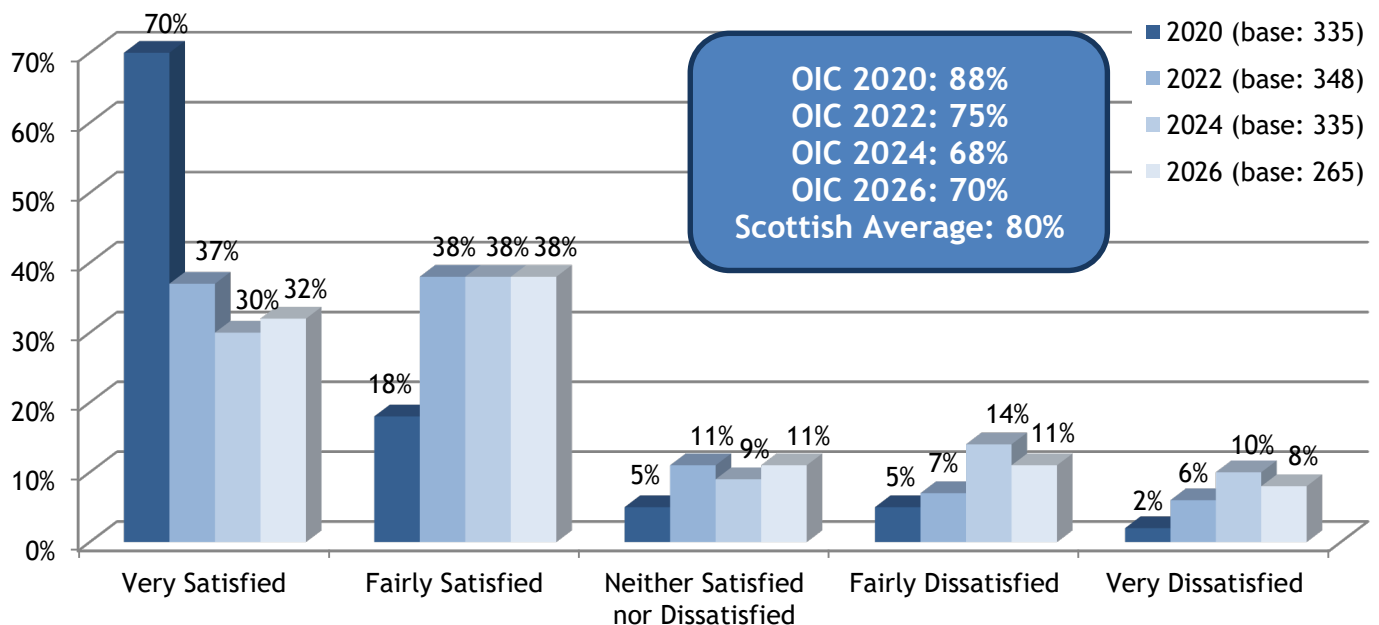
- 6.6 The following question was posed to all respondents with respect to satisfaction with the quality of their home:¹⁷

“Overall, how satisfied or dissatisfied are you with the quality of your home?”

The results are set out in Figure 6.4.

Figure 6.4: Satisfaction with Quality of Home

*Overall, how satisfied or dissatisfied are you with the quality of your home?
Base is only those that provided an answer.*



¹⁷ The questionnaire indicated that “quality of your home” referred to the quality to which homes were repaired and maintained by the landlord. It further noted that it included things like the general state of repair of the property and the standard of kitchen units and bathroom suites.

The majority of respondents (70%, up from 68% in 2024, but lower than the Scottish average of 80%) were very or fairly satisfied with the quality of their home overall. A significant minority were very or fairly dissatisfied (19%, compared to 24% in 2024) and the remaining 11% gave a neutral response (compared to 11% in 2024).

Kirkwall respondents provide a slightly higher level of satisfaction (71%) when compared to respondents from other areas (70%).

6.7 Table 6.1 details how satisfied or dissatisfied respondents are with aspects of their home. These figures are compared to the overall satisfaction figures from 2024.

Table 6.1: Satisfaction with Aspects of Home

How satisfied or dissatisfied are you with the following aspects of the inside of your home?

Aspect of Home	Very or Fairly Satisfied 2024	Very or Fairly Satisfied 2026	Very Satisfied	Fairly Satisfied	Neither Satisfied nor Dissatisfied	Fairly Dissatisfied	Very Dissatisfied	Base
External appearance of home	78%	87%	43%	44%	5%	4%	4%	262
Living room	84%	84%	45%	39%	6%	6%	4%	264
Bedroom(s)	78%	80%	42%	38%	6%	7%	7%	264
Kitchen	74%	78%	43%	35%	5%	10%	7%	265
Private Gardens	77%	73%	39%	34%	12%	4%	11%	251
Bathroom(s)	69%	71%	38%	33%	9%	13%	7%	265
Windows	65%	67%	40%	27%	6%	12%	16%	264
Doors	67%	67%	34%	33%	6%	14%	13%	264
Heating	51%	53%	28%	25%	7%	18%	23%	262

The majority of respondents were either very or fairly satisfied with all aspects of their home, most notably with the external appearance of the home (87%, up from 78% in 2024), the living room (84%, also 84% previously), bedrooms(s) (80%, up slightly from 78%) and kitchens (78%, up from 74%). However, respondents are significantly less likely to be satisfied with heating (53%, up slightly from 51%).

Satisfaction levels were comparable for respondents living in Kirkwall and respondents living in other areas in relation to external appearance (87% in both areas), living room (84%) and heating (53%). Levels of satisfaction were higher amongst respondents in Kirkwall in relation to bedrooms (81%, compared to 79% in other areas), kitchens (78%, compared to 76% in other areas) and bathrooms (75%, compared to 65% in other areas). Conversely, levels of satisfaction were higher amongst respondents in other areas in relation to private gardens (79%, compared to 69% in Kirkwall), windows (71%, compared to 64% in Kirkwall) and doors (70%, compared to 65% in Kirkwall).

- 6.8 Table 6.2 profiles the type of central heating respondents said they had in their home compared with the profile from 2024, 2022 and 2020.

Table 6.2: Type of Heating

What kind of heating do you have?

Heating Type	2020	2022	2024	2026
Air source	15%	19%	18%	14%
Air-to-air	0%	0%	2%	0%
Ground source	6%	9%	5%	9%
Oil	0%	1%	0%	2%
Open coal fire	2%	1%	1%	1%
Solar / photovoltaic panels	1%	0%	0%	1%
Solid fuel with back boiler	1%	3%	1%	0%
Storage heating	67%	54%	59%	56%
Other	6%	7%	8%	12%
Not sure	2%	6%	5%	6%
Base	343	333	336	263

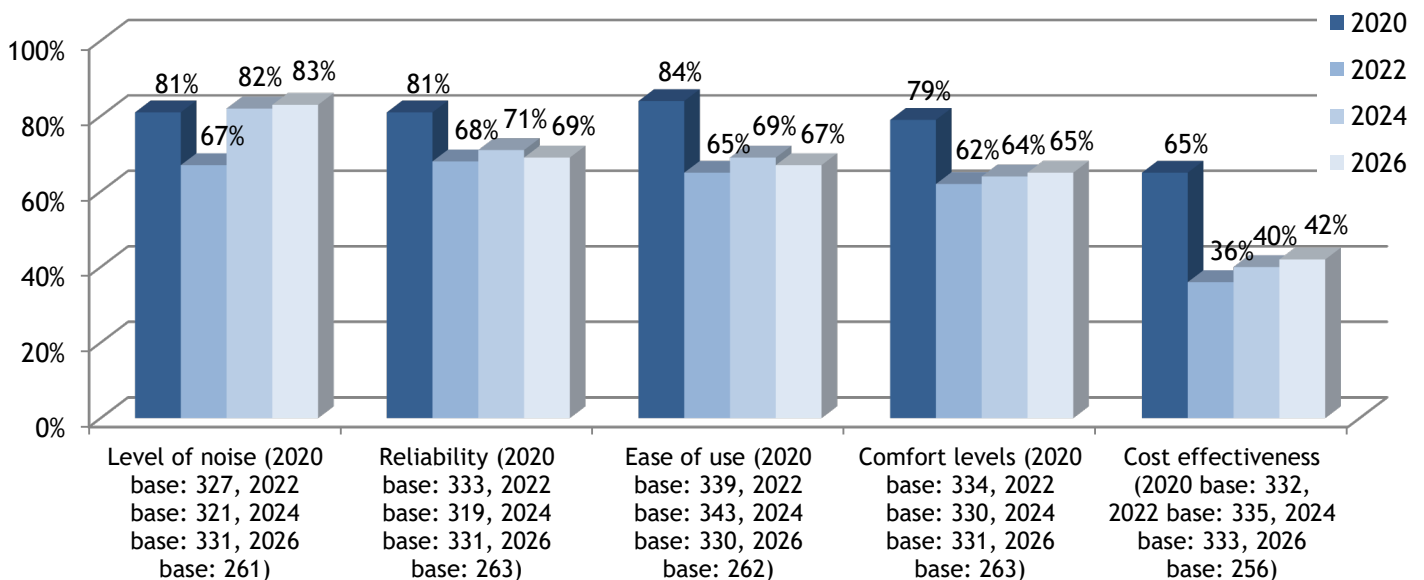
As shown above, the profile shows a slightly lower proportion of respondents with storage heating (56%, compared to 59% previously) and air source heating (14%, compared to 18%) and a slightly greater proportion of respondents with ground source heating (9%, up from 5%).

This profile is also broadly similar across Kirkwall and other areas, although storage heating was more common in Kirkwall when compared with other areas (59%, compared with 50% in other areas) and air source heating was significantly more common in other areas (21%, compared with 9% in Kirkwall).

- 6.9 Respondents' rating of their heating system is illustrated in Figure 6.5 below. This shows the proportion that rate their heating system as very good or good and is compared to the results from previous surveys back to 2020.

Figure 6.5: Rating of Aspects of Heating System

*How would you rate your heating system according to the following?
Bases are those that gave an answer.*



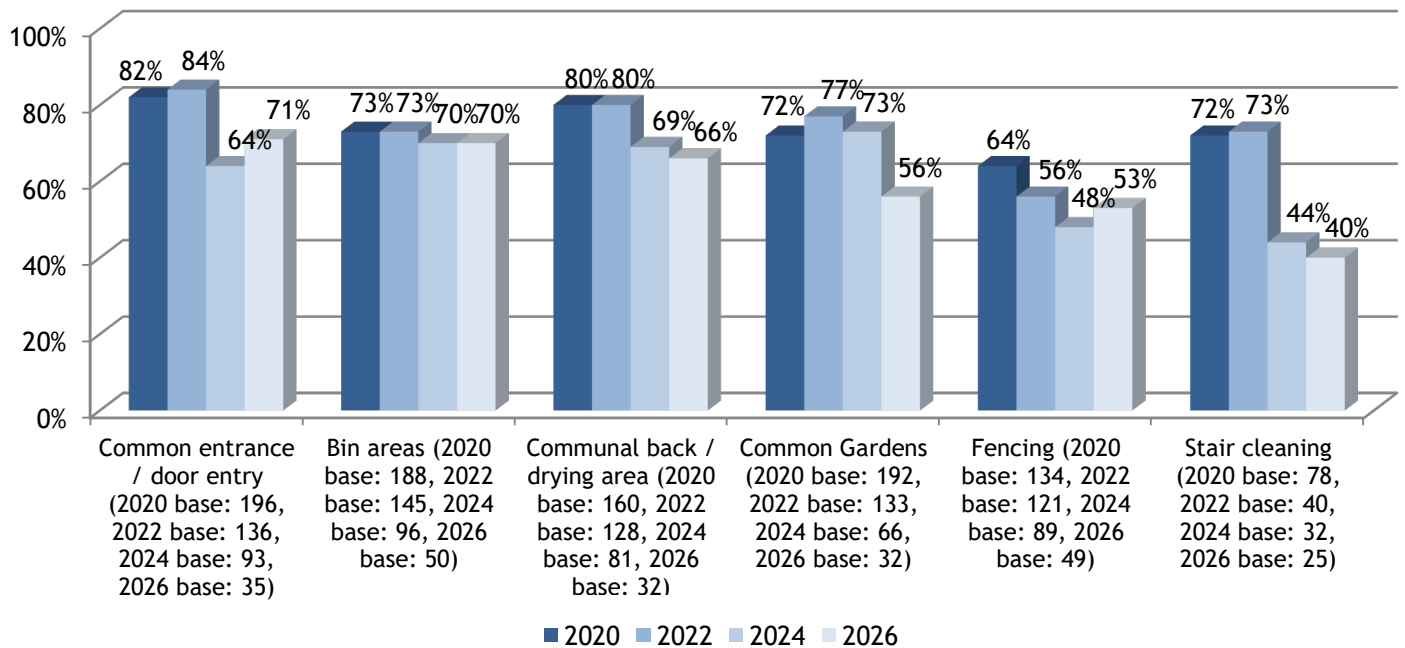
The majority of respondents rate most aspects of their heating systems as good or very good, with the exception being in relation to cost effectiveness where 42% rate it as very good or good (this is up slightly from 40% in 2024). Ratings were highest in relation to level of noise (83%, up slightly from 82% in 2024), followed by reliability (69%, down slightly from 71%), ease of use (67%, down slightly from 69%) and comfort levels (65%, up slightly 64%).

- 6.10 Figure 6.6 over the page illustrates how satisfied or dissatisfied respondents are with aspects of the common areas of their property. This shows the proportion that are very or fairly satisfied with aspects of the common areas of their property, again compared to the results from previous surveys.

Figure 6.6: Satisfaction with Common Areas

How satisfied are you with the common areas of your property (if relevant) with regard to the following?

Bases exclude 'Don't know / Not relevant' responses.



The majority of respondents were very or fairly satisfied with most aspects of the common areas of their property. This was the case in relation to: common entrance / door entry systems (71% very or fairly satisfied, up from 64% in 2024); bin areas (70%, also 70% previously); communal back / drying areas (66%, down slightly from 69%); common gardens (56% down significantly from 73%) and fencing (53%, up from 48%). Satisfaction was significantly lower in relation to stair cleaning (40%, down from 44% in 2024).

Satisfaction levels were higher amongst respondents in Kirkwall when compared to respondents from other areas in relation to bin areas (72%, compared to 65% for respondents in other areas), common gardens (57%, compared to 51% in other areas) and fencing (59%, compared to 47% in other areas). Conversely, satisfaction levels were higher amongst respondents in other areas compared to respondents in Kirkwall in relation to common entrance / door entry (83%, compared to 72% amongst Kirkwall respondents), communal back / drying area (66%, compared to 64% in Kirkwall) and stair cleaning (50%, compared to 38% in Kirkwall). It should be noted that these figures are based on a small number of tenants that have each of these common areas.

KEY POINTS IN RELATION TO THE HOME

Of those that moved into their home in the last year, the majority (77%, up significantly from 58% in 2024) were satisfied with the standard of their home when they moved in.

Amongst respondents that moved into their home in the last year the majority were also satisfied with all aspects of the moving in process, with a significant improvement in the proportion of respondents that expressed satisfaction with the condition of the home when they moved in (from 58% in 2024 to 78% in 2026). A slightly higher proportion of respondents were satisfied with the process for applying for a home (87%, up from 85%). Again, the small base number of responses for this specific question means that significant percentage changes can arise based only on the views of a small number of people.

15 respondents indicated that they had had contact with the Council's homelessness and advice section over the past two years or so. Of these, 86% expressed satisfaction (down slightly from 92% in 2024). 15 people indicated that they had been provided with homeless accommodation. Of these, 66% expressed satisfaction (down from 100% in 2024).

Overall, 70% of respondents said that they were satisfied with the overall quality of their home; this was up slightly from the 68% recorded in 2024.

The majority of respondents were very or fairly satisfied with a range of specific aspects of their homes and satisfaction figures recorded in 2026 were generally comparable or slightly higher than those recorded in 2024. The exception being, satisfaction with private gardens (73%, down from 77% in 2024).

Ratings on some aspects of heating systems have shown improvement since 2024 with the majority rating most aspects as good or very good. The exception related to cost effectiveness where 42% rate it as very good or good (this is up slightly from 40% in 2024).

Satisfaction with a number of aspects of common areas, where relevant to the tenant, has declined between 2024 and 2026. This was the case for each of communal back / dying areas (66%, down slightly from 69%); common gardens (56% down significantly from 73%) and stair cleaning (40%, down from 44% in 2024). Again, these results are based on a small number of respondents relative to the whole sample.

7.0 REPAIRS AND HOUSING SERVICES

Percentage of tenants who have had repairs or maintenance carried out in last 12 months satisfied with the repairs and maintenance service (Charter Indicator 12).

- 7.1 With respect to the repairs service, respondents were asked firstly if they had any repairs carried out to their property in the last 12 months.¹⁸ 60% of respondents indicated that this was the case (compared to 61% in 2024).

In line with the Regulator's guidance, the follow up question described below was asked of all respondents. However, the Regulator's guidance is that, although this question should be asked of all tenants, the information for the Annual Return on the Charter (ARC) should be based only on those that indicated that they had repairs carried out in the last 12 months. We have therefore set out the results below on this basis (that is, for those that indicate they have had repairs carried out over the past 12 months).

- 7.2 The following question was posed with respect to satisfaction with the repairs service:

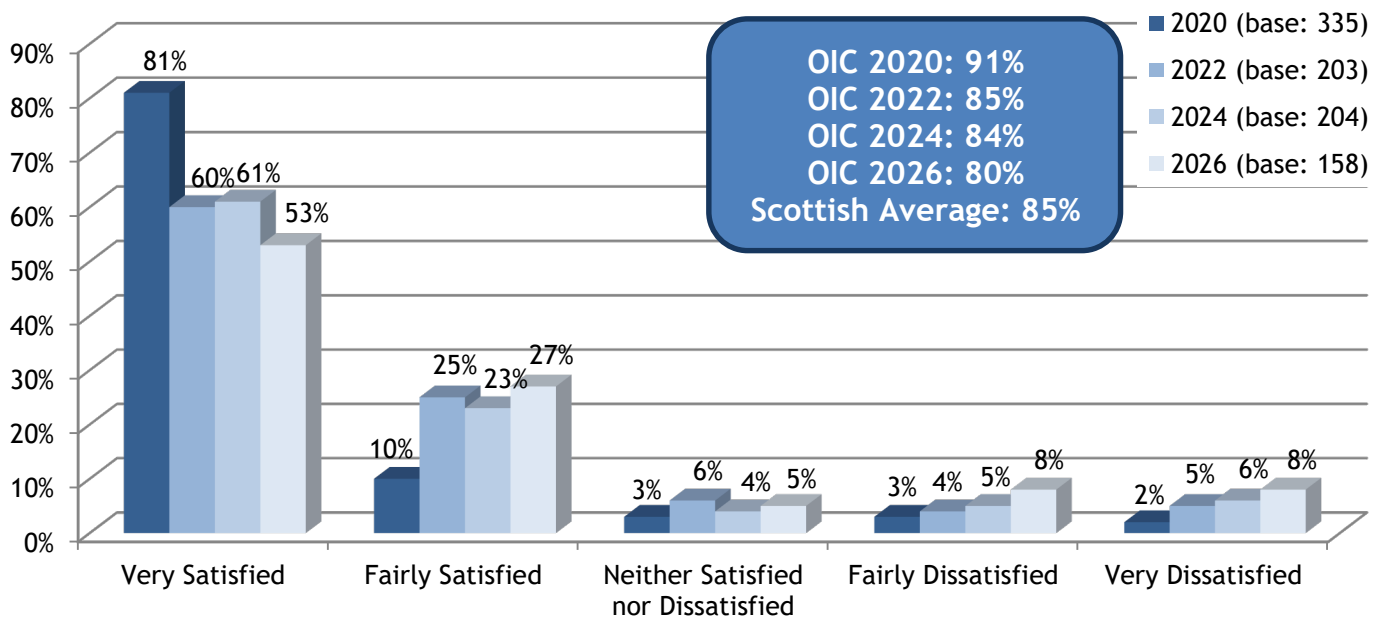
“Thinking about the LAST time you had repairs carried out, how satisfied or dissatisfied were you with the repairs service provided by the Housing Service?”

The results are set out in Figure 7.1 on the following page.

¹⁸ The questionnaire noted that repairs related to “reactive repairs” rather than any repairs or maintenance carried out as part of a planned programme.

Figure 7.1: Satisfaction with Repairs Service

*Thinking about the LAST time you had repairs carried out, how satisfied or dissatisfied were you with the repairs service provided by the Housing Service?
Base is only those that have had repairs carried out in the last 12 months.*



Amongst those that have had repairs carried out in their home in the last 12 months, the Council achieves a high level of satisfaction with 80% of respondents being very or fairly satisfied (down slightly from 84% in 2024 and slightly lower than the Scottish average of 85%).

Satisfaction levels vary between respondents in Kirkwall (77%) and respondents from other areas (84%).

- 7.3 Figure 7.2a and 7.2b over the page illustrate how satisfied respondents were with aspects of the repairs service they received. This is based on respondents that have had repairs carried out in the last 12 months. This shows the proportion that are very or fairly satisfied with aspects of the repairs service compared to the results from previous surveys.

Figure 7.2a: Satisfaction with Aspects of Repairs Service

Thinking about the last time you had repairs carried out by the Housing Service, how satisfied or dissatisfied were you with each of the following?

Bases are only those that have had a repair carried out in the last 12 months and excludes 'Don't know / No opinion' responses.

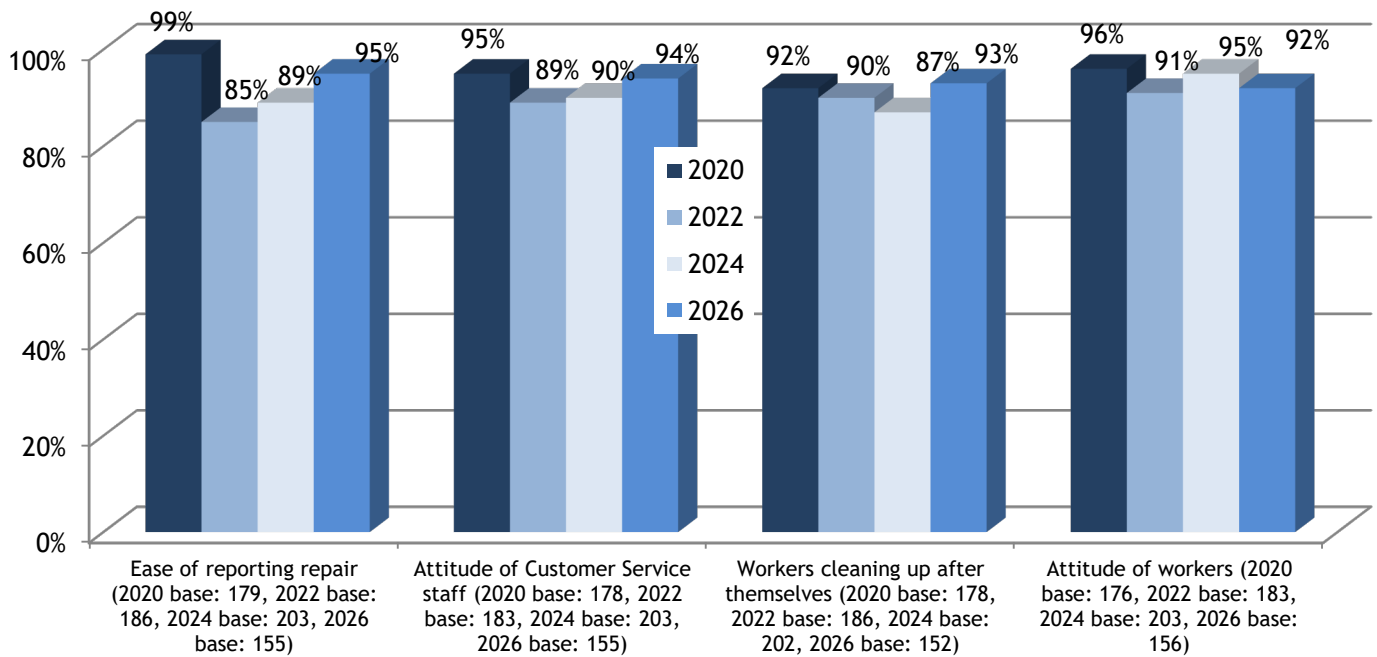
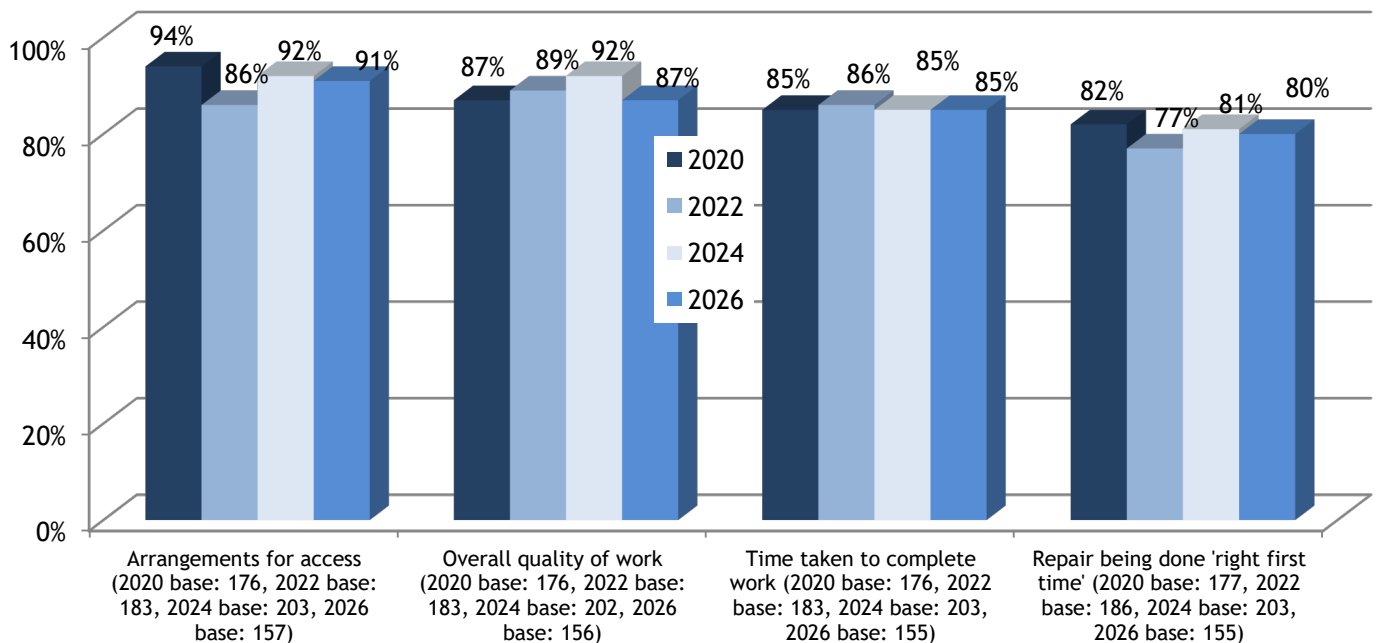


Figure 7.2b: Satisfaction with Aspects of Repairs Service (continued)

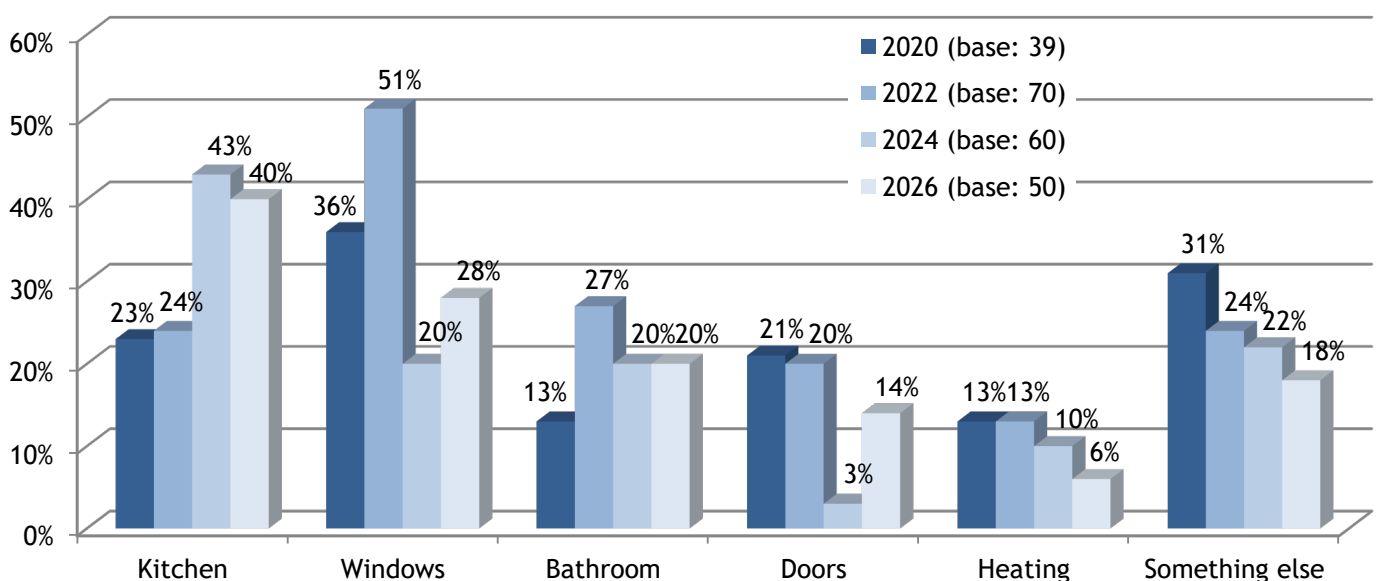


The majority of respondents were very or fairly satisfied with all aspects of the repairs service they have received in the last 12 months, particularly in relation to the ease of reporting the repair (955 very or fairly satisfied, up from 89% in 2024), the attitude customer service staff (94%, up from 90%), workers clearing up after themselves (93%, up from 87%), the attitude of workers (92%, up substantially from 67%) and the arrangements for worker access (91%, down slightly from 92%). Satisfaction levels are significantly lower by comparison in relation to the repair being done “right first time” (80%, down slightly from 81%); these are still very positive results.

- 7.4 19% of all respondents have had planned maintenance improvements carried out to their home in the last 2 years or so (18% in 2024). Figure 7.3 illustrates the improvements that respondents had carried out to their home.

Figure 7.3: Planned Maintenance Improvements

*What improvements did this work include?
Bases exclude ‘Don’t know’ responses.*



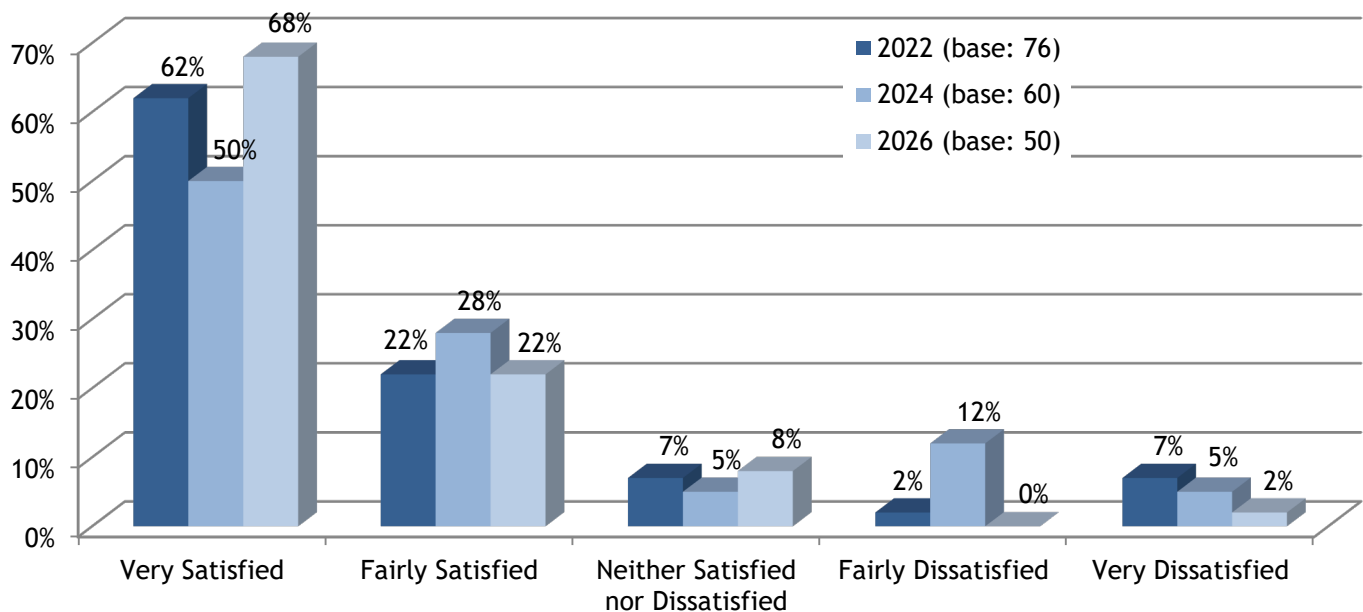
Amongst those that have had planned maintenance improvements carried out to their home over the last two years this most commonly related to kitchens (40%, down slightly from 40% in 2024), windows (28%, up from 20%) and bathrooms (20%, also 20% previously). Some respondents cited other types of specific improvements, a full listing of which can be found in the appendices.

7.5 Respondents' level of satisfaction with the planned maintenance work that was carried out in their home is detailed in Figure 7.4. This question was not asked prior to the 2022 survey.

Figure 7.4: Planned Maintenance Improvements

How satisfied or dissatisfied were you with the planned maintenance work that was carried out?

Bases exclude 'Don't know' responses.



The vast majority of tenants that have had planned maintenance carried out were very or fairly satisfied with the work done (90%, up significantly from 78% in 2024). Satisfaction with this was significantly lower amongst Kirkwall tenants (87%), compared with tenants elsewhere (100%).

KEY POINTS IN RELATION TO REPAIRS AND HOUSING SERVICES

The majority of respondents (60%, down slightly from 61% in 2024) indicated that they had repairs carried out in their home in the last 12 months.

Amongst those that have had repairs carried out in their home in the last 12 months, 80% were satisfied with the service they received (down slightly from 84% in 2024).

KEY POINTS IN RELATION TO REPAIRS AND HOUSING SERVICES (CONTINUED)

The vast majority of respondents that have had repairs carried out in their home in the last 12 months were very or fairly satisfied with a range of specific aspects of the service they received; the level of satisfaction with specific aspects of service has improved slightly in relation to ease of reporting the repair (95%, up from 89% in 2024), the attitude of customer service staff (94%, up from 90%) and workers clearing up after themselves (93%, up from 87%). Conversely, a slight decline in levels of satisfaction is evident in relation to the attitude of workers (92%, down from 95%), arrangements for worker access (91%, down slightly from 92%), overall quality of work (87%, down from 92%) and the repair being done ‘right first time’ (80%, down slightly from 81%).

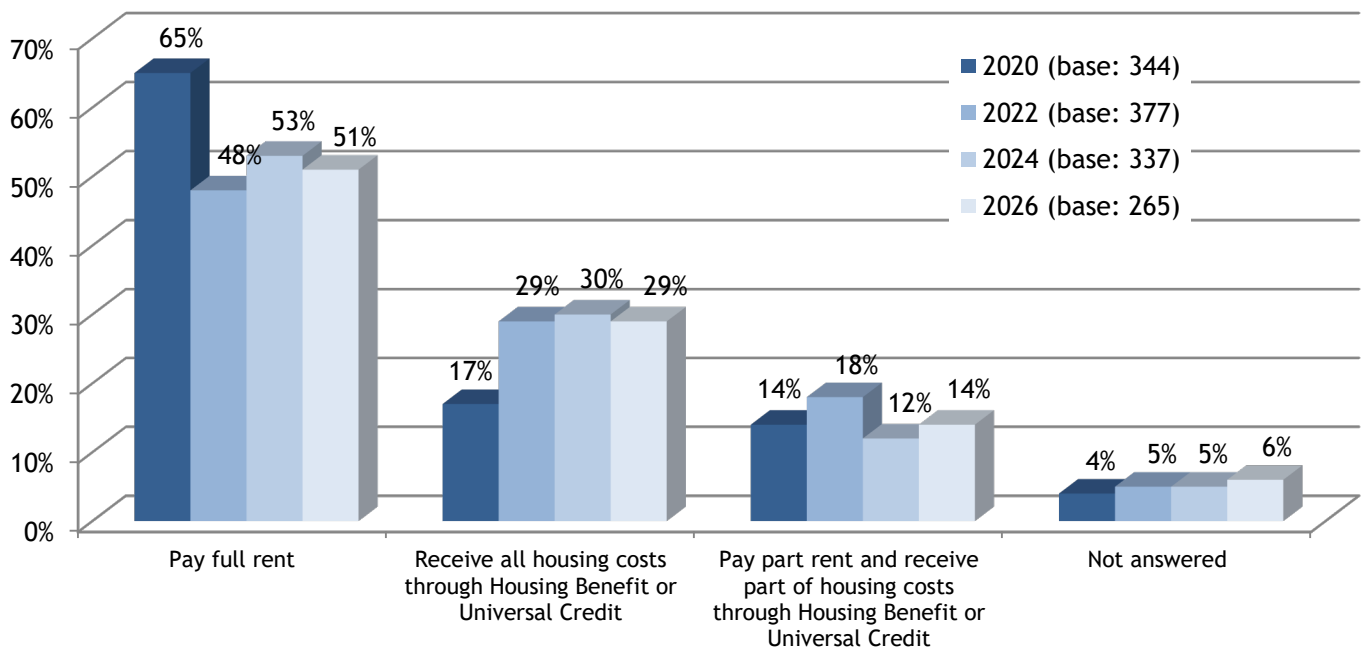
19% of respondents indicated that they had had planned maintenance improvements carried out in their home within the previous two years or so (this figure was 18% in 2024). 90% of those that had such work undertaken expressed satisfaction with it (up significantly from 78% in 2024).

Amongst all respondents, regardless of whether or not they have had repairs carried out in their home in the last 12 months, 80% were very or fairly satisfied overall with the Housing Service’s repairs service (down very slightly from 81% in 2024).

8.0 RENT AND FINANCIAL ISSUES

8.1 Figure 8.1 illustrates whether respondents pay full rent, receive full Housing Benefit / Universal Credit or partial Housing Benefit / Universal Credit. This is compared to the profiles from 2024, 2022 and 2020.

Figure 8.1: Method of paying rent



The majority of respondents stated that they pay full rent (51%, down slightly from 53% in 2024) while 29% say they receive all housing costs through Housing Benefit or Universal Credit (down slightly from 30%). A further 14% say they pay part rent and receive part of their housing costs through Housing Benefit or Universal Credit (up slightly from 12%). The remaining 6% did not answer this question (up slightly from 5% in 2024).

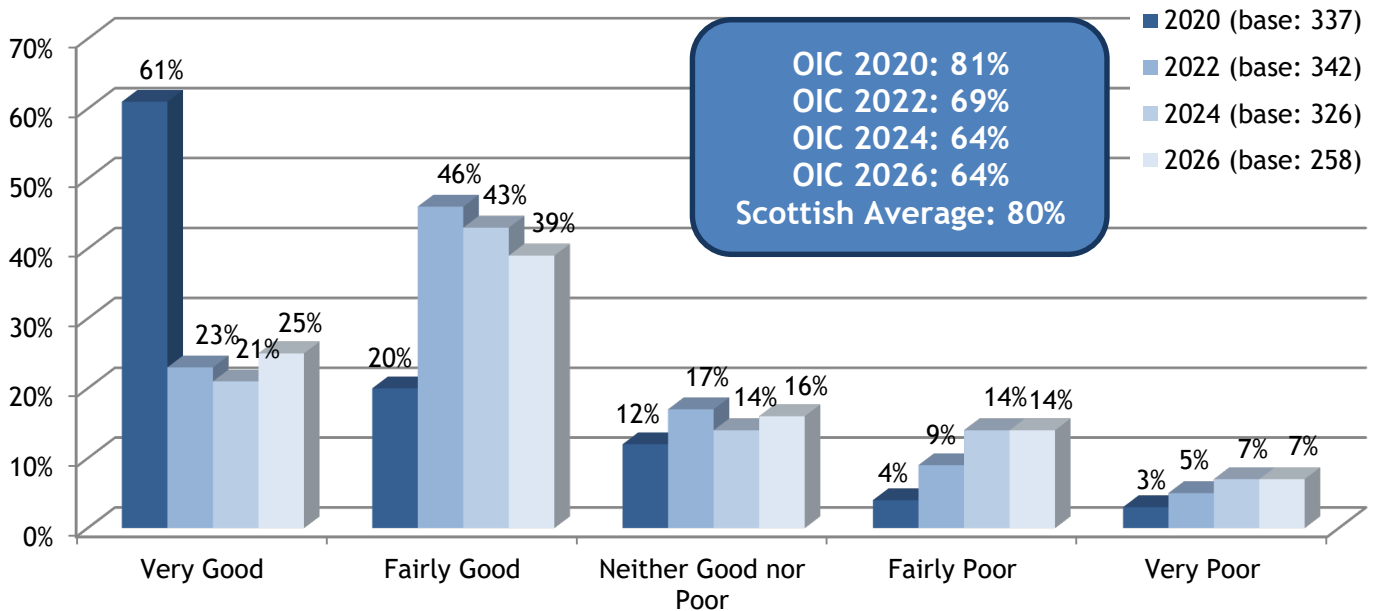
Percentage of tenants who feel the rent for their property represents good value for money (Charter Indicator 25).

8.2 The following question was posed with respect to the accommodation and services provided:

“Taking into account the accommodation and the services the Housing Service provides, do you think that the rent for this property represents good or poor value for money? Is it....”

The results are set out in Figure 8.2 over the page.

Figure 8.2: Rating of Value for Money of Rent



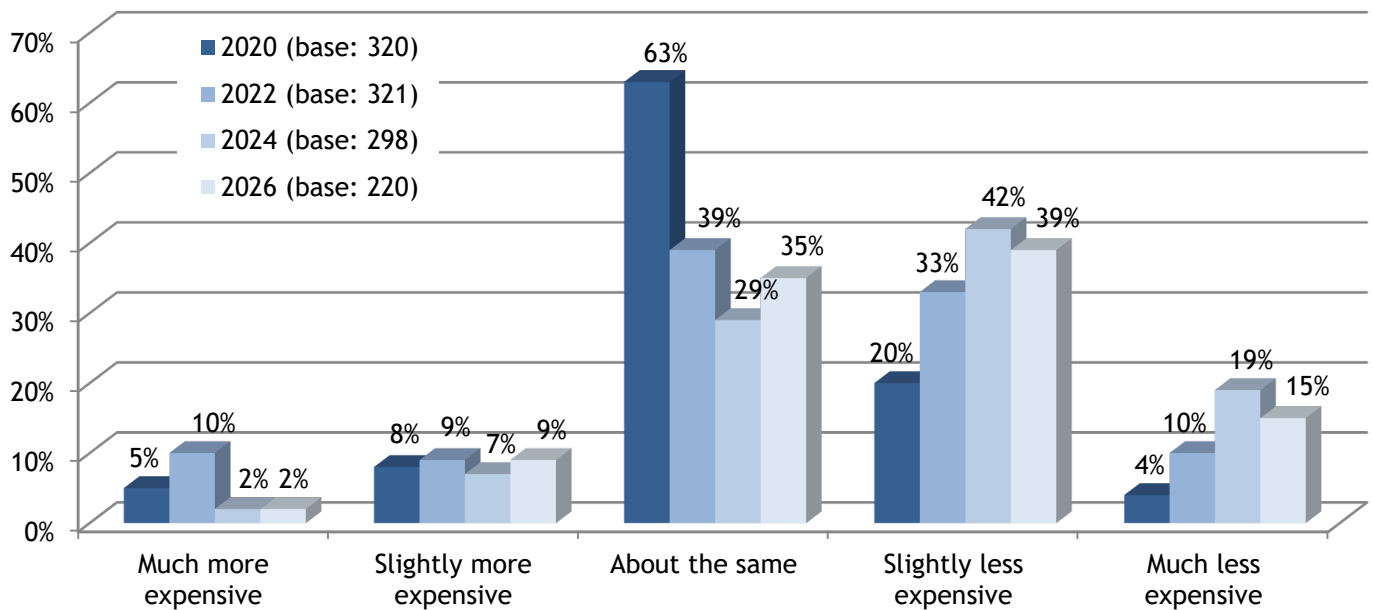
64% of respondents rate the rent that they pay as very or fairly good value for money (also 64% in 2024 and below the Scottish average of 80%) while 21% rate it as very or fairly poor (also 21% previously). A further 16% gave a neutral response (up slightly from 14%).

These results are very slightly more positive amongst Kirkwall respondents (64%) compared to respondents in other areas (63%).

- 8.3 Figure 8.3 over the page illustrates respondents' perception of rent levels for the Housing Service's properties compared to similar properties held by other landlords in the area. This is compared to the results from 2024, 2022 and 2020.

Figure 8.3: Rent Levels Compared to Other Landlords

How do you think rent levels for the Housing Service's properties compare to those of similar properties from other landlords in your area?



Overall, the majority of respondents indicated that they considered the Council's rents to be less expensive than those of other landlords (54%, down from 61% in 2024) compared to 11% that considered them to be more expensive (up from 9% in 2024). Also, a greater proportion indicated that rent levels were "about the same" (35%, up from 29%).

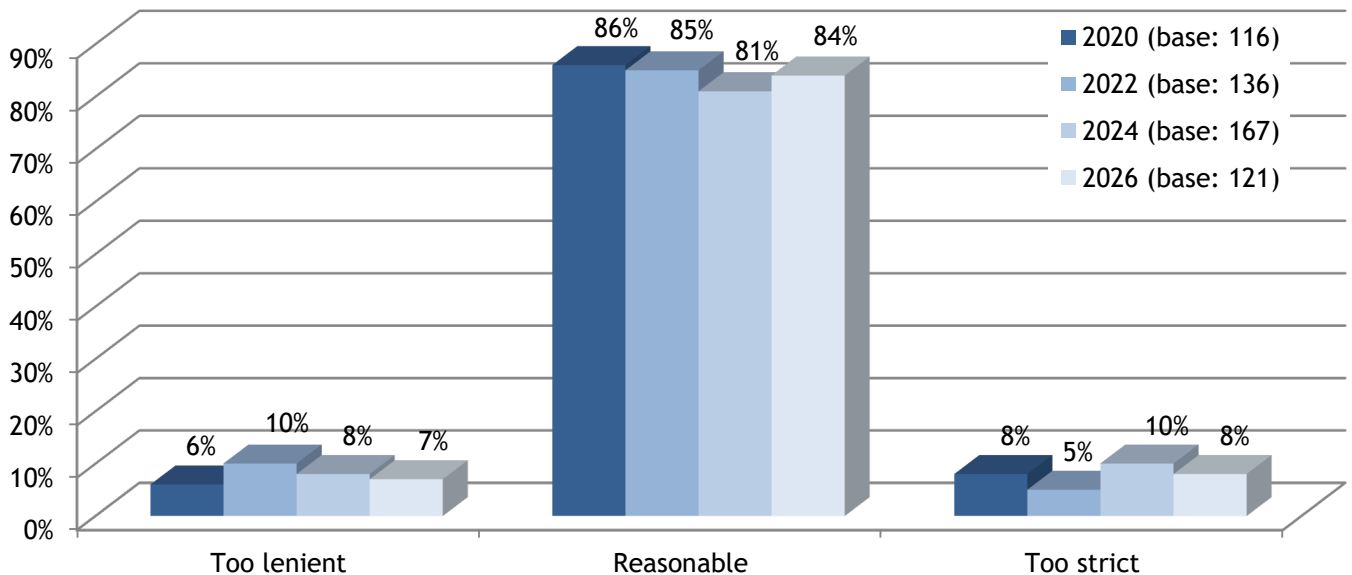
Kirkwall respondents are more likely than respondents in other areas to perceive that the Housing Service's rent levels were slightly or much less expensive (56%, compared with 49% respectively). However, Kirkwall tenants were slightly less likely to think that the Council's rents were more expensive than other landlords (9%, compared to 13% amongst tenants in other areas).

8.4 Respondents' perception of the Housing Service's approach to dealing with arrears is illustrated in Figure 8.4 over the page. This is compared to the results from 2024, 2022 and 2020.

Figure 8.4: The Housing Service's Approach to Dealing with Arrears

From what you know, which of the following statements best describes the Housing Service's approach to dealing with arrears?

Base excludes 'Don't know / No opinion' responses.



The majority of respondents that provided an answer (84%, up from 81% in 2024) perceive the Housing Service to have a reasonable approach to dealing with arrears while a further 7% perceive the Housing Service to be too lenient (down slightly from 8% in 2024) and 8% perceive the Housing Service to be too strict (down from 10% in 2024).

KEY POINTS IN RELATION TO RENT AND FINANCIAL ISSUES

The profile of respondents by rent payment status is broadly similar to the previous survey with 51% paying full rent (compared with 53% in 2024), 29% having all costs met through Housing Benefit or Universal Credit (30% previously) and 14% paying part rent (12% previously).

64% of respondents considered their rent to be good value for money (also 64% in 2024).

Overall, 54% of respondents indicated that they considered the Council's rents to be less expensive than those of other landlords (down from 61% in 2024) compared to 11% that considered them to be more expensive (down slightly from 9%).

KEY POINTS IN RELATION TO RENT AND FINANCIAL ISSUES (CONTINUED)

The great majority of respondents (84%) consider that the Housing Service's approach to dealing with arrears is a reasonable one (the comparable figure in 2024 was 81%).

9.0 AFFORDABILITY AND COST OF LIVING ISSUES

- 9.1 The working status of the head of the household compared to the profile in 2024 and 2022 are detailed in Table 9.1.

Table 9.1: Working Status of Head of Household

What is the working status of the head of your household?

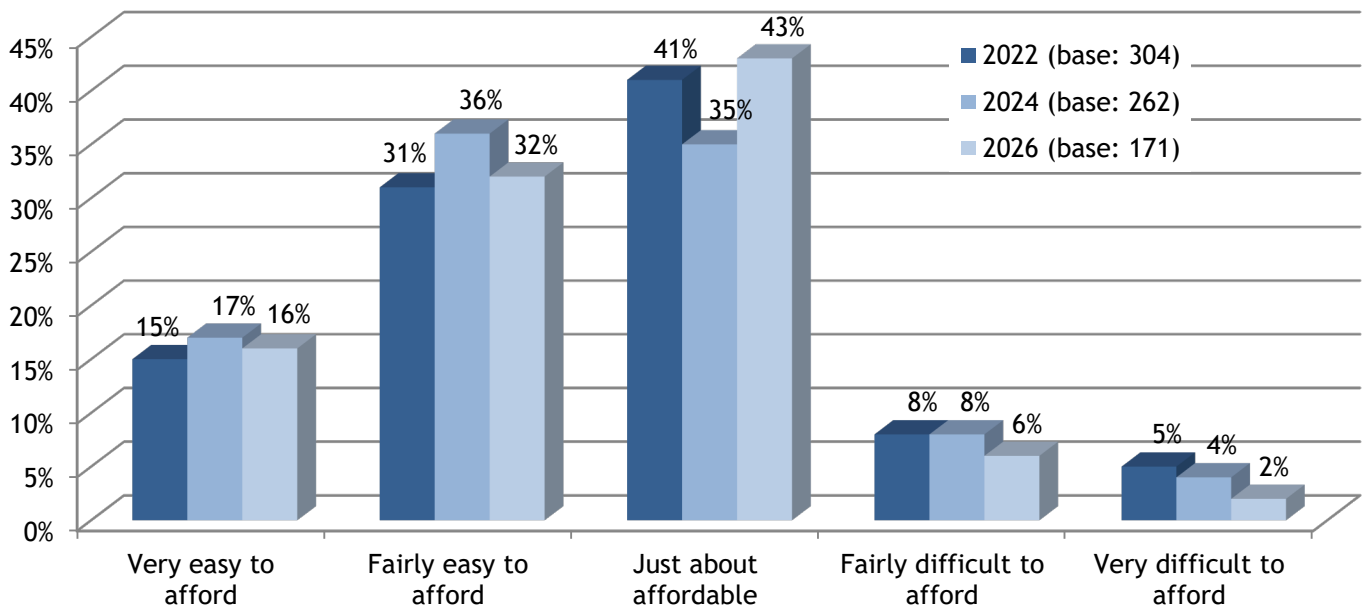
Working Status of Head of Household	2022	2024	2026
Employed full-time	21%	38%	31%
Employed part-time	12%	12%	12%
Self-employed	5%	3%	4%
In full-time education	-	1%	1%
Unemployed, seeking work	3%	2%	2%
Looking after home and family	2%	1%	1%
Not working due to ill health / disability	12%	20%	22%
Retired	43%	19%	24%
Other (please say what)	0%	2%	2%
Prefer not to say	2%	2%	3%
Base	359	337	265

As shown above, the profile above shows a slightly lower proportion in full time work (31%, down from 38%) or in work at all, the latter including people employed part-time or self-employed (47% compared to 53%). The proportion of respondents not working due to ill health or disability has increased slightly from 20% to 22% and there is a slightly higher proportion of retired tenants (24%, up from 19%). However, these changes do not represent a significant change in the overall working status profile.

- 9.2 The extent to which tenants find it easy or difficult to afford their rent payments is illustrated in Figure 9.1 over the page. This question was not asked prior to the 2022 survey.

Figure 9.1: Ease of Affording Rent Payments

*How easy or difficult do you find it to afford your rent payments for this property?
Base excludes those that did not know or did not wish to answer.*



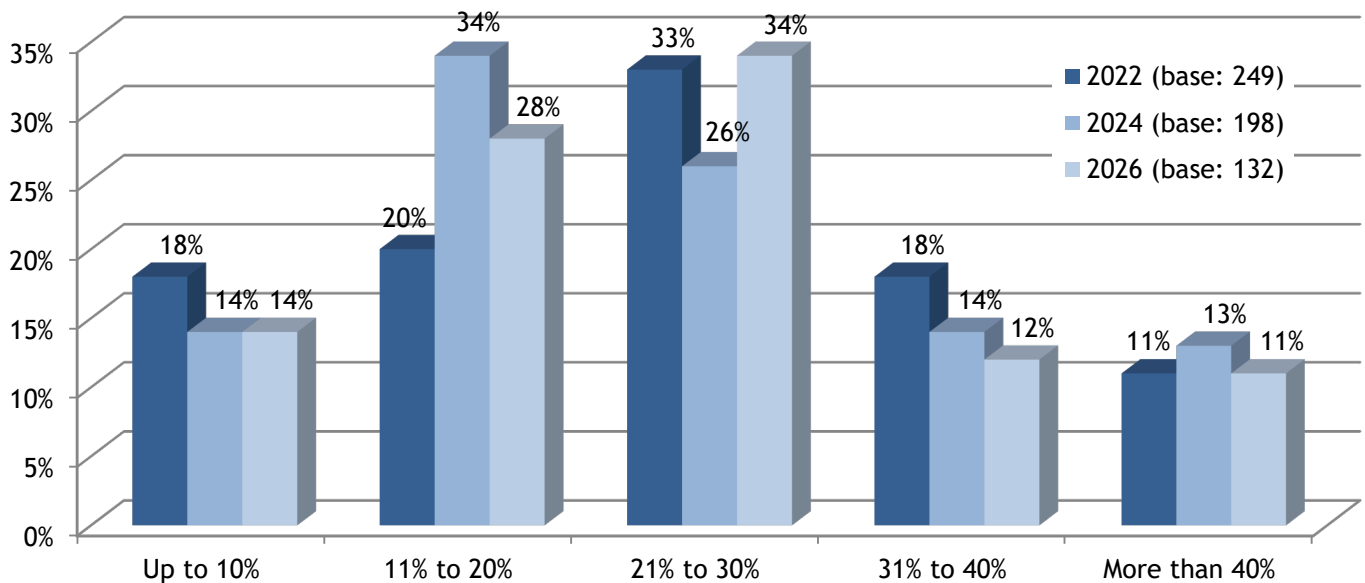
48% of tenants say they find their rent payments very or fairly easy to afford (down from 53% in 2024) while a further 43% say they are just about affordable (up from 35%). The remaining 8% of respondents say they find their rent payments very or fairly difficult to afford (down from 12%).

Those most likely to say that it was either fairly or very difficult to afford their rent payments were in the 45-54 age group (15%) and single tenant households (15%). In terms of working status, those not working due to ill health or disability were most likely to say that they found their rent either fairly or very difficult to afford (43%).

9.3 Figure 9.2 over the page illustrates the proportion of net household income that tenants say goes on paying their rent. Again, this question was not asked prior to the 2022 survey.

Figure 9.2: Proportion of Income on Rent

*Approximately what percentage of your net household income (that is, after tax) goes on paying your rent (and any service charges) to the Council's Housing Service?
Base excludes those that did not know or did not wish to answer.*



42% of respondents spend up to 20% of their income on paying rent and service charges (down from 48% in 2024) while 34% spend between 21% and 30% of their income (up from 26%). A further 23% spend over 30% of their income on paying rent (down from 27%), with 11% of this paying more than 40% (down slightly from 13%).

Those most likely to be spending more than 30% of their net household income on paying their rent and service charges included respondents aged 65+ (38%) and lone parents (31%).

In relation to working status, those employed retired or not working due to ill health or disability were considerably more likely than others to say that they spent more than 30% of their net household income on rent or service charges (36% and 33% respectively).

9.4 The Scottish Government has adopted the following definition of fuel poverty¹⁹:

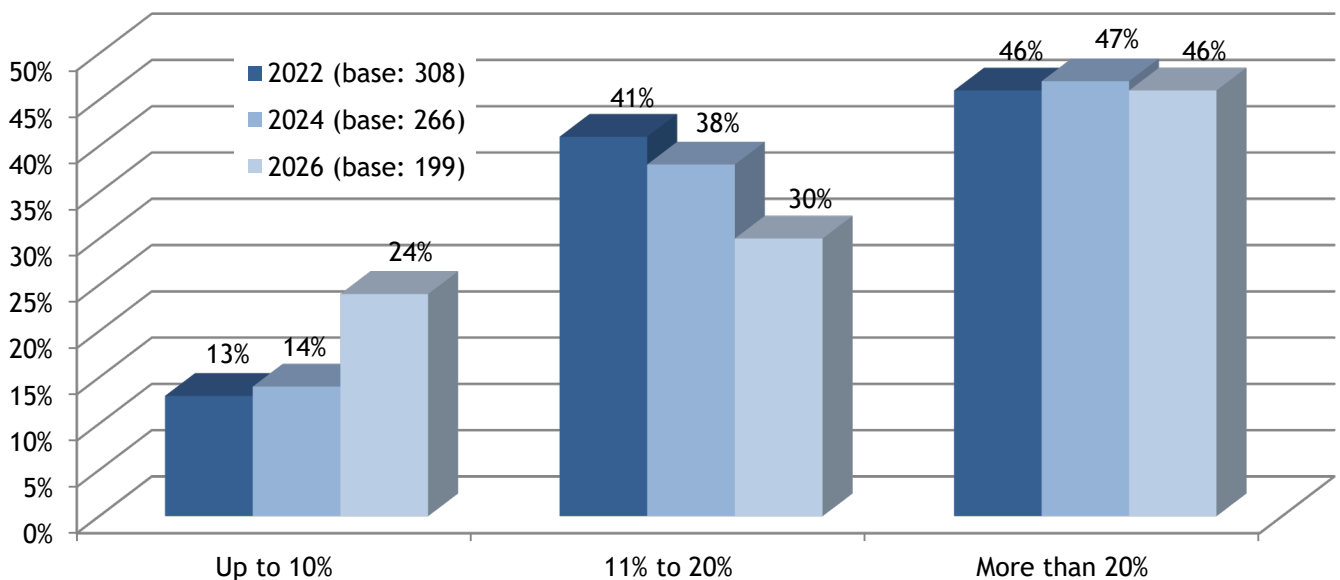
“After housing costs have been deducted, more than 10% (20% for extreme fuel poverty) of their net income is required to pay for their reasonable fuel needs.”

Tenants were therefore asked to indicate the approximate proportion of their net household income that goes on all household fuel use. These results are illustrated in Figure 9.3.

Figure 9.3: Affordability

Approximately what percentage of your net household income (that is, after tax) goes on all household fuel use (including gas, electricity, heating etc.?)

Base excludes those that did not know or did not wish to answer.



These results indicate that the majority of respondents (76%) are in fuel poverty (down from 85% in 2024) with 46% of these being in extreme fuel poverty (i.e. 20% or more of their household income being spent on all household fuel use), down very slightly from 47% in 2024.

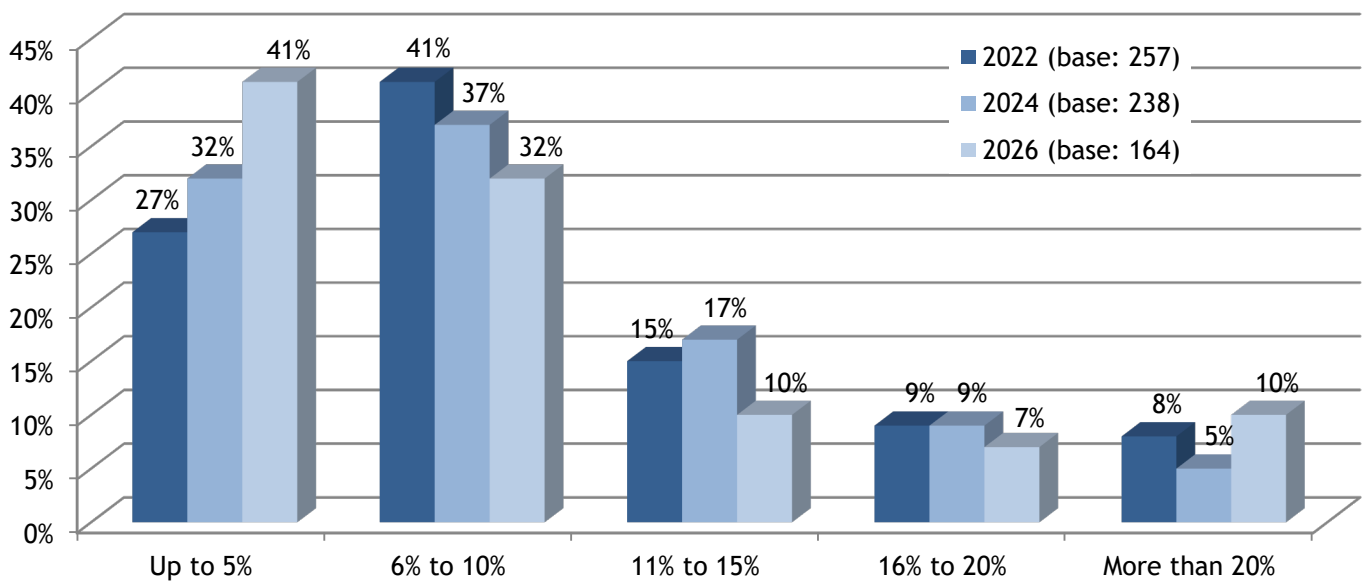
Tenants more likely than others to say that they spent more than 20% of their net income on household fuel use were aged 45 to 54 (54%), lone parents (65%), tenants with a disability (54%), those working part-time (71%) and tenants receiving support with part of their rent (62%) or all of their rent (59%).

¹⁹ <https://www.gov.scot/policies/home-energy-and-fuel-poverty/fuel-poverty/>

- 9.5 The proportion of tenants' household income that goes on paying Council Tax, water and sewage charges is illustrated in Q9.4. Again, this question was not asked prior to the 2022 survey.

Figure 9.4: Proportion of Income on Council Tax, Water and Sewage

*Approximately what percentage of your net household income (that is, after tax) goes on paying your Council Tax and water and sewage charges?
Base excludes those that did not know or did not wish to answer.*



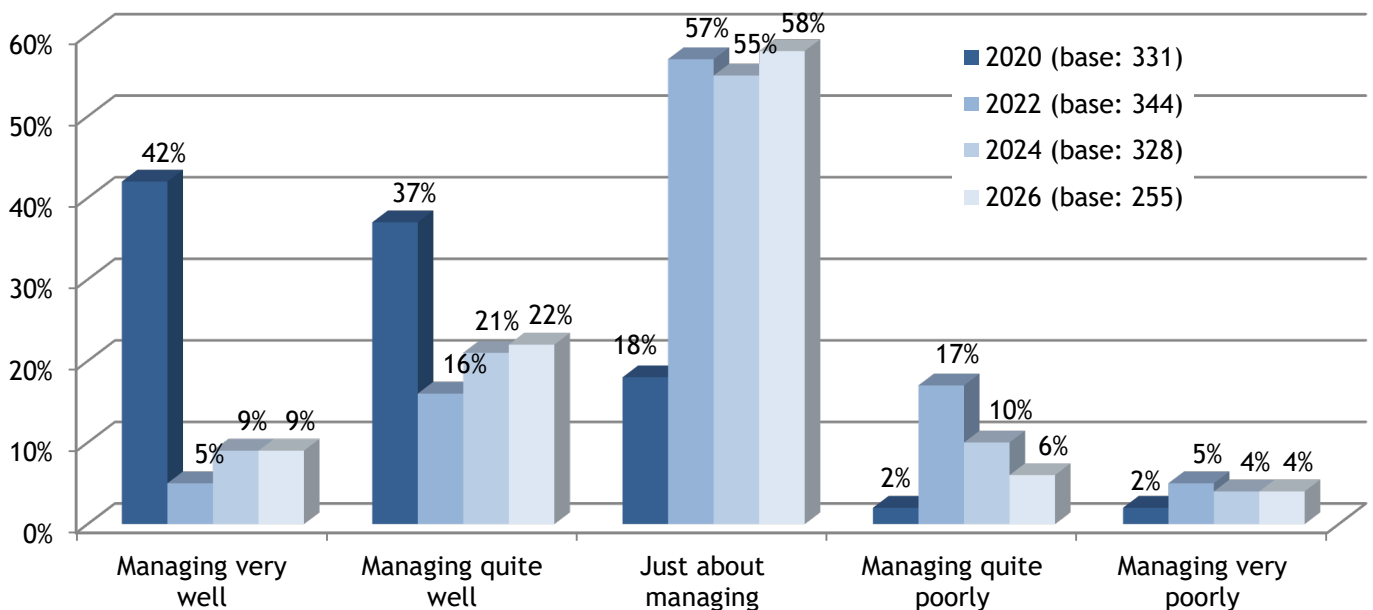
The majority of respondents spend 10% or less of their income on paying Council Tax, water and sewage charges (73%, up from 69% in 2024) while a further 10% spend between 11% and 15% of their income (down from 17%). The remaining 17% spend over 15% of their income on paying rent (up from 14%), with 10% of this paying more than 20% (up from 5%).

- 9.6 Figure 9.5 over the page illustrates how well or otherwise respondents feel they and their household are currently managing financially. This is compared to the results from 2024, 2022 and 2020.

Figure 9.5: Financial Health of Household

Taking everything together, which of the following statements best describes how you and your household are managing financially these days?

Base excludes those that did not know or did not wish to answer.



The majority of households (68%, down slightly from 69% in 2024) perceive that they are just about managing, managing quite poorly or managing very poorly. Conversely, a significant minority (31%, up slightly from 30% in 2024) perceive that they are managing quite or very well.

Those most likely to say that they are managing quite or very poorly included respondents aged 45-54 (26%), lone parents (16%), respondents with a disability (14%) those not working due to ill health or disability (18%) and those employed part-time (16%).

KEY POINTS IN RELATION TO AFFORDABILITY AND COST OF LIVING ISSUES

There have been only slight changes in the profile of the working status of the heads of household, with 47% in employment (down from 53% in 2024) and 24% retired (up from 19%).

KEY POINTS IN RELATION TO AFFORDABILITY AND COST OF LIVING ISSUES (CONTINUED)

8% of respondents indicate that they find it fairly or very difficult to afford their rent payments (down from 12% in 2024) and a further 43% finding this “just about affordable” (up from 35%). 23% indicate that more than 30% of their net household income goes on paying rent and service charges to the Council’s Housing Service (down from 27% in 2024).

76% indicate that they spend more than 10% of their net household income on household fuel use and (down from 85% in 2024), of these, 46% indicate that they spend more than 20% of their net household income on this (down very slightly from 47%).

27% indicate that more than 10% of their net household income goes on paying their Council tax and water and sewage charges (down slightly from 31% in 2024).

In terms of overall finances, it is notable that less respondents now say that they are managing either quite or very poorly. This figure was 14% in 2024 and has now reduced to 10% in 2026. However, the proportion indicating that they are just about managing financially is 58% (up from 55%).

10.0 THE NEIGHBOURHOOD

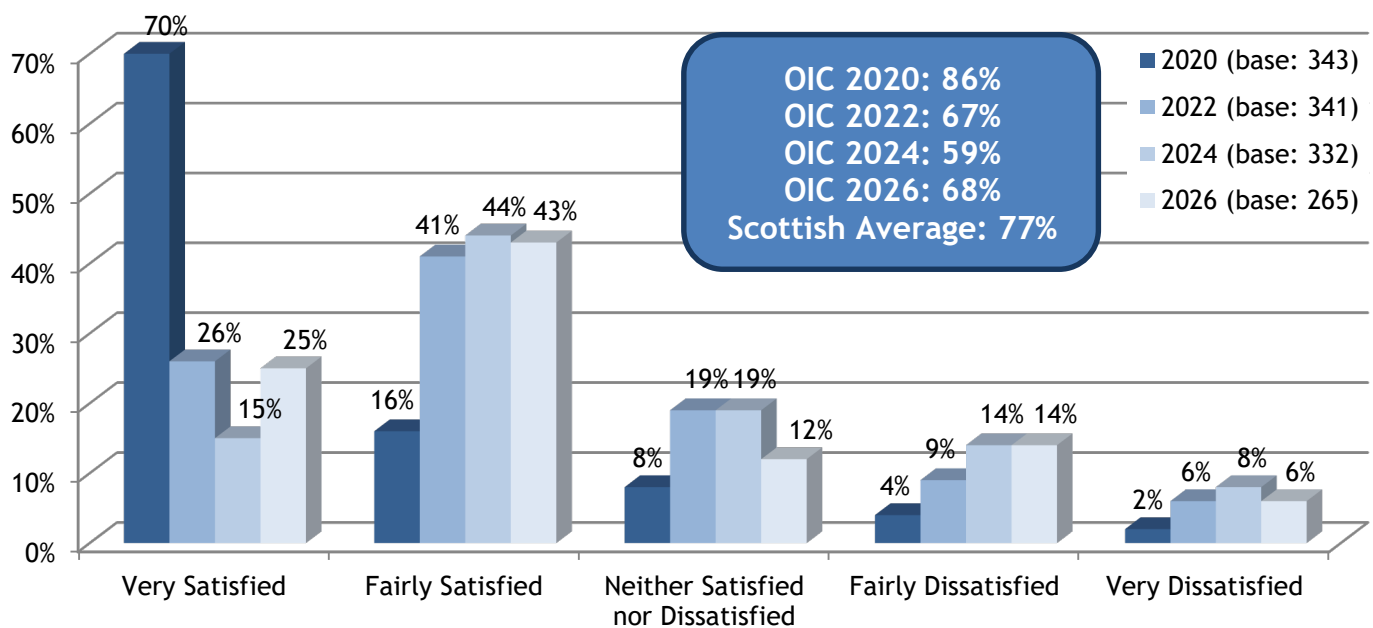
Percentage of tenants satisfied with the management of the neighbourhood they live in (Charter Indicator 13).

10.1 The following question was posed with respect to satisfaction with management of the neighbourhood:

“Overall, how satisfied or dissatisfied are you with the Housing Service’s contribution to the management of the neighbourhood you live in?”²⁰

The results are set out in Figure 10.1 below.

Figure 10.1: Satisfaction with Management of Neighbourhood



The majority of respondents (68%, up from 59% in 2024, but lower than the Scottish average of 77%) were very or fairly satisfied with the Housing Service’s contribution to the management of their neighbourhood. 20% were very or fairly dissatisfied (down slightly from 22% in 2024) and the remaining 12% provided a neutral response (down from 19%).

²⁰ “Management of the neighbourhood” was described as being things like: management of anti-social behaviour; dealing with nuisance neighbours; the maintenance of the estate; and, overall, making sure the neighbourhood is a safe place to be. “The neighbourhood” was described as the street in which you live and the immediate surrounding area. The wording of this question was changed between 2018 and 2020 with the addition of the words “contribution to”. The comparative results should be seen in this context.

Satisfaction with the Housing Service’s contribution to the management of the neighbourhood is slightly lower than average amongst Kirkwall respondents (67%) and slightly higher than average amongst respondents in other areas (71%).

- 10.2 Figure 10.1 details how satisfied or dissatisfied respondents are with various aspects of their neighbourhood.

Table 10.1: Rating of Aspects of Neighbourhood

*How would you rate each of the following aspects of your neighbourhood?
Bases exclude ‘Don’t know’ responses.*

Aspect	Overall Positive 2024	Overall Positive 2026	Very Good	Fairly Good	Neither Good nor Poor	Fairly Poor	Very Poor	Base
Feeling of safety	91%	90%	60%	30%	4%	5%	1%	263
Cleanliness of the neighbourhood	77%	78%	30%	48%	9%	10%	4%	263
Overall appearance of the neighbourhood	78%	77%	34%	43%	11%	10%	3%	263
Grounds maintenance	65%	62%	23%	39%	18%	12%	8%	262
Car parking	68%	61%	23%	38%	13%	13%	13%	261

The majority of respondents gave a positive rating to all aspects of their neighbourhood, particularly in relation to feeling of safety (90% very or fairly good, down very slightly from 91% in 2024), followed by the cleanliness of the neighbourhood (78%, up slightly from 77%) and the overall appearance of the neighbourhood (77%, down slightly from 78%). Ratings were lowest in relation to car parking (61%, down from 68%) and grounds maintenance (62%, down from 65%).

Ratings for most aspects are lower than average in Kirkwall. The exceptions related to feeling of safety where 88% of respondents in other areas rated this element positively (compared with 92% in Kirkwall). Cleanliness of the neighbourhood was rated positively by 77% of respondents in both Kirkwall and other areas. The overall positive figures in Kirkwall for the remaining elements were 75% for overall appearance of the neighbourhood (compared with 77% in other areas), 59% for grounds maintenance (compared with 66% in other areas) and 56% for car parking (compared with 70% in other areas).

- 10.3 To further explore perceptions in relation to the “management of the neighbourhood” issue, IBP undertook an analysis as to how satisfaction with this varied according to satisfaction with the different specific elements discussed in 10.2 above. This showed the following figures for those that expressed dissatisfaction with contribution to the management of the neighbourhood:

- 79% of those dissatisfied were satisfied with feeling of safety (overall satisfaction figure 91%).
- 55% of those dissatisfied were satisfied with cleanliness of the neighbourhood (overall satisfaction figure 78%).
- 40% of those dissatisfied were satisfied with overall appearance of the neighbourhood (overall satisfaction figure 77%).
- 23% of those dissatisfied were satisfied with grounds maintenance (overall satisfaction figure 62%).
- 47% of those dissatisfied were satisfied with car parking (overall satisfaction figure 61%).

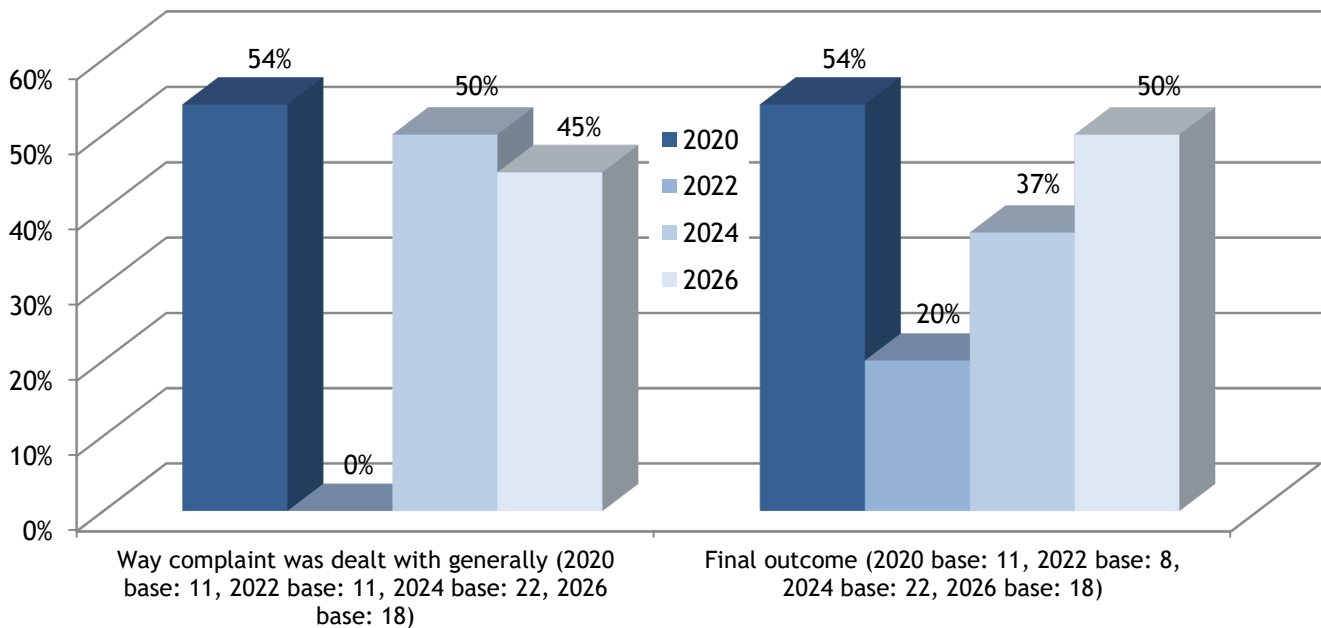
These figures suggest strongly that grounds maintenance is the biggest driver of the dissatisfaction that exists in relation to this question along with wider issues around neighbourhood appearance and car parking to a somewhat lesser extent.

- 10.4 Only 7% of respondents (18 people) had reported anti-social behaviour to the Housing Service in the last 12 months (compared with 7%, 22 people in 2024). Figure 10.2 over the page illustrates how satisfied or dissatisfied respondents were with aspects of the anti-social behaviour service they received and compares this with the figures from 2024, 2022 and 2020.

Figure 10.2: Satisfaction with Aspects of the Anti-Social Behaviour Service

How satisfied or dissatisfied were you with the following aspects of the anti-social behaviour service?

Bases are only those that have reported anti-social behaviour in the last 12 months and gave an answer to this question.



As shown above, there has been an improvement in relation to ratings for the final outcome of the anti-social behaviour complaint (50%, up significantly from 37% in 2024) while ratings have declined slightly in relation to the way the complaint was handled generally (45%, down from 50%). However, it should be noted that these results are based on very small numbers; a full breakdown of responses is contained in the appendices.

KEY POINTS IN RELATION TO THE NEIGHBOURHOOD

Satisfaction with the Housing Service's contribution to the management of the neighbourhood has improved from 59% in 2024 to 68% in 2026.

Ratings for various aspects of the neighbourhood have remained positive particularly in relation to feeling of safety (90% very or fairly good, down very slightly from 91% in 2024), followed by the cleanliness of the neighbourhood (78%, up slightly from 77%) and the overall appearance of the neighbourhood (77%, down slightly from 78%). Ratings were lowest in relation to car parking (61%, down from 68%) and grounds maintenance (62%, down from 65%).

KEY POINTS IN RELATION TO THE NEIGHBOURHOOD (CONTINUED)

Further analysis of the various satisfaction figures suggests that dissatisfaction with management of the neighbourhood overall is driven by dissatisfaction with grounds maintenance, as well as wider issues relating to neighbourhood appearance and car parking to a somewhat lesser extent.

Where respondents have reported anti-social behaviour in the last 12 months, ratings for the final outcome of their complaint have improved since 2024 (50%, up from 37% in 2024) while ratings have declined slightly in relation to the way the complaint was handled generally (45%, down from 50%).

11.0 FUTURE PRIORITIES

- 11.1 Respondents were shown a list of different issues to do with their tenancy and the service they receive and were asked to choose their top three most important issues. These results are detailed in Table 11.1. This is compared to the results from 2024, 2022 and 2020.

Table 11.1: Importance of Issues - Services and Activities

We have listed below a number of specific services and activities that may or may not be important to you. Please choose up to 3 of these things that are most important to you.

Issue	2020	2022	2024	2026
The overall quality of your home	71%	68%	62%	65%
The energy efficiency of your property	52%	62%	62%	58%
The quality of the repairs and maintenance service	47%	41%	33%	48%
The value for money of rents	38%	33%	41%	41%
The Housing Service making more houses available for people to rent	15%	22%	23%	30%
Your overall neighbourhood environment	20%	22%	23%	28%
Communication from the Housing Service about its services and decisions	23%	16%	18%	11%
The quality of customer service that you receive from the Housing Service	31%	23%	16%	8%
Having the chance to be involved in decisions about the Housing Service's policies and practices	23%	5%	6%	2%
Base:	327	349	317	249

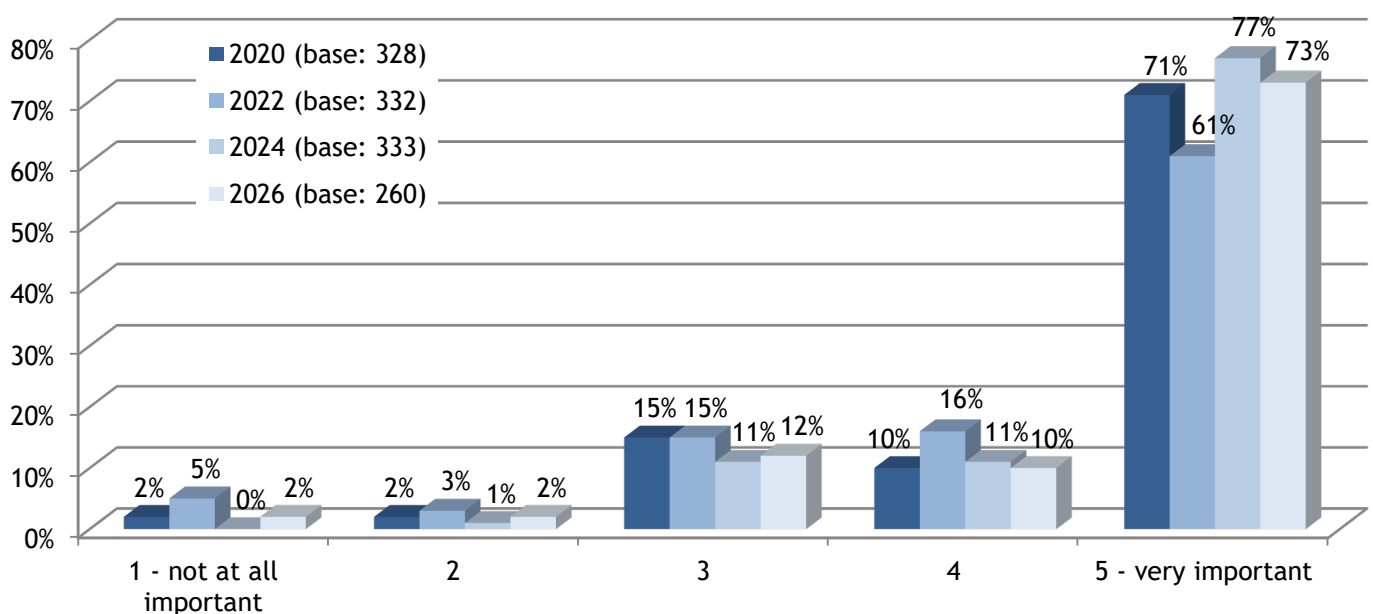
The quality of respondents' homes (65%, up slightly from 62% in 2024), the energy efficiency of the property (58%, down from 62%) and the quality of the repairs and maintenance service (48%, up significantly from 33%) are the elements most commonly placed in respondents' top three issues followed by the value for money of rent (41%, also 41% previously). The Housing Service making more houses available for people to rent (30%, up from 23%) and the overall neighbourhood environment (28%, up from 23%) are also commonly perceived to be among the most important issue for tenants.

Conversely, the issues ascribed least importance were having the chance to be involved in decisions about the Housing Service's policies and practices (2%, down from 6%), the quality of customer service received from the Housing Service (8%, down from 16%) and communication from the Housing Service about its services and decisions (11%, down from 18%).

- 11.2 These results are broadly similar between Kirkwall and the other areas, although more emphasis is placed on the quality of the repairs and maintenance service by respondents in other areas (56%, compared with 43% in Kirkwall) and value for money of rents (48%, compared with 35% in Kirkwall). A full breakdown of responses is contained in the appendices. Slightly more emphasis is placed on energy efficiency amongst Kirkwall respondents (59%, compared with 55% of respondents in other areas) and overall quality of the home (67%, compared with 64% of respondents in other areas).
- 11.3 Figure 11.1 illustrates how important or not respondents feel it is for the Housing Service to make more properties available for rent.

Figure 11.1: Importance of Making More Properties Available for Rent

Thinking more generally about the future priorities for the Housing Service, how important or unimportant is it for the Housing Service to make more properties available for rent. Please answer on a scale of 1 to 5 where 1 is "not at all important" and 5 is "very important".
Bases exclude 'Don't know' responses.



The vast majority of respondents (83%, up significantly from 88% in 2024) feel it is important that the Housing Service make more properties available for rent. Comparatively few (4% up from 1%) feel it is not important and 12% feel it is neither important nor unimportant (up slightly from 11%).

KEY POINTS IN RELATION TO FUTURE PRIORITIES

The issues that tenants most commonly place in their “three most important issues” are the quality of respondents’ homes (65%, up slightly from 62% in 2024), the energy efficiency of the property (58%, down from 62%) and the quality of the repairs and maintenance service (48%, up significantly from 33%). In 2024, the top two issues were the same, but the third most important issue was the value for money of rents (41%).

83% of respondents (compared to 88% in 2024) feel it is important that the Housing Service make more properties available for rent.

12.0 OVERALL SATISFACTION

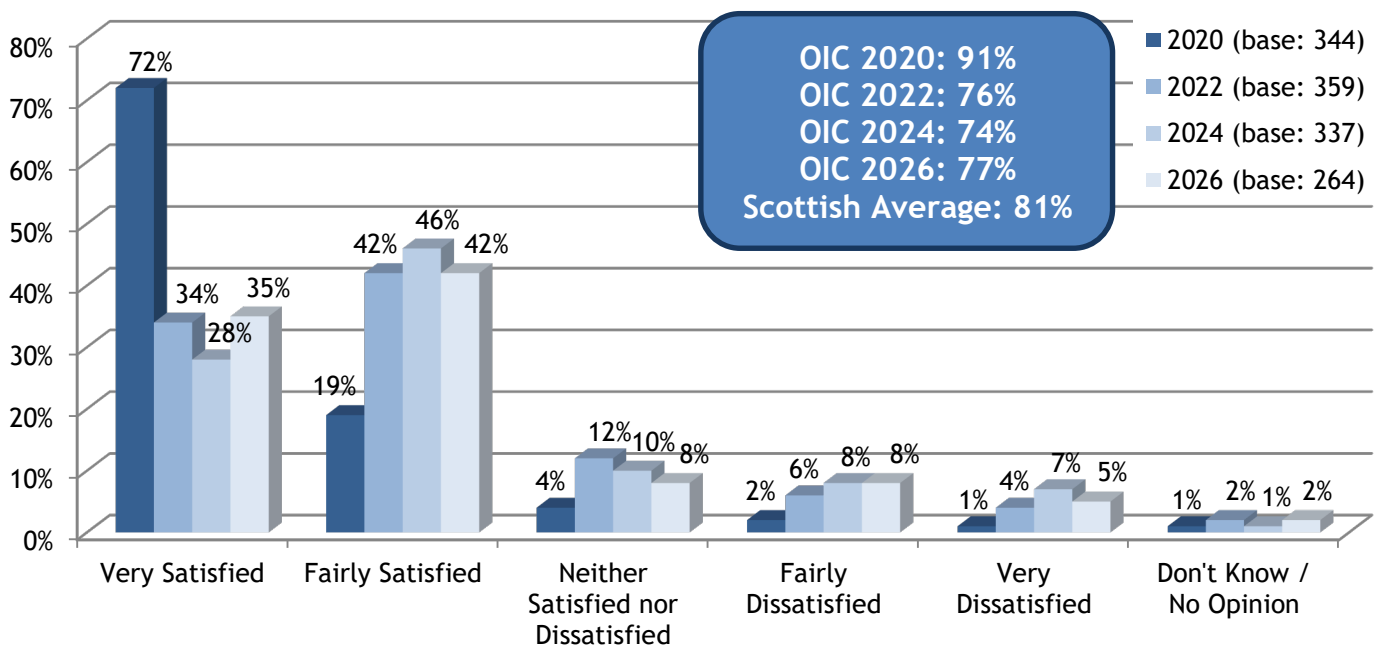
Percentage of tenants satisfied with the overall service provided by their landlord (Charter Indicator 1).

12.1 The following question was posed with respect to satisfaction with overall service provided:

“Taking everything into account, how satisfied or dissatisfied are you with the overall service provided by the Housing Service of Orkney Islands Council?”

The results are set out in Figure 12.1 below.

Figure 12.1: Overall Satisfaction with Service Provided



12.2 Overall, 77% of respondents are very or fairly satisfied with the service provided by the Housing Service of Orkney Islands Council (up from 74% in 2024, but lower than the Scottish average of 81%). 13% are very or fairly dissatisfied (down from 15% in 2024) while 8% provided a neither / nor response (down slightly from 10% in 2024) and 2% did not know or had no opinion (1% in 2024).

Overall satisfaction levels are slightly higher amongst Kirkwall respondents (78%) compared with respondents from other areas (75%) and respondents in Kirkwall are slightly more likely to be “very satisfied” (36%) than respondents from other areas (34%).

KEY POINTS IN RELATION TO OVERALL SATISFACTION

Overall, 77% of respondents now indicate that they are very or fairly satisfied with the service provided by the Housing Service of Orkney Islands Council. This has improved from 74% recorded in 2024.

Appendix 2: Housing Services – Tenant Satisfaction Action Plan

Indicator.	Stats (to 31/03/24).	Stats (to 31/03/26).	Action.	Performance Measure.	Target.	Resource Requirement.	Completed.
Customer Satisfaction.							
Percentage of tenants who feel their landlord is good at keeping them informed about their services and decisions (indicator 3).	77%.	75%.	1. Continue to raise the profile of service work through regular social media posts and quarterly newsletter which is provided either digitally or hard copy dependent on tenant's choice.	Customer satisfaction for indicator 3 to have increased to 80% by next survey.	May 2028.	Tenant Participation Officer.	14/07/2026 – TPO to arrange discussion with OIC Resident Panel reps and Armchair Panel.
				Continue to encourage participation through various methods.	Ongoing.		06/07/2026 – Housing Service uses Facebook / Instagram and now has an Armchair Panel alongside its Resident Panel.
				Annually Spring, Summer and Winter Newsletter to be distributed.	Ongoing.		06/07/2026 – Summer newsletter in process of being distributed includes encouragement to participate. Also includes newsletter preference

Indicator.	Stats (to 31/03/24).	Stats (to 31/03/26).	Action.	Performance Measure.	Target.	Resource Requirement.	Completed.
							survey which gives tenants the option to receive paper or digital copy and the option to become part of Armchair Panel.
			2. The Tenant Participation Officer along with the Housing Management team to continue to promote participation and engagement such as Resident Panel, Armchair Panel, Residents' Groups, Facebook / Instagram pages, etc. in community.	Increase participation in tenants.	Ongoing.	Tenant Participation Officer / Housing Management Team.	06/07/2026 – Increase in members in respect of Armchair Panel since survey in 2024. Since last survey, Flotta Residents Association has been established.
			3. Housing Management team to use written resources to promote tenant participation to new/ existing tenants.	Increase participation in tenants.	Ongoing.	Housing Management Team / Tenant Participation Officer.	06/07/2026 – A review of the Tenant Participation documents was undertaken in July 2025.

Indicator.	Stats (to 31/03/24).	Stats (to 31/03/26).	Action.	Performance Measure.	Target.	Resource Requirement.	Completed.
			4. Arrange one-off events to encourage participation.	Create a diary of events for each year.	Annually in January.	Tenant Participation Officer.	06/07/2026 – Tenant Participation Officer creates a diary in December / January. Additional one-off events are arranged during the year, as required.
Percentage of tenants satisfied with the opportunities given to them to participate in their landlord's decision-making processes (indicator 6).	71%.	62%.	1. Tenant Participation Officer along with Housing Management team to continue to promote participation and engagement such as Resident Panel, Armchair Panel, Residents' Groups, Facebook Page, etc. in community.	Customer satisfaction for Indicator 5 to increase to 77%.	Ongoing.	Tenant Participation Officer.	06/07/2026 – New Instagram page for Housing Services along with Facebook posts.
				Regular posts on Housing Service social media page evident.	Ongoing.		
				Newsletter completed and distributed to ensure 100% coverage.	Annually Spring, Summer and Winter Newsletter to be distributed.		06/07/2026 – Summer Newsletter distributed this week.

Indicator.	Stats (to 31/03/24).	Stats (to 31/03/26).	Action.	Performance Measure.	Target.	Resource Requirement.	Completed.
			2. Tenant Participation Officer to continue to develop written information for tenants to encourage participation, including information on Council website / social media.	Continue to enhance the information available to tenants through website / written information.	Ongoing.	Tenant Participation Officer.	06/07/26 – Website has been enhanced in respect of Tenant Participation and newsletters available on site.
			3. Arrange one-off events to encourage participation.	Create a diary of events each year.	Annually in January.	Tenant Participation Officer.	06/07/2026 – Tenant Participation Officer creates a diary in December / January. Additional one-off events are arranged during the year, as required. Examples: Planned walkabout to Kirkland's Road to try and establish Resident

Indicator.	Stats (to 31/03/24).	Stats (to 31/03/26).	Action.	Performance Measure.	Target.	Resource Requirement.	Completed.
							group; Tenant Participation Officer attendance at CLDE Summer Family Picnics, etc.
Percentage of repairs or maintenance carried out in last 12 months satisfied with the repair and maintenance service (indicator 16).	89%. *	85%. *	1. Ongoing evaluation of complaints / compliments / comments being discussed with Measured Term Contractor / IOD on monthly basis.	Discussion with Measured Term Contractor / IOD monthly.	Ongoing.	Service Manager (Housing Homelessness and Schoolcare Accommodation). Service Manager (Resources). Team Manager (Maintenance and Heritage). Data Analysts.	06/07/2026 – Regular monthly meetings are in place with Measured Term contractor and IOD staff, gives an opportunity to highlight areas of concern. Regular monthly meeting with IOD staff to discuss repairs / maintenance issues.

* Figures from repairs satisfaction questionnaires rather than tenant satisfaction survey.

Item: 12

Education, Communities and Housing Committee: 9 September 2026.

Revenue Expenditure Outturn.

Report by Head of Finance.

1. Overview

- 1.1. This report presents the revenue financial outturn position as at 31 March 2026, in respect of service areas for which the Education, Communities and Housing Committee is responsible.
- 1.2. On 4 March 2025, the Council set its overall revenue budget for financial year 2025/26. On 17 June 2025, the Policy and Resources Committee recommended approval of the detailed revenue budgets for 2025/26, which form the basis of the individual revenue expenditure monitoring reports.
- 1.3. Individual revenue expenditure monitoring reports are circulated every month to inform elected members of the up-to-date financial position. Quarterly revenue expenditure monitoring reports are presented to individual service committees.
- 1.4. In terms of revenue spending, at an individual cost centre level, budget holders are required to provide an explanation of the causes of each material variance and to identify appropriate corrective actions to remedy the situation.
- 1.5. Material variances are identified automatically as Priority Actions within individual budget cost centres according to the following criteria:
 - Variance of £10,000 and more than 110% or less than 90% of anticipated position (1B).
 - Not more than 110% or less than 90% of anticipated position but variance greater than £50,000 (1C).
- 1.6. Priority Actions can be identified at the Service Function level according to the same criteria and these are shown in the Revenue Expenditure Statements. As with individual cost centre variances, each of these Priority Actions requires an explanation and corrective action to be identified and these are shown in the Budget Action Plan.

- 1.7. The details have been provided following consultation with the relevant Directors and their staff.
- 1.8. The figures quoted within the Budget Action Plan by way of the underspend (-) and overspend position will always relate to the position within the current month.

2. Recommendations

2.1. It is recommended that members of the Committee:

- i. Note the revenue expenditure monitoring statement in respect of service areas for which the Education, Communities and Housing Committee is responsible, for the period 1 April 2025 to 31 March 2026, attached as Annex 1 to this report, indicating a net budget overspend position of £880,200, comprising the following:
 - Overspend of £83,000 against General Fund services.
 - Overspend of £797,200 against Non-General Fund services.
- ii. Note the revenue financial service area statement in respect of service areas for which the Education, Communities and Housing Committee is responsible, for the period 1 April 2025 to 31 March 2026, attached as Annex 2 to this report.
- iii. Note the explanations given and actions proposed in respect of significant budget variances, as outlined in the Budget Action Plan, attached as Annex 3 to this report.

For Further Information please contact:

Pat Robinson, Service Manager (Accounting), extension 2621, Email:
pat.robinson@orkney.gov.uk

Implications of Report

1. **Financial** The Financial Regulations state that Directors can incur expenditure within approved revenue and capital budgets. Such expenditure must be in accordance with the Council's policies and objectives and subject to compliance with the Financial Regulations.
2. **Legal** Regular financial monitoring and reporting help the Council meet its statutory obligation to secure best value.
3. **Corporate Governance** In terms of the Scheme of Administration, monitoring the levels of revenue expenditure incurred against approved budgets, in respect of each of the service areas for which the Committee is responsible, is referred to the Education, Leisure and Housing Committee.

4. **Human Resources** N/A.
5. **Equalities** An Equality Impact Assessment is not required for financial monitoring.
6. **Island Communities Impact** An Island Communities Impact Assessment is not required for financial monitoring.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☐ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☐ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk** N/A.
10. **Risk** N/A.
11. **Procurement** N/A.
12. **Health and Safety** N/A.
13. **Property and Assets** N/A.
14. **Information Technology** N/A.
15. **Cost of Living** N/A.

List of Background Papers

Policy and Resources Committee, 25 February 2025, Budget and Council Tax Level for 2025/26.

Policy and Resources Committee, 17 June 2025, Detailed Revenue Budgets.

Annexes

Annex 1: Financial Summary.

Annex 2: Financial Detail by Service Area.

Annex 3: Budget Action Plan.

The table below provides a summary of the position across all Service Areas.

General Fund

Service Area	Spend £000	Budget £000	Over/(Under) £000	Spend %	Annual Budget £000
Education	50,995.1	50,531.8	463.3	100.9	50,531.8
Leisure Services	4,424.7	4,362.9	61.8	101.4	4,362.9
Other Housing	1,871.8	2,313.9	(442.1)	80.9	2,313.9
	57,291.6	57,208.6	83.0	100.1	57,208.6

Non-General Fund

Service Area	Spend £000	Budget £000	Over/(Under) £000	Spend %	Annual Budget £000
Housing Revenue Account	(745.0)	(920.0)	175.0	81.0	(920.0)
UHI Orkney	622.2	0.0	622.2	0.0	(0.0)
	(122.8)	(920.0)	797.2	13.3	(920.0)
Service Totals	57,168.8	56,288.6	880.2	101.6	56,288.6

Annex 2: Financial Detail by Service Area

March 2026

The following tables show the spending position by service function

General Fund

		Spend	Budget	Over/(Under)	Spend	Annual
	PA	£000	£000	£000	%	Budget
						£000
Education						
Senior Secondary Schools	1C	13,671.0	13,546.6	124.4	100.9	13,546.6
Junior Secondary Schools	1C	3,771.4	3,660.9	110.5	103.0	3,660.9
Primary Schools	1C	13,913.6	13,161.1	752.5	105.7	13,161.1
Early Learning & Childcare	1C	5,166.5	5,240.7	(74.2)	98.6	5,240.7
Additional Support Needs	1C	3,886.4	3,967.7	(81.3)	98.0	3,967.7
Papdale Halls of Residence	1C	1,079.8	1,016.7	63.1	106.2	1,016.7
Quality Development	1B	90.7	28.9	61.8	313.8	28.9
Administration	1C	2,264.2	2,454.4	(190.2)	92.3	2,454.4
Assistance for Students	1B	166.3	235.5	(69.2)	70.6	235.5
Community Learning & Development		730.2	720.4	9.8	101.4	720.4
School Meals	1C	2,029.2	2,254.0	(224.8)	90.0	2,254.0
School Transport		4,406.5	4,409.4	(2.9)	99.9	4,409.4
School Crossing Patrol	1B	56.6	72.6	(16.0)	78.0	72.6
Movement in Reserves		(247.9)	(247.9)	0.0	100.0	(247.9)
Parent Councils		10.6	10.8	(0.2)	98.1	10.8
Service Total		50,995.1	50,531.8	463.3	100.9	50,531.8

Changes in original budget position:

Original Net Budget	50,230.6
Teachers Induction Scheme	37.0
Adopt and Adapt Funding	69.0
SIP Budget Realignment	191.0
Apportionment Realignment	4.2
	<u>50,531.8</u>

		Spend	Budget	Over/(Under)	Spend	Annual
	PA	£000	£000	£000	%	Budget
Leisure Services						£000
Administration - RC		1,087.5	1,093.3	(5.8)	99.5	1,093.3
Parks and Play Areas		553.4	548.5	4.9	100.9	548.5
Healthy Living Centres	1B	66.1	90.0	(23.9)	73.4	90.0
Tourism - Caravan Sites	1B	(22.7)	(12.2)	(10.5)	186.1	(12.2)
Tourism - Hostels		3.5	4.4	(0.9)	79.5	4.4
Sports Development	1B	76.9	109.1	(32.2)	70.5	109.1
Sports Facilities		1,120.2	1,148.1	(27.9)	97.6	1,148.1
Swimming Pools		368.9	363.0	5.9	101.6	363.0
Theatres		11.2	6.7	4.5	167.2	6.7
Active Schools	1B	73.4	62.4	11.0	117.6	62.4
Community Facilities	1B	532.7	407.1	125.6	130.9	407.1
Libraries		1,208.5	1,197.4	11.1	100.9	1,197.4
Movement in Reserves		(654.9)	(654.9)	0.0	100.0	(654.9)
Service Total		4,424.7	4,362.9	61.8	101.4	4,362.9

Changes in original budget position:

Original Net Budget	4,156.5
No One Left Behind	53.0
Holiday Playschemes	2.6
SIP Budget Realignment	75.7
Apportionment Realignment	75.1
	<u>4,362.9</u>

		Spend	Budget	Over/(Under)	Spend	Annual
	PA	£000	£000	£000	%	Budget
Other Housing						£000
Housing Support		79.0	83.0	(4.0)	95.2	83.0
Homelessness	1B	782.8	1,124.3	(341.5)	69.6	1,124.3
Housing Loans		13.5	14.1	(0.6)	95.7	14.1
Energy Initiatives	1B	(6.0)	63.2	(69.2)	N/A	63.2
Garages	1B	(127.4)	(115.1)	(12.3)	110.7	(115.1)
Miscellaneous - OH		444.9	484.0	(39.1)	91.9	484.0
Housing Benefits		248.4	246.5	1.9	100.8	246.5
Landlord Registration		(22.8)	(28.8)	6.0	79.2	(28.8)
Care & Repair		400.4	402.9	(2.5)	99.4	402.9
Sheltered Housing		196.8	190.6	6.2	103.3	190.6
Student Accommodation	1B	(13.7)	(26.7)	13.0	51.3	(26.7)
Movement in Reserves		(124.1)	(124.1)	0.0	100.0	(124.1)
Service Total		1,871.8	2,313.9	(442.1)	80.9	2,313.9

Changes in original budget position:

Original Net Budget	2,215.2
Ukrainian Resettlement Funding	57.8
Rapid Rehousing Transition Plan	20.0
Discretionary Housing Payments	9.0
Apportionment Realignment	11.9
	<u>2,313.9</u>

Non-General Fund

		Spend	Budget	Over/(Under)	Spend	Annual
	PA	£000	£000	£000	%	Budget
Housing Revenue Account						£000
Administration - HRA	1B	1,111.3	1,268.5	(157.2)	87.6	1,268.5
Property Costs - HRA	1B	2,636.6	2,177.6	459.0	121.1	2,177.6
Rent Income	1C	(5,040.1)	(4,781.0)	(259.1)	105.4	(4,781.0)
Tenant Participation		32.9	30.1	2.8	109.3	30.1
Other Income - HRA	1B	(85.3)	(23.0)	(62.3)	370.9	(23.0)
Accounting for Pensions		(72.9)	(72.9)	0.0	100.0	(72.9)
Movement in Reserves	1B	145.9	(178.4)	324.3	N/A	(178.4)
Non Distributed Costs		0.4	0.4	0.0	100.0	0.4
Finance Charges - HRA	1B	526.2	658.7	(132.5)	79.9	658.7
Service Total		(745.0)	(920.0)	175.0	81.0	(920.0)

		Spend	Budget	Over/(Under)	Spend	Annual
	PA	£000	£000	£000	%	Budget
UHI Orkney						£000
Business Support	1C	1,409.1	1,489.6	(80.5)	94.6	1,489.6
Further and Higher Education	1B	(703.5)	(1,405.8)	702.3	50.0	(1,405.8)
Accounting for Pensions		(43.7)	(43.7)	0.0	100.0	(43.7)
Movement in Reserves		(42.2)	(42.2)	0.0	100.0	(42.2)
Non Distributed Costs		2.1	2.1	0.0	100.0	2.1
Service Total		622.2	(0.0)	622.2	0.0	(0.0)

Education

<u>Service Function</u>		<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R11AC		Senior Secondary Schools More than anticipated expenditure by £124.4K	Wendy Bowen	Long term absence cover (teaching) higher than anticipated £105k; supplies and services costs higher than anticipated, £210k. To some extent these costs are mitigated by savings made in other areas.	Review the procedures relating to the management of absence. Explore pro-active use of supply budgets to reduce short term absence. Review all costs contributing to supplies and services overspend to ensure optimum efficiency.
R12AF		Junior Secondary Schools More than anticipated expenditure by £110.5K	Wendy Bowen	The overspend is primarily due to higher-than-expected long-term teaching absence cover, £30k and increased property and utility costs £65k.	Review the procedures relating to the management of absence. Explore pro-active use of supply budgets to reduce short term absence. Review all costs contributing to property/utility overspend to ensure optimum efficiency.

Education

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R13AW	Primary Schools More than anticipated expenditure by £752.5K	Wendy Bowen	The overspend is largely driven by higher staff costs driven from increased absence cover (teaching) across the primary schools. With analysis indicating the majority of this absence is short-term in nature rather than long-term cases.	Review the procedures relating to the management of absence. Explore pro-active use of supply budgets to reduce short term absence.
R14A	Early Learning & Childcare Less than anticipated expenditure by £74.2K	Wendy Bowen	The underspend mainly reflects reduced staffing expenditure, caused by vacancies and persistent recruitment difficulties. This has been offset by reduced income to The Strynd Nursery running below capacity.	Continue to prioritise recruitment and retention.

Education

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R14FI	Additional Support Needs Less than anticipated expenditure by £81.3K	Wendy Bowen	Several posts have remained vacant for longer than anticipated, largely due to delays in recruitment, shortage of supply staff to cover vacant posts, and low numbers in applications for temporary positions.	Support for Learning posts have now been made permanent which has led to increased numbers of applications per post in comparison to the temporary positions previously. Continue to monitor the impact of this decision.
R14J	Papdale Halls of Residence More than anticipated expenditure by £63.1K	Frances Troup	A combined overspend was reported within the Papdale Halls of Residence budget as income received during the year was lower than budgeted. This was further impacted by expenditure relating to the former Papdale Halls, where building-related costs continued to be incurred despite the facility no longer being operational. No budget provision had been made for these ongoing costs.	There are plans being taken forward in regard to demolition of the former Papdale Halls. Income will be monitored during 2026/27 to see if this trend continues.

Education

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R14N	Quality Development More than anticipated expenditure by £61.8K	Wendy Bowen	There is a query around the grant income for probationers that is causing an overspend of £92K, underspends in other cost centres have mitigated this overspend to a degree.	A review of the relevant cost centres and budget allocations under the Quality Development header will be undertaken during 2026/27 to ensure budgets are aligned with their intended purpose and accurately reflect service activity and spending requirements.
R15A	Administration Less than anticipated expenditure by £190.2K	Wendy Bowen	The underspend reflects budget provision that has historically been transferred to individual cost centres but was retained within the Administration cost centre during the year. As a result, budget was not fully aligned to the areas where expenditure was incurred.	Budget allocations will be reviewed and realigned during the current financial year to ensure resources are held within the appropriate cost centres and reflect planned expenditure.

Education

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R15B	Assistance for Students Less than anticipated expenditure by £69.2K	Wendy Bowen	Expenditure on student assistance payments and tuition fees was lower than budgeted during the year, resulting in an underspend. A similar position was reported in the previous financial year.	Budget requirements will be monitored throughout the year, with any recurring surplus budget provision reviewed and potentially reallocated to other priority areas where appropriate.
R15DE	School Meals Less than anticipated expenditure by £224.8K	Frances Troup	A cumulative underspend has arisen across the majority of school meals cost centres within supplies and services budget line. This reflects improved management of catering resources, including enhanced portion control, reduced waste, and more efficient use of supplies, resulting in expenditure being lower than anticipated.	Expenditure will continue to be monitored throughout the current financial year. Where underspends are recurring, budgets will be reviewed and potentially realigned to more accurately reflect spending patterns, with allocation to other service pressure areas.

Education

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R15G	School Crossing Patrol Less than anticipated expenditure by £16.0K	Wendy Bowen	The underspend reflects two vacant posts within the School Crossing Patrol services during the period.	One vacant post has now been recruited to, with recruitment ongoing for the remaining vacancy.

Leisure & Cultural Services

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R17D	Healthy Living Centres Less than anticipated expenditure by £23.9K	Garry Burton	Vacant posts have contributed to this situation. Mainly this applies to posts with a small number of hours.	Continue to promote and advertise posts.
R17E	Tourism – Caravan Sites More than anticipated income by £10.5K	Garry Burton	There has been an increase in the use of facilities which has generated additional income.	Usage will continue to be monitored.
R17G	Sports Development More than anticipated income by £32.2K	Garry Burton	The Outdoor Education Cost Centre has generated additional income for the financial year.	Usage will continue to be monitored.

Leisure & Cultural Services

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R17N	Active Schools More than anticipated expenditure by £11.0K	Garry Burton	This has resulted from a number of minor overspends across individual budget lines which cumulatively led to an overall overspend position.	Budget monitoring will continue to ensure early identification and management of any similar pressures in 2026/27.
R17P	Community Facilities More than anticipated expenditure by £125.6K	Garry Burton	This was primarily due to employee-related expenditure pressures incurred during the year.	Budgets will be monitored closely throughout the 2026/27 financial year. The employee-related pressures experienced in 2025/26 are not anticipated to continue, and expenditure will be managed to achieve a balanced budget position where possible.

Other Housing

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R30B	Homelessness More than anticipated income by £341.5K	Frances Troup	Income exceeds budget due to sustained demand for temporary accommodation and a short turnaround time for void properties, resulting in higher rental income being generated during the year.	Income levels are largely demand-led. The service will continue to seek to rehouse homeless households as quickly as possible, subject to the availability of suitable permanent accommodation,
R30E	Energy Initiatives Less than anticipated expenditure by £69.2K	Frances Troup	The variance relates to the HEES:ABS project. The project remained in progress at year end, resulting in a timing difference between income and expenditure.	The project will continue into financial year 2026/27, with the final outturn position expected to generate a small surplus for the Council on completion.
R30F	Garages More than anticipated income by £12.3K	Frances Troup	Income from garage rent arrears is higher than anticipated which shows recovery action has been effective.	Monitor the income received within 2026/27 to see if this trend continues.

Other Housing

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R30N	Student Accommodation Less than anticipated income by £12.0K	Frances Troup	This is as a result of lower demand levels than anticipated during the year.	Occupancy levels will continue to be monitored closely, with efforts focused on maximising occupancy and achieving the set income budget during the current financial year.

Housing Revenue Account

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R61A	Administration – HRA Less than anticipated expenditure by £157.2K	Frances Troup	The final outturn position for Housing Administration reflected an underspend across a number of budget lines. This is consistent with previous years and has historically been used to offset overspends elsewhere within the service, although no budget transfer was processed during the financial year.	Budgets will continue to be monitored closely during the current financial year. Budget transfers will be considered, where appropriate, to better align budgets with expenditure and ensure resources are allocated to areas of service pressure.
R61B	Property Costs – HRA More than anticipated expenditure by £459.0K	Frances Troup	Additional repairs and maintenance work were carried out, and additional costs were applied at year end relating to grounds maintenance and insurance.	Property costs will continue to be monitored throughout the current financial year. Any budget adjustments required to better reflect the level of fixed property-related expenditure will be considered as part of ongoing budget management processes.
R61E	Rent Income More than anticipated income by £259.1K	Erik Knight	Rent receipts above budget. Note budget set in alignment with HRA Business Plan which was prepared in 2023/24. This disassociation with actual results has increased from £126k in 2023/24 to £197k in 2024/25 and current year £259k.	Consider whether Business Plan needs updated to reflect actual results.

Housing Revenue Account

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R61I	Other Income – HRA More than anticipated income by £62.3K	Frances Troup	Higher than anticipated income received from Photovoltaic Panels on housing stock including interest payments received.	Consider reviewing budget for future years, as it is anticipated that this level of income should continue.
R61U	Movement in Reserves Less than anticipated income by £324.3K	Erik Knight	The main cause of the variance is loan debt repayment of £406k which is not budgeted for. The balance arises from reduction in HRA Reserve balance from £582k to £500k per the HRA Business Plan.	Consider year end process in respect of budget creation for year-end transactions.
R61Y	Finance Charges – HRA Less than anticipated expenditure by £132.5K	Erik Knight	Interest and debt management recharges are below budget.	Consider year end process in respect of budget creation for year-end transactions.

UHI Orkney

<u>Service Function</u>	<u>Service Description</u>	<u>Responsible Officer</u>	<u>Variance Reason</u>	<u>Action Notes</u>
R67A	Business Support Less than anticipated expenditure by £80.5K	Wendy Bowen	The main areas of underspend against budget are: £41.3K for loan charges as the final loan requirement was less than originally budgeted, £18.8K for supplies and services due to activity being delayed until 2026/27, £12.9K staff costs due to vacancy savings, and £6.6K additional net income, mainly due to an increase in rents and lettings income.	Budget performance will continue to be monitored throughout the current financial year to ensure expenditure and income remain aligned with approved budgets.
R67B	Further and Higher Education Less than anticipated income by £702.3K	Wendy Bowen	Whilst income exceeded budget by £235.4K mainly due to better than anticipated student related grants and fees, and net expenditure was £60.9K lower than budget mainly due to small savings across staffing in the curriculum areas, there remained a net shortfall of £702.3K. The final outturn position for UHI Orkney is a £622.2K shortfall against an original budget of £1,266.0K.	Budget performance will continue to be monitored throughout the current financial year to ensure expenditure and income remain aligned with approved budgets. An Officer Task Force was established in 2025/26 with the remit to work across the Council; identify savings and income; and develop plan to reduce loan required. This work is ongoing.

Item: 13

Education, Communities and Housing Committee: 9 September 2026.

Revenue Expenditure Monitoring.

Report by Head of Finance.

1. Overview

- 1.1. This report presents the revenue financial summary position of expenditure incurred, as at 30 June 2026, in respect of services areas for which the Education, Communities and Housing Committee is responsible.
- 1.2. On 10 March 2026, the Council set its overall revenue budget for financial year 2026/27. On 16 June 2026, the Policy and Resources Committee recommended approval of the detailed revenue budgets for 2026/27, which form the basis of the individual revenue expenditure monitoring reports.
- 1.3. Individual revenue expenditure monitoring reports are circulated every month to inform elected members of the up-to-date financial position. Quarterly revenue expenditure monitoring reports are presented to individual service committees.
- 1.4. In terms of revenue spending, at an individual cost centre level, budget holders are required to provide an explanation of the causes of each material variance and to identify appropriate corrective actions to remedy the situation.
- 1.5. Material variances are identified automatically as Priority Actions within individual budget cost centres according to the following criteria:
 - Variance of £10,000 and more than 110% or less than 90% of anticipated position (1B).
 - Not more than 110% or less than 90% of anticipated position but variance greater than £50,000 (1C).
- 1.6. Priority Actions can be identified at the Service Function level according to the same criteria and these are shown in the Revenue Expenditure Statements. As with individual cost centre variances, each of these Priority Actions requires an explanation and corrective action to be identified and these are shown in the Budget Action Plan.

- 1.7. The details have been provided following consultation with the relevant Directors and their staff.
- 1.8. The figures quoted within the Budget Action Plan by way of the underspend (-) and overspend position will always relate to the position within the current month.

2. Recommendations

2.1. It is recommended that members of the Committee:

- i. Note the revenue expenditure monitoring statement in respect of service areas for which the Education, Communities and Housing Committee is responsible, for the period 1 April to 30 June 2026, attached as Annex 1 to this report, indicating a net budget underspend position of £260,100, comprising the following:
 - Underspend of £1,286,600 against General Fund services.
 - Overspend of £1,026,500 against Non-General Fund services.
- ii. Note the revenue financial service area statement in respect of service areas for which the Education, Communities and Housing Committee is responsible, for the period 1 April to 30 June 2026, attached as Annex 2 to this report.
- iii. Note the explanations given and actions proposed in respect of significant budget variances, as outlined in the Budget Action Plan, attached as Annex 3 to this report.

For Further Information please contact:

Pat Robinson, Service Manager (Accounting), extension 2621, Email:
pat.robinson@orkney.gov.uk

Implications of Report

1. **Financial** The Financial Regulations state that Directors can incur expenditure within approved revenue and capital budgets. Such expenditure must be in accordance with the Council's policies and objectives and subject to compliance with the Financial Regulations.
2. **Legal** Regular financial monitoring and reporting help the Council meet its statutory obligation to secure best value.
3. **Corporate Governance** In terms of the Scheme of Administration, monitoring the levels of revenue expenditure incurred against approved budgets, in respect of each of the service areas for which the Committee is responsible, is referred to the Education, Leisure and Housing Committee.

4. **Human Resources** N/A.
5. **Equalities** An Equality Impact Assessment is not required for financial monitoring.
6. **Island Communities Impact** An Island Communities Impact Assessment is not required for financial monitoring.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☐ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☐ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk** N/A.
10. **Risk** N/A.
11. **Procurement** N/A.
12. **Health and Safety** N/A.
13. **Property and Assets** N/A.
14. **Information Technology** N/A.
15. **Cost of Living** N/A.

List of Background Papers

Policy and Resources Committee, 3 March 2026, Budget and Council Tax Level for 2026/27.
Policy and Resources Committee, 16 June 2026, Detailed Revenue Budgets.

Annexes

Annex 1: Financial Summary.
Annex 2: Financial Detail by Service Area.
Annex 3: Budget Action Plan.

The table below provides a summary of the position across all Service Areas.

General Fund

Service Area	Spend £000	Budget £000	Over/(Under) £000	Spend %	Annual Budget £000
Education	11,763.0	12,725.4	(962.4)	92.4	53,095.6
Leisure Services	1,073.3	1,614.8	(541.5)	66.5	4,339.7
Other Housing	477.3	260.0	217.3	183.6	2,251.9
	13,313.6	14,600.2	(1,286.6)	91.2	59,687.2

Non-General Fund

Service Area	Spend £000	Budget £000	Over/(Under) £000	Spend %	Annual Budget £000
Housing Revenue Account	1,393.4	1,322.1	71.3	105.4	(1,070.0)
UHI Orkney	(17.7)	(972.9)	955.2	1.8	0.0
	1,375.7	349.2	1,026.5	394.0	(1,070.0)
Service Totals	14,689.3	14,949.4	(260.1)	98.3	58,617.2

Compared to last month, the total number of PAs has changed as follows:

Service Area	No. of PAs		Service Functions	PAs/ Function
	P02	P03		
Education	10	8	14	57%
Leisure Services	10	6	12	50%
Other Housing	7	2	11	18%
Housing Revenue Account	3	3	7	43%
UHI Orkney	2	1	2	50%
Totals	32	20	46	43%

Annex 2: Financial Detail by Service Area

June 2026

The following tables show the spending position by service function

General Fund

		Spend	Budget	Over/(Under)	Spend	Annual
	PA	£000	£000	£000	%	Budget
Education						£000
Senior Secondary Schools	1C	3,378.3	3,265.0	113.3	103.5	13,929.4
Junior Secondary Schools		1,075.8	1,055.0	20.8	102.0	3,817.0
Primary Schools	1B	3,445.1	3,945.0	(499.9)	87.3	13,689.7
Early Learning & Childcare	1C	1,151.0	1,246.7	(95.7)	92.3	5,565.9
Additional Support Needs	1B	924.4	1,115.7	(191.3)	82.9	4,825.6
Papdale Halls of Residence		244.6	231.6	13.0	105.6	1,056.2
Quality Development	1B	(90.4)	52.2	(142.6)	N/A	83.1
Administration	1B	265.7	302.9	(37.2)	87.7	2,255.0
Assistance for Students	1B	20.9	93.9	(73.0)	22.3	241.5
Community Learning & Development		153.0	164.1	(11.1)	93.2	734.3
School Meals		488.4	489.7	(1.3)	99.7	2,314.1
School Transport	1C	689.1	741.0	(51.9)	93.0	4,497.7
School Crossing Patrol		14.6	16.3	(1.7)	89.6	75.1
Parent Councils		2.5	6.3	(3.8)	39.7	11.0
Service Total		11,763.0	12,725.4	(962.4)	92.4	53,095.6

		Spend	Budget	Over/(Under)	Spend	Annual
	PA	£000	£000	£000	%	Budget
Leisure Services						£000
Administration - RC		66.3	59.2	7.1	112.0	601.3
Parks and Play Areas		411.0	415.2	(4.2)	99.0	469.4
Healthy Living Centres		17.7	16.9	0.8	104.7	96.6
Tourism - Caravan Sites	1B	(74.6)	(3.7)	(70.9)	2,016.2	(11.7)
Tourism - Hostels		10.2	11.9	(1.7)	85.7	3.7
Sports Development	1B	27.6	(19.1)	46.7	N/A	113.8
Sports Facilities		356.1	338.3	17.8	105.3	1,067.2
Swimming Pools	1B	107.4	153.0	(45.6)	70.2	379.0
Theatres		9.3	5.9	3.4	157.6	6.7
Active Schools	1B	(245.5)	7.7	(253.2)	N/A	70.1
Community Facilities	1B	112.1	232.5	(120.4)	48.2	363.4
Libraries	1B	275.7	397.0	(121.3)	69.4	1,180.2
Service Total		1,073.3	1,614.8	(541.5)	66.5	4,339.7

		Spend	Budget	Over/(Under)	Spend	Annual
		£000	£000	£000	%	Budget
Other Housing	PA					£000
Housing Support		18.0	19.2	(1.2)	93.8	88.2
Homelessness		611.9	610.1	1.8	100.3	1,163.9
Housing Loans		(0.2)	(1.4)	1.2	14.3	13.6
Energy Initiatives	1B	280.7	10.7	270.0	2,623.4	48.8
Garages		(8.6)	(4.3)	(4.3)	200.0	(120.0)
Miscellaneous - OH		(411.0)	(401.4)	(9.6)	102.4	288.5
Housing Benefits	1B	(33.4)	14.9	(48.3)	N/A	214.3
Landlord Registration		(31.4)	(31.4)	0.0	100.0	(30.0)
Care & Repair		2.6	4.4	(1.8)	59.1	410.9
Sheltered Housing		51.3	46.7	4.6	109.9	201.6
Student Accommodation		(2.6)	(7.5)	4.9	34.7	(27.9)
Service Total		477.3	260.0	217.3	183.6	2,251.9

Non-General Fund

		Spend	Budget	Over/(Under)	Spend	Annual
		£000	£000	£000	%	Budget
Housing Revenue Account	PA					£000
Administration - HRA	1B	164.6	191.6	(27.0)	85.9	1,269.6
Property Costs - HRA	1C	2,162.3	2,084.2	78.1	103.7	2,196.8
Rent Income		(943.6)	(946.5)	2.9	99.7	(5,011.4)
Tenant Participation		4.4	6.4	(2.0)	68.8	31.5
Other Income - HRA	1B	19.3	0.0	19.3	0.0	(73.0)
Movement in Reserves		0.0	0.0	0.0	0.0	(242.0)
Finance Charges - HRA		(13.6)	(13.6)	0.0	100.0	758.5
Service Total		1,393.4	1,322.1	71.3	105.4	(1,070.0)

		Spend	Budget	Over/(Under)	Spend	Annual
		£000	£000	£000	%	Budget
UHI Orkney	PA					£000
Business Support		167.8	161.4	6.4	104.0	1,716.9
Further and Higher Education	1B	(185.5)	(1,134.3)	948.8	16.4	(1,716.9)
Service Total		(17.7)	(972.9)	955.2	1.8	0.0

Education

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R11AC	Senior Secondary Schools More than anticipated expenditure by £113.3K This variance relates mainly to additional staffing costs in relation to staff sickness.	Management input required The service will review the budgets and profiles before the next reporting period. There will be a requirement where possible to move budget from underspending areas to cover these overspends.	Wendy Bowen	31/08/2026	Ongoing
R13AW	Primary Schools Less than anticipated expenditure by £499.9K The variances across primarily relate to Non-Domestic Rates invoices timing differences between the profile and when they were charged.	No action required Although there is no action required to correct the profiles due to Non-Domestic Rates payments being paid later, which corrected itself by the next reporting period. There is reprofiling required to ensure the Devolved School Management budgets are set to match the spending pattern.	Wendy Bowen	31/08/2026	Ongoing
R14A	Early Learning & Childcare Less than anticipated expenditure by £95.7K The underspend relates to vacant Early Year Practitioner posts within the service.	Monitor the situation Recruitment is actively ongoing to recruit to these vacant posts.	Wendy Bowen	31/10/2026	Ongoing

Education

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R14FI	Additional Support Needs Less than anticipated expenditure by £191.3K Ongoing cost pressures associated with Out of Orkney placements are currently being offset by underspends elsewhere within the service, including vacant Support for Learning Assistant posts.	Raise virement request The budget position will continue to be closely monitored throughout the financial year. Recruitment is ongoing, and expenditure will be reviewed and reprofiled as required to reflect staffing levels and placement requirements.	Wendy Bowen	30/09/2026	Ongoing
R14N	Quality Development Less than anticipated expenditure by £142.6K The variance relates to profiling issues within the Strategic Equity Funding, Youth Music Initiative and Bright Start Breakfast, with grant funding received, but no profile to match.	Monitor the situation A profiling exercise will be done, which will eliminate the underspend position, with the grants expected to be spent within this financial year.	Wendy Bowen	31/01/2027	Ongoing
R15A	Administration Less than anticipated expenditure by £37.2K The variance relates primarily to an underspend position showing against the Nursery Milk.	Raise journals request A journal will be processed to move the grant income for nursery milk into the individual nursery settings, this will correct the variance.	Wendy Bowen	31/08/2026	Ongoing

Education

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R15B	Assistance for Students Less than anticipated expenditure by £73.0K This relates to underspends against budget in the Further Education Bursary and Education Maintenance Allowance, this is a profiling difference only. Grants are reclaimed against actual expenditure.	Raise virements request A reprofiling exercise will be done to ensure budgets align with actual spend.	Wendy Bowen	30/09/2026	Ongoing
R15F	School Transport Less than anticipated expenditure by £51.9K There is an underspend showing against Primary School transport due to timing differences between invoices being received and being paid.	Raise virements request The budget is to be reprofiled to correct this, with the whole school transport budget expected to be in line with overall budget for 2026/27 financial year.	Wendy Bowen	31/08/2026	New

Leisure Services

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R17E	Tourism - Caravan Sites More than anticipated income by £70.9K More than anticipated income against budget, with this being used elsewhere in the service.	No action required This will continue to be monitored, with budget being moved if required elsewhere in the service, or a virement processed to reflect the additional income.	Garry Burton	31/12/2026	Ongoing
R17G	Sports Development Less than anticipated income by £46.7K Sports Development Grant not yet received, and Outdoor Education invoices have been sent but the income profile is not aligned to actual income received.	Monitor the situation A reprofiling will be done to correct the Outdoor Education Budget. The sports development grant has now been received, and therefore no action required.	Garry Burton	31/08/2026	Ongoing
R17K	Swimming Pools Less than anticipated expenditure by £45.6K The P3 underspend relates to a timing difference in the Non-Domestic Rates invoice at the Stromness Swimming Pool,	No action required No action required, as the position has now resolved in P4.	Garry Burton	31/07/2026	Ongoing

Leisure Services

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R17N	Active Schools Less than anticipated expenditure by £253.2K This variance relates to capital grant income sitting in a revenue code, this has now been resolved with a journal processed to move this into the correct capital code.	No action required No action required.	Garry Burton	31/08/2026	Ongoing
R17P	Community Facilities Less than anticipated expenditure by £120.4K This is mainly related to profiling issues for Non-Domestic Rates, the revenue repairs and maintenance contribution and a grant payment across several cost centres being out of line with profile.	Raise virements request The invoice timing difference has been resolved in July, however a virement will have to be processed to correct the profile for the grant payment.	Garry Burton	31/08/2026	Ongoing
R17V	Libraries Less than anticipated expenditure by £121.3K This variance relates to a profiling difference, due to the Non-Domestic Rates bill being paid in July.	No action required No action required, invoice paid, and expenditure in line with profile.	Garry Burton	31/07/2026	Ongoing

Other Housing

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R30E	Energy Initiatives More than anticipated expenditure by £270.0K A budget profile has not been set.	Raise virements request A virement request has been raised so that the budget profile can be set for 2026/27.	Frances Troup	30/09/2026	Ongoing
R30H	Housing Benefits Less than anticipated expenditure by £48.3K Housing benefit costs centre returned an underspend in 2025/26 which is repayable. Returns have been submitted, however the timing for the repayment requires reprofiling to correct budget position. Analysis of the budget to be carried out to ensure budget, and profile is appropriate.	Management input required Review budget and profiles for accuracy and make adjustments if necessary.	Erik Knight	31/07/2026	Ongoing

Housing Revenue Account

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R61A	Administration - HRA Less than anticipated expenditure by £27.0K This variance relates mainly due to an underspend on the supplies and services line within the administration cost centre.	Raise virements request A virement will be processed to adjust the profiling, and any forecast underspend moved elsewhere in the service, as required.	Frances Troup	30/09/2026	New
R61B	Property Costs - HRA More than anticipated expenditure by £78.1K The annual contribution of £2.06M for repairs and maintenance and £24.8K for grounds maintenance has impacted on budget in first quarter of financial year, causing a variance. While budget is not overspent, a significant proportion of the annual budget has been absorbed.	Raise virements request Budget to be re-profiled to address variance.	Frances Troup	30/09/2026	Ongoing
R61I	Other Income - HRA More than anticipated expenditure by £19.3K Income from Feed in Tariff relating to 2025/26, that is yet to be received, has been accrued into 2026/27. This variance will clear once received.	Monitor the situation Monitor the situation, as the variance is expected to resolve once the income has been received.	Frances Troup	30/09/2026	Ongoing

UHI Orkney

Function	Function Description/ Explanation	Action Category/ Action Description	Responsible Officer	Deadline	Status
R67B	Further and Higher Education Less than anticipated income by £948.8K £994.5k of the variance represents the maximum loan fund advance required to set a balanced budget for 2026/27.	Monitor the situation An Officer Working Group was established in 2025/26 with the remit to work across the Council; identify savings and income; and develop plan to reduce loan required. This work is ongoing.	Wendy Bowen	31/03/2027	Ongoing

Item: 14

Education, Communities and Housing Committee: 9 September 2026.

UHI Orkney – Capital Funding Expenditure Plan.

Report by Director of Education, Communities and Housing.

1. Overview

- 1.1. This report presents the UHI Capital Funding Expenditure Plan for UHI Orkney, for noting.
- 1.2. The Scottish Funding Council sets a sector-wide capital maintenance and research capital budget for each financial year which is allocated to Scottish Colleges and Universities. The allocation, which UHI receives, is then allocated to each of the UHI Academic Partners.
- 1.3. Awards have been made by UHI to UHI Orkney for the Further and Higher Education Capital Maintenance grants along with the Higher Education Research Business Innovation and Skills grant for research.
- 1.4. UHI requires submission of annual reports on this funding with an expenditure plan around September/October and final actual expenditure around July/August.
- 1.5. Funding of £162,288 for 2026/27 has been allocated to UHI Orkney as follows:
 - Further Education Capital Maintenance £104,743.
 - Higher Education Capital Maintenance £13,087.
 - Higher Education Business Information and Skills – to be spent on physical infrastructure used solely for research purposes £44,458.
- 1.6. The Scottish Funding Council has again allocated the Further Education funding for 2026/27 as Capital Departmental Expenditure Limits. In 2024/25 and 2025/26 the Scottish Funding Council initially allocated the funding as Capital Departmental Expenditure Limits but subsequently allowed the flexibility for use as Revenue Departmental Expenditure Limits. If the same flexibility is not permitted in 2026/27 it means this funding should be spent on items which may be capitalised in the accounts. This poses a difficulty for UHI Orkney and for colleges across Scotland who have in previous years used this funding for general repairs and maintenance.

UHI continues to lobby the Scottish Funding Council to highlight the extent that Academic Partners are impacted by the Capital Departmental Expenditure Limits restriction and to request flexibility to permit Revenue Departmental Expenditure Limits where necessary. There is no outcome yet to this but it is important to highlight that the stance by the Scottish Funding Council has been more definitive than in previous years.

- 1.7. The funding allocated during 2026/27 is expected to be fully committed by 31 March 2027. If specific expenditure has been committed but goods or services not yet received, then an element of the funding will be carried forward to be spent by 31 July 2027, following the UHI guidelines and the Council's accrual process.
- 1.8. The draft UHI Orkney Capital Expenditure Plan for 2026/27 is attached as Appendix 1 to this report.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
 - i. Note the UHI Capital Funding Expenditure Plan for UHI Orkney for financial year 2026/27, attached as Appendix 1 to this report.

For Further Information please contact:

Christine Scott, Finance Manager, UHI Orkney, telephone 01856 569404, Email christine.scott@uhi.ac.uk.

Implications of Report

1. Financial

There is a requirement to ensure all allocated funding is received, spent according to the conditions of the grants awarded, and reported to the funding body.

Because of the potential change of position by the Scottish Funding Council in allocation of funding in 2026/27 as Capital Departmental Expenditure Limits, rather than Revenue Departmental Expenditure Limits as in previous years, there is a risk that the repairs and maintenance plans detailed in Appendix 1 will not be covered by this funding.

If UHI fail to persuade the Scottish Funding Council to permit flexibility on the Further Education funding, the potential financial risk of non-funded expenditure is up to £104,743. Any potential shortfall will be required to be met within other funding sources within UHI Orkney

2. **Legal** – Not applicable.
3. **Corporate Governance** - Not Applicable.

4. **Human Resources** - Not Applicable.
5. **Equalities** –Not applicable.
6. **Island Communities Impact** – Not applicable.
7. **Links to Council Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☐ Strengthening our Communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan:** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☐ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk** – Not Applicable.
10. **Risk** - Not Applicable.
11. **Procurement** – There are no specific implications arising from this report.
12. **Health and Safety** – There are no specific implications arising from this report.
13. **Property and Assets** – There are no specific implications arising from this report.
14. **Information Technology** - There are no specific implications arising from this report.
15. **Cost of Living** - Not Applicable.

List of Background Papers

None.

Appendix

Appendix 1: UHI Capital Funding Expenditure Plan 2026/27.

The table below should cover all capital investment plans that involve and are funded (fully or in part) by SFC/BIS (as appropriate) capital funding allocations & FE capital grants, and should include partners own contributions.
(Please add more rows as necessary)

Description of project		Link to estate strategy	How proposals meet criteria	FY26-27 ESTIMATED capital expenditure				
				HE Capital Maintenance £	HE BIS £	FE Capital (Backlog Maintenance) £	FE Lifecycle Maintenance £	TOTAL £
Area of expenditure: <i>please insert as appropriate (e.g. new build, refurbishment, capital equipment, etc.)</i>								
Please provide a full and clear description of each project.		Please describe how the project links to, and is consistent with, your estate strategy.	Please describe how the project meets the funding criteria					
1	Agronomy - equipment to support research projects Archaeology - new vehicle (minibus), equipment for archaeological dig sites INS - estate costs associated with relocation to larger premises to accommodate PhD numbers	To maintain a sustainable research profile.	Maintaining and developing excellence in reseach areas.		44,458			44,458
2	Rolling repairs and maintenance, including statutory testing, reactive works, materials, furniture	Estates maintainance	To maintain estate to current or better quality	13,087			54,343	67,430
3	OIC Technical Services Recharges- estates maintenance	Estates maintainance	To maintain estate to current or better quality				7,200	7,200
4	IT equipment	Maintaining and developing technology relevant to curriculum delivery	To provide relevant modern equipment for students and staff				21,200	21,200
5	Equipment for departments (Café, Construction, Maritime)	New equipment and facilities upgrades to enable course delivery to meet community needs	To provide relevant training facilities				22,000	22,000
6								0
7								0
8								0
9								0
10								0
11								0
12								0
			Area of expenditure sub-total	13,087	44,458	0	104,743	162,288

Where appropriate, I confirm that all BIS Research Capital Investment Funding will be / ~~has been~~ spent on research infrastructure (delete as appropriate)

Institutional contact name (to be used for all future correspondence relating to formula capital funding):	Seonaidh McDonald / Christine Scott
Position in institution:	Principal / Finance Manager
Telephone number:	01856 569250 / 569404
Email:	seonaidh.mcdonald@uhi.ac.uk / christine.scott@uhi.ac.uk
Signature (Principal or designate):	
Date:	

Item: 15

Education, Communities and Housing Committee: 9 September 2026.

Housing Revenue Account.

Revenue Repairs and Maintenance Programme.

Expenditure Outturn.

Report by Head of Finance.

1. Overview

- 1.1. This report presents the expenditure outturn position as at 31 March 2026 in respect of the annual Housing Revenue Account revenue repairs and maintenance programme for financial year 2025/26.
- 1.2. To demonstrate a focus on monitoring the Repairs and Maintenance Programme which includes pre-planned work around the Scottish Housing Quality Standard, Energy Efficiency Standard for Social Housing, heating upgrades, servicing and other upgrades and replacements, reactive repairs that cover properties handed back by tenants, as well as repairs that are reported throughout the year which are agreed by the relevant service Committee or Sub-committee.
- 1.3. Delivery of these planned programmes of work are thereafter monitored throughout the financial year by the relevant service Committee or Sub-committee.
- 1.4. The annual programme of revenue repairs and maintenance for the Housing Revenue Account for financial year 2025/26 was approved by the Education, Leisure and Housing Committee on 2 April 2025.

- 1.5. The table below provides an overview of the expenditure incurred for financial year 2025/26:

Description.	Actual Expenditure at 31 March 2026.	Approved Budget 2025/26.	Overspend/ (Underspend).
	£000	£000	£000
Repairs and Maintenance Programme	2,431.2	2,104.0	327.2
Total	2,431.2	2,104.0	327.2

- 1.6. Appendix 1 to this report provides a detailed breakdown of the approved programme of work for financial year 2025/26, including individual project updates.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
- Note the summary position of expenditure incurred, as at 31 March 2026, against the approved Housing Revenue Account revenue repairs and maintenance programme for 2025/26, as detailed in section 1.5 of this report.
 - Note 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 this report.

For Further Information please contact:

Pat Robinson, Service Manager (Accounting), extension 2621, Email:

pat.robinson@orkney.gov.uk

Implications of Report

- Financial** The Financial Regulations state that Directors can incur expenditure within approved revenue and capital budgets. Such expenditure must be in accordance with the Council's policies and objectives and subject to compliance with the Financial Regulations.
- Legal** Regular financial monitoring and reporting helps the Council meet its statutory obligation to secure best value.

3. **Corporate Governance** In terms of the Scheme of Administration, monitoring the levels of expenditure incurred against the approved annual programme for improving and maintaining the existing Council housing stock, held on the Housing Revenue Account, funded through the approved capital programme and revenue budgets, is referred to the Education, Communities and Housing Committee.
4. **Human Resources** N/A.
5. **Equalities** An Equality Impact Assessment is not required for financial monitoring.
6. **Island Communities Impact** An Island Communities Impact Assessment is not required for financial monitoring.
7. **Links to Council Plan** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☐ Strengthening our communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☐ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk** Where resources allow, improvement works can include 'greener' solutions.
10. **Risk** Improvement of existing assets can help reduce risks associated with these assets.
11. **Procurement** Any contractual arrangements require to comply with the Financial Regulations and Contract Standing Orders.
12. **Health and Safety** Well-maintained assets will assist the Council in complying with relevant Health and Safety requirements for both staff and the public.
13. **Property and Assets** Included throughout the report and detailed in the Appendix.
14. **Information Technology** N/A.
15. **Cost of Living** N/A.

List of Background Papers

Education, Leisure and Housing Committee, 2 April 2025, Housing Revenue Account Revenue Repairs and Maintenance Programme – Proposed Programme for 2025/26.

Appendix

Appendix 1 – Housing Revenue Account Revenue Repairs and Maintenance Monitoring Report as at 31 March 2026.

Appendix 1

Repairs and Maintenance Programme	<u>Actual</u> <u>Expenditure 31</u> <u>March 2026</u> <u>£000's</u>	<u>Approved Budget</u> <u>2025/26</u> <u>£000's</u>	<u>Overspend /</u> <u>(Underspend)</u> <u>£000's</u>	<u>Update</u>
Cyclical Maintenance	196.2	104.0	92.2	As previously reported, Electrical Installation Condition Reports (EICRs) and interlinked alarm contract works continued to progress ahead of schedule. Remedial actions for all planned preventive maintenance (PPM) have been delivered through cyclical maintenance for that discipline, resulting in increased expenditure.
Planned Maintenance	808.6	780.0	28.6	Re-rendering of Buttquoy House and at access path to Watersfield have been brought forward. which have increased costs in in 2025/26.
Reactive Repairs	499.7	443.0	56.7	Reactive repairs are ad hoc in nature. Several large unforeseen repairs took place in 2025/26 including roof replacements and a hot water cylinder replacement that have contributed to higher expenditure. Reactive repairs are generally at the same level as 2024/25.
Voids/Improvements/Adaptations	517.6	535.0	(17.4)	Contractor availability, (that has now been addressed) has led to delays in several adaptations in 2025/26.
In-House Professional Fees	409.1	242.0	167.1	Increase in professional fees due to high number of servicing and planned maintenance contracts renewals in 2025/26.
TOTALS	2,431.2	2,104.0	327.2	

Item: 16

Education, Communities and Housing Committee: 9 September 2026.

Housing Revenue Account.

Revenue Repairs and Maintenance Programme.

Expenditure Monitoring.

Report by Head of Finance.

1. Overview

- 1.1. This report presents the summary position of expenditure incurred as at 30 June 2026 in respect of the approved Housing Revenue Account revenue repairs and maintenance programme for 2026/27.
- 1.2. To demonstrate a focus on monitoring the Repairs and Maintenance Programme which includes pre-planned work around the Scottish Housing Quality Standard, Energy Efficiency Standard for Social Housing, heating upgrades, servicing and other upgrades and replacements, reactive repairs that cover properties handed back by tenants, as well as repairs that are reported throughout the year which are agreed by the relevant service Committee or Sub-committee.
- 1.3. Delivery of these planned programmes of work are thereafter monitored throughout the financial year by the relevant service Committee or Sub-committee.
- 1.4. The annual programme of revenue repairs and maintenance for the Housing Revenue Account for financial year 2026/27 was approved by the Education, Communities and Housing Committee on 1 April 2026.

- 1.5. The table below provides an overview of the expenditure incurred as at 30 June 2026:

Description.	Actual Expenditure at 30 June 2026.	Approved Budget 2026/27.	Probable Out-turn 2026/27.	Overspend/ (Underspend).
	£000	£000	£000	£000
Repairs and Maintenance Programme	351.1	2,055.1	2,050.6	(4.5)
Total	351.1	2,055.1	2,050.6	(4.5)

- 1.6. A detailed breakdown of the approved programme of work for financial year 2026/27, including individual project updates is attached at Appendix 1.

2. Recommendations

- 2.1. It is recommended that members of the Committee:
- Note the summary position of expenditure incurred, as at 30 June 2026, against the approved Housing Revenue Account revenue repairs and maintenance programme for 2026/27, as detailed in section 1.5 of this report.
 - Note the detailed analysis of expenditure figures and approved programme updates in respect of the approved Housing Revenue Account revenue repairs and maintenance programme for 2026/27, attached as Appendix 1 to this report.

For Further Information please contact:

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Implications of Report

- Financial** The Financial Regulations state that Directors can incur expenditure within approved revenue and capital budgets. Such expenditure must be in accordance with the Council's policies and objectives and subject to compliance with the Financial Regulations.
- Legal** Regular financial monitoring and reporting helps the Council meet its statutory obligation to secure best value.

3. **Corporate Governance** In terms of the Scheme of Administration, monitoring the levels of expenditure incurred against the approved annual programme for improving and maintaining the existing Council housing stock, held on the Housing Revenue Account, funded through the approved capital programme and revenue budgets, is referred to the Education, Communities and Housing Committee.
4. **Human Resources** N/A.
5. **Equalities** An Equality Impact Assessment is not required for financial monitoring.
6. **Island Communities Impact** An Island Communities Impact Assessment is not required for financial monitoring.
7. **Links to Council Plan** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Council Plan strategic priorities:
 - ☐ Growing our economy.
 - ☐ Strengthening our communities.
 - ☐ Developing our Infrastructure.
 - ☐ Transforming our Council.
8. **Links to Local Outcomes Improvement Plan** The proposals in this report support and contribute to improved outcomes for communities as outlined in the following Local Outcomes Improvement Plan priorities:
 - ☐ Cost of Living.
 - ☐ Sustainable Development.
 - ☐ Local Equality.
 - ☐ Improving Population Health.
9. **Environmental and Climate Risk** Where resources allow, improvement works can include ‘greener’ solutions.
10. **Risk** Improvement of existing assets can help reduce risks associated with these assets.
11. **Procurement** Any contractual arrangements require to comply with the Financial Regulations and Contract Standing Orders.
12. **Health and Safety** Well-maintained assets will assist the Council in complying with relevant Health and Safety requirements for both staff and the public.
13. **Property and Assets** Included throughout the report and detailed in the Appendix.
14. **Information Technology** N/A.
15. **Cost of Living** N/A.

List of Background Papers

Education, Communities and Housing Committee, 1 April 2026, Housing Revenue Account Revenue Repairs and Maintenance Programme – Proposed Programme for 2026/27.

Appendix

Appendix 1 – Housing Revenue Account Revenue Repairs and Maintenance Monitoring Report as at 30 June 2026.

Appendix 1

Repairs and Maintenance Programme	<u>Actual</u>	<u>Approved Budget</u>	<u>Balance</u>	<u>Estimated Outturn</u>	<u>Predicted Overspend /</u>	<u>Update</u>
	<u>Expenditure 30</u> <u>June 2026</u> £000's					
		<u>2026/27</u> £000's	<u>Remaining</u> £000's	<u>2026/27 P12</u> £000's	<u>(Underspend)</u> £000's	
Cyclical Maintenance	16.9	98.9	(82.0)	115.0	16.1	Much of the planned preventive maintenance (PPM) works will occur in Q2/Q3, with expenditure anticipated to increase during these periods.
Planned Maintenance	36.8	697.4	(660.6)	700.0	2.6	Kitchen and Bathroom replacement contract progressng, with windows replacement contract to commence in Q3 which will impact costs in Q4.
Reactive Repairs	126.7	444.7	(318.0)	430.0	(14.7)	Reactive repairs broadly on budget, but may flex over Q2 and Q3.
Voids/Improvements/Adaptations	170.7	538.5	(367.8)	530.0	(8.5)	Voids works progressing. A large number of void works emerging in Q2 that will impact the expenditure in later quarters.
In-House Professional Fees		275.6	(275.6)	275.6	0.0	To be charged at year-end.
TOTALS	351.1	2,055.1	(1,704.0)	2,050.6	(4.5)	