



## **REPORT**

**To: Services Committee**

**9 October 2008**

**From: Head of Capital Programmes and Housing**

**Report No: HS-19-08**

### **Allocation Policy Review 2008-09**

#### **1 Introduction**

- 1.1. Shetland Islands Council allocates its vacant dwelling to the rules set out in the Council's Allocation Policy.
- 1.2. The Allocation Policy has been designed primarily to allocate houses according to housing need, in line with agreed targets set on an annual basis.
- 1.3 The current policy was drawn up in consultation with members and other stakeholders over a twelve-month period, and was first published in 2001.
- 1..4. Since then, it has been reviewed on an annual basis, with a major update in 2005 to take account of new legislation introduced in the intervening period.
- 1.5 The principles and objectives of the policy ensure it adheres to the legal requirements placed on the Council and reflects the aims of the Community Plan, the Council's Corporate Plan, Local Housing Strategy and good practice.
- 1.6 The national policy and legislative requirements for Local Authorities are detailed in Appendix A.

#### **2 Links to Corporate Priorities**

- 2.1 Housing - Improve services that prevent and alleviate homelessness in Shetland.
- 2.2 Housing - All unintentionally homeless households will be entitled to settled accommodation by 2012.
- 2.3 The overall aim of the Housing Service is to ensure we are providing safe, well-designed, energy-efficient homes that meet the demands of our unique

environment and are available across Shetland to meet different levels of affordability.

### **3 Background**

- 3.1 In 2001, an Allocation Policy Monitoring Group (APMG) was established with Elected Members, staff from the Housing Service and the Shetland Tenants Forum worker.
- 3.2 Current councillor membership of the group is Iris Hawkins, Jim Henry, Allison Duncan, Cecil Smith and Florence Grains.
- 3.3 The role of the APMG is to ensure that there is an ongoing assessment of the effectiveness of the allocation policy and to annually review the allocation targets and letting profile areas.
- 3.4 Part of the group's remit is also to consider ideas and issues for improving the policy where required, and to recommend changes to Services Committee, thereby ensuring the allocation policy remains relevant and up to date.
- 3.5 The group was advised in April 2008 that an allocation policy review would be required that year, to take into account the following: -
  - The recommendations made by Communities Scotland following the inspection of the Housing Service
  - The impact of new legislation contained within the Homelessness etc (Scotland) Act 2003
- 3.6 Since then a number of factors have led to a delay in progressing this review and at the last APMG meeting, members requested that report was written for Services Committee outlining the reasons for the review, its timetable and the resources needed to carry this out.

### **4 Regulation and Inspection Report**

- 4.1 During 2007, the Council's Allocation Policy was audited by Communities Scotland, as part of the inspection of Housing Services. Access to housing and lettings form part of the council's housing management service. Shetland Islands Council achieved a C grade for housing management. Communities Scotland's assessment is that Shetland Island Council's housing management service has some areas of strength, but set against these are a number of weaknesses.
- 4.2 Relevant extracts from the Inspection Report have been attached as Appendix B. A copy of the full report can be found at [http://www.scottishhousingregulator.gov.uk/stellent/groups/public/document/s/webpages/shr\\_shetlandislandscouncilinsp.pdf](http://www.scottishhousingregulator.gov.uk/stellent/groups/public/document/s/webpages/shr_shetlandislandscouncilinsp.pdf)
- 4.3 Communities Scotland stated that the Council's current Allocation Policy prioritises applications on a range of housing needs that reflect the statutory reasonable preference categories. All of the allocations they reviewed were to people with one or more of these needs.

4.4 The report further stated that the Council allocates its houses in a transparent way. It allocates in accordance with its allocation policy, makes appropriate use of discretion and has good audit trails for its allocation decisions.

4.5 In summary Communities Scotland stated that the council is meeting housing need through its allocations and lets its houses in a transparent way. It knows that it needs to do more to meet the needs of homeless people, and it does not effectively monitor the outcomes of its lettings process.

## 5 Impact of the Homelessness etc (Scotland) Act 2003 and the 2012 target

5.1 New legislation introduced in the Homeless etc (Scotland) Act 2003 means that the Council has to ensure that by 2012 all unintentionally homeless people have access to permanent housing.

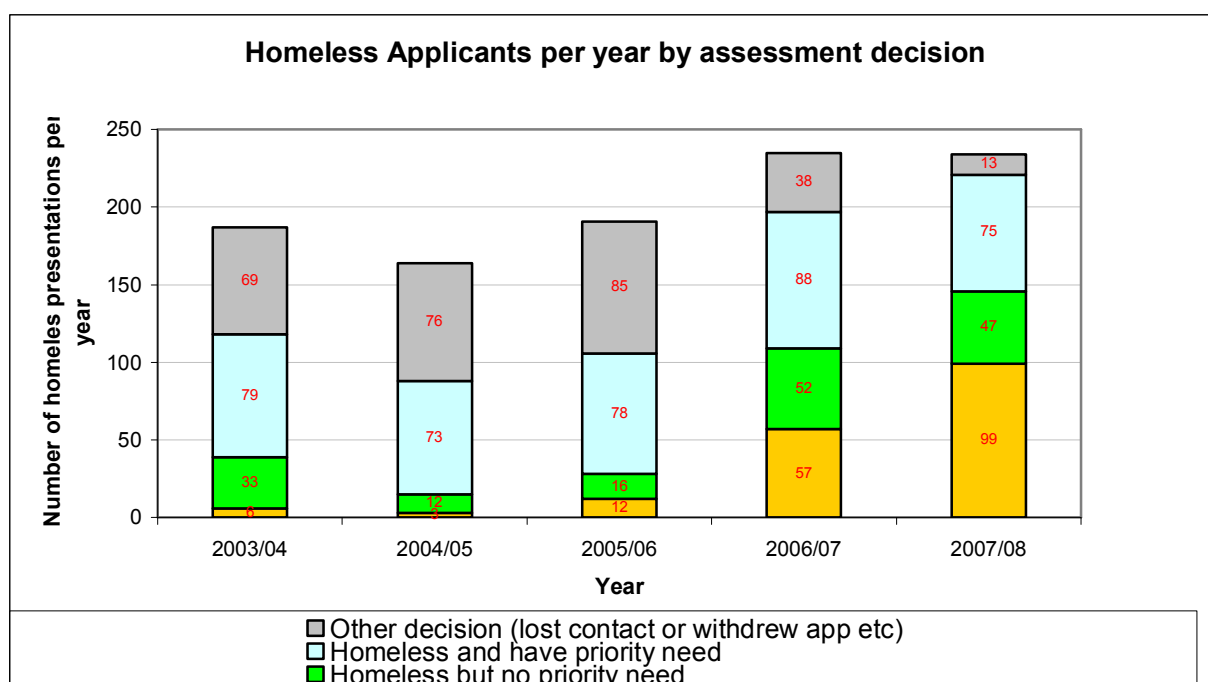
5.2 At the moment homeless people who are found by the Council to be in a category of 'priority need' (who are unintentionally homeless and who have a local connection) have the right to permanent accommodation.

5.3 This right will be expanded gradually between now and 2012 to include all unintentionally homeless people, by abolishing priority need.

5.4 Changes will also be introduced by 2012 to the Council's duty in relation to intentionality and local connection, which are detailed at Appendix C.

5.5 The Government published a statement in December 2005 stating what has been done, and what it is planning to do, to reach this goal. The statement set out that, as an interim target, the Council should aim to reduce the proportion of non-priority assessments by 50% by 2009.

5.6 The total number of homeless applications to Shetland Islands Council is increasing each year, and is summarised in Figure 1 below.



- 5.7 Different levels of advice and assistance are available to applicants depending on the decision made on their application e.g. not homeless, homeless and in priority need and these are outlined in Appendix D.
- 5.8 As is demonstrated by figure 1 above, the numbers of households who present as homeless each year in Shetland that the Council has a duty to provide temporary accommodation to (135 households); is already greater than the total number of general need Council vacancies available for relet each year throughout the whole of Shetland (112 vacancies).
- 5.9 This pressure on the Council's housing stock is increased in that the numbers of households who the Council has a duty to secure settled accommodation for (75 in 07/08 plus 195 households as at the 31/03/07 from previous years who are still awaiting a permanent solution and are living in temporary accommodation), already outstrips the total number of vacancies available for relet each year in the areas they want and need to live.
- 5.10 For example over 50% of our homeless applicants wish to be rehoused in Lerwick. Based on 07/08 figures this could mean up to 107 households, although contact will be lost with some of these households, and some will voluntarily cancel their application. The Council gets approximately 34 general needs voids in Lerwick each year.
- 5.11 In addition to the actual availability of housing in numerical terms not adding up. The size of property that most often becomes available, does not meet the demand, which is mainly for one-bedroom houses (under the terms of our policy).
- 5.12 This demonstrates that it is clear the Council will be less and less able to assist applicants with more general needs, due to meeting our statutory requirements, now and into the future.
- 5.13 It is also likely that as the Council becomes less able to meet more general needs, this will result in more households presenting as homeless, as they will see this as the only solution to their housing need.
- 5.14 For example, 315 applicants on the housing waiting list currently have sharing amenities points. This means that they are a household, within a household and we often use this award of points as a means of measuring 'hidden homelessness'.
- 5.15 My interpretation is that it is likely if any of these 315 applicants, who are currently on the general need waiting list, presented as homeless, the Council may have a duty to them. This would be in addition to the number who already present as homeless each year, which as shown above is steadily increasing.
- 5.16 Further, as stated above Communities Scotland recommended that the Council also has to reduce the length of time homeless households spend in temporary accommodation, decrease the length of time it takes us to make offers of permanent housing to homeless households and increase

the proportion of lets to homeless households to improve our performance in relation to other local authorities.

- 5.17 A large percentage of staff time and effort is currently being invested into the prevention of homelessness alongside other initiatives such as private sector leasing to try and manage this situation. The Council's Homeless Strategy will be rewritten this year, and will cover this issue in much more depth, and the Allocation Policy should be reviewed alongside work on this strategy to ensure it is helping the council to meet this target.

## **6 Scope of the Allocation Policy Review**

- 6.1 The review of the Allocation Policy will need to take into account the issues listed in Appendix E.

## **7 Project Governance**

- 7.1 The governance and management arrangements for this project are set out below, along with a description of roles and responsibilities.

	<b>Description of Responsibility</b>
<b>Project Sponsor</b> Head of Housing	Overall responsibility for the delivery of the project
<b>Project Manager</b> Service Manager – Housing & Property	Responsible for ensuring that the project tasks are progressed in line with the agreed timescales
<b>Allocation Policy Review Group</b> SIC staff (including staff from Housing and Legal Services), Elected Members from APMG, Shetland Tenants Forum Worker	Responsible for producing and reviewing options; and making recommendations to Services Committee for any changes to the policy
<b>Project Team</b> Vaila Simpson, Shirley Mills, Monique Hunter, Annette Stickle, Ian Bray, Ronnie Calderwood	Responsible for updating documentation and carrying out consultation

## **8 Timetable and suggested actions**

- 8.1 The table in Appendix F details high-level actions for this project, along with the responsible officer or group, a suggested timescale and outputs.
- 8.2 I would suggest that the project could be taken forward by pulling the various issues together into four main areas of work as indicated.

## **9 Financial Implications**

- 9.1 The Council will be required within six months of the changes in policy to ensure that these changes are publicised. These changes can be publicised within existing resources.

9.2 Depending on the extent of the proposed changes to the policy, there may also be costs associated with wider consultation with applicants and tenants. These costs can be met from within existing resources.

9.3 There are therefore no financial implications as a result of this report.

## **10 Conclusions**

10.1 The Council's Allocation Policy currently meets legal requirements and operates within the legislative framework placed on the Council.

10.2 Due to Scottish Government targets for 2012 in respect of homelessness, and recommendations made following the inspection of the Housing Service, the policy needs to be reviewed.

## **11 Policy and Delegated Authority**

11.1 In accordance with Section 13 of the Council's Scheme of Delegation, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by council, in addition to appropriate budget provision.

## **12 Recommendations**

12.1 I recommend that the Committee:

12.2 Agree the scope of the review as detailed at appendix E.

12.3 Note that the current Allocation Policy meets legal requirements but that a review is necessary to take into account the comments made by Communities Scotland in their inspection report and to ensure the Council is doing all it can to meet the 2012 homelessness targets set by the Scottish Government

12.4 Agree the governance and management arrangements, outlined at paragraph 7.1

12.5 Agree that a project team and a short life project group should be established, with the membership as suggested at 7.1 to enable the review to be carried out

12.6 Note the proposed project plan and timescales detailed at Appendix F, in particular the breakdown of the review into four areas of work.

12.7 Agree that the recommendations of the project team will be reported back to Services Committee and full Council on completion of the project for their discussion and approval.

Date: 9 October 2008  
Our Ref: VS/SP

Report No: HS-19-08

### **Policy Background**

Even with the changes introduced by the 2001 Act, the statutory provisions relating to allocations and lettings by social landlords are relatively limited. The view of the Scottish Government is that within these legislative constraints and the requirements of the homelessness provisions set out in Part II of the 1987 Act (as amended by the 2001 Act), landlords should have discretion to develop allocation and lettings policies in line with local priorities.

In developing our allocation and lettings policies, the Scottish Government expects us to take account of both the legislation described below and also the Performance Standards for Social Landlords and Homelessness Functions jointly published by the Housing Regulator, SFHA and CoSLA. The relevant performance standards are as follows:

**“Access to housing** - We ensure that people have fair and open access to our housing list and assessment process. We work with others to maximise and simplify access routes into our housing.”

**“Lettings** - We let houses in a way that gives reasonable preference to those in housing need, makes best use of available stock, maximises choice, and helps to sustain communities.”

The Scottish Government also expects us to develop our allocations and lettings policies in consultation with our tenants. We also have to involve or consult other stakeholders including e.g. applicants for housing, Shetland NHS, Social Work, Criminal Justice, Environmental Health, CADSS

In addition, the Scottish Government would expect us to take account of relevant good practice guidance when developing and implementing our allocations and lettings policies.

### **Equal Opportunities**

We have to bear in mind in the management of the housing list and allocation of housing, the requirements under section 106 of the 2001 Act that: Scottish Ministers and local authorities must exercise their functions under the Act in a manner, which encourages equal opportunities and in particular the observance of the equal opportunity requirements.

In providing housing accommodation and related services, registered social landlords must act in a manner, which encourages equal opportunities and, in particular, the observance of the equal opportunities requirements.

In particular, we must ensure that we take into account the needs and circumstances of all relevant groups, including, for example, information for disabled people on the availability of suitable houses and adaptations.

## **Housing Lists**

Section 19(1) of the 1987 Act (as amended by section 9 of the 2001 Act) sets out the entitlement for anyone aged 16 or over to be admitted to a housing list.

This is intended to ensure that no one in housing need, can be excluded from a housing list, and, therefore, will not be 'lost from the system' as a result. Although it is recognised that, once admitted to a housing list, we will continue to determine the priority of the application, section 20 of the 1987 Act (as amended by section 10 of the 2001 Act) sets out some broad criteria that should be taken into account together with more specific requirements relating to factors which should not be taken into account.

## **Allocation of Housing**

### **Reasonable Preference**

Section 20(1) of the 1987 Act as amended requires that in selecting tenants for their houses, we must give reasonable preference –

a) to persons who

(i) are occupying houses which do not meet the tolerable standard; or

(ii) are occupying overcrowded houses; or

(iii) have large families; or

(iv) are living under unsatisfactory housing conditions; and

b) to homeless persons and persons threatened with homelessness (within the meaning of Part II of the Housing (Scotland) Act 1987 (as amended by the 2001 Act).

– “Overcrowding” is defined in Part VII of the 1987 Act

– “Tolerable Standard” is as defined by section 86 of the 1987 Act and amended by section 102 of the 2001 Act.

– “Large families” is not defined. We have discretion to exercise our own judgement on what constitutes a large family, taking account of local conditions. A judgement as to what counts as “reasonable preference” in this context will also need to take account of our housing stock.

– “Unsatisfactory housing conditions” is not defined in statute and is sufficiently wide to cover the physical condition of the house and the more subjective aspects of an applicant’s circumstances, such as unsatisfactory living arrangements, problems with neighbours, etc.

What does “**reasonable preference**” mean?

Reasonable preference refers to the priority given to applicants for housing. It means that we should give due weight to the factors listed above, but it does not restrict us to taking only such factors into account.

We could add other factors of our own, such as housing key workers coming into the area, whose presence is essential for economic growth. Medical priority is another factor to be taken into account. However, we should not allow our own secondary criteria to dominate our allocation scheme at the expense of factors in the statutory list.



### **Factors not to be taken into consideration in allocation of housing**

Section 20 (2) of the 1987 Act (as amended by section 10 (3) of the 2001 Act) details those factors which we must not take into account in the allocation of houses held by the Council for housing purposes.

The factors that should not be taken account of are:

(i) the length of time for which an applicant has resided in Shetland.

This provision is intended to ensure that decisions on priority for housing are not influenced by length of residence. It prevents, for example, the award of points purely for residence in Shetland. Its effect is to put applicants who have moved into Shetland from outside on the same footing as those already living in the area but it does not give incomers any advantage over local residents. It does not prevent us from operating separate allocation systems for different parts of our areas or from giving people living in specific neighbourhoods or communities or with past residence there, priority for housing in that neighbourhood or community, providing the assessment of local connection is not determined by length of residence. An example might be where an applicant wishes to return to an area where he or she was born and where family members live. In determining that applicant's priority for housing, we award points for local connection with that area. Similarly, we are not prevented from giving points for the length of time an applicant has been on the housing list (or time spent in a particular house), provided such points are available to anyone on the list, i.e. whether within or out with Shetland. For example, landlords may wish to use waiting time to determine priority in allocation between two households with similar levels of need.

**We must ensure, whatever system we operate, that we give reasonable preference to the categories of applicant specified in section 20 of the 1987 Act as amended.**

(ii) any outstanding liability (such as rent arrears) attributable to a house of which the applicant was not the tenant;

(iii) any rent or other arrears accrued by the applicant on a previous tenancy which are no longer outstanding;

(iv) any such liability, which is outstanding but where:

(a) the amount outstanding is not more than 1/12th of the annual amount payable (or which was payable) by the applicant to the landlord in respect of the tenancy; or

(b) the applicant:

has agreed arrangements with the landlord for paying the outstanding liability;

has made payments in accordance with that arrangement for at least 3 months; and

is continuing to make such payments.

(v) any outstanding debts (including council tax arrears) of the applicant or anyone who it is proposed will reside with the applicant which do not relate to the tenancy of a house (this would include a previous tenancy), i.e. which are not rent arrears or service charges. This means that any outstanding debts,

which do relate to the tenancy of a house – i.e. rent or service charges – can be taken into account.

The provisions at (ii) to (v) above seek to limit the circumstances in which landlords refuse to house an applicant because of their or others' previous debts. It is clearly reasonable for landlords to refuse to house an applicant if he or she has significant outstanding rent arrears or service charges and these provisions do not prevent landlords from doing this. However, it is important to strike a reasonable balance between the interests of applicants and landlords and these provisions prevent landlords from refusing to house an applicant:

- because of non-housing debts; or
- if they have had arrears of rent or service charges which have since been paid; or
- where the rent or service charges arrears amount to no more than a month's charges, (to avoid penalising applicants for purely technical arrears); or
- where the applicant has come to an arrangement for paying arrears, has kept to the arrangement for at least three months and is continuing to make the payments. This is designed to help applicants who are making a genuine effort to pay off arrears.

(vi) the age of the applicant provided that the applicant is 16 years of age or over except in the allocation of (a) houses which have been designed or substantially adapted for occupation by persons of a particular age group; (b) houses to persons who are, or are to be, in receipt of housing support services (within the meaning of section 91 of the 2001 Act) for persons of a particular age group.

These exceptions are brought in under section 20 (2A) of the 1987 Act as inserted by section 10 (4) of the 2001 Act. They reflect that whilst age should not be a barrier to getting houses, in some cases, certain housing will be particularly or only suitable for certain age groups, e.g. sheltered housing for older people and, supported housing, such as foyers, for young people.

(vii) the income of the applicant and his family.

Income in this context refers to any source of income including benefits.

(viii) whether or to what value the applicant or any of the applicant's family owns or has owned (or any of them own or have owned) heritable or moveable property.

The rationale for not taking account of any history of home ownership is that owners can find themselves in necessitous circumstances and require social housing. Such circumstances might include mortgage repossessions, relationship breakdown, loss of employment or other income required to sustain ownership, age, infirmity or the need to be near a relative or carer. As with all allocation decisions, the overriding criterion is that allocations should be made on an objective assessment of need and other relevant factors.

**Residency**

In allocating houses held by them for housing purposes, we can take no account of whether an applicant is resident in Shetland if the applicant:

- i) is employed, or has been offered employment, in the Shetland; or
- ii) wishes to move into Shetland to seek employment and we are satisfied that this is the applicant's intention; or
- iii) wishes to move into Shetland to be near a relative or carer; or
- iv) has special social or medical reasons for requiring to be housed within the Shetland or
- v) wishes to move into Shetland because of harassment; or
- vi) wishes to move into Shetland because he or she runs the risk of domestic violence.



## **APPENDIX B**

Communities Scotland stated that the Council's current Allocation Policy prioritises applications on a range of housing needs that reflect the statutory reasonable preference categories. All of the allocations they reviewed were to people with one or more of these needs.

The Council categorises applicants in three ways: tenants of Council or HHA seeking a transfer; homeless people it has a duty to secure permanent accommodation for; and other applicants. The Council set annual targets to maintain a balance of lets between these categories. The targets are different for Lerwick and the rest of the stock to reflect the differing levels of demand.

Communities Scotland found that the Council meets its duties to secure temporary accommodation for people who need it. Housing Services recognised that the length of stay in temporary accommodation was too long and commissioned an independent review in 2006 to help address these issues. Since then the length of stay in furnished temporary accommodation has reduced.

The Council takes a long time to make offers of permanent accommodation to homeless people: on average it took 526 days in 2005/06 and 469 days in 2006/07. This is in part due to the supply and demand challenges discussed later.

In 2006/07 the Council set the following targets: in Lerwick – 45% of offers to homeless people, 20% to transfer and 35% to others; and in landward areas, 5% to homeless people, 15% to transfers and 80% to others. The Council failed to meet these targets in Lerwick where 30% of offers were made to homeless applicants, 25% to transfers and 45% to others. In the landward areas the figures were 7%, 17% and 76% respectively.

In response to its performance in 2006/07 and to the independent review the Council set new challenging targets. The Council agreed in March 2007 targets for 2007/08 of 80% of all offers in Lerwick to homeless people and 35% in landward areas. The Council did not reach these targets in the first quarter of 2007/08, but it told us that 50% of offers in Lerwick and 6% in landward areas were made to homeless applicants, this is improved performance.

The Council recognised that it had been allocating a lower proportion of its overall lets to homeless households compared to other councils. However, it has taken steps to increase the proportion housed and has made significant improvements.

The Council faces a number of significant supply and demand challenges, which make it difficult for it to achieve its targets. In particular:

- Over 50% of homeless people want to be housed in Lerwick, but only 18% of all lets since April 2007 have been in Lerwick;
- 38% of these lets have been of sheltered and very sheltered properties;
- There is a significant mismatch between the Council's stock and the profile of the applicants on its housing list – 24% of its stock has one bedroom while 64% of applications are from single people or childless couples;
- We have 247 sheltered properties and only 27 applicants requesting this type of accommodation.

The Council has taken some positive steps to try to ease this situation by:

- Converting larger properties into one bedroom flats;
- Developing a programme for new build;
- Allowing childless couples to apply for two bedroom properties – it is considering extending this to single people;
- Letting low demand sheltered properties to applicants how would not normally qualify for them;
- Carrying out a review of our sheltered provision; and
- Making plans to provide more information to applicants about the landward areas to encourage them to think about living there.

However, it has not yet monitored the effectiveness of these initiatives or developed their strategies to take account of the impact of the initiatives.

The Inspection Report stated that although the Council still lets a relatively low level of its houses to homeless people, the majority of applicants it does house have high levels of housing need. However, it does not monitor the types of needs it is meeting through its allocations – aside from its three broad categories. This is a weakness.

The report further stated that the Council allocates its houses in a transparent way. It allocates in accordance with its allocation policy, makes appropriate use of discretion and has good audit trails for its allocation decisions. We found that the Council does not monitor the impact of its use of bypassing of applicants to allocate to someone below them on the list. The Council accepted that this is a weakness and told us it would review its procedures for bypassing.

The Council allows all applicants to choose 4 lettings areas out of the 46 on the Islands, more than half of which contain less than 20 properties. This significantly limits applicants' choice. The Council further restricts choice by:

- Suspending applicants for being considered for housing for three months if they change their area of choice; and
- Suspending applicants for six months if they refuse two offers of housing.

The Council plans to investigate options to increase flexibility and choice and to stimulate demand.

The Council is working well with Hjaltsland Housing Association (HHA) on nominations and section 5 referrals; the level of successful nominations increased steadily over the last three years and since April 2007 HHA successfully re-housed all the council nominated applicants.

The Association increased the proportion of its lets it makes available to the council from 25% in 2005/06 to 48% since April 2007. Under the revised agreement all properties available for nomination are advertised in line with HHAs choice based lettings system. The advert states which quota will be given preference and then the council prioritises applicants who express interest in line with the council's allocation policy. This approach gives applicants additional choice since they can apply for a property in any letting area.





## **APPENDIX C**

### Intentionality

Currently, if a council finds that a homeless person is in priority need they have a duty to investigate if that person is intentionally homeless. Only a small fraction of homeless people are intentionally so.

In the future, this duty will be changed into a power (through bringing into force section 4 of the 2003 Act) so that councils can choose not to investigate intentionality. This is because the assessment of whether someone is intentionally homeless can take a lot of time and effort - and may not be the best way of responding to that applicant's housing need.

Further changes will be made (through sections 5 and 6 of the 2003 Act) to ensure that everyone who is found to be intentionally homeless has access to support and assistance to help them overcome any problems and help sustain their tenancies.

If someone is intentionally homeless as a result of anti-social behaviour, then they will have access to support and accommodation, which has no tenancy rights.

If they are intentionally homeless but NOT as a result of anti-social behaviour they will have access to support and assistance and short Scottish Secure Tenancy (SSST) - a six-month tenancy. If they are able to sustain this tenancy, they will have the right at the end of the tenancy period to change it to a full SST.

Research is currently being carried out on the most effective models of support for intentionally homeless people.

During 2007/08 Shetland Islands Council found 2 households presenting as homeless, intentionally homeless.

### Suspension of local connection

Currently, a homeless person who is in priority need and is unintentionally homeless still has to show they have a 'local connection' to the council to which they have applied. This connection can be as a result of having family in the area, or through work or some other reason. In the future, this local connection requirement will be modified.

During 2007/08 Shetland Islands Council found 1 household presenting as homeless as having no local connection with Shetland.



## APPENDIX D

### Applicants who are not homeless

Applicants who have accommodation they are legally entitled to occupy, are legally entitled to advice and assistance to pursue alternative housing options such as social rented waiting lists; private rented; seeking help from other agencies to address any personal difficulties or issues with the current home they are applying from (i.e. grants assistance etc.)

### Applicants who are homeless but do not have any priority need

These applicants are legally entitled to temporary accommodation for a limited period of time that depends on the personal circumstances (often around 2/3 months or until a permanent housing solution can be found). Also legally entitled to active advice and assistance to find their own permanent home (social rented waiting lists; private rented; returning to previous home where possible; addressing any personal difficulties etc). Outreach support offered where appropriate.

### Applicants who are homeless and who have a priority need

The applicants are legally entitled to temporary accommodation and advice and assistance to help them until they can be offered a permanent home. SIC has a legal duty to ensure the household is rehoused and supported so that they can maintain a tenancy. Outreach support offered where appropriate.

### Other applicants

This category includes homeless applications where the applicant either withdrew their housing application or where we lost contact with the applicant before a final decision was made. We have improved our service to keep in better contact with applicants and also make quicker decisions on their homeless applications.



## SCOPE OF POLICY REVIEW

<b>Policy</b>	<b>Progress</b>
Review our approach to cancellations – currently not legal	
Review our suspension policy in particular suspension for three months for change of areas; suspension for six months for refusing two offers of housing, and suspension for no local connection	
Review numbers of areas applicants can choose, currently 4 out of 46	
Consider reducing the number of areas e.g. Unst, Lerwick, Scalloway from 3 areas to 1 area	
Consider creating area groupings, which would count as one choice e.g. anywhere in Shetland, North Isles, Westside, South Mainland – could link these to the LSDG or Health Areas	
Consider allowing greater choice in relation to property type e.g. be very specific about property types in each area and allow applicant's to choose exactly what type of house they'd be willing to accept	
Consider allowing single applicants to be considered for two bedroom properties	
Consider advertising any no / low demand voids – Shetland Times, internet, front office, wall board on street on a regular basis	
<b>Procedure</b>	
Need to check that applications have been accurately processed	In progress
Need to review how we contact applicants who do not complete their application correctly or fail to submit all necessary evidence	Complete
Follow up apparent instances of homelessness or risk of homelessness	Complete
Need to enter on Orchard and use information collected on ethnicity or disability to help understand the needs of people from BME communities	In progress
Must assess the needs of applicants who are suspended	
Draft clearer procedures for letting profile areas e.g. to make clear that age is not a consideration	
<b>Information</b>	
Advertise translation service on the application form and information and advice leaflet	
Letters need to give information on demand and turnover in an applicant's chosen lettings areas	In progress
Improve the information available to applicants e.g. publicise each week what's been let and points banding	
Review the information given out to applicants when they first apply e.g. instead of telling people their position on the list, could we give them a priority and advice / information about their housing options linked to that priority?	

Develop information about previous allocations for internet to try and dispel myths e.g. general information on number housed, where housed from or local connection, statutory homeless numbers, real life case stories for information, list of voids	
<b>Structural</b>	
Offer applicants interviews to help them understand how quickly they are likely to be offered a house	In progress
<b>Orchard</b>	
Management of List - reports needed from Orchard on changes due to age or length of time e.g. number of bedrooms entitled to, overcrowding, IOT	
Considering decreasing the review period from annually to every six months	
<b>Monitoring</b>	
Need to monitor the types of housing needs we meet through our allocations to ensure we comply with the statutory reasonable preference categories	
Need to monitor allocations to homeless households to ensure we are in line with other councils.	
Need to monitor the impact of bypassing applicants	
<b>Strategic</b>	
Need to develop our strategies in relation to supply and demand to take account of the impact of the initiatives and monitor their effectiveness	Part of LHS
<b>Training</b>	
Provide training on translation services	
Provide training on any changes to policy	

## APPENDIX F

Action	Responsibility	Deadline	Output
1 Review policy on cancellations; review period and suspensions	APR Group	14/10/08	Revised policy document
2 Review policy on areas of choice	APR Group	21/10/08	Revised policy document
3 Review policy on size and type of property applicants will be considered for	APR Group	28/10/08	Revised policy document
4 Review policy to take account of 2012 targets	APR Group	04/11/08	Revised policy document
Produce draft revised policy document	Project Team	14/11/08	Revised policy document
Carry out consultation with tenants, applicants, elected members and other stakeholders	Project Team	12/12/08	Feedback and comments on policy changes
Pull together feedback and comments	Project Team	15/12/08	Report on feedback
Hold meeting to review feedback from consultation	APR Group	16/12/08	Agreed changes
Produce 2 <sup>nd</sup> draft & write report	Project Team	By clearance date	Report
Report to Services Committee & Full Council	Head of Service	Jan 09 (date to be agreed)	Agreement to updated policy
Produce final document and manual	Project Team	Jan 09	Allocation Policy Manual
Provide training to all staff	Project Team	Feb 09	Staff confident in knowledge of policy changes
Publicise changes	Head of Service	Feb 09	Press release, updates on intranet / internet
Contact applicants to obtain any information needed pre implementation	Housing Officers/ Housing Assistants	Feb / Mar 09	Updated application files
Implement policy, update system	Project Team	Mar 09	System updated
Notify applicant's of any changes to their points or position on the list as a result of the changes	Housing Officers/ Housing Assistants	Apr 09	Applicant's advised of new position







## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### BLUEPRINT FOR EDUCATION IN SHETLAND – CONSULTATION TIMETABLE

#### 1. Introduction

- 1.1 This report is to provide members with the timetable for the consultation on the Blueprint. It proposes that the key issues are now taken to the community of Shetland in a round of consultation meetings.

#### 2. Link to Council Priorities

- 2.1 In July 2007, the Services Committee agreed a 4-year plan, as the service element of the Council's Corporate Plan. In relation to the Schools Service, the plan states:-

“Shetland schools population projections anticipate a substantial reduction in pupils within a relatively short time frame. The challenge for the authority is, therefore, to develop a modern “blueprint” for the shape of the Service across Shetland for 10 years time. This model will consider the educational and financial viability levels for schools, their host communities as well as important associated issues such as transport requirements. It will consider links with pre-school services and life long, vocational, further and higher education and training. It will consider the development of centres of excellence, focused on particular sectors of the economy across Shetland building on existing high quality facilities. It is anticipated that significant capital investment will be required to bring some schools and facilities up to a modern standard”.

- 2.2 The Council will ensure a model for education is developed by 2009 that considers the educational and financial viability for schools and communities and its outputs are then implemented.
- 2.3 The Council will work to create and maintain a culture where individual learners can strive to realise their full potential.

### **3. Background**

- 3.1 At the Services Committee in November 2007 a report was presented entitled, "Developing a Blueprint for the Education Service". Members considered the report and agreed that:
- (a) the key drivers should be to provide the best quality educational opportunities and learning environment for all;
  - (b) in so doing, the opportunity for savings to bring budgets to a sustainable level should be considered; and
  - (c) the final blueprint comes back to Services Committee with an action plan to look at all schools, internal management, the necessary investment required, quality of education, new ways of delivering education and the potential for each school within a realistic timescale.
- 3.2 At the Council meeting in December 2007, the Vice Chair of Services Committee clarified that the revised "Blueprint" should come back to Services Committee in January 2008.
- 3.3 At Services Committee in January 2008 a report was presented entitled, "Developing a "Blueprint" for the Education Service". The Committee agreed to the establishment of the working group to undertake the 'blueprint' review (Min Ref: SC 09/08).
- 3.4 At Services Committee in June 2008 a report was presented to inform members of ongoing work on the Blueprint by the sub-groups of the working group. At that meeting Members requested a seminar on the work undertaken so far on the Blueprint (Min Ref: SC 55/08). This seminar took place on 3 July 2008.

### **4 Current Situation**

- 4.1 The Blueprint working group met on the 26 June 2008 to review the information which had been gathered by each of the sub-groups, and to agree on emerging issues which would require further exploration. As previously agreed sub-groups were formed to look at quality education and transitions at three stages: Pre-School/Primary, Secondary/Further/Higher and for pupils with Additional Support Needs.
- 4.2 It became clear at the meeting that any Blueprint for Education in Shetland will require to be informed by current Scottish Government policy direction in education.
- 4.3 The specific issues here are:
- The increase in hours within the entitlement to pre-school education;
  - The Skills for Scotland, a Lifelong Skills Strategy;

- The content of the new Curriculum for Excellence for Scottish Schools as described in Building the Curriculum 3, published in June 2008;
  - The current consultation on changes to the National Qualifications Framework in Scotland, which runs until 31 October 2008.
- 4.4 Due to the significance of these emerging issues, it was felt important that these, and the feedback from each of the sub-groups, was shared with all Members. As a result, a Seminar took place on 3 July 2008.
- 4.5 At Services Committee in August 2008 a report was presented for approval which set out the key issues from the three sub-groups, Pre-School/Primary, Secondary/Further/Higher and Additional Support Needs.

## 5. Emerging Issues

- 5.1 Within each area of Pre-School/Primary, Secondary/Further/Higher and Additional Support Needs, the Working Group identified critical issues both national and local, which require further consideration as they will impact on how any Blueprint for Education in Shetland may look in the future.
- 5.2 The Skills for Scotland strategy challenges us to seek to put in place cohesive structures for learners, as follows:
- Simplifying structures to make it easier for people to access the learning, training and development they need, including formal and informal learning by merging a number of bodies into one, focussed on skills.
  - Ensuring that *Curriculum for Excellence* provides vocational learning and the employability skills needed for the world of work and is the foundation for skills development throughout life.
  - Achieving parity of esteem between academic and vocational learning, recognising that vocational learning is a valuable alternative to the academic pathway and important to all.
  - Encouraging providers to see themselves as part of a continuum of provision - links in a chain - which helps individuals to see the relevance of learning to them, progress in their learning and make full and effective use of the skills they have acquired. Judging that system by how well it serves those who need the most support.

## 6. Proposals

- 6.1 In order to inform the direction of the Blueprint from this point, it is proposed that the Schools Service develop a programme of consultation, along with other providers, to seek the community of Shetland's views on the issues which the Working Group feel need more consideration.

6.2 The methods by which we would wish to communicate what is happening will include:

- Press releases
- Information Sheets and Bulletins
- Newsletters
- Establishing a web-site with up to date information and a means on e-mailing in questions, issues or comments
- Frequently Asked Questions sheet
- Dedicated e-mail box
- Address and phone numbers for communications
- Public meetings – presentations
- Information accessible in large font or in other languages.

6.3 The proposed consultation arrangements for each stakeholder group is as follows:

<b>Stakeholder group</b>	<b>Proposed method of consultation.</b>
Pupils	Quality Improvement Officer to attend Pupil Council meeting.
All school staff	Head Teacher to lead a meeting with all their school staff.
Parents	Parent Council meetings.
Parent Councils	Lead officer to attend Bi-Annual meeting of Parent Councils. Offer for Quality Improvement Officer to attend Parent Council meeting.
Community Councils	Information sent out with offer for a Lead Officer to attend.
Shetland Community	Community Council to facilitate meeting with a Lead Officer presenting the information and group responses to the key issues.
Unions	LNCT JCC
Services providers, such as bus operators	Meeting with service providers.
Users of Community facilities	Community Workers to lead a meeting in their area.
Other learning partners (such as Shetland College, Adult Learning, Youth Work, Library Service, etc)	Lead Officer to attend management team meetings of each learning partner.
Other SIC support services (such as Building Maintenance, ICT)	Item on the agenda of the regular liaison meeting with each of these service areas.

Council Members	Seminar
Careers Service	Meeting with a Lead Officer
Skills Development Scotland	Skills Strategy group for Shetland to facilitate a discussion with Skills Development Scotland
Employers	Meeting with a Lead Officer.

- 6.4 The Lead Officers for this consultation are the Executive Director, the Director of Shetland College, Head of Schools and the two Quality Improvement Managers. One of these people will lead each of the meetings with the Shetland Community. There will be other officers in attendance at these meetings to facilitate the group discussions and record the comments from each group.

## **7. Financial Implications**

- 7.1 There are no financial implications from this report. The resources required for the proposed consultation will be met from existing resources.

## **8. Policy and Delegated Authority**

- 8.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by Council, in addition to appropriate budget provision.

## **9. Recommendation**

- 9.1 I recommend that Services Committee agree to the proposed methods of consultation with each stakeholder group and the format for the key issues, Appendix A.

Our Ref: HB/AE/sm

Report No: ED-48-F



## Blueprint for Education - Consultation

Please consider each statement and note your comments below each one.

Pre-School / Primary
<ul style="list-style-type: none"> <li>Placing pre-school provision as close as possible to primary school provision to minimise the impact of the transition from pre-school to primary</li> </ul>
<ul style="list-style-type: none"> <li>Ensuring we have the minimum number of transition points necessary from pre-school through to Post-16 education</li> </ul>
<ul style="list-style-type: none"> <li>Resolving the relationship between pre-school education and childcare, and what the local authority is required to provide by statute and what it wishes to provide to support the sustainability of communities in Shetland and the Shetland economy. This needs to include consideration of out-of-school and after-school provision</li> </ul>

- Agreeing a pupil roll of 20 as minimum size for delivering the best service delivery except in our remote isles – Fair Isle, Foula, Fetlar, Skerries and Papa Stour

- Acceptance of the role of composite classes in Shetland's primary schools, and their educational benefits

- Agreeing a position on the continuance of teaching head teachers



Secondary
<ul style="list-style-type: none"> <li>The proposals within the Scottish government's consultation on Qualifications. Responses to this specific consultation must be submitted by 31 October 2008. In all likelihood the Scottish Curriculum will be delivered for Secondary Education where Secondary 1-3 will be the the third and fourth levels of a broad general education and Secondary 4-6 will be the senior phase. This senior phase will be when the young people sit National Qualifications.</li> </ul>
<ul style="list-style-type: none"> <li>Ensuring we provide, as far as possible equality of opportunity for our young people in terms of curriculum choices and post-school destinations</li> </ul>
<ul style="list-style-type: none"> <li>Continue to develop strengthening the partnership between schools and centre of further education, in terms of meeting the specific educational needs of each individual child</li> </ul>
<ul style="list-style-type: none"> <li>Making Halls of Residence accommodation available to students attending Shetland College</li> </ul>

Additional Support Needs
<ul style="list-style-type: none"><li>• Improving transition arrangements beyond school and into adulthood, this will include consultation with Social Work</li></ul>



## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### CONSULTATION ON SHARED MANAGEMENT IN YELL SCHOOLS

#### 1. Introduction

- 1.1 A report (ED-03-F) entitled 'Shared Management Guidelines for Shetland's Schools' was approved by the Services Committee of Shetland Islands Council on 26 January 2006. (Min Ref: SC 03/06)
- 1.2 The Appendix to the report, Shared Management Guidelines, contained a framework for consultation with communities on the subject of Shared Management.
- 1.3 This framework contained specific procedures to be followed during the consultation process.
- 1.4 A report was submitted to Services Committee in June 2008 which followed the consultation process. It was requested that this report be deferred until the Blueprint came forward.
- 1.5 A request has been made that the report on the Shared Management of two of the Yell Schools be brought back to Services Committee. If this report is approved then this would overturn the Council decision of June 2008 to defer until the Blueprint comes forward.

#### 2. Links to Corporate Priorities

- 2.1 The Council will ensure a model for education is developed by 2009 that considers the educational and financial viability for schools and communities and its outputs are then implemented.
- 2.2 The Council will work to create and maintain a culture where individual learners can strive to realise their full potential.

#### 3. Current Position

- 3.1 There are three schools in Yell – Burravoe Primary School in the south of the island, Cullivoe Primary School in the north, and Mid Yell

Junior High School which provides Nursery and Secondary education for the whole island and Primary education for the central catchment area.

- 3.2 The Head Teacher of Mid Yell Junior High School was formerly the Head Teacher of Cullivoe Primary School. Prior to his appointment to Mid Yell he requested that consideration be given to developing a shared management model between Mid Yell Junior High School and Cullivoe Primary School.
- 3.3 The Cullivoe Primary School Board also asked the Schools Service to consider a pilot with Mid Yell Junior High School, after Mr Lawson had been appointed to the post of Head Teacher at Mid Yell Junior High School.
- 3.4 A report to Services Committee, 'Shared Management of Schools in Shetland: Pilot Project – Cullivoe Primary School and Mid Yell Junior High School' (ED-06-F) (Min Ref: SC19/06), suggesting a pilot to examine the possibility of an established model was approved in March 2006 and subsequently approved by full Council on 28 June 2006.
- 3.5 A Pilot Group was set up to monitor the progress of the pilot and to review the model after a period of two years. As a result of their review, the Schools Service carried out consultation with the school communities in May 2008 following the guidelines set down in 'Shared Management Guidelines for Shetland's Schools' (Report: ED-03-F - see para 1.1).
- 3.6 Since the report 'Consultation on Shared Management in Yell Schools' (Min Ref: SC 46/08) was submitted in June 2008 the Schools Service has been working with both schools to ensure the education of the children is not affected by the current arrangements continuing.
- 3.7 The Head of Schools and Quality Improvement Officer attended a meeting in August, with the Head Teacher, both Parent Council Chairs and Councillors for the area. They discussed the current situation and practical ways in which parents could be kept informed.
- 3.8 It was agreed to hold an open meeting of the Mid Yell Parent Council which the Head of Schools would attend. This meeting was held on 10 September 2008. It was well attended and a good discussion was held.

#### **4. The Consultation - Meetings**

- 4.1 Consultation meetings were held with:

Mid Yell Junior High School Staff  
Mid Yell Junior High School Parents Council  
Cullivoe Primary School Staff



Following feedback from previous consultations, it was decided that consultation with pupils should be encouraged through discussion with their parents, as many pupils, parents and staff felt uneasy with the process. Questionnaires were therefore issued through the schools involved following the Public Meeting held in Mid Yell on Wednesday 21 May 2008.

## **5. The Consultation – Written Submissions**

### **5.1 Written submissions were received from**

The Educational Institute of Scotland  
The Mid Yell Pilot Monitoring Group – 48 replies forwarded  
The Yell Community  
Pupils  
School-based Staff  
The wider community:  
- 46 people returned the completed questionnaire  
- 14 people responded by e-mail  
...giving a total of 60 responses.

## **6. The Consultation – what the Community said**

- 6.1 The feedback from all the meetings showed a divergence of opinion between the two communities of Mid Yell and Cullivoe. Though neither community was unanimous there was a large majority in Cullivoe in favour of the model and a large majority in Mid Yell against.
- 6.2 At both meetings in Cullivoe there was significant support for the current scheme of provision (the Pilot) and an appreciation of the work of the school and the staff members. However, there was a deep suspicion of the motives of the Schools Service and the Shetland Islands Council and a fear that either adopting the current model or reverting to the previous one would impact on the case for altering the overall scheme of provision in Yell.
- 6.3 During these meetings there was a genuine feeling of a need for stability – the school has been subject to frequent change and uncertainty for the last five years or more. It was generally agreed that, whatever model was adopted, Cullivoe would continue to deliver a high quality of education but needed a guaranteed period of time to allow the community to develop. It was noted that current school roll projections suggest that Cullivoe will become a two-teacher school within the next few years.
- 6.4 At the meeting with staff in Mid Yell, there was a significant degree of disquiet expressed. Figures of a poll of staff suggested there was no-one with a positive view of the arrangement and a large majority with

a negative view. It was noted that these figures were not collected anonymously and that some chose not to express their opinions.

- 6.5 At the meeting with the Parent Council, there was again a significant number of concerns expressed, specifically that when the Head Teacher was out of school, his deputy had to leave her class and that this had a negative impact on learning and teaching. Several parents commented that this had had a negative impact on their children's learning.
- 6.6 At the Public Meeting it soon became obvious that opinion was divided. Those present from Cullivoe were wholeheartedly of the opinion that the set-up was working efficiently to the benefit of their pupils, and that the model had allowed for the sharing of resources. Those from Mid Yell were almost unanimously against the model, citing problems accessing the Head Teacher when he was out of school, and the negative impact on pupils when his deputy had to leave her class in his absence.
- 6.7 Of the written responses, both by post and by e-mail there was a marked difference of opinion based almost exclusively on the geography of the island. This meant that a large majority were against the model (80%) reflecting the sizes of the two communities.
- 6.8 The attainment and achievement of pupils have to be of paramount importance in any model supported by the Schools Service. Figures on attainment are notoriously untrustworthy in small schools. Standards remain high in both schools, although mention was made during the consultation process of a drop in attainment at Standard Grade in Mid Yell JHS. Both schools provided a list of the many achievements of pupils and the varied learning experiences that pupils can access. However, it remains unclear as to how the pilot has impacted on this area – indeed, staff at Mid Yell pointed out that this good practice “was in place 10, 15 and 20 years ago.”

## **7. Financial Implications of a Shared Management model**

- 7.1 The financial implications associated with the possible shared management models were outlined in the original report as Appendix A (Min Ref: SC03/06). This suggested a saving in employee costs of approximately £18,000, offsetting an increase in travelling costs of approximately £2,500 to leave an overall saving of some £15,500.
- 7.2 The actual staffing costs for the three Yell schools are set out in the table below. There is a clear indication that savings of approximately £15,500 have been made in staffing costs in Cullivoe. However, this is due mainly to the fact that the teacher in Cullivoe Primary School is a Class Teacher and not a Principal Teacher as planned, this resulted in a difference in salary costs of approximately £10,000. Taking into account the additional 0.15FTE management time for an established

Principal Teacher, the shared management model generates no significant savings.

Summary (Actuals)		2007/08	2006/07	2005/06
GRE1207 Burravoe Primary School	Employee Costs	72,558	68,251	69,098
GRE1208 Cullivoe Primary School	Employee Costs	54,551	56,406	70,099
GRE1320 Mid Yell Secondary School	Employee Costs	582,160	550,001	574,794

- 7.3 The report 'Shared Management Guidelines for Shetland's Schools' approved by Council (Min Ref: SC 03/06) (ED-03-F) states in para 6.1:

*"There are no financial implications associated with the approval of this report. However, the guidelines do contain a stated advantage of shared management in the following terms: "Shared management can facilitate financial savings (in most cases)". The Education Service will not implement structures that do not represent best value."*

## 8. Conclusions

- 8.1 The two communities of Mid Yell and Cullivoe hold diametrically opposed views on the success for the pilot of shared management for their two communities. It has always been the view of the Schools Service that for shared management to work effectively both, or in some cases all three, communities must support the model.
- 8.2 The majority of staff in Mid Yell and the teachers' union (in this case the EIS) are united in their opposition to the introduction of a permanent shared management model.
- 8.3 Reports by Her Majesty's Inspectors of Education and Shetland Islands Council's Quality Improvement Officers suggest that the best practice suggested by the Education Service's information leaflet is already in place in schools in Yell and that the sharing of resources, including staff, has been in place in Yell for some time. It is also worth noting that such good practice works well in Burravoe Primary School with its own teaching Head Teacher.
- 8.4 Introduction of the shared management model in Mid Yell and Cullivoe would not result in any significant financial savings
- 8.5 This report provides an up dated position for the provision of the Shared Management. The recommendation does not change although there are no major issues with the interim continuation of the pilot. This is mainly because all those involved, the staff within both



schools and the parents are working very hard to ensure that the education of the children and young people is not affected by this.

## **9. Policy and Delegated Authority**

- 9.1 The policy and delegated authority for the consultation process are laid down in Appendix A to report ED-03-F 'Shared Management Guidelines for Shetland's Schools' (Min Ref: SC 03/06):

*"The Head of Service will instruct the Quality Improvement Manager (QIM) to consult initially with staff, parents, School Boards (or their replacements), Community Councils, union representatives, and pupils of the schools who may be involved in a move towards shared management, observing SIC Guidelines for Consultation (April 2002).  
..... The QIM will prepare a proposal informed by the consultations and present this to the Head of Service ...."*

- 9.2 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by Council, in addition to appropriate budget provision.

## **10. Proposals to the Head of Schools**

The proposals made to, and accepted by, the Head of Schools as a result of the consultation process were that:

- 10.1 the Schools Service recognises that the wish of the School Community in Cullivoe is for the present scheme of provision to continue and appreciates the rationale for continuity within the model. It further recognises the hard work of all staff involved with the pilot.
- 10.2 the Schools Service recognises that the wish of the School Community in Mid Yell is for the present scheme of provision to cease at the earliest date practically possible to provide their school with a full-time Head Teacher.
- 10.3 the Schools Service, taking account of the strength of feeling in both communities, recommends that a return to the previous model of provision be implemented and that it moves immediately to recruit a Head Teacher for Cullivoe Primary School under the same Terms and Conditions as the previous Head Teacher. This will provide a period of stability for each school.
- 10.4 the present arrangement in Cullivoe and Mid Yell will continue until a new Head Teacher is in post, thus ensuring minimum disruption for pupils and staff.

## **11. Financial Implications**

- 11.1 The budget approved in 2008/09 was for a Teacher at Cullivoe Primary School at a cost of £39,244. Additional funding, in the region of £14,000, to meet the cost of a Head Teacher for Cullivoe Primary School will be met from Budget Code GRE12510016.
- 11.2 In addition, there will be the one off cost of the external recruitment exercise and possible relocation costs of up to £8,000. This will be met from Budget Code GRE1215.

## **12. Recommendations**

I recommend that the Services Committee agree:

- 12.1 to the implementation of the previous model of provision and that the Schools Service move to immediately recruit a Head Teacher for Cullivoe Primary School under the same Terms and Conditions as the previous Head Teacher. This will provide a period of stability for each school.
- 12.2 that the present arrangement in Cullivoe and Mid Yell continue until a new Head Teacher is in post, thus ensuring minimum disruption for pupils and staff.

October 2008

Ref: HB/JR/sm

Report No: ED-52-F



## REPORT

To: Services Committee

09 October 2008

From: Head of Children's Services

### Childcare Partnership

#### 1. Introduction

- 1.1 This report provides an update for Services Committee on the work carried out so far by the Childcare Partnership Review Working Group. The Group was set up to examine the role of the Childcare Partnership and the Council's relationship with it. The Working Group was also tasked with identifying the level of current childcare provision and exploring possible ways forward for the service sector.
- 1.2 This report also outlines for Members the level of current childcare provision available in Shetland including where gaps are and the threats this sector faces currently.
- 1.3 It should be noted that during the life of the Working Group, the Scottish Government has published its draft Early Years Framework, with a final publication due by the end of the calendar year. This has impacted on the work of the Group, as this framework identifies national priorities within this sector which will require to be taken account of locally in determining the nature of future childcare provision in Shetland.
- 1.4 Alongside these national developments, locally, the Shetland Childcare Partnership in partnership with the Economic Development Unit commissioned a study into the Economic Value of Childcare in Shetland. The findings in this report were presented to Development Committee on 2 October 2008 (The Executive summary of this report is attached as Appendix 1). These will also contribute to the future direction of this service area in Shetland.

- 1.5 As well as providing an update, the Report also asks Members to agree that the next stage in this work will be to develop a specific policy on Childcare, which sets out the Council's ambitions for developing and supporting Childcare Services, in a range of settings and by a range of providers, taking account of recent national policy drivers on Early Years and the overall national direction to support economic growth.

## 2. Links to Corporate Priorities

- 2.1 The provision of childcare services to children and their families contribute to the corporate priorities of the Council and its partners in the following areas:

- Seek to create fulfilling well paid jobs for all
- Nurture creativity, build skills and engage enterprise
- Expand knowledge, extend opportunities and improve access
- Everyone should be able to access the places, services and opportunities that they need to reach
- Support population growth

- 2.2 The Corporate Plan includes specific commitments from this Council to developing Childcare Services. The Plan states that the Council will, "...work out ways to minimise the fragility of childcare provision (for reasons of, for example, low numbers, travelling distances, volunteering commitment, training and management support) and actively support additional childminding services". This will, "...improve the sustainability of childcare and pre-school provision".

- 2.3 Until recently, Government and local policy sought to secure a balance of provision between the elements of sustainable development – social, economic and environmental – at an affordable level to the community. Recently, with the signing of the Single Outcome Agreement, through the Concordat, the national policy drive is towards sustainable **economic** growth. The over-arching purpose of the government's objectives is, "to focus the Government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable growth".

## 3. Background

- 3.1 In light of the Council's Corporate commitment, Services Committee agreed in October 2007 to establish a short-life working group to better understand the current arrangements for Childcare as a pre-requisite to developing a policy to help shape the future direction of services. The purpose of the review group was to:

"To review the governance arrangements and ongoing delivery and support for Childcare services by Shetland Islands Council.

To review the governance arrangements in terms of:

- Links to strategic direction and relevant plans
- Legal nature of partnership and relationship with SIC decision making structures, scheme of delegation and employed staff
- Role and Remit of Chairperson
- Service reporting arrangements
- Staff reporting arrangements (particularly difference between Board and line management)
- Service performance
- Resource allocation, finances and budgets

To review the ongoing delivery and support for childcare services by Shetland Islands Council in terms of:

- Role of Children's Services
- Role of Schools Service
- Commissioning Strategy – public / private / voluntary sector for the following service areas:
  - Out of School Care
  - Breakfast Clubs

- 3.2 Childcare Partnerships were developed in each local authority in Scotland in 1998. Membership came from the local authority, private and voluntary sectors, parents, the community – all those with a key interest in childcare locally. Partnerships had an initial remit of identifying local need, developing plans and generating proposals for the development of childcare services. They had to mobilise local commitment and identify resources to achieve planned outcomes. Work had to be integrated with plans for the expansion of early education at the time.
- 3.3 In April 2000, Partnerships submitted joint Early Education and Childcare Plans for 2000-2003. From 2005, Early Education and Childcare Plans have been subsumed into the Integrated Children's Services Plan. Members approved the current Children's Services Plan on 12 June 2008 (Min Ref: 49/08).
- 3.4 Local authorities were responsible for convening the Partnership and providing a strategic lead.
- 3.5 Partnerships were resourced through the Childcare Strategy funding, which was initially "ring fenced".
- 3.6 At first in Shetland, the Chair of the Partnership was seconded part-time from Highlands and Islands Enterprise. Thereafter, a Council Officer who had protected time to support the role of the Partnership. This changed in 2006 when a non-Council officer became the Chair.
- 3.7 Due to the historic way the Partnership was chaired in Shetland, there was, and still remains, a degree of confusion as to the nature of the Council's relationship with the Partnership. This issue was highlighted in the independent evaluation of the Partnership in 2006.

- 3.8 Funding arrangements have also changed, initially in 2004 when the Childcare Strategy became part of the GAE, and more recently with local settlements and the Single Outcome Agreement. This means that the allocation previously received for Childcare is no longer “ring fenced” and the Council is free to allocate the amount of resources it considers is appropriate to support local need.
- 3.9 These financial changes have meant a more robust system and greater accountability around funding distribution to the Partnership.
- 3.10 The strongest links between the Council and the Partnership have been through the School’s and Children’s Services. There has also been an important link more recently with the Economic Development Unit. This link is vital given the importance of childcare to Shetland’s economy.
- 3.11 Education and Social Care wish to ensure these strong links are maintained and developed, however they wish to ensure that the independence of the local Partnership is also recognised and strengthened.
- 3.12 Statutory guidance on the implementation of local authorities’ obligations in respect of pre-school education recognises that pre school education is fundamental to achieving better outcomes for children and their families. It also acknowledges that early childhood education and childcare are interdependent and mutually supportive. It charges us to ensure that these universal services should be planned, staffed, regulated, managed and resourced as one coherent system. This is a significant challenge for Shetland, given the geographical nature of the islands and low numbers / high unit cost considerations.
- 3.13 The above guidance and the Early Years Framework (due to be published soon) goes further than previous guidance and places a greater emphasis on local authorities and childcare partnerships to plan, staff, regulate, manage and resource pre-school education and childcare as one service.
- 3.14 The School’s Service Blueprint for Education will further explore some of the issues in relation to future provision for early years education and childcare and asks a specific question through the consultation on:
- “Resolving the relationship between pre-school education and childcare, and what the local authority is required to provide by statute and what it wishes to provide to support the sustainability of communities in Shetland and the Shetland economy. This needs to include consideration of out-of-school and after-school provision”

#### **4. Findings of the Review Group**

- 4.1 In general, in spite of some confusion as to roles mentioned above, the governance and management arrangements for the Council's relationship with the Childcare Partnership is working well. The Partnership has strong supporting documentation, which clearly sets out its role and remit, a committed membership and appropriate decision making structures and systems. As one of the partners, the Council's childcare services and early years provision is included in the relevant service plans, budgets and performance monitoring arrangements. The remit of the Partnership was reported to Services Committee in August 2007, when Councillors Andrew Hughson and Bill Manson were appointed as the political representatives to the Partnership [Minute Reference 39/07]. The work is embedded into the overall planning arrangements for Children and Young People, with clear links to existing and developing national policy directions.
- 4.2 The working group has not yet looked at governance arrangements in detail and feel this is something that should be completed soon.

## **5. Duties of the Council and Role of the Childcare Partnership**

- 5.1 Currently the Council has a statutory duty to provide pre-school education places for all three and four year olds for 475 hours per school session.
- 5.2 The Council has no statutory duty to provide childcare, however it acknowledges it has a key role in supporting the development of this service sector locally.
- 5.3 The Childcare Partnership has no statutory duty as a Partnership to provide services. It has never been the intention of the Partnership to do so.
- 5.4 The Partnership's role has been to identify local childcare needs and to help plan the development of childcare services.
- 5.5 The partnership also has an important role in providing support to childcare providers, particularly voluntary, private, partner providers and childminders.
- 5.6 The draft Early Years Framework challenges the Council and the Childcare Partnership to deliver a coherent childcare and early years service.
- 5.7 A challenge for the Council is to agree the priority childcare has in line with other services it must deliver, including the allocation of appropriate financial resources.
- 5.8 A challenge for the Council, with the Childcare Partnership, is to help strategically plan early years services in line with national and local policy.

## **6. Current Delivery of Childcare and Pre-School Education**

- 6.1 Current Childcare and Pre-School Education provision within Shetland is outlined at Appendix 2. This information should be viewed with caution as the situation constantly changes, for example there are three intakes for pre-school education each school session.
- 6.2 Even though Appendix 2 gives detail of the current provision it does not explain some of the challenges faced by different childcare providers. These challenges were identified in the Anderson Solutions report. These are summarised below:

#### **Childminders**

- Increasing level of professionalism and regulation and inspection from the care commission
- Operation of a business for childminders is very difficult and demanding
- Lack of recognition of the quality of care and support provided
- Inappropriate / ever-changing regulation
- Conflict between short-term lifestyle choice and demands of an increasingly professionalised sector
- Fragmented nature of supply and demand

#### **Private Nurseries**

- Scottish Social Services Council Registration and Qualification Requirements
- Private versus public sector pay
- Fluctuating numbers

#### **Pre-School Education and Out of School Clubs**

- The requirement to make 475 hours of pre-school education available to every 3-5 year old in Scotland does create challenges in the remote areas, where providing cost-effective provision with suitably qualified employees is difficult
- Shetland Islands Council has addressed this challenge by using unqualified Nursery Assistants in some more peripheral areas of Shetland. However, the new Scottish Social Services Council registration requirements will mean that in the near future this will no longer be an option for the local authority
- The low demand in some more peripheral areas means that the local authority is paying for provision that is not fully utilised

#### **Informal Childcare**

- Not all parents have access to family and friends to provide informal childcare.
- Unregistered childminders are working outwith regulatory frameworks. This has a number of risks including, childminder having to cease operating at very short notice, no safeguards for the protection of children

### **7. Economic Value of Childcare in Shetland**

- 7.1 The Anderson Solutions report shows that the economic value of childcare in Shetland is £10.4m. Childcare accounts for the equivalent of 446 full-time equivalent jobs in Shetland.



## **8. Developing a Policy Statement on Support for Childcare - Issues to be Considered**

8.1 Developing a clear policy statement on the Council's approach to Childcare and Early Years is a complex and challenging task. Services have evolved over the years, to meet different demands in different locations. It certainly is the case that a "one size fits all" approach is not suitable for this sector. Breakfast clubs and out-of-schools clubs have been developed in some schools, but there is not equality of provision across Shetland. For early years, there is also a variety of models, with some direct provision and some services bought in from voluntary groups. Members will see from Appendix 2 that there is a broad range of service delivery models in place. However, without a clear policy statement, the Council will continue to respond to issues as they arise, rather than taking a long term strategic approach. Recently, the Council has chosen to extend the wrap-around care services provided at Mossbank School, the Committee has previously discussed the vulnerability of Little Tikes playgroup and, on today's agenda, there is a proposal to put in place temporary arrangements to enable pre-school provision to continue at Lunnasting School. Last year, work was done by the Childcare Partnership to try to develop sustainable models of childcare for Lerwick, but that thinking relied on significant Council investment in facilities (which at the time was not supported by policy guidance).

8.2 Some of the key issues which the Council will need to consider in developing a policy for this sector are set out below.

- What is the role of the Council in delivering Childcare Services (as an employer, as well as a service provider)
- Who should pay for childcare services and what is an appropriate balance of cost between the state (including tax relief) and individual families?
- Where should the strategic direction for service provision lie within the Council – in economic development (to support economic and population growth), in Education and Social Care (to support learning) or jointly?
- What will be the right balance of public sector, private sector and voluntary sector provision? How can the Council deliver on its statutory remit to extend pre-school sessions without adversely impacting private and voluntary sector provision?
- How much funding will the Council be willing to pay to develop childcare services (when other Council budgets are under pressure and it is not a statutory requirement)?

8.3 It is not easy to identify the demand for childcare and pre-school education in all parts of Shetland. For example, in some areas there is a "surplus" of places for pre-school education but limited childminding available.

- 8.4 It is widely acknowledged that the childcare sector in Shetland is very fragile with demand in excess of supply. A number of providers have expressed concern over long-term viability and it only takes one such provider to cease operating to have a significant detrimental impact on childcare provision.
- 8.5 The numbers of childminders have reduced from 65 in 2000 to 29 at the present time. This has resulted in a significant gap in many parts of Shetland.
- 8.6 The Scottish Government will require local authorities to extend pre-school education provision to 570 hours per year for all 3 and all 4 year olds from August 2010. There are no additional financial resources being provided to implement this increase. Some parents do not take up their full entitlement to pre-school education, and some children, especially 3 year olds attend for fewer than 5 sessions per week.
- 8.7 Some parts of Shetland eg Whalsay, Northmavine and the West Mainland do not have choices in the type of Early Years Education and childcare they receive.
- 8.8 Until now Shetland Childcare Partnership has provided excellent support to sustain delivery of childcare provision. However, given the national policy context within which we are now operating there is a need to develop within Shetland, a coherent local childcare strategy.

## **9. Proposals**

- 9.1 It is proposed that work is undertaken locally to develop a local childcare strategy which takes account of the finalised Early Years Framework. Given the economic value of childcare to Shetland it is imperative that Education and Social Care, the Shetland Childcare Partnership and the Economic Development Unit work in partnership to achieve sustainable childcare services locally. The recommendations of the Anderson Solutions report give us an appropriate starting point for this work.
- 9.2 It is proposed that an officer working group is set up to undertake the work above. This officer working group should include the Executive Director, Education and Social Care, Head of Children's Services, Quality Improvement Manager, Schools Services, the Head of the Economic Development Unit and representation from the Childcare Partnership. This working group will work closely with the Childcare Partnership in developing a local childcare strategy. The terms of reference for this group is at Appendix 3.

## **10. Financial Implications**

- 10.1 There are no financial implications arising directly from this report.

## **11. Policy and Delegated Authority - SIC**

- 11.1 All Social Care and Education matters stand referred to the Services Committee. The Committee has delegated authority to make decisions on matters within its remit and for which the overall objectives have been approved by the Council, in addition to appropriate budget provision, in accordance with Section 13 of the Council's Scheme of Delegation. At this stage, there are no proposals to amend existing policy, so recommendations can be addressed to Services Committee. The future work to develop a Childcare Strategy Policy will need Council approval, as it will be a new policy which crosses committee remits.

## **12. Conclusions**

- 12.1 Pre-school education and childcare is a complex and constantly changing area.
- 12.2 There is no single solution in terms of provision that suits all parts of Shetland.
- 12.3 Pre-school education and childcare provision should be more closely planned, staffed, regulated, managed and resourced than before.
- 12.4 The economic value of childcare in Shetland is £10.4M.
- 12.5 A coherent childcare strategy for Shetland is required.

## **13. Recommendations**

- 13.1 I recommend that Services Committee: -
- a) Note the content of this report.
  - b) Agree to the development of a local childcare strategy being taken forward through an officer working group, led by Education and Social Care.

Our Ref: SM/eal

Report No: CS-04-F



# Economic Value of Childcare in Shetland

Executive Summary to

Shetland Islands Council and Shetland Childcare  
Partnership

23 July 2008

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**Shetland Islands Council**

**Shetland Childcare Partnership**

**Economic Value of Childcare in Shetland**

**23 July 2008**

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# **Executive Summary**

This summary provides an overview of the report into the Economic Value of Childcare in Shetland. The study was commissioned by Shetland Islands Council and the Shetland Childcare Partnership. The study was required to consider:

- current provision and opportunities for the childcare sector;
- key barriers and issues for the sector;
- effect of the childcare sector on the local economy; and
- future support mechanisms.

The focus of the research and analysis is on the forms of regulated childcare which can offer a parent the opportunity to work. These childcare services will have the greatest economic value to Shetland as they provide direct employment and have the additional value of supporting others to access employment.

Throughout the report the provision of informal childcare is also referred to, including both family support and unregulated childminders, however, it was not within the remit of the study to measure the supply and impact of informal childcare.

The research has revealed that the economic value of childcare services in Shetland is significant because of the direct and indirect employment that it supports. However, there are challenges which suggest the potential value is not being realised, and that some elements of existing provision are under threat, which would, if lost, create a knock-on negative economic impact in the wider Shetland economy.

## **Supply and Demand**

There are four forms of regulated childcare which can offer support to a working parent:

- childminders;
- private nurseries;
- local authority owned nurseries and pre-school groups that offer extended hours; and
- out of school clubs (OOSC).

In Shetland, as may be expected, Lerwick offers both the highest number and widest range of providers (Table 1). In contrast the west of Shetland is wholly dependent on childminders (See Chapter 3 of the main report for more detail). In addition, provision is not consistent within sectors, for example only four of the nine nursery providers can offer full-time provision, and only two of these can cater for children under the age of two and childminders are free to choose their own operating hours.

**Table 1: Formal Childcare Provision that Supports Employment in Wider Economy**

	Lerwick	Central	South	West	North	N Isles
Childminders	9	4	3	6	5	2
Pre-School, Local Authority, Voluntary Nurseries (offering extended hours)	4	1	-	-	1	1
Private Nursery	1	-	1	-	-	-
Out of School Clubs	1	-	2	-	1	-

Sources: Shetland Childcare Partnership and Shetland Islands Council

Each form of childcare has its advantages and disadvantages and is likely to be viewed differently by each family in need of childcare. For example, difficulties that can be encountered by parents include:

- those with young children (under 2 years) can only access either childminders or private nurseries and there are limited spaces due to childminder/staff ratio restrictions;
- it can be difficult to find a single solution for one child as it is very difficult to find full-time childcare anywhere in Shetland. This leads to fragmented childcare provision; and
- it can be even more difficult to find a single solution for two or more children in Shetland, which can create significant problems for parents, particularly if each child is in more than one form of childcare.

### Challenges for Childminders

Childminders represent the main form of provision in the peripheral areas of Shetland and are also significant in Lerwick and its surrounding areas. However, the sector is facing difficulties. There has been a significant decline in the number of childminders between 2000, when there were 65, and today when there are 29 registered childminders. Based on interviews with 15 of Shetland's childminders and those associated with the sector, the main challenges that exist for childminders include:

- difficulties in managing a one-person business in a heavily regulated and often isolated environment;
- a lack of recognition of the important role that they play for both the children and parents, and the standards that they maintain;
- inappropriate / ever-changing regulation;
- a conflict between the nature of childminding and the demands of an increasingly professionalised sector. This conflict means the sector appears to be in the midst of a difficult transition period and many are leaving the sector; and
- it can be difficult to start-up a viable childminding business as it can take time for parents to adjust their behaviour and once operational it can quickly become difficult to offer full-time places.

It appears likely that there will be a further reduction in the number of childminders as those that find the new and more challenging environment for a childminding business no longer attractive as a self-employment option (see Chapter 3 of the main report for more detail). However, as a result perhaps of the difficult transition phase and the demand for childcare services, there are new models emerging. There are partnership models where two childminders combine their business to provide a childcare service. If this remains in domestic premises it continues to be a childminding business, if it moves to non-domestic



premises it becomes a nursery business. A partnership approach can help to share the burden of running the business and can combine different skills in order to address the challenges faced.

### Challenges for Nurseries

The nursery sector is in general more stable with a mix of private and public sector provision. In Shetland two local authority owned nurseries provide options for full-day care, while two others offer 'extended hours' where the provision of pre-school education places is supplemented by hours that can provide a half day of childcare provision, at relatively low cost. The private sector nurseries both offer full-day care but cannot offer the free pre-school education places. Based on interviews with both the local authority and private providers, the challenges in the nursery sector are different from those in the childminding sector. The challenges in the nursery sector are summarised as:

- SSSC registration and qualification requirements, this is perhaps the most prominent challenge across the sector. Nursery managers are now required to be qualified to SCQF Level 9 (degree equivalent) and for some providers this will be difficult, if not impossible – although peripatetic managers may provide a solution in the public sector;
- private sector versus public sector pay. The level of pay on offer in the private sector can be half of what is available in the public sector which can make recruitment and retention particularly difficult for the private sector nurseries;
- staff training which is essential can be difficult to support unless it is undertaken out of work hours;
- fluctuating numbers can be a problem in more peripheral areas where the provision of pre-school education nurseries may require significant subsidy, and it is therefore difficult to justify or sustain the extended hours provision, which could support employment;
- financial stability for voluntary groups. Similar to the previous point, in peripheral areas it can be particularly difficult to sustain voluntary group provision and access funding. This perceived or real fragility can reduce confidence in the provision and may make parents reluctant to rely on it to support their employment, which in turn makes the provision ever more fragile as the service is not fully utilised.

### Demand for Childcare

Challenges in the supply of childcare inevitably have knock-on impacts on those who are reliant on formal childcare services. There are mechanisms that can provide support to parents using formal childcare, these include tax credits, a voucher scheme if supported by a parent's employer and in the case of Shetland College assistance with up to 100% of the cost of childcare for students, assessed on need. However, take up of these mechanisms in Shetland appears low, for example only 41 parents currently benefit from the childcare voucher scheme offered by SIC and Shetland College struggles to spend its budget. Interviews suggest this is likely to be a result of a combination of a lack of supply of appropriate childcare places; dependency on unregulated or informal childcare; and either a lack of need or awareness of the support available.

The measurement of demand for childcare is difficult because of the use of informal childcare options and the combination of more than one option for either one child or within one family, which is often forced upon, rather than selected by a parent. However, economic indicators exist which suggest demand is high within the workforce. There is low unemployment in Shetland and a higher than average proportion of women in employment.

Indications from the research which included a small survey of parents suggest that demand currently exceeds supply, particularly in central areas of Shetland. With evidence of population drift away from the peripheral areas in Shetland and employment focused in Lerwick there will be different pressures experienced on childcare throughout Shetland:

- in central areas there will be pressure on the sector due to high demand levels and parents may find it difficult to find an available space that suits their needs; and
- in rural areas, satisfying demand will be more difficult because of the challenges in providing viable childcare that meets the demands of working parents.

## **Economic Value**

The economic value of childcare is that it provides not only direct employment for those involved in the provision of childcare but that it can also allow parents to access employment. The economic value of childcare is particularly important in Shetland because:

- there is low unemployment, and therefore difficulties in recruitment within the economy; and
- there is also a need to attract new residents to Shetland, often to provide key services.

The risk to Shetland of insufficient childcare services is that not enough people return to the workforce and there is a reduced ability to attract new residents from outwith Shetland. The result of this is that it could become increasingly difficult to fill vacancies and maintain key service provision, particularly in peripheral areas, where often a childminder supports police, health and education services through their service.

The quantitative assessment of the economic value of childcare services considers three sources of value:

- **Direct** – the direct effect considers all employment associated with the delivery of frontline childcare services. The figure includes employment in childcare services that do not necessarily support employment in the wider economy, for example pre-school education only providers;
- **Indirect** – the indirect effect is calculated by estimating the value associated with those that are enabled to work through the provision of formal childcare services;
- **Induced** – the induced effect considers the effect on the local economy which arises from the combined spending power of those directly or indirectly in employment and supported by childcare services.

The calculations associated with the three sources of impact outlined above demonstrate that formal childcare services support almost **450 full-time equivalent jobs** and generate income of **£10.4 million** (see Chapter 5 of the main report for more detail).

**Table 2: Total Employment and Income Impact of Childminding and Childcare Services in Shetland, 2008**

<b>Impact</b>	<b>Employment Supported (FTEs)</b>	<b>Income Supported (£'s million)</b>
Direct	98	£2.3
Indirect	245	£5.8
Induced	103	£2.3
<b>Total</b>	<b>446</b>	<b>£10.4</b>

## **Recommendations**

There are a number of issues in the childcare sector that if resolved could improve the economic value of the sector to the wider economy. This is likely to require greater focus and clarity in how current resources are used and in some cases, with the support of further information, this may justify additional resources. These resources should be prioritised towards the greatest challenges identified for the types of provision that support working parents. This will require collaboration between all stakeholders involved in strategic decision-making regarding childcare to ensure that efficient and effective use is made of the resources available to maximise the benefit to Shetland.

Areas suggested for priority consideration include:

- a clear, geographically based, two-strand approach that recognises the different supply and demand issues that exist between central and more peripheral areas in Shetland and ensure collaborative solutions are developed between all key stakeholders in order to support working parents;
- a coherent package of targeted advice and financial support for childminders that better promotes existing support and considers new and more appropriate support tailored to suit the current provision phase. Recommendations include the provision of:
  - either formal or informal support for childminders, ideally both;
  - advice and support on business development, and it is suggested that the progress of both the Scalloway and North Isles example is supported, monitored and recorded so that other childminders may benefit;
  - promotion of existing start-up assistance and a review of success with those that consider childminding. A greater understanding of the needs addressed and level of success of the Western Isles scheme may be of benefit, however, any additional support may not necessarily be financial;
  - opportunities that encourage childminders to work together, where appropriate, to develop a shared understanding of issues and challenges they face. For example, developing an approach towards fees for transporting children to and from pre-school education places;
  - promotion of the importance of childminders and the quality standards that must be adhered in order to raise awareness amongst parents and boost confidence in the sector. This could help the childminding sector by boosting demand and by identifying the potential benefits from the difficulties they currently face; and this awareness raising could also be used to support recruitment activities;
- continuation of the practical support for training;
- achieving an effective balance between strategic and 'on-the-ground' support;
- while focus is likely to be largely on supply-side issues, there should be serious consideration, although less resources, dedicated to demand-side activity. For example, it is very difficult to get a clear understanding of provision of childcare services in Shetland and this is reflected in the comments of those interviewed. Focus should be given to the demand-side challenges and a single point of coherent and user-friendly information developed to assist working parents. Any demand-side initiative could also be used to promote the benefits of using regulated childcare services; and

- where strategic decisions are being made regarding the provision, form and location of all childcare services, consideration should be given to:
  - o working parents and the need to support employment within Shetland; and
  - o reducing the pressure on parents travelling between different options for either the same child or different children.

Supporting the wider Shetland economy and therefore the wider community is the overall aim of the recommendations above. A viable, formal and coherent childcare sector is critical for Shetland's future as the projected reductions in the working population will make it increasingly difficult for employers, including key service providers, to recruit and reverse the decline. A strong childcare sector will support working parents and can help to encourage those not currently employed and in-migrants to work in Shetland. If choosing to review childcare services a further survey or discussions with working parents would be expected to generate valuable information for any review.

In addition, within these recommendations, it is important for decision-makers to remain sensitive to the balance between different providers and where possible try to support positive outcomes for all, including providers and working parents. Between public and private providers there are variances that exist in terms of both cost and access to support services and, for example, while working parents may benefit, childminders and private nurseries may be financially affected by an increase in pre-school education. However, in an environment of insufficient supply, issues between the public and private sector are perhaps not as significant as they might be if supply and demand become more closely matched.

## Appendix 2

<b>Provider</b>	<b>Location</b>	<b>Sector</b>	<b>Reg. Places</b>
Central Private Nursery and Out of School Club	Sandwick	Private	24 nursery  18 OOSC  46 families on the register
Peerie Foxes	Lerwick	Private	22  number of children on register – 60
Westside Daycare	Scalloway	Private	12 under - 5s but depends on ratio/number of babies Expect to increase to 20 places
North Isles Childcare Daycare and OOSC	Mid Yell	Voluntary	14 depends on ratio / number of babies
Mossbank Daycare	Mossbank Primary School	SIC	15 per session, operates 2 sessions per day, plus wrap-around
Lerwick Pre-school	Lerwick	Partner Provider	30 per session, open some afternoons, morning session is extended to 4 hours,
Islesburgh Pre-school	Lerwick	Partner Provider	
Burra Playgroup	Hamanvoe	Partner Provider	30 per session, open mornings
Scalloway Playgroup	Scalloway	Partner Provider	28 per session, open mornings with a slightly extended session
Lunnasting	Lunnasting Primary School	Partner Provider	12
Blydehaven	Lerwick	Partner Provider (Shetland College)	12 per session, with full daycare possible
Out of School Clubs: ○ Ness ○ Islesburgh	Ness Lerwick	SIC	

<ul style="list-style-type: none"> <li>○ Kidzone</li> </ul>	Mossbank		
Breakfast Clubs <ul style="list-style-type: none"> <li>○ Islesburgh</li> <li>○ Kidzone</li> </ul>	Lerwick Mossbank		
Childminders	Various	Private	
Shetland Pre-school Play Ltd.		Voluntary	Support service to partner providers
Shetland Childminding Group		Voluntary	Support service to childminders

## Appendix 3

### Terms of Reference

#### Membership

Executive Director, Education and Social Care  
Head of Economic Development Unit  
Head of Children's Services  
Quality Improvement Manager, School's Service  
Representation from the Childcare Partnership

#### Remit

In partnership with the Childcare Partnership, develop a childcare strategy for Shetland. This strategy should take into account national and local factors including:

- Universal childcare and pre school education services should be planned, staffed, regulated, managed and resourced as one coherent system. (Draft Early Years Strategy)
- Work out ways to minimise the fragility of childcare provision
- Actively support additional childminding services
- Improve the sustainability of childcare and pre-school provision
- What is the role of the Council in delivering Childcare Services (as an employer, as well as a service provider)?
- Who should pay for childcare services and what is an appropriate balance of cost between the state (including tax relief) and individual families?
- Where should the strategic direction for service provision lie within the Council – in economic development (to support economic growth), in Education and Social Care (to support learning) or jointly?
- What will be the right balance of public sector, private sector and voluntary sector provision? How can the Council deliver on its statutory remit to extend pre-school sessions without adversely impacting private and voluntary sector provision?
- How much funding will the Council be willing to pay to develop childcare services (when other Council budgets are under pressure and it is not a statutory requirement)?
- Given the continuing integration of aspects of childcare provision with the provision of education, work on this strategy will be informed by the principles of the Blueprint for Education in Shetland.

## Timescale

The strategy will be reported to Services Committee in the first cycle of the new year.





## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### Provision of Pre-School Education in the Lunnasting Area

#### 1. Introduction

- 1.1 The purpose of this report is to seek approval in principle from Members for the Schools Service to open a nursery class in Lunnasting Primary School.

#### 2. Links to Corporate Priorities

- 2.1 In recognition that, "Shetland Schools' population projections anticipate a substantial reduction in pupils, within a relatively short time frame" the Authority will, "develop a modern 'blueprint' for the shape of the education service across Shetland for 10 years time". The pre-school service will form part of this review.

#### 3. Background

- 3.1 The Standards in Scotland's Schools etc Act 2000 requires local authorities to make provision to ensure that all 3 and 4 year olds have access to at least 475 hours of pre-school education. Where nursery classes are not accessible, Authorities commission places from Partner Providers. In the Lunnasting area, pre-school education is currently provided by Lunnasting Playgroup.
- 3.2 Lunnasting Playgroup operates as a voluntary partner provider from a purpose-built space inside Lunnasting Primary School.

#### 4. Current Situation

- 4.1 The Manager of Lunnasting Playgroup has resigned with effect from 30 September 2008. At the Group's Annual General Meeting, held on 10 September 2008, no Committee was able to be formed to take the Group forward, and to ensure recruitment of a new manager. Parents indicated clearly that they had no intention of continuing the group, and they were seeking support in winding up the Playgroup

- 4.2 Owing to the notice required by the Care Commission, the Playgroup will have to continue to operate until 31 December 2008, with increased support from the Shetland Childcare Partnership and Schools Service to identify staff cover and provide management support.
- 4.3 At the meeting on 10 September parents, and future parents, also made it clear that they felt it was impracticable for them to take their children to existing pre-school provision in Brae High School and Mossbank Primary School, and that they strongly wished to retain the pre-school provision in their school.
- 4.4 The Playgroup operates from a space in the school purpose-built for them when the school was extensively refurbished. It is situated in a central position in the school. The Playgroup is registered for 12 children and opens four days per week. Currently there are 8 children enrolled, four of which attend for the full four days.
- 4.5 In addition to the grant per place paid by Schools Service to the Group to provide pre-school education, the Schools Service pays most of the revenue costs incurred by the Group which relate to their occupancy of the school eg heating and lighting.
- 4.6 Excellent transition to Primary One results from having the pre-school children in Lunnasting attending the group in the school. The head teacher is strongly in support of doing everything possible to retain pre-school education in the school.

## **5 Proposals**

- 5.1 It is proposed that, as Lunnasting Playgroup occupies a purpose-built space for pre-school education within Lunnasting Primary School, that Schools Service maintains this provision for pre-school education. In order to do this it would require Schools Service to apply to the Care Commission to open a nursery class in the school. Registration with the Care Commission can take as long as six months so Schools Service is working to a very tight timescale.
- 5.2 As Schools Service is about to embark on a widespread consultation across the community of Shetland to develop the Blueprint for Education, it is proposed that the Schools Service applies to open a nursery class in Lunnasting Primary School, but at this time, staffs it on an interim basis. This interim arrangement would be until the outcome of the Blueprint consultation is known and a way forward for pre-school education in Shetland is decided.
- 5.3 Schools Service is still in discussion with the head teacher of Lunnasting Primary School as to the level of staffing which might go into the nursery class.
- 5.4 Once the Blueprint for Education in Shetland is agreed, Schools Service would have to review the provision in Lunnasting in relation to

the principles set out in the finalised Blueprint and would return to Members for a decision as to the long term future of the provision.

- 5.4 As the proposal is to open a nursery class, Schools Service would be required to open it for five sessions per week, not for four as currently operated by the Group. This is because from August 2007 the Scottish Government has funded local authorities to open their nursery classes for 38 weeks per year, providing access to 475 hours of pre-school education for every three and every four year old.

## **6. Financial Implications**

- 6.1 The outstanding grant payment payable to Lunnasting Playgroup from January 2009 to July 2009 if they were continuing to operate as a partner provider is £9,092.
- 6.2 Schools Service is still in discussion with the head teacher of Lunnasting Primary School as to the level of staffing which might go into the nursery class.
- 6.3 Schools Service will meet any additional interim cost from their nursery supply budget.

## **7. Policy and Delegated Authority**

- 7.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to implement decisions relating to matters within its remit for which the overall objectives have been approved by the Council, in addition to appropriate budget provision.

## **8. Recommendations**

- 8.1 I recommend that Services Committee agree in principle to Schools Service opening a nursery class on an interim basis in Lunnasting Primary School, until the outcome of the Blueprint for education is known and determines the nature of future pre-school education in the community. This is as a result of the current partner provider of pre-school education in the Lunnasting area ceasing to operate from 31 December 2008.

October 2008

Ref: HB/AE/sm

Report no: ED-49-F





## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### **REPORT BY HM INSPECTORATE OF EDUCATION: SHETLAND ISLANDS COUNCIL – ACTION PLAN**

#### **1. Introduction**

- 1.1 The education function of Shetland Islands Council was inspected in January 2008 as part of HM Inspectorate commitment to inspect and report on the quality of education and to help secure improvement across Scotland. The report by HM Inspectorate of Education was published on 8 July 2008.
- 1.2 The purpose of this report is to provide the action plan following HM Inspectorate of Education's published report.

#### **2. Link to Council Priorities**

- 2.1 The Council will ensure a model for education is developed by 2009 that considers the educational and financial viability for schools and communities and its outputs are then implemented.
- 2.2 The Council will work to create and maintain a culture where individual learners can strive to realise their full potential.

#### **3. Background**

- 3.1 Inspectors evaluated the education function of Shetland Islands Council under four main questions;
  - How good are attainment and achievement of children and young people and how well are they supported?
  - What impact has the authority had in meeting the needs of parents, carers and families, staff and the wider community?
  - How well is the authority led?
  - What is the Council's capacity for improvement?

- 3.2 Ten quality indicators were examined. Five of these indicators were evaluated as Very Good, four evaluated as Good and one was evaluated as Adequate.
- 3.3 Members were made aware of the key strengths and main points for action in an earlier report (ED-38-F) (Min Ref: SC 63/08).

#### **4. Proposals**

- 4.1 The Schools Service has prepared an action plan detailing how the main points for action are to be addressed (see Appendix A). The District Inspector will continue to monitor progress made as part of the agency work with the Council.

#### **5. Financial Implications**

- 5.1 There are no financial implications arising from this report. The costs of addressing the main points for action will be addressed through budget allocated to the Education and Social Care Department.

#### **6. Policy and Delegated Authority**

- 6.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by Council, in addition to appropriate budget provision.

#### **7. Recommendation**

- 7.1 I recommend that the Services Committee approve the contents of the action plan.

October 2008

Our Ref: HB/sm

Report No: ED-47-F2

## ACTION PLAN following HMle report of 8 July 2008

What key outcomes have we achieved? - 1: Key performance outcomes

1.1: Improvements in performance

1.2: Fulfilment of statutory duties

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
Improved attainment in reading, writing and mathematics for all pupils by the end of S2	<p>October – December 2008 Quality Improvement Officer focussed visit on attainment will examine individual schools' progress in raising attainment specifically through improvement planning in:</p> <ul style="list-style-type: none"> <li>• Pupil Target setting</li> <li>• Pupil Tracking</li> <li>• Monitoring of Pupils' progress</li> <li>• Use of Assessment is For Learning techniques</li> </ul> <p>Realistic individual school targets for improved attainment will be set.</p> <p>Authority performance will continue to be analysed by outside consultant/Management Information Officer/Quality Improvement Officer for discussion with Schools Service Management Team</p>	<p>An overall improvement in Attainment in reading, writing and mathematics by the end of S2 over a three year period. <i>SOA targets?</i></p> <p>Improved levels of attainment in Scottish Qualifications Authority results in Secondary Schools.</p>	<p><b>Jim Reyner</b> Robert Sim James Cuthbert Jerry Edwards Lesley Roberts Maggie Spence Management information officer</p> <p>(Ongoing throughout the year)</p>	<p>Staff time</p> <p>Cost of exam analysis</p> <p>Continuing professional development opportunities</p> <p>Supply time to facilitate sharing of good practice</p>	<p>Attainment monitored and discussed prior to Quality Improvement Officers focussed visit.</p> <p>Results of Quality Improvement Officers focussed visits shared with all Scschools Service Management Team</p> <p>Annual comparisons analysed.</p>

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
	<p>Levels of attainment will be monitored by Quality Improvement Officers and Quality Improvement Manager</p> <p>Where targets are not met, specific focussed support will be offered to schools</p> <p>Where attainment has been successfully improved, strategies used will be identified and shared across other school</p> <p>Appropriate Continued Professional Development will be provided for school based staff</p>				



## How well do we meet the needs of our stakeholders? - 2: Impact on service users

## 2.1: Impact on learners

## 2.2: Impact on parents/carers and families

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
Ensure that the needs of pupils with Social Emotional and Behavioural Needs are being met fully at school level and within specialist units.	<p>Map current approaches in schools to:</p> <ul style="list-style-type: none"> <li>Promoting positive behaviour</li> <li>Supporting pupils with social, emotional and behavioural needs</li> </ul> <p>Conduct a skills audit of staff in schools</p> <p>Map current resources across Schools Service and partner agencies to support pupils with social emotional and behavioural needs including:</p> <ul style="list-style-type: none"> <li>Referral procedures</li> <li>Integrated approaches to supporting children and young people</li> <li>Management arrangements</li> <li>Resourcing</li> <li>Individualised educational planning</li> <li>Arrangements for monitoring pupils' progress</li> </ul>	<p>Reduced numbers of temporary exclusions</p> <p>Increased numbers of young people achieving positive and sustained destinations beyond schools</p> <p>Increased tariff score of the lowest attaining 20% of our pupils</p> <p>Consistent approach across schools for tolerance levels, referrals and identification of pupils.</p> <p>Inter agency approach to the needs of pupils with social, emotional and behavioural needs</p>	<p>Additional Support Needs Management Team</p> <p>Behaviour Support Staff</p> <p>Partner agencies</p>	Resources to support management development of the service	<p>Recorded exclusions</p> <p>School leaver destination information</p> <p>Scottish Qualifications Authority examination results</p> <p>Feedback from pupils</p> <p>Feedback from staff</p> <p>Monitor attainment of lowest attaining 20%</p> <p>Monitor attainment of specific vulnerable groups eg Looked After Children</p>

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
	Produce a coherent behaviour strategy which meets the needs of the children and young people and includes training in early intervention and the use of core strategies to address behavioural needs.	Revised policy on exclusions			

## How good is our management? - 6: Policy development and planning

## 6.1 Policy review and development

## 6.2 Participation of learners and other stakeholders

## 6.3 Operational Planning

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
To review and develop the Quality Assurance Policy, including arrangement for the pre-school sector	<p>A comprehensive review of the policy, taking account of new HMle approaches to school inspections, and including a structured approach to Quality Assurance visits.</p> <p>Rationalisation of the focus of the policy to secure better outcomes for pupils</p>	<p>A more effective QA policy to be in place by August 2008.</p> <p>Areas that affect teachers' terms and conditions agreed by Local Negotiating Committee for Teachers.</p> <p>Schools better prepared for inspection process</p> <p>Improved self-evaluation practices</p> <p>Improved attainment and achievement for all pupils</p>	<p><b>Jim Reyner</b>            James Cuthbert            Jerry Edwards            Robert Sim            Lesley Roberts            Maggie Spence            Chris Geldard            Heather Summers            Complete by June 2008</p>	<p>Some supply costs will be needed for teaching staff, estimated 12 days from Central Supply Budget – approx £1,800.</p> <p>Updating, collating, printing etc will be done by central admin staff.</p>	<p>Quality Assurance Policy fully discussed throughout review.</p> <p>HMle inspection reports on schools</p>
To support schools in their developments towards a Curriculum for Excellence	To keep schools updated with regard to developments by attending national conferences (4 per year), launches of outcomes, curriculum design meetings, Continuing Professional Development events.	The Curriculum for Excellence Strategy Group decides upon an action plan to help it to support schools and share relevant good practice.	<p><b>Maggie Spence</b>            James Cuthbert            Lesley Roberts            Robert Sim</p>	<p>Room hire and catering costs for meetings of the Curriculum for Excellence: 6 x £100: £600.</p> <p>Supply costs for teachers' cover to</p>	<p>Curriculum for Excellence Strategy Group Action Plan.</p> <p>Feedback from Head Teachers.</p> <p>Feedback from local Continuing</p>

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
	<p>To continue to work with the following groups in order to establish direction and action for Shetland schools:</p> <ul style="list-style-type: none"> <li>• Curriculum for Excellence Strategic working group</li> <li>• Schools Service Management Team</li> <li>• The Head Teachers</li> </ul> <p>To support the trialling of Learning Outcomes in different subject areas.</p> <p>To support short-life working groups which have been established to inform direction in focussed areas.</p> <p>To identify on appropriate Continuing Professional Development relevant to Curriculum for Excellence developments.</p>	<p>Each school to undertake development for Curriculum for Excellence through the development planning process.</p> <p>Increased skills and knowledge of all staff.</p> <p>All teachers understand the structure and implications of working with Learning Outcomes.</p>		<p>attend these meetings: £1,000.</p> <p>Attendance at national conferences and events: 12 x £500: £6,000.</p> <p>Training costs for local Continuing Professional Development events: £4,000, supply: £1,000 training cost: £5,000.</p> <p>Continuing Professional Development at November In-Service: £10,000.</p> <p>Support for schools for development work (supply costs). This may take the form of project work - still to be decided): £30,000.</p>	<p>Professional Development events.</p> <p>Evaluation of actions on school development plans.</p> <p>Minutes of Curriculum for Excellence working group meetings.</p> <p>Evaluation of readiness and implementation.</p>

## How good is our leadership? - 9: Leadership

9.1: Vision, values and aims

9.2: Leadership and direction

9.3: Developing people and partnerships

9.4: Leadership of change and improvement

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
To progress the 'Blueprint' for Shetland's schools as remitted by the Council	<p>Report to Services Committee on the proposed implementation of the Blueprint</p> <p>Widespread programme of Shetland Wide consultation on areas for consideration</p> <p>Results of consultation analysed and Blueprint finalised and approved by Committee</p> <p>Implementation of the strategy which is developed as the Blueprint by Councillors and Schools Service staff.</p>	An appropriate, affordable and sustainable education service for the community of Shetland	<b>Helen Budge</b> Hazel Sutherland Central Staff		<p>Feedback from staff, pupils and parents on the consultation process</p> <p>Minutes from working group</p> <p>Reports on progress to Services Committee</p>
To review the vision and aims of the Schools Service	<p>The Head of Schools will continue with the timetable of visits to schools to meet with staff and pupils. These meetings will discuss the ideas for the vision and aims for the Schools Service.</p> <p>The Head of Schools will consult with Parent Councils</p>	A vision and aims for the Schools Service which reflects the education service being delivered in Shetland.	<b>Helen Budge</b> James Cuthbert	£500 for consultation process.	Feedback from staff, pupils and parents on final agreed vision and aims.

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
	<p>to ascertain their views on the vision and aims for the Schools Service.</p> <p>A revised vision and aims for the Schools Service will be shared with all staff, pupils and parents following the consultation process.</p>				
Increased levels of partnership working within the Education and Social Care Department	<p>Identify current areas of good partnership working within the department.</p> <p>Review and develop communication between the teams within the department.</p> <p>Establish a blog for departmental staff to share information and identify more opportunities for staff to work together</p> <p>Develop an understanding of the individual roles within the department.</p> <p>Identify and develop the collective roles and responsibilities of the staff within the department.</p> <p>Regular and systematic sharing of views on vision, values, planning and practice within the Education and Social Care department.</p>	<p>Staff are fully aware of their individual and collective roles and responsibilities</p> <p>High quality partnership working within the Education and Social Care department.</p> <p>Improved experiences for children and young people in Shetland</p> <p>Curriculum for Excellence implemented more effectively</p>	<b>All staff</b> July 2009.		<p>Team meeting minutes.</p> <p>Education and Social Care Senior Management Team minutes.</p> <p>Feedback from service users</p>

Schools Service's Objectives	Strategy for Implementation	Target Outcome	Responsibility and Timescales	Finance	Monitoring and Evaluation
Ensure consistency of delivery, and maximise the impact of the Quality Improvement Managers and Officers in supporting and challenging schools.	<p>Examine the current strategic and operational roles and remits of Quality Improvement Managers and Officers through auditing against national guidance</p> <p>Sample specific approaches to common tasks and agree strategy</p> <p>Continue to develop skills in self-evaluation alongside head teachers</p> <p>Communicate the roles and remits of the Quality Improvement Managers and Officers to all stakeholders.</p> <p>Continued targeted Professional Development as required for Quality Improvement Officers and Managers.</p>	<p>Strategic and operational roles are clear.</p> <p>Consistency of delivery by the Quality Improvement Managers and Officers at establishment level.</p> <p>Balance of workloads for all Quality Improvement Officers and both Quality Improvement Managers in terms of quantity and quality.</p> <p>Increased accountability</p> <p>More effective use of time</p> <p>Improved attainment and achievement in schools</p> <p>Improved HMle inspection outcomes</p> <p>Improved self-evaluation for establishments</p>	Helen Budge Quality Improvement Managers and Officers. July 2009		<p>Feedback from schools</p> <p>Progress meetings.</p> <p>Schools Service Management Team minutes.</p> <p>Quality Improvement Officers Team minutes</p> <p>Attainment information</p> <p>School improvement objectives achieved</p> <p>Schools service improvement objectives achieved</p> <p>Complaints monitoring</p>







## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### Consultation on Secondary Education Qualifications

#### 1. Introduction

- 1.1 The purpose of this report is to provide Members with the proposed response for Shetland Islands Council on the next generation of qualifications for secondary education in Scotland.
- 1.2 The consultation was launched on 10 June 2008 and will take views until the end of October 2008.

#### 2. Links to Corporate Priorities

- 2.1 Schools – Ensure a model for education is developed by 2009 that considers the educational and financial viability for schools and communities and its outputs are then implemented.
- 2.2 Schools – Consider the development of 'Centres of Excellence' and building on existing high quality facilities.

#### 3. Background

- 3.1 In the early 1990s Standard Grade examinations were introduced to replace the O Grade examinations. The pupils sit these exams at the end of the fourth year in Secondary Schools throughout Shetland.
- 3.2 There was some flexibility introduced with the relaxation of the age and stage restrictions in 2000, which allowed pupils to sit these exams earlier if the schools felt they were ready and prepared. A few pupils in Shetland / Scotland have done this but the majority of pupils continue to sit these exams at the end of fourth year.
- 3.3 The current Higher Still framework was introduced from 2000. This saw a wider range of courses being available to post 16 pupils at Access and Intermediate levels.

- 3.4 The Scottish Government has reflected on the current shape of qualifications and found that in general the existing system works well for many young people. However, they wish to look at how the qualifications system can best meet the needs of Scotland in the 21<sup>st</sup> century.

#### **4. Consultation**

- 4.1 The consultation focuses on the following proposals:

- Introduction of new awards in literacy and numeracy
- Introduction of a new qualification to be offered at SCQF levels 4 and 5, which will replace Standard Grade (General and Credit) and Intermediate 1 and 2 whilst reflecting the best features of the current arrangements
- Review of the content of National Qualifications at all levels to ensure that qualifications reinforce the values, purposes and principles of *Curriculum for Excellence*
- Investigation of ways to increase flexibility and meet the needs of young people more effectively.

- 4.2 The proposed response which has been drawn from Central Schools Service staff, a meeting of Primary Head Teachers and a meeting of Secondary Head Teachers provides a collated response which the Schools Service wish to submit on behalf of Shetland Islands Council.

- 4.3 Head Teachers have encouraged individual staff members to respond in addition to responses being sent from individual schools.

- 4.4 All learning partners can submit their individual responses to the Scottish Government.

#### **5. Future Implications**

- 5.1 The current arrangements for Secondary Education in Shetland would need to be reviewed if the consultation results in the proposed changes going ahead. This is being considered as part of the Blueprint for Education.

#### **6. Financial Implications**

- 6.1 There are no financial implications arising from this report.

## **7. Policy and Delegated Authority**

- 7.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by Council, in addition to appropriate budget provision.

## **8. Recommendations**

- 8.1 I recommend that Services Committee agree Appendix A of this report as the submission to this consultation process.

October 2008

Ref: HB/SM

Report no: ED-53-F



## Scottish Government Consultations

### A Consultation on the Next Generation of National Qualifications in Scotland

#### Shetland Islands Council

The document which follows uses the consultation feedback format from the Scottish Government publication. This was used by central Schools Service staff and primary head teachers to form their response, and this is a summary of their views.

Secondary head teachers chose to comment more holistically on the proposals, and a summary of their concerns is the last section of this document.

#### Consultation

##### **PROPOSAL 1**

National Qualifications at Access, Higher and Advanced Higher will be retained as points of stability. Highers, in particular, will remain the 'gold standard' of the Scottish education system. The content of all National Qualifications will be updated to reflect the values, purposes and principles of *Curriculum for Excellence*. Some aspects of the structure of these qualifications will also be reviewed.

##### **Question 1**

Do you welcome the intention to update all qualifications at Access, Higher and Advanced Higher in line with *Curriculum for Excellence*? Please comment on any implications to be considered.

##### **Response**

Central staff and Primary Head Teachers welcomed this. It was felt there was a need for the examination process to be simplified, however we also feel that the good work done in supporting pupils' progress through Assessment is For Learning techniques does not sit easily with a grading system.

##### **PROPOSAL 2**

A new qualification will replace the present Standard Grade General and Credit levels and Intermediate 1 and 2 (SCQF 4 and SCQF 5) qualifications. The new qualification will be available in a wide range of subjects, as at present. The new qualification will reflect the best features of Standard Grade and Intermediate. Standard Grade Foundation level will be removed and Access 3 will provide certification at SCQF level 3. (See Annex A Table 1 for illustration of new qualifications on SCQF framework.)

##### **Question 2**

Early consultation has identified the 'best' features of Standard Grade and Intermediate qualifications as:

- the 'inclusive' approach to certification contained in Standard Grade; and
- the 'unit based' structure of Intermediate qualifications

Are there any other features in the present Standard Grade and Intermediate qualifications which should be included in the new qualification at SCQF levels 4 and 5?

### Response

The other features in the present Standard Grade and Intermediate qualifications which should continue be included in the new qualification at SCQF levels 4 and 5 were felt to be external examinations to maintain standards, but also the commitment to continuous assessment. Central staff also wished to see bi-level teaching continue as it supports the philosophy of mixed ability teaching.

### Question 3

One of the proposals is to grade units. Do you agree that units should be graded A - C rather than pass/fail?

### Response

Central staff disagreed with this but primary heads supported it, as they felt it leant itself to ensuring that pupils, parents and employers could identify the parts of the curriculum they had strengths and weaknesses in.

### Question 4

Do you want graded units to count towards the final award?

### Response

Primary head teachers wanted graded units to count towards the final award, feeling it was better for pupils to know that their results were not solely dependent on one final paper, and that if you had worked all year, that you only then needed a certain percentage to pass.

### Question 5

Which option for introducing compensatory arrangements would you most support?

- Option A - Extend the range of grading in course awards to grade E.
- Option B - Recognise unit passes only.
- Option C - Compensatory award at the level of the course studied with no grade awarded.
- Option D - Compensatory grade C award at the level of course below that studied.
- Option E - Compensatory grade A award at the level of course below that studied.

### Response

Central staff were against the proposal of compensatory arrangements as they felt that if the learning and teaching approaches were correct, then pupils would be entered appropriately for exams which they were able to achieve in. Primary head teachers supported the idea of compensatory awards, and felt these should be based on unit passes already achieved by pupils.

### Question 6

The proposed name for the new award is General (SCQF 4) and Advanced General (SCQF 5). Please indicate if you are content with this suggestion. If not please offer an alternative and explain your choice.

### Response

Central staff did not have a view here as to the name used, but primary head teachers suggested these were named as Standard Academic Qualifications 4 and 5, or Secondary Certificate and Secondary Diploma.

### PROPOSAL 3

New awards in literacy and in numeracy will be available at SCQF levels 3 to 5. *Curriculum for Excellence* brings a sustained focus on developing literacy and numeracy skills in our young people. To help strengthen this focus, the Scottish Government is proposing new separate awards to accredit young people's literacy and numeracy skills – the Scottish Certificate for Literacy and the Scottish Certificate for Numeracy. The awards will be available at SCQF levels 3 to 5. The expectation is that all young people will be presented for these awards unless there are exceptional reasons for not doing so. The intention is also to ensure that the structure of these awards is flexible enough to make them available to adult learners.

### Question 7

Do you agree with the proposal to offer literacy and numeracy awards at a range of SCQF levels (3 to 5)? If not please offer an alternative.

### Response

All agreed with the proposal to offer literacy and numeracy awards at a range of SCQF levels (3 to 5). It was also suggested that these should be made available to adult learners. They should be skills based – skills for life and work.

### Question 8

National Qualifications at Access 3 (SCQF level 3) do not have an external examination. Do you agree that any new awards in literacy and numeracy at SCQF level 3 should have an external examination?

### Response

Central staff felt that any new awards in literacy and numeracy at SCQF level 3 should not have an external examination, but instead have rigorous external moderation. Primary head teachers however, wanted external examination, believing it would give the awards credibility and would standardise them. This would ensure schools were accountable. Exams could be practical.

### Question 9

Should the weighting between the internal and external assessments for the literacy and numeracy awards be equal? If not should more weight be attached to the internal or external assessment? Please explain.

- Option A - Equal weight.
- Option B - More weight to internal assessment.
- Option C - More weight to external assessment.

### Response

Primary head teachers felt the weighting between the internal and external assessments for the literacy and numeracy awards should be equal. Pupils would gain more confidence and would be able to build up an achievement portfolio. There would still be standardisation for employers to use. As central staff felt that all assessment here should be internal, the question was not appropriate. If there had to be some external assessment, then more weight should be given to internal than external.

### Question 10

When should young people be assessed for literacy and numeracy awards?

Please select one option.

- Option A - At the end of S3 as part of the summer diet of examinations.
- Option B - In the December of S4 as part of a winter diet of examinations.
- Option C - At the end of S4 as part of the summer diet of examinations.

### Response

Primary head teachers felt that young people should be assessed for literacy and numeracy awards at the end of S3, as part of a summer diet of examinations. Central staff felt there should be flexibility here, and pupils should be able to sit these when they are ready.

### PROPOSAL 4

Increased flexibility to better meet the needs of young people. Suggestions include:

- studying National Qualifications over 18 months (or 2 years) as well as one year;
- introducing a winter diet of examinations; and
- encouraging the most able young people to bypass lower level qualifications and to study Highers from S4 onwards.

### Question 11

Do you agree with the proposal to allow the study of Highers and Advanced Highers over 12 months, 18 months and 2 years?

### Response

Central staff agreed with the proposal, however primary head teachers thought this needed more detailed explanation as to how it would work, before they could comment. How would this affect Junior High Schools and how would universities view decisions on how long it took a pupil to achieve a certain grade.

### Question 12

Do you agree with the proposal to introduce a winter diet of examinations?

### Response

Central staff agreed with the proposal, however primary head teachers felt that it could lead to a narrowing of the curriculum, and practical problems of providing coursework and organising the lead-in to the exams. There are also practical difficulties with Winter exams eg snow days, increased sickness. It



could mean that a lot of pupils left at Christmas. More organisation of timetables would be required to cope around exams.

**Question 13**

If you agree with the proposal to introduce a winter diet of examinations, what subjects and levels of qualifications might first be offered?

**Response**

Central staff felt that all subjects and levels of qualifications should be offered if a winter diet of examinations was introduced.

**Question 14**

Would you agree with changes to the system which allowed the most able students to bypass qualifications at lower levels and begin study for Highers from S4 onwards?

**Response**

Central staff agreed with this. Primary head teachers thought that more able pupils should not bypass qualifications, but should be able to start study for Highers in S4. They were also concerned that as Highers were designed for 16 plus year olds, some students might not be mature enough to cope with them, and would need more support.

**Question 15**

Do you have any other ideas for increasing flexibility within the senior phase (S4 to S6)?

**Response**

Other ideas for increasing flexibility within the senior phase (S4 to S6) were:

- project / skills based activities with recognisable awards, then a move onto Highers
- pupils should be able to leave school when they are ready to follow what they would like to do
- more links with colleges
- more Vocational Pathways / Skills for Work courses

**TIMELINE**

**Question 16**

It is intended that planning for the new curriculum should commence in 2008/09, with approaches based on the new curriculum introduced from school year 2009/10. This suggests that the new and revised qualifications and any increased flexibilities would be required from 2012/13 onwards to ensure smooth progression between the curriculum and qualifications. Is this indicative timeline realistic? Please comment on any implications to be considered.

**Response**

There are huge implications in the proposals for our current Junior High system and we need more time to discuss these and ensure appropriate staff development is in place.

### **Comment from Secondary Head Teachers**

The secondary scheme of provision in Shetland means that young people transfer from Junior High Schools at the end of Secondary 4 on to one of two High Schools. The proposed changes to the secondary curriculum could cause Shetland considerable change to the scheme of provision as it may be more practical for young people to transfer between schools at the end of Secondary 3.

Staffing and recruitment issues in all schools will be affected by how such curricular changes are managed and may well affect the level of provision for pupils. In particular, a transfer point at Secondary 3 could affect the viability of a number of Junior High Schools.

We may need to undertake some work to investigate the possibility of the current transition pattern being continued, even on an interim basis. Could the national documentation be interpreted in such a way that would allow pupils to continue transferring at the end of Secondary 4?

We wish all children to have the same level of opportunity, and their families to have clarity regarding when, where and if their children will move school.



## REPORT

To: Services Committee

9 October 2008

From: Executive Director of Education and Social Care

### **Prioritisation of Education and Social Care Capital Projects**

#### **1 Introduction**

- 1.1 This reports asks Services Committee to start the process of agreeing the prioritisation of the capital projects within the remit of the Education and Social Care Department, in line with recent changes to the method by which Capital Projects are ranked for funding. This is a significantly challenging exercise, as overall aspirations for capital projects far exceed the total available resources each year. Members may wish further information and analysis to be presented, to future committees, in order to assist them to reach a balanced decision on the allocation of limited resources.

#### **2 Links to Corporate Priorities**

- 2.1 Investment in capital assets will enable the Council to support the aspirations set out in the Corporate Plan in respect of the following service areas – Community Care, Children's Services, Schools, Sport and Leisure, and Shetland College. Currently, there are no bids directly in support of the work of the Criminal Justice service or the Community Work team.
- 2.2 The Council's Corporate Plan includes reference to the following specific capital projects:
- "Complete a review of services for Long Term Care, young adults with physical disabilities and the Eric Gray Resource Centre.
  - Complete strategies for Long Term Mental Health and Joint Respite Care.
  - Complete feasibility studies or necessary capital works, including Viewforth and Isleshavn Care Centres.
  - Progress the Joint Occupational Therapy Service and Resource Centre.

- Consider investment decisions on the replacement of Leog, Laburnum and the Bruce Family Centre
- Improve our teaching facilities by completing the new Anderson High School and Mid Yell Junior High School.”

### 3 Background

- 3.1 In the last cycle of meetings, the Council changed the mechanism by which it wishes to assess the relative priority of capital project proposals [Minute Reference 122/08]. Previously, there was in place a formal scoring mechanism, with assessment and ranking through the Capital Programme Review Team, prior to reporting to Members for inclusion in the capital programme. Under the new system, there will be no points system to determine priorities. Instead, each Committee will decide the relative priority of each project, based on the Committee’s aspirations for service developments over the next 4-5 years. The Council has agreed that the need to maintain existing assets will be the first call on available resources. The Council will then merge all the priorities from each of the spending committees, to agree an overall programme.
- 3.2 The process has five steps, as set out below.
- 3.3 **Step 1** requires the Department to assess Rolling Programmes to determine what expenditure is required to maintain existing assets (for 1 - 5 years). This is to ensure that existing assets are protected before approval is given to create new assets.
- 3.4 **Step 2** is consideration of the need for New Projects. Projects will be categorised into:
- 1) what we have to do (a legal requirement);
  - 2) what we need to do (an identified service need); and
  - 3) aspirational projects, described as what we might like to do.
- 3.5 This assessment will cover the creation of new or replacement assets, where new service developments need new facilities to meet growing or changing needs. There is also a need to consider facilities which are no longer “fit for purpose”, perhaps due to the condition of existing buildings, limitations on refurbishing old buildings because of layout, meeting disabled access requirements or simply the need for different types of spaces and facilities to meet modern service needs.
- 3.6 There is no framework in place for considering the priority ranking of projects. As a first stage, the detailed justification for each of the department’s projects has been assessed under the following headings:
- Purpose / Objectives / Service Need - identifying the service need and what would happen if the capital investment did not happen, including options for how best to deliver objectives / service need
  - Social / Economic / Environmental impacts
  - Legal Obligations
  - Financial Impacts - capital and ongoing running costs

- 3.7 The complete list of projects for Services Committee to consider is provided by service area at Section 6. This list does not include projects which are already committed and contractual arrangements already in place. Those costs will need to be top-sliced from the spending allocation each year.
- 3.8 The detailed justification of need, using the framework at paragraph 3.6, for each project is included at Appendix 1. There is a significant amount of data included in these Appendices, as, in most cases, the decisions which Members are required to take involves significant capital investment choices. The lead officer for each service area has ranked the order in which they would wish to see projects progress, based on identified service need.
- 3.9 At Appendix 2, I have then provided a list of the order in which I consider that projects should be prioritised for the Department, together with reasons to justify my approach from a service delivery point of view. It will then be up to Members to consider the political aspects of the proposed list and present their views to the Council for overall consideration. As mentioned, this Report should be seen as the first stage in the process of prioritising the projects to support the work of the Education and Social Care Department and I would ask Members to consider what further information and analysis might be helpful, to assist in undertaking a politically based ranking process.
- 3.10 **Step 3.** All the bids then go to the Council for assessment, where Members will determine the order of priority for all projects.
- 3.11 The relative priority lists will establish the order in which staff work up the detail of each project. The same tests will be required (to determine evidence of need, value for money, and so on) as is currently the case, in line with the Capital Projects Procurement Guidance. So, **Step 4** involves the Capital Programme Review Team (CPRT) evaluating each project to ensure that the following steps have been carried out to an appropriate standard: business case; feasibility; option appraisal; consultation; cost reduction ideas; use of existing buildings/assets, etc. The CPRT will now also include the Chair and Vice Chair of each Committee.
- 3.12 **Step 5** is the Report to set the capital programme, which will work out the lead in time for developing the projects and the funding allocation required for each stage of that work.
- 3.13 The following Appendices are provided in support on this Report:

Appendix 1 – Detailed Justification of Each Project  
 Appendix 2 – Proposed Priority List for the Education and Social Care Department  
 Appendix 3 – Supporting Justification of Community Care Needs

#### **4 Policy Framework for Capital Investment – National and Local Drivers**

- 4.1 At the outset, it might be useful to state that capital investments are one of the most effective methods which Members have to enhance and improve

services for the local community. It is therefore a key political tool in meeting corporate objectives for service development.

4.2 Until recently, Government and local policy sought to secure a balance of provision between the elements of sustainable development – social, economic and environmental – at an affordable level to the community. Recently, with the signing of the Single Outcome Agreement, through the Concordat, the national policy drive is towards sustainable **economic** growth. The over-arching purpose of the government's objectives is, "to focus the Government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable growth".

4.3 Thereafter, the Government set out the 5 priorities for sustainable economic growth:

- Learning, skills and well-being
- Supportive business environment
- Infrastructure development and place
- Effective government
- Equity

and five strategic objectives:

- Wealthier and fairer
- Smarter
- Healthier
- Safer and stronger
- Greener

which are defined as:

- Wealthier and Fairer – enable businesses and people to increase their wealth and more people to share fairly in that wealth.
- Smarter – expand opportunities for Scots to succeed from nurture through to life long learning ensuring higher and more widely shared achievements.
- Healthier – help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care.
- Safer and Stronger – help local communities to flourish, becoming stronger, safer places to live, offering improved opportunities and a better quality of life.
- Greener – improve Scotland's natural and built environment and the sustainable use and enjoyment of it.

4.4 Shetland wide, the Council has endorsed the Shetland Community Planning Partnership's statement of intent, known as the Shetland Resolution, as follows:

"We shall work together for a future that's better and brighter. In particular, we aim to create a secure livelihood, look after our stunning environment and care well for our people and our culture. We recognise that we can only succeed in any of these aims by succeeding in all of them.

In our economy,

- We want to be known for carefully crafted products and excellent service.
- We shall nurture creativity, build skills and encourage enterprise.
- We'll promote fine quality and unique origin because they're vital to our customers.
- We'll seek to create fulfilling, well paid jobs for all, whatever their talent.
- We'll use the natural resources at our disposal responsibly and seek more control over them.
- Public sector resources will be used to stimulate a stronger private sector.

In our environment, we shall...

- Take pride in our heritage, natural or manmade, and respect it for its own sake;
- Recognise that our livelihood depends on our environment;
- Work with nature in all its diversity, not against it;
- Restore our environment where it has been damaged;
- Use the gifts of nature responsibly; and
- Play our part as responsible members of the world community.

In our community, we shall...

- Cherish and promote our traditions and our values;
- Keep Shetland's people safe and encourage them to be healthier;
- Foster confident, thriving communities across Shetland;
- Welcome visitors and new Shetlanders from wherever they may come;
- Promote justice and equality, here and overseas; and
- Expand knowledge, extend opportunities and improve access."

4.5 The Corporate Plan then sets out this Council's ambitions, as a broad and balanced approach to policy and service development. Before I turn to service specific policy drivers, I consider it is important to also touch on two key policy statements which support the work of the Education and Social Care Department. The Deprivation and Social Exclusion study recently demonstrated, through front line research techniques, that individuals, families and communities face deprivation and exclusion from services. The Department therefore needs to find innovative ways to address issues about

access to services. The recent Population Study indicated to the Council that steps need to be taken to ensure that Shetland retains an appropriate number of working age people, to sustain services and community life.

- 4.6 The services provided by the Education and Social Care Department can be described under the service management headings as set out below. Of these, Criminal Justice and Community Work do not currently require any specific capital investment bids.

Children's Services	Stephen Morgan
Community Care	Christine Ferguson
Community Work	Bill Crook
Criminal Justice	Denise Morgan
Schools	Helen Budge
Shetland College	George Smith
Sport and Leisure	Neil Watt

- 4.7 The Department does not have an overall Mission Statement, as our service users are diverse, but, broadly speaking, the Department exists to provide services which:

- keep people safe;
- enable them to fulfil their full potential; and
- support them to lead healthy lives.

- 4.8 The specific over-arching statements of intent for each of the main service areas are set out below.

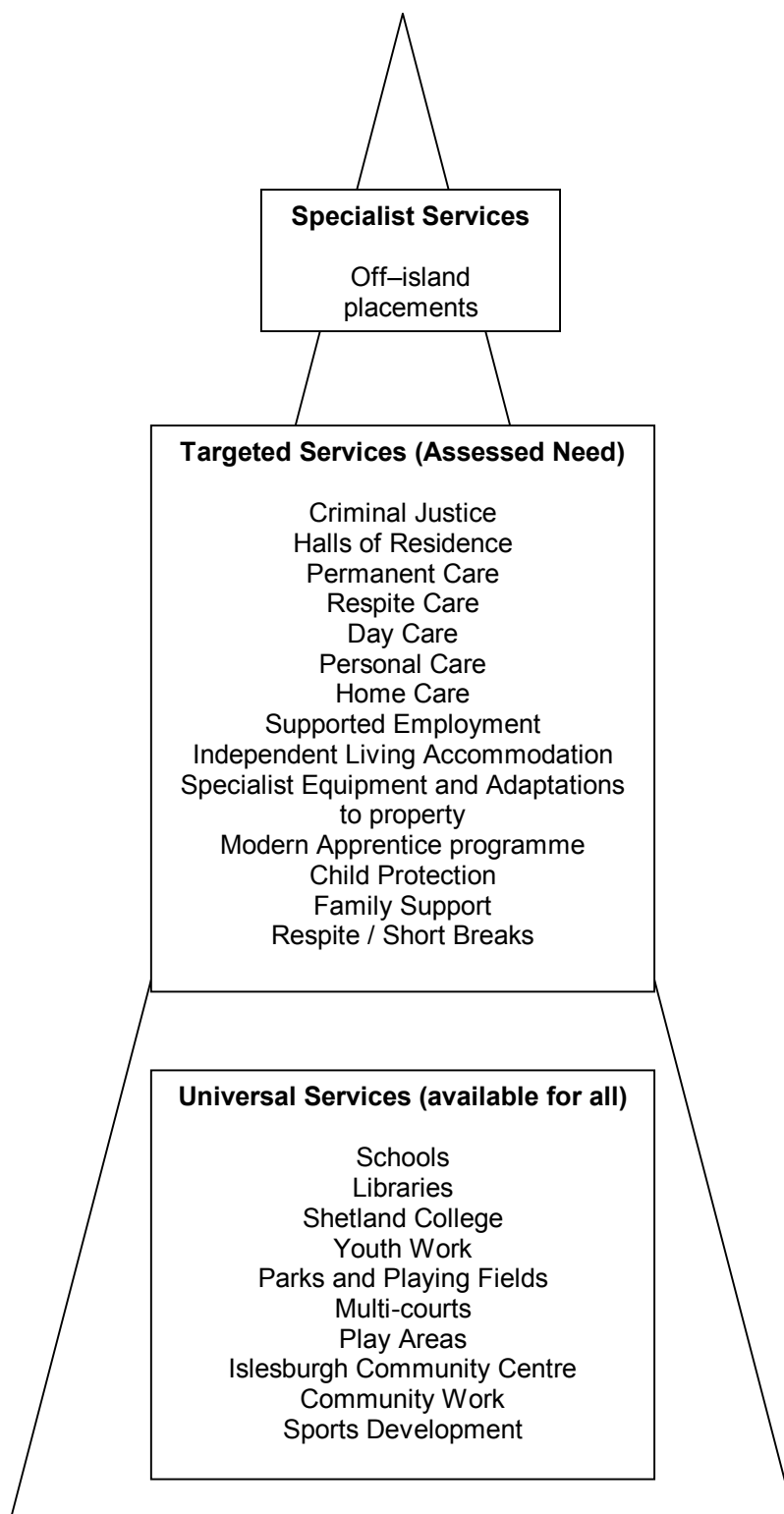
Children's Services	Children and Young People should be encouraged and supported to enjoy being young and to lead full, safe, healthy, active and responsible lives in their communities.
Community Care (Social Work function)	To support and protect the most vulnerable members of the community, promoting independence and ensuring services are targeted at those that are most in need.
Schools	To create and maintain a framework and culture in which individual learners can strive to realise their full potential.
Shetland College	Shetland College UHI seeks to make a major contribution to the local economy through the provision of high quality further and higher education and training which meets the needs of the population and employers.

- 4.9 The Department can demonstrate direct links to the Government target for economic growth, through the provision of education, learning and supported employment opportunities, and indirect support through care services.



Through the provision of a range of services, the Department is a source of employment for many people in Shetland.

- 4.10 Another aspect to the work of the Department, which Members may wish to bear in mind, is the question of targeted and universally provided services. Some services target individuals, families or communities with specific and identified needs (for example, child protection, community care, additional support for learning, criminal justice, etc) whereas some services are available for all to use (known as universal services and examples of which include sport and leisure, schools, youth work, etc). The diagram below shows a pyramid of need – from universal to very specialised services.



## **5 Basis of Developing Priorities**

5.1 The Council direction indicates that the first call on available resources from the capital programme would be to maintain existing assets. This sets some particular challenges for the Education and Social Care Department, as set out below.

- Council policy on developing Community Care services acknowledges the need for the service to grow, to support increasing needs for frail and elderly people and an increasing incidence of people with learning disabilities requiring support services into adulthood. In this Report, I will therefore propose investment in new facilities to meet new service needs (as well as maintaining existing services).
- The Schools Service predicts declining numbers of pupils, so increasing the unit cost of supporting the current model of delivery. This is the basis upon which Members have agreed to undertake a review of the structure and cost of the current method of delivery, referred to as the “Blueprint” for Education. Once the Blueprint work is complete, the Schools Service may request different investments in the Schools Estate, on a “spend to save” basis.
- Some of the grant aid programmes specifically support the development of new or enhanced facilities. I would highlight the general grant aid programme (for village halls and other community facilities) and the Water Based Facilities (previously referred to as Marinas) as two examples of grant aid programmes which would not, under current direction, be seen as a priority within the new framework. A recent review of the Water Based Facilities grant aid programme resulted in an endorsement from Members as to the continuation of this scheme.

5.2 The Council decision also requires consideration of new projects under three criteria, namely:

- what we have to do (a legal requirement);
- what we need to do (an identified service need); and
- aspirational projects, in terms of what we might like to do.

5.3 For this Department’s projects I have therefore classified projects as follows:

- Rolling Programmes – maintain existing assets
- Rolling Programmes – create new or enhance existing assets
- Projects – must do
- Projects – need to do
- Projects – like to do

5.4 It is my assessment that the projects which fall into the “Projects – Must Do” category are those which are required to meet specific health and safety or

other regulatory requirements. Otherwise, the Department has considerable scope to choose how to deliver its service obligations, and new capital investment is only one mechanism to achieve our service objectives.

5.5 It might be useful at this stage to set out the various stages of capital programme development, as set out in the Council's Capital Projects Procurement Guidance. The Capital Programme Prioritisation system has a number of stages, as the need for capital investment develops. The initial stages, prior to tender, can be described as:

- The Business Case – the initial idea or concept to address a gap in service.
- Feasibility Study – an in depth exploration of the service need and the options to best meet that service need.
- Design – the design of the new asset, once agreement on identified service need and the best option to meet that need has been identified.

5.6 Some projects are still at “Business Case” and “Feasibility Study” stage, which means that the final solution (in terms of how best to meet certain service objectives) has not yet been identified. Indications of cost for the projects which are not yet fully developed therefore come with a “health warning” that these are only very indicative costs based on average rates per square metre for a standard build, based on the information which is available at the moment. These costings should not therefore be used for anything other than an indication of the scale of the project, at this stage. In future, the Department will ensure that the Business Case for each project will be presented to Services Committee for approval of the brief, or service specification. Members will also be asked to agree the options to be looked into. Prioritisation of projects will therefore be an ongoing process, as new issues and ideas develop.

5.7 In terms of how Services Committee might consider prioritising the projects, Members may wish to bear in mind the following suggestions:

- To ensure that the Department is able to meet all its statutory obligations (predominantly for health and safety matters, disabled access, fire regulations and Care Commission standards).
- To provide a balance across service areas, to support the work of all services in contributing to the quality of life in Shetland.
- To take a pragmatic approach during this period of transition to support projects which are already well developed to design stage, through the previous ranking scheme.
- To provide a balanced approach between meeting core service delivery needs and investing in new and innovative projects (to

meet the wider population and economic growth directions from recent policy decisions).

- To take account of the implications for other projects and services in the scope and timing of projects (eg Isleshavn care centre and Mid Yell School and transport services).
- Balancing short term demands with long term needs, especially taking into account population changes.

## **6 Proposed Priorities for the Education and Social Care Department**

6.1 This Section sets out the Capital Projects for the Education and Social Care Department. I have categorised these by service area, by rolling programme or new project and by the purpose which the investment will deliver. I have only listed “live” projects which are in the current system, as some projects are not yet well enough developed to consider at this point in time. This will ensure that the service need has been properly identified and Members have endorsed that need, prior to the project being prioritised for further development.

### **6.2 Children’s Services**

6.2.1 There are three projects within Children’s Services and the recommended priority ranking order is as follows:

<b>Ranking</b>	<b>Project Name</b>	<b>Category</b>	<b>Reason for Ranking</b>
1	Leog Replacement	New Project – Need to Do	Statutory duty to provide suitable accommodation for Looked After Children. Current facility not fit for purpose due to limitations on layout and use of space.
2	Laburnum Replacement	New Project – Need to Do	Services for children and young people with specific and high care needs. Current facility not fit for purpose due to limitations on space needs and layout.
3	Family Centre	New Project – Need to Do	Early intervention services for children and families. Current facility not fit for purpose due to limitations on layout and use of space.

### 6.3 Community Care

6.3.1 There are eight projects within the Community Care remit and the recommended priority ranking order is as follows:

<b>Rank-ing</b>	<b>Project Name</b>	<b>Category</b>	<b>Reason for Ranking</b>
1	Fire Upgrades to Care Homes	New Project – Must Do	To meet fire regulation and building control standards.
2	Occupational Therapy (OT) Rolling Programme	Rolling Programme – Create New or Enhance Existing Assets	Service users with specific service needs, to enable them to remain safe in their own homes for longer.
3	New Temporary Care Home for Lerwick (Montfield)	New Project – Need to Do	The Delayed Discharge target is zero people delayed in hospital and this project is key to ensuring that NHS Shetland and SIC achieve that Government target, by creating an additional 17 care beds in Lerwick.
4	Occupational Therapy Resource Centre	New Project – Need to Do	Target to reduce waiting times and numbers, with a focus on enabling service users to remain safe in their own homes for longer. Current premises facing significant health and safety challenges. Detailed design complete and site identified.
5	Eric Gray Replacement	New Project – Need to Do	To meet the needs of increasing numbers of people with high support needs. Current premises not fit for purpose.
6	Replacement Viewforth	New Project – Need to Do	To contribute to increasing the number of care beds by 120 by 2024 and meet Care Commission standards for residential accommodation.
7	Replacement Isleshavn	New Project – Need to Do	To contribute to increasing the number of care beds by 120 by 2024 and meet Care Commission standards for residential accommodation.
8	Older People's Rolling Programme for new care places	Rolling Programme – Create New or Enhance Existing Assets	To contribute to increasing the number of care beds by 120 by 2024, by extending and re-modelling existing facilities.

6.3.2 Appendix 3 provides a summary of the identified care needs, to support the significant investment required in this service area.

6.3.3 There is also an identified need for supported accommodation for people with severe physical disabilities and/or other high support needs who are aged under 65 at the start of their tenancy. The objectives of this type of accommodation will be:

- To provide 24/7 on-site care and support to people with an assessed need for this level of input and
- To provide family-friendly wheelchair accessible accommodation.

Discussions are ongoing with housing providers as to the best mechanism to provide independent living accommodation so the capital costs are not included under the community care service.

#### 6.4 Schools

6.4.1 There are seven projects within the Schools Services and the recommended priority ranking order is as follows:

<b>Ranking</b>	<b>Project Name</b>	<b>Category</b>	<b>Reason for Ranking</b>
1	Maintenance / Refurbishment	Rolling Programme – Maintain Existing Assets	To fulfil health and safety, disabled access and building regulations of existing premises.
2	Anderson High School Replacement, including moving Train Shetland from premises at the Knab	New Project – Need to Do	Long term stated policy that this is the number one priority, in order to resolve the condition of the current school and to deliver continuity of service for AHS pupils.
3	Little Tikes	New Project – Need to Do	Fragility of current arrangements regarding premises and management arrangements. Recent political decision to progress (but service can be provided by other means).
4	Lerwick Library Refurbishment (incl replacement premises for Adult Learning)	New Project – Need to Do	Ability to display full collection. Project well-developed through extensive consultation with detailed design nearing completion.
5	Sandwick JHS Additional Classrooms	New Project – Need to Do	Additional classroom space, if planned housing development proceeds in the area.
6	Happyhansel Primary School	New Project – Need to Do	Additional classroom space, to meet increasing school roll.

	Additional Classrooms		
7	Lerwick Primary Provision	New Project – Aspirational	Longer term plans, current facilities adequate to meet existing service needs.

## 6.5 Shetland College

- 6.5.1 There is one project within Shetland College's remit, which is the proposed extension to the campus at Gremista. Alternative premises are required for Adult Learning, when the Library extension project is progressed, and for Train Shetland, if the Anderson High School proposed design develops as currently envisaged. I have built both those projects into the main projects, as there would be no requirement to move these services were they not being displaced by other activity.

Ranking	Project Name	Category	Reason for Ranking
1	Shetland College Extension	New Project – Need to Do	Key project for population retention and skills development for current and future skills and training needs.

## 6.6 Sport and Leisure Services

- 6.6.1 There is one project within Sport and Leisure Services remit, together with four rolling programmes.

Ranking	Project Name	Category	Reason for Ranking
1	Park Equipment	Rolling Programme – Maintain Existing and Enhancement of Some Assets	Rolling Programme – Maintain Existing and Enhancement of Some Assets
2	Play Areas	Rolling Programme – Maintain Existing and Enhancement of Some Assets	Rolling Programme – Maintain Existing and Enhancement of Some Assets
3	Capital Grants to Voluntary Organisations (General)	Rolling Programme – Maintain Existing and Enhancement of Some Assets	Breadth of community benefit from level of investment. Supports the maintenance and enhancement of community owned facilities.
4	Indoor	New Project –	No specific identified need

	Children's Activity Centre (former Islesburgh Squash Courts)	Aspirational	and enhancement of existing services.
5	Capital Grants to Water Based Facilities	Rolling Programme – New and Enhanced Assets	Targeted community benefit.

6.7 I now need to turn to drawing the five service areas together into one overall programme for the Department, from 2009/10 onwards. As mentioned, I have excluded contracts which have already been awarded or are due to be awarded before the start of the new financial year, to acknowledge decisions already taken by the Council. There are projects on the list which may not involve a specific allocation of capital funding but they will still require staff time from the Department and the Capital Programme Service to deliver, so I have included them in the list for completeness and prioritisation in terms of limited staff resources. These projects are the Anderson High School (which is likely to be funded initially by Shetland Charitable Trust on a leaseback arrangement over a period of years) and the Temporary Care Home for Lerwick being constructed at Montfield (where a funding arrangement between NHS Shetland and the SIC was recently agreed). I have made no reference to the current priority ranking in drawing up the list. Instead, I have focused on the Department's legal requirements, the most pressing service needs for our most vulnerable clients, whilst trying to retain a balance of provision in terms of the social and economic benefits to be secured from various levels of investment across the community.

6.8 My proposed capital project ranking for the Education and Social Care Department is set out at Appendix 2, for consideration and discussion by Members.

## **7 Financial Implications**

7.1 There are no direct financial implications arising from this Report, as the programming and costing of the Capital Projects, once the priority ranking has been agreed, will be developed by the Capital Programme Service, based on the agreed allocation of funding year on year.

## **8 Conclusions**

8.1 A new system of ranking capital projects has recently been agreed, which moves away from a points based system to a politically directed programme.

8.2 This is a significantly challenging exercise and aspirations for capital investments far exceed the total available funding year on year.

8.2 The Department has set out the justification for each of the twenty-three live projects under our remit. Each lead officer has ranked the projects in the



order in which they would wish to see the projects proceed, based on legal obligations and service need.

- 8.4 Appendix 2 puts forward a proposed priority ranking system for the Department for Members to consider, from a political dimension.
- 8.5 In light of the significance of the decisions being taken, Members may wish to hold separate workshop sessions, to learn more about each of the projects from the lead officers, or to visit some of the premises where we have determined that current facilities are not fit for purpose, in order to gain a better insight into the service improvements which the Department is promoting.

## **9 Policy and Delegated Authority**

- 9.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to co-ordinate and monitor the effective use of resources, human, physical and financial, for the provision of those services that are within the remit of the committee. This includes the assessment of need in terms of capital investment, referred to as the Business Case and Feasibility Study stage of the capital programme prioritisation method.
- 9.2 The Council retains full authority for decisions on the Capital Programme. Services Committee is required to make recommendations to the Council as to the priority ranking of projects within its remit.

## **10 Recommendations**

- 10.1 I recommend that Services Committee:
  - (a) consider the detailed justification of capital project proposals, set out in Appendix 1;
  - (b) consider the ranking by Service Area, set out at Section 6; and
  - (c) consider the ranking by Department, set out at Appendix 2; and
  - (d) advise the Department as to what further information or analysis might be helpful in determining the relative priority of each project, in preparation for making recommendations to the Council for building an overall capital programme in the next cycle of meetings.

**Proposed Priority Ranking for Education and Social Care Department Projects**

	<b>Project Name</b>	<b>Category</b>	<b>Service Area</b>	<b>Reason for Ranking</b>
1	Fire Upgrades to Care Homes	New Project – Must Do	Community Care	To meet fire regulation and building control standards.
2	Park Equipment	Rolling Programme – Maintain Existing and Enhancement of Some Assets	Sport and Leisure	Breadth of community benefit for level of investment.
3	Maintenance / Refurbishment	Rolling Programme – Maintain Existing Assets	Schools	To fulfil health and safety, disabled access and building regulations for existing premises.
4	Play Areas	Rolling Programme – Maintain Existing and Enhancement of Some Assets	Sport and Leisure	Breadth of community benefit for level of investment.
5	Capital Grants to Voluntary Organisations (General)	Rolling Programme – Maintain Existing and Enhancement of Some Assets	Sport and Leisure	Breadth of community benefit for level of investment.
6	Anderson High School Replacement, including moving Train Shetland from premises at the Knab	New Project – Need to Do	Schools	Long term stated policy that this is the Council's number one capital investment priority, in order to resolve the condition of the current school and to deliver continuity of service for AHS pupils.
7	Occupational Therapy (OT) Rolling Programme	Rolling Programme – Create New or Enhance Existing Assets	Community Care	Increasing numbers of service users, with specific service needs, this enable people to remain safe in their own homes for longer.
8	New Temporary Care Home for Lerwick (Montfield)	New Project – Need to Do	Community Care	Delayed Discharge target is zero and this project is key to ensuring that NHS Shetland and SIC achieve

				that Government target. Contribution towards Council policy of creating an additional 120 care beds by 2024.
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## **Appendix 2**

### **Proposed Priority Ranking for Education and Social Care Department Projects**

	<b>Project Name</b>	<b>Category</b>	<b>Service Area</b>	<b>Reason for Ranking</b>
9	Occupational Therapy Resource Centre	New Project – Need to Do	Community Care	Target to reduce waiting times and numbers, with a focus on enabling service users to remain safe in their own homes for longer. Current premises facing significant health and safety challenges.
10	Leog Replacement	New Project – Need to Do	Children's Services	Statutory duty to provide suitable accommodation for Looked After Children. Current facility not fit for purpose due to limitations on layout and use of space.
11	Eric Gray Replacement	New Project – Need to Do	Community Care	Current facilities not fit for purpose and increasing demand for services for people with specific and identified service needs into adulthood.
12	Shetland College Extension	New Project – Need to Do	Shetland College	Key project for population retention and skills development for current and future skills and training needs.
13	Little Tikes	New Project – Need to Do		Fragility of current premises and voluntary management arrangements
14	Lerwick Library Redevelopment, including replacement premises for Adult Learning	New Project – Need to Do	Schools	A project which will enhance existing services and facilities, where the design work is well developed.
15	Laburnum Replacement	New Project – Need to Do	Children's Services	Services for children and young people with specific and significant identified

				care needs. Current facility not fit for purpose due to limitations on space needs and layout.
16	Replacement Viewforth	New Project – Need to Do	Community Care	To contribute to increasing the number of care beds by 120 by 2024 and meet Care Commission standards for residential accommodation.

## **Appendix 2**

### **Proposed Priority Ranking for Education and Social Care Department Projects**

	<b>Project Name</b>	<b>Category</b>	<b>Service Area</b>	<b>Reason for Ranking</b>
17	Replacement Isleshavn	New Project – Need to Do	Community Care	To contribute to increasing the number of care beds by 120 by 2024 and meet Care Commission standards for residential accommodation.
18	Family Centre	New Project – Need to Do	Children's Services	Early intervention services for children and families. Current facility not fit for purpose due to limitations on layout and use of space.
19	Older People's Rolling Programme for new care places	Rolling Programme – Create New or Enhance Existing Assets	Community Care	To contribute to increasing the number of care beds by 120 by 2024, by extending and re-modelling existing facilities.
20	Sandwick JHS Additional Classrooms	New Project – Need to Do	Schools	Project dependent on new housing developments proceeding, current facilities are adequate to meet existing numbers.
21	Happyhansel Primary School Additional Classrooms	New Project – Need to Do	Schools	Project dependent on new housing developments proceeding, current facilities are adequate to meet existing numbers.
22	Lerwick Primary Provision	New Project – Aspirational	Schools	Existing facilities meet current requirements; this project will plan for longer term requirements.
23	Indoor Children's Activity Centre (former Islesburgh Squash Courts)	New Project – Aspirational	Sport and Leisure	Enhancement of existing service provision.
24	Capital Grants to Water Based	Rolling Programme –	Sport and Leisure	More targeted community benefit.

	Facilities	New and Enhanced Assets		
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**Projected demand on Residential Care and Intensive Care at Home services**

The population is ageing, people are living longer and staying healthier for longer. This is reflected locally in the age of people now receiving services and particularly those in residential care. Therefore population projections for older people in Shetland for this paper have been based on the over 75's population.

According to GRO estimates, population projections for over 75's are as follows:

<b>2006</b>	2018	<u>Increase</u>	2024	<u>Increase</u>
<b>1,585</b>	2,243	<b>42%</b>	2,838	<b>79%</b>

Current demand (Dec 2007)

Existing permanent residential*	122
Waiting list (inc IPU)	22
Extra Care (KEH)	16
	<b>160</b>
Intensive Home Care	<b>80</b>
	<b>240</b>

\*Note: Respite places are not included above as this would mean there would be double counting in the figures of people living at home.

**There is, therefore, current demand for services at this level for 240 people.**

Using the population figures to project an anticipated number of people likely to require services over the next 10 – 16 years;

	Total	Resid'l Care	Extra Care	Waiting list	Intensive Care at home
Demand 2006	240	122	16	22	80
<b>Demand 2018 (2006 + 45%)</b>	<b>348</b>				
<b>Demand 2024 (2006 + 80%)</b>	<b>432</b>				

If we retain our commitment to keep existing levels of people in their own home (40%), then the projected capacity required in future years is as follows:

	Total	Residential Care + Extra Care	Intensive Home Care
Demand 2006	240	160	80
Demand <b>2018</b> (2006 + 45%)	<b>348</b>	<b>208</b>	<b>140</b>
Demand <b>2024</b> (2006 + 80%)	<b>432</b>	<b>259</b>	<b>173</b>

**Projected demand on Residential Care and Intensive Care at Home services**

**Residential and Extra Care Places**

Currently there are 122 permanent residential beds and 16 extra care places = 138, therefore capacity requires to be increased as follows:

	Current places	Demand for Res'l care and extra care	Increased capacity required
2006	138	160	22 (waiting list)
2018	138	208	<b>70</b>
2024	138	259	<b>121</b>

In summary, it is projected that by 2018, Shetland will need an additional **70** residential/extra care places. Given that one third of the population lives in Lerwick, it could be considered that there is the need to make available a further 35-40 residential places in, or near Lerwick with a similar number required in rural areas. This is in addition to a replacement for Viewforth.

Increased capacity of 121 would be required by 2024 but further projections should be researched during this period to monitor population figures and service demand.

Other factors to consider:

Existing mortality rates – based on national projections (accurate given health of nation?)

Migration – based on national projections across all age groups – is there an argument for higher rates of migration rates TO Shetland of older people? (People coming back to retire, relatives moving to Shetland)

Accuracy of projections – over 75 age group used, but difficult to obtain a reflective figure that is entirely suitable to use for projections.

Ref : CF/DS

Date January 2008





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**Children's Services**

**Leog Replacement**

**Purpose/Objectives/Service Need**

Following a review of services to looked after children in 2005, it was identified that Leog House, as a children's house was no longer fit for purpose as it was:

- Attempting to care for too many children and young people with varying needs
- Not designed for purpose
- Expensive to maintain.

Services Committee approved the report in November 2005 recommending a new build.

A subsequent report was prepared for Capital Projects Management Team, 2 October 2006 seeking funding for a new build to be undertaken by Hjaltsland beginning 2007. This also was approved. However, due to escalating costs this project did not progress.

Over the past 15 years Shetland Islands Council has required residential accommodation and projections of need carried out by the Looked After Children's Placement Review Team indicate that this service will continue to be required into the foreseeable future.

An in-house review of the services provided from Leog House was completed earlier this year. This was designed to review progress in implementing the recommendations approved in 2005 and take account of any changes in service demand from 2005 to present. This review, as the one conducted in 2005, consulted with a wide range of stakeholders including young people and their families. This review concluded that a replacement build for Leog House is urgently required to provide a homely provision for up to three children/young people requiring longer term stays. The preferred location for this is out of Lerwick, but easily accessible to the town. A new build children's house, specifically designed to meet the needs of children and young people, will significantly enhance the experience of care that they would have.

Additional facilities to provide accommodation for children and young people needing to stay for short periods of time during times of difficulty, or to accommodate sibling groups or assess parents and babies, are being developed at Windybrae under the direct management of Leog House. A good range of services will reduce the chances of having to use "off Island" placements that are very expensive and socially isolate children and young people.

**Social/Economic/Environmental Impacts**

The Looked After Children's Placement Report (2005) recognised that without replacement of Leog House, services to looked after children and young people will not best meet their needs. This will result in these children and young people having poorer outcomes in their lives and therefore not reaching their full potential. This is likely to result in many of these

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young people requiring significant support services into adulthood at significant cost to the Council.

A new build out of town will have the added benefit of providing children and young people with space away from the town centre and lessen the opportunities for them to become involved in antisocial behaviour.

**Legal Obligations**

Provision of a range of placement options for looked after children is a requirement of Shetland Islands Council. S.59 of the Social Work (Scotland) Act 1968, states, "It shall be the duty of a local authority to provide and maintain such residential and other establishments as may be required for their functions under this Act." This was re-affirmed in Part II of the Children (Scotland) Act 1995.

Residential accommodation is one of the options in the range of placement choice available for Looked After Children.

**Financial Impacts**

There are no revenue implications for the new build as it is considered that the current revenue for Leog House is what is required for the new development.

**Options for Delivery of Objectives/Service Need**

Leog House to continue to function as a children's house. It has already been stated Leog House is not fit for purpose. Leog House is in need of extensive upgrading to meet regulatory requirements and to transform it into a homely house for children and young people.

New build just outside of Lerwick could provide a house designed specifically to meet the needs of children and young people and provide them with opportunities in a more rural location.

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**Children's Services**

**Laburnum Replacement (with change of use for Laburnum)**

**Purpose/Objectives/Service Need**

Laburnum House is registered by the Care Commission to provide a day care and respite service to children with learning disabilities. Some of the service users have additional physical or sensory disabilities, medical conditions, autistic spectrum disorders, challenging behaviour or mental ill-health.

Laburnum House seeks to give service users the opportunity to realise their potential in a safe environment, whilst promoting dignity, privacy, choice, equality and diversity in line with the requirements of the national care standards. Physical, social and emotional support is provided as well as learning opportunities. The focus is on the maintenance and development of service users' skills in a supportive environment. Service users are assisted to access education and various leisure activities and facilities.

The steep rise in the numbers of children requiring a service and the increasing complexity of their needs means the existing building is too small and inadequate for all current and potential user numbers to access the service. It is not designed for full wheelchair access, the toilets, changing and storage areas, heating and lighting are particularly unsuitable for people requiring high levels of physical support.

People with extremely diverse needs are all currently being catered for within Laburnum House. Consequently, the service users with challenging behaviour present significant risks to the more frail and vulnerable service users. The only way of reducing these risks is to carefully select groups of service users. This results in less flexibility in service delivery than has previously been available.

If day care and respite services are not enhanced Shetland Islands Council will have to apply much stricter eligibility criteria in order to reduce the projected demand for the services.

A reduction in provision for day care and respite services will undoubtedly result in significant political pressure.

As well as a reduction in quality of life for those excluded from day care and respite services, research would suggest that needs will rise as a direct result of a less active and more isolated lifestyle, so we may find that more people meet the new eligibility criteria thus negating our efforts to reduce demand.

**Social/Economic/Environmental Impacts**

The service provision at Laburnum House has the following Socio-economic impacts:

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- The service raises social awareness in the Shetland community and enables users to engage and integrate within the local community. Social inclusion will be promoted.
- The service supports existing family units and enables family members to be released into full/part time employment.
- The service relieves the considerable pressure on family support and carers and enables them to remain stable. However it should be recognised that any reduction in service may lead to breakdowns in the family units and the resulting social impact.

### **Legal Obligations**

The Social Work (Scotland) Act 1968, Section 12 – places a duty on every local authority to promote social welfare by making available advice, guidance and assistance on a scale appropriate for their area. The provision of day care and respite services for children with additional support needs is a response to this clause.

Subsequent acts, ie the Chronically Sick and Disabled Persons Act 1972; the Disabled Persons (Services, Consultation and Representation) Act 1986; the National Health Service and Community Care Act 1990; Carers (Recognition and Services Act) 1995; Disability Discrimination Act 1995 and the Regulation of Care (Scotland) Act 2001, combine to place a duty upon local authorities to assess the needs of people with disabilities and their carers and make a plan to meet them, either through direct provision or commission of resources or through advice and information.

Shetland Islands Council has been working locally to implement the recommendations of the Scottish Executive's policy initiative '*The Same as You? A review of services for people with learning disabilities*'. Whilst there is not a specific recommendation in relation to day care and respite services, some of the 29 recommendations can be most easily met in a day care or respite service setting.

The National Care Standards for Support Services apply to day care and respite services for children with additional support needs. Any new service will need to comply, but they are not prescriptive in respect of the shape of the service. They focus more on attitudes and upholding the key principles of dignity, privacy, choice, safety, realising potential, equality and diversity.

### **Financial Impacts**

The existing revenue costs for the service are £521,069.35 (2004-2005) per annum

It is estimated at this stage that any potential new build project is likely to be in region of £2m - £3m with an increased potential revenue cost to £1,500,000 per annum.

These high costs reflect the staff intensive nature and specific design and accommodation requirements of this service delivery.

Potential may exist in partnership funding with NHS Shetland.

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**Options for Delivery of Objectives/Service Need**

- No day care or respite service provision (Laburnum House)
- Status quo
- Refurbish existing building and expanded service on other locations
- Break down service into components (ie. Segment client group provisions, geographical location provisions, or satellite unit provisions)
- New build – whole service or segmented service, locations to be considered outwith Lerwick
- Outsourcing the service externally (their solutions to a performance specification)
- Community schools

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**Children's Services**

**Family Centre**

**Purpose/Objectives/Service Need**

The Bruce Family Centre is registered by the Care Commission to provide a support service to children and families. This was not initially a requirement but a voluntary arrangement to acknowledge the quality of the work undertaken at the Centre. With recent developments at the Centre the requirement for registration and inspection has become mandatory.

The family centre seeks to give service users the opportunity to realise their potential in a safe environment, whilst promoting dignity, privacy, choice, equality and diversity in line with the requirements of the national care standards. Physical, social and emotional support is provided as well as learning opportunities. The focus is on the maintenance and development of service users' skills in a supportive environment. Service users are assisted to access education, leisure facilities, and employment.

If the family centre ceases to operate the effect on vulnerable families will be significant. The services listed above will cease to be as effective and some will stop completely.

Resultant effects will be an increase in more costly statutory involvement with many children and families.

The Bruce Family Centre, which was established as a pilot in June 2001 can no longer meet the service needs of vulnerable families. This is because of the success of the pilot, resulting in increased demands on the service, which includes new service provision within the Family Centre.

The situation requires attention because the existing services and service users cannot physically fit into the Bruce Family Centre. Any development of the service is impossible due to lack of accommodation.

Even if overcrowding was not an issue at the 82 year old Bruce Hostel, the building is in need of extensive refurbishment or replacement as heating, lighting, pointing and the roof are all in need of attention.

Any service re-design will need to comply with the national care standards and the Disability Discrimination Act 1995 as well as the usual health and safety legislation. It will also need to cater for a very diverse group of service users.

**Social/Economic/Environmental Impacts**

The service provision at the Bruce Family Centre has the following Socio-economic impacts:

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- The service reduces social stigma in the Shetland community and enables users to engage and integrate within the local community.
- Social inclusion is promoted.
- The service supports existing family units and enables family members to be released into full/part time employment.
- The service relieves the considerable pressure on family support and carers and enables them to remain stable. However it should be recognised that any reduction in service may lead to breakdowns in the family units and the resulting social impact.

**Legal Obligations**

Section 59 of the Social Work (Scotland) Act 1968, states that "It shall be the duty of a local authority to provide and maintain such residential and other establishments as may be required for their functions under this Act". Similarly Part II of the Children (Scotland) Act 1995 states that local authorities are to "arrange for the provision of such establishments...".

Integrated Children's Services believe the Family Centre is one such establishment that is essential for fulfilling Shetland Island Council's duties under these Acts.

**Financial Impacts**

Increased revenue costs are likely to include increased heating, lighting and maintenance.

Capital costs are likely to be significant as the building has been poorly maintained and is in need of considerable refurbishment. An estimation of this can only be accurately presented following survey of the building.

Emergency work to repair the Bruce Family Centre has taken from November 2007 till now (September 2008). Additional costs have been accrued to deliver services from two sites: Quarff school and Ladies Drive.

**Options for Delivery of Objectives/Service Need**

- Removal of service
- Status Quo
- Expand the service in the current building to fulfil service need
- Other location which can meet service delivery objectives

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**Community Care Projects**

**Care Home Fire Upgrades**

**Purpose/Legal Obligations:**

The upgrades are required to meet the requirements of the Regulation of Care (Scotland) Act 2001 and the Scottish Health Technical Memorandum 84 (SHTM84).

**Objectives:**

To ensure that all care homes meet the requirements of the legislation and are as safe for vulnerable people as they can be.

**Service Need:**

Should the investment not happen the Care Commission and Fire Officer could close the care centres, due to non-compliance.

**Financial Impact:**

Those premises owned by the Charitable Trust are not included in the capital programme. Care Centres owned by the SIC are.

Estimated cost is based on March 2007 figures is £341,768. There has been some slippage in the programme and costs are higher than anticipated. Currently waiting for updated cost estimates and programme timescales. NHS Shetland have made a contribution towards the cost incurred in 2007/08.



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**Community Care Projects**

**Occupational Therapy Rolling Programme**

**Purpose of project:**

To provide equipment and adaptations to meet the needs of disabled people as defined in the Shetland Disability Strategy.

**Objectives:**

- To provide equipment to maintain or increase the functional independence and/or safety of a person with permanent or substantial disabilities.
- To assist with provision of or to commission adaptations to properties in order to maintain or increase the functional independence of a person with permanent or substantial disabilities.
- To service, repair and recycle equipment in order to make best use of available funds, and ensure equipment is in safe working order.

**Service need:**

The Social Work Task Force reported to council in March 2006 and highlighted increasing levels of need in the community due to the aging population – an increase of 40% in the older population in the next 10 years and a 3-fold increase in the number of people with disabilities who will have an assessed need for these services.

The Occupational Therapist's interventions have been shown to reduce dependency and the need for costly and complex care packages or admission to hospital or residential care.

The OT service has a budget of approximately £9K including funds managed by the housing service to provide adaptations to council properties. The service issues over 1000 items per year and carries out approximately... adaptations a year to council owned and private properties. A small proportion of the community equipment (approximately 20%) is collected again, and recycled if it is possible to clean and repair items to a suitable standard. There are increasing demands on servicing and repair budgets in order to maintain equipment to the required standards and in response to Safety Action Notices issued by the Medicines and Healthcare products Regulatory Agency and Health Facilities Scotland (NHS Scotland). Towards the end of each financial year clients experience delays in receiving adaptations due to funds having run out.

There are over 100 people currently waiting for an Occupational Therapy assessment. New staff are currently being recruited which will significantly reduce the wait for an initial assessment. However this is likely to have a knock on impact on the equipment and adaptations budget, and may lead to unmet needs once assessments have been completed.

**Legal obligations:**

The Council is required under the terms of the Social Work (Scotland) Act 1968 to provide a range of services to meet assessed needs. Specific reference to OT services including provision of equipment and adaptations to property are made in subsequent legislation and guidance including NHS and Community care Act 1990 and Community Care and Health

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(Scotland) Act 2002. National targets are set by the Scottish Government for Delayed Discharges and are linked to Joint Future targets for equipment and adaptations. The Scottish Government document “Using the law to develop and Improve equipment and adaptation” provides guidance on ensuring equipment is fit for purpose.

**Social/ economic/ Environmental impact**

Provision of equipment and adaptations enables many older and disabled people to live as independently as possible in their own homes, reducing the strain on carers, minimising the requirement for paid care, hospital or residential home admission, and increasing the safety of clients, family and carers.

**Financial impacts**

Capital costs: rolling programme of approximately £9K per year spent on equipment and adaptations.

Revenue costs: No additional costs

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**Community Care Projects**

**Montfield Care Home Project**

**Purpose/Objective:**

Demographic studies indicate that the council will have to provide an additional 120 residential beds by the year 2024.

The Montfield Project is part of that development and will provide an additional 17 beds in Lerwick. The project undertakes to convert the ground floor ward of Montfield Hospital into a care centre.

**Legislation**

The Council is required under the terms of the Social Work (Scotland) Act 1968 to provide a range of services to meet assessed needs. Residential care is part of the Council's response alongside the services provided to people in their own homes.

**Impacts:**

The project will help reduce the number of people currently waiting for residential care and complement work currently being undertaken to reduce and keep the delayed discharge figures at zero. It will support people in the setting most appropriate to their needs and relieve pressure on services provided for people in their own homes to meet growing needs for care at home services.

**Financial Impacts:**

Report No ESCD-51-F agreed to place the project on the Councils capital programme at nil cost. The capital cost will be met by NHS Shetland up to £1.9 million.

There will be a requirement for revenue monies to staff and maintain the building as well as the lease agreement whereby the Council will lease the ground floor of Montfield Hospital from NHS Shetland.

There is no requirement for purchasing grounds. The estimated cost of a new build is £4M excluding the costs of site purchase.

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**Community Care Projects**

**Occupational Therapy Resource Centre**

**Project: Occupational Therapy Resource Centre**

**Purpose of project:**

To provide a joint facility that would combine office accommodation, storage, maintenance and assessment areas for the Occupational Therapy (OT) Services in Shetland.

**Objectives:**

- To provide a facility where equipment can be stored, cleaned and repaired according to relevant guidance
- To reduce waste resulting from disposal of equipment that has gone mouldy or rusted
- To allow self-selection of equipment by service users thereby reducing waiting lists and enabling OT skills to be focussed on rehabilitation and management of long term conditions.
- To provide a facility where equipment can be demonstrated to/tried out by service users, and returned to a convenient centre when no longer required.
- To provide office accommodation for the joint Community and NHS OT service

**Service need:**

The Social Work task force reported to council in March 2006 and highlighted a 3-fold increase over the next 10 years in the number of people with disabilities who will have an assessed need for services.

The Occupational Therapist's interventions have been shown to reduce dependency and the need for costly and complex care packages or admission to hospital or residential care. To counteract the increased demand for input, the service must identify alternative ways of meeting needs by increasing access to equipment through self assessment and self selection.

The OT service has an annual equipment budget of £300,000, and issues over 1000 items per year. A small proportion of the community equipment (approximately 20%) is collected again, and recycled if it is possible to clean and repair items to a suitable standard. There is often a significant wait for initial assessment, delivery and trial of the equipment, and constant pressure on budgets.

Current storage facilities are inadequate in terms of size, accessibility and condition. OT staff spend a significant proportion of time travelling between the stores and office.

**Legal obligations:**

The Council is required under the terms of the Social Work (Scotland) Act 1968 to provide a range of services to meet assessed needs. Specific reference to OT services is made in subsequent legislation and guidance including NHS and Community care Act 1990, Community Care and Health (Scotland) Act 2002. National targets are set by the Scottish Government for Delayed Discharges and are linked to Joint Future targets for equipment and adaptations.

Working practices and storage facilities are governed by the Health and Safety at Work Act (1974) and the Management of Health and Safety at Work Regulations (1999). The Medicines and Healthcare products Regulatory Agency (MHRA) provides guidance on decontamination processes for Community Equipment Loan Stores.

A recent Health and Safety report on the Market Street store noted the following:

- The temperature in the store was too low to reasonably allow staff members to work there.

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- Lack of heating and ventilation gives rise to the growth of mould on equipment causing serious concern that equipment is then provided for use by vulnerable groups.
- The facilities provided in this area do not allow the thorough cleaning required between use by different clients to be carried out effectively.
- There are no sanitary conveniences on the premises available for use by council staff.
- The lighting was not suitable or sufficient to enable maintenance and inspection of equipment to be carried out safely.
- The room is overcrowded and there is insufficient space to enable clean and dirty items to be stored separately.

A consequent Environmental Health report reiterated these concerns and noted others, namely:

- The increasing concern about the extent of antibacterial resistance within community-acquired infections.
- Potential for cross contamination between the storeroom and the auction room and lack of capacity to facilitate separation of clean items from dirty items.
- Items in the store are high risk vectors for potential infection spread when used against bare skin with vulnerable clients who may have open wounds as well as potential antibacterial resistance.
- Walls and floor are unable to be cleaned or disinfected.
- The store is not pest proof and there is evidence of ingress of birds exposing clients and staff to a range of diseases.

**Social/ economic/ Environmental impact of non-provision**

- Continued deterioration of equipment
- Staff will continue to work at risk of injury
- Clients will continue to wait for assessments and provision of equipment
- No reduction in transport costs as the OT Technician continues to deliver or collect single items of equipment.

**Financial impacts**

Capital costs: Construction was estimated in the Feasibility Study report (Nov 2007) at £2.6M over 2 years including £100K for a new computerised stock control system.

NHS Shetland would make a significant contribution to the capital cost. Initial discussions indicate that approx 50% would come from NHS Shetland. The preferred site is on NHS property and the lease or purchase agreement would need to be negotiated.

Revenue costs: It is estimated that these would be met from within existing budget allocations assuming that the operating costs for Quendale House and the Market Street store were no longer required.

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**Community Care Projects**

**Eric Gray Resource Centre (EGRC)**

**Purpose of project:**

The re-design of day services for adults with learning disabilities to take account of the increasing number of people with high support needs.

**Objectives:**

To meet the wide range of needs by the provision of 4 service strands:

- A complex needs service – predominantly for people with profound and complex learning disabilities, many of whom have additional physical disabilities (16 adults needing this service in 2006; 27 by 2020).
- A highly structured service – predominantly for people with autistic spectrum conditions (5 adults needing this service in 2006; 26 by 2020).
- More community based jobs – access to work at COPE or via Moving On for people with high support needs (24 adults needing this service in 2006; 48 by 2020).
- A new 'EGRC' – for those who need pre-work opportunities combined with education and social activities (30 adults needing this service in 2006; 59 by 2020).

To achieve this through a phased development of new build accommodation; refurbished accommodation and enhancement of the staff team.

**Current situation:**

The number of people with learning disabilities or autistic spectrum conditions is increasing significantly throughout the UK. In Shetland in 2006 there were 92 named adults eligible for support on account of their learning disabilities, by 2020 there will be 196, of whom 160 are expected to require the services listed above.

In the past people with profound and complex needs often did not survive to adulthood. This is no longer the case, so not only are the numbers of service users increasing, but also the complexity of care.

The design phase of the feasibility study is nearing completion. In the first instance, it will propose building a new day centre in which to provide a complex needs service. This is urgent as (1) the heating and lighting at EGRC is insufficient for some existing service users (for example those who cannot maintain their own body temperature); and (2) some existing service users cannot fit into the EGRC and EGRC staff are having to support these adults in school premises.

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In order to meet the needs of the other service users further new build and/or refurbished accommodation will be needed once this initial stage is completed. A single building for all day services for adults with learning disabilities is considered inappropriate in the long term due to the wide range of needs (for example, many people with autism cannot cope with a busy environment).

**Potential impacts:**

Day services help adults with learning disabilities to stay at home with their families for longer, as well as giving the service users the opportunity to develop or maintain their skills and knowledge.

There is no statutory obligation to provide day care but there are various statutory obligations to provide other services for people with disabilities. If insufficient day care is provided, the demand for residential placements will go up and there is a statutory requirement to provide or purchase these. It would be more difficult and more expensive to meet an increased need for local accommodation than an increased need for day care. A single placement south for an adult with complex needs currently costs between £180,000 - £400,000 per annum.

**Capital costs:**

The interim feasibility study report calculated the capital required to deliver all 4 service strands as £7million (at 2006/7 prices). It is likely that this could be spread across 3-5 years.

**Revenue costs:**

The interim feasibility study report calculated the revenue required to deliver all 4 service strands as (2006/7 prices):

Staff costs: £3,085,721pa

Non-pay costs: £624,854pa

At that time EGRC's revenue budget was £928,910 pa.

It is expected that the full feasibility study will be available by the end of 2008.

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**Community Care Projects**

**Viewforth Replacement Care Home for Lerwick**

**Purpose of project:**

To increase the capacity of older people's services in terms of long term care options; specifically residential care places and extra care housing/supported accommodation across all areas of Shetland, providing a further 120 places over the next 10-15 years

Specifically to build a new Viewforth Care Centre as a dedicated Care Centre for service users with dementia, situated in Lerwick, as well as providing day care and running a Care at Home services for service users with dementia.

**Objectives:**

General

- To upgrade existing facilities to meet higher levels of dependency and good practice guidelines for dementia care
- To reduce unit costs by increasing capacity close to existing care centres and providing additional core and cluster models of care
- To share support functions with other services wherever feasible e.g. catering and cleaning
- To support community based health services so that health care services can be provided in care settings e.g. physiotherapy and community nursing services.

Specifically for Viewforth:

- 20 to 24 Units for residential care, depending on available site
- 8 to 10 Units for extra Care Housing, depending on available site
- The total number of units should not be lower than 28 and not be larger than 32.
- Adequate facilities for staff who provide care within the complex, as well as staff who work in the community, like care at home, meals on wheels, etc.
- Day Care facilities for 12-16 service users, depending on site
- Combined treatment/assessment room for visiting services, i.e. GP, Community Nurses, OT, and others.
- Kitchen facilities, (including storage) for up to 50 service users.
- Laundry facilities with the capacity to process washing for up to 50 service users.
- Garden

**Service need:**

Population projections show an anticipated increase of 60% in the numbers of older people by 2024 and that the incidence of dementia in older people will double in that time.

A summary of data available and proposals for increased capacity discussed with SIC members in 2008 is attached.



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The existing building has reached its capacity and requires major refurbishment in order to meet Care Commission standards and levels of service need.

**Legal obligations:**

The Council is required under the terms of the Social Work (Scotland) Act 1968 to provide a range of services to meet assessed needs. Subsequent legislation and guidance which applies includes NHS and Community Care Act 1990, Community Care and Health (Scotland) Act 2002. National targets are set by the Scottish Government for Delayed Discharges and reducing admissions to hospital by shifting the balance of care to the community and community based facilities.

Community Care services are subject to the provisions of the Regulation of Care (Scotland) Act 2001. The Care Commission carries out inspections against national care standards.

The Council has to fulfil its duties under the Disability Discrimination Act 1996

**Financial impacts**

Anticipated Cost = £4,200,000 at todays prices.

This excludes the cost of Extra Care Housing provision.

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**Community Care Projects**

**Isleshavn Replacement Care Home for Yell**

**Purpose of project:**

To increase the capacity of older people's services in terms of long term care options; specifically residential care places and extra care housing/supported accommodation across all areas of Shetland, providing a further 120 places over the next 10-15 years

Specifically, to replace the existing Isleshavn care centre in Mid Yell.

**Objectives:**

General

- To upgrade / replace existing facilities to meet higher levels of dependency and good practice guidelines for dementia care
- To reduce unit costs by increasing capacity close to existing care centres and providing additional core and cluster models of care
- To share support functions with other services wherever feasible e.g. catering and cleaning
- To support community based health services so that health care services can be provided in care settings e.g. physiotherapy and community nursing services.

Specifically for Isleshavn:

- 16 to 18 Units for residential care, depending on available site
- 6-8 Units for extra Care Housing, depending on available site
- Adequate facilities for staff who provide care within the complex, as well as staff who work in the community, like care at home, meals on wheels, etc. The rooms provided should at least consist of:
  - Day Care facilities for 6-10 service users, depending on site
  - Combined treatment/assessment room for visiting services, i.e. GP, Community Nurses, OT, and others.
  - Relatives room for overnight stays with en-suite shower/wc.
  - Café-style community facility
  - Kitchen facilities, (including storage) for up to 26 service users and up to 40 additional meals on wheels for service users in Yell.
  - Laundry facilities with the capacity to process washing for up to 40 service users.

**Service need:**

Population projections show an anticipated increase of 60% in the numbers of older people by 2024 and that the incidence of dementia in older people will double in that time.

A summary of data available and proposals for increased capacity discussed with SIC members in 2008 is attached.

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The existing building has reached its capacity and requires major refurbishment in order to meet Care Commission standards and levels of service need.

A feasibility study undertaken in 2004 concluded that there was insufficient space on the current site to allow for the necessary level of refurbishment/upgrade to the existing care centre facilities without compromising the range of services that could be provided and that no additional care places could be created.

**Legal obligations:**

The Council is required under the terms of the Social Work (Scotland) Act 1968 to provide a range of services to meet assessed needs. Subsequent legislation and guidance which applies includes NHS and Community Care Act 1990, Community Care and Health (Scotland) Act 2002. National targets are set by the Scottish Government for Delayed Discharges and reducing admissions to hospital by shifting the balance of care to the community and community based facilities.

Community Care services are subject to the provisions of the Regulation of Care (Scotland) Act 2001. The Care Commission carries out inspections against national care standards.

The Council has to fulfil its duties under the Disability Discrimination Act 1996

**Financial impacts**

Budget Costings

Anticipated Cost = £3,600,000 at today's prices.

This excludes the cost of Extra Care Housing provision.

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**Community Care Projects**

**Older People's Services Rolling Programme**

**Purpose of project:**

To increase the capacity of older people's services in terms of long term care options; specifically residential care places and extra care housing/supported accommodation across all areas of Shetland, providing a further 120 places over the next 10-15 years

**Objectives:**

- To upgrade existing facilities to meet higher levels of dependency and good practice guidelines for dementia care
- To reduce unit costs by increasing capacity close to existing care centres and providing additional core and cluster models of care
- To share support functions with other services wherever feasible e.g. catering and cleaning
- To support community based health services so that health care services can be provided in care settings e.g. physiotherapy and community nursing services.

**Service need:**

Population projections show an anticipated increase of 60% in the numbers of older people by 2024 and that the incidence of dementia in older people will double in that time.

A summary of data available and proposals for increased capacity discussed with SIC members in 2008 is attached below.

**Legal obligations:**

The Council is required under the terms of the Social Work (Scotland) Act 1968 to provide a range of services to meet assessed needs. Subsequent legislation and guidance which applies includes NHS and Community Care Act 1990, Community Care and Health (Scotland) Act 2002. National targets are set by the Scottish Government for Delayed Discharges and reducing admissions to hospital by shifting the balance of care to the community and community based facilities.

Community Care services are subject to the provisions of the Regulation of Care (Scotland) Act 2001. The Care Commission carries out inspections against national care standards.

**Financial impacts**

Capital costs: £1.5-£2M Per annum for the next 10 years.

NHS Shetland could make a significant contribution to the capital cost.

Revenue costs: Estimated £750,000 per annum as dependency levels increase and nos. of people supported increase. Further work is needed to develop detailed timetable and costs for specific phases of this project. This is in addition to the revenue costs for Montfield and in adult services.

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**Schools Service**

**Maintenance / Refurbishment Programme**

**Purpose of project:**

To maintain the fabric of the existing school estate

**Objectives:**

- To meet statutory obligations for health and safety, disabled access and environmental health
- To ensure an appropriate standard of building maintenance and refurbishment

**Service need:**

Programme set out below.

**Legal obligations:**

Health and Safety, Disabled Access and Environmental Health legislations.

**Financial impacts**

**Schools Service Maintenance List – Implementation Programme**

School	Maintenance Required
Anderson High School	Old English Block – New sash and case windows – listed building (Historic Scotland) Piped supply systems – copper pipework failures. Piped supply systems – external/perimeter distribution pipework. Electrical systems – local switchgear upgrades and renewals. Flat roofing – isolated renewals and spot repairs.
ASN Gressy Loan	Replacement boilers or district heating required within 5 years.
Baltasound School	Old school – electrical rewire required.
Bells Brae Primary School	3 storey block – new windows required within 5 years. Special needs – aluminium curtain wall and door screens 3 years. Playground resurfacing due now. 3-storey block – lack of ventilation. Fire alarm replacement to L2 standard,

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	including emergency lighting systems.
Brae High School	Phase 3 roofing still to do. Switchgear and electrical system rewiring – phased plan. Boiler plant requires renewal.
Bressay Primary School	New kitchen required.
Burravoe Primary School	Electrical system life expired – rewire required.
Cunningsburgh Primary School	Renew existing electrical underfloor heating system – beyond service life. Electrical system approaching life expiry – renewal within 5 years.
Dunrossness Primary School	Electrical system life expired – rewire required now.
Hamanvoe Primary School	Existing asbestos cement roof expired. New roof £120k. Complicated abutment/valley details. Renew boiler plant (new boiler-house structure complete)
Janet Courtney Hostel	Electrical Rewire required – existing system life expired. Replumb existing copper pipework systems life expired. Phased flat roofing renewals, depends upon life span. External repairs and liquid plastics paint system.
Mossbandk Primary School	Gym hall roof – existing asbestos cement roof life expired. New roof £80k.
New Bruce Hostel	Pump replacement programme. Phased flat roofing renewals, depends upon life span.
Old Bruce Hostel	Mid Garth Wall
Olnafirth Primary school	Fabric, structure and services life expired and in poor condition; major investment needed now.
Sandwick Junior High School	Defective sub and superstructure blockwork below canteen; structural

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	assessment required. Fire alarm replacement to L2 standard. Include emergency lighting systems.
Scalloway Junior High School	Provision/conversion of external basement to storage area (lack of storage in school)
Sound Primary School	Phase 3 rendering. Gym hall rubber/elastomeric roof renewal. External fencing renewals (rolling over 5 years)
Whalsay Secondary School	Windows aren't performing; listed replacement required. Water ingress through stonework (150 year old listed building, problems at parapets, leadwork).

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**Schools Service**

**Anderson High School Replacement (including Train Shetland move)**

**Purpose of project:**

A school to deliver secondary education from Secondary 1 (S1) to Secondary 6 (S6), for the pupils of Lerwick and the surrounding area, pupils transferring from the small islands and pupils transferring from junior high schools. Although to be built in Lerwick, it is a school which serves the needs of the whole Shetland community.

The space should meet the learning needs of all pupils at present and be flexible enough to accommodate learning needs of the future (through technological advances, changes to models of delivery such as the Curriculum for Excellence, etc). It should be fully compliant with the disabled access requirements.

The space should embrace the concept of community use and have the ability to serve pupils, parents, learners and other service users beyond the school day. Where possible spaces for community use should be located in areas which can be closed off from the rest of the building (for reasons of safety, security and supervision).

**Objectives:**

When planning for future service needs, the following factors need to be considered in deciding on the scope and size of the new Anderson High School:

- Implementing the Curriculum for Excellence;
- The Additional Support for Learning Act;
- The forthcoming review of the structure of the curriculum and the qualifications framework in terms of what that might mean for pupils in Secondary 3 and Secondary 4 and how that might impact on the current Junior High School model (currently out to consultation by the Scottish Government); and
- A national drive to deliver more vocational learning opportunities.
- School Roll
- New developments in learning and teaching, and exam provision, using ICT
- Blueprint for Education
- This accommodation schedule allows for linking into the Gressy Loan Additional Support Needs Unit.

**Service need:**

- disabled access is restricted in some areas of the site
- the maintenance liability is high, due to the lifespan and condition of the current building
- dining room space is very limited (so the school will have difficulty in meeting new healthy eating legislation)
- the Halls of Residence is used to provide meals as lunchtime and their dining room space is limited and operating at near capacity



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- circulation and gathering spaces (to acknowledge the local weather conditions) is insufficient and not suitable for pupil's needs
- examples of recent school disruption include:
- during the past winter, the school had to close unexpectedly as a result of health and safety issues concerning plumbing and electrical problems.
- last session, a partition wall was dismantled, over a weekend, to try to repair a burst pipe in a stairwell
- before the summer holidays, the school experienced a burst heating pipe, flooding three floors
- problems in external pipework have caused flooding and loss of heating to parts of the school
- School closure causes disruption to the pupils' learning as well as transport and childcare difficulties. It also causes problems for the Halls of Residence, where the heating and electrical systems are linked to the school, and pupils are being sent to another building with the same problems as the school.

**Legal obligations:**

Health and Safety, Disabled Access and Environmental Health legislations.

**Financial impacts**

Target budget set at £49m.

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**Schools Service**

**Little Tikes, Pre-School Provision at Tingwall School**

**Purpose/Objectives**

To provide alternative accommodation for Little Tikes, Partner Provider of pre-school education for the Tingwall, Nesting and Girlsta area.

**Service Need**

To provide pre-school places for 3 and 4 year olds for the Tingwall, Nesting and Girlsta area.

There is no specific service need to support this capital investment proposal, as there is capacity at existing provision elsewhere to accommodate the number of children currently attending Little Tikes.

Services Committee considered a report on a feasibility study at the meeting on 28 August 2008 where they agreed to place the Little Tikes capital project into the capital programme. They have requested that a larger traditional built extension to Tingwall Primary School is progressed.

**Implications of no further capital investment**

There is capacity at existing provision elsewhere.

Councillors have not accepted that the service to pre-school children in this area could be provided at existing establishments.

Parents have requested that their children be kept together on one site from the three areas and the cheapest way to do this in the longer term is to build an extension to Tingwall Primary School.

**Socio-economic Impact**

The following is an excerpt from Little Tikes Playgroup Business Plan:

The local community and parents of children attending Little Tikes Playgroup are keen to emphasise the community benefit of a group in their local area. Children who attend pre-school education together form friendships from a very early age, and are at an advantage when going on to start school. Their self-esteem and confidence are much greater through knowing their peers, than for those joining from outside the community. The benefits to the parents of these children through the social contacts made through the groups' rotas and fund-raising activities, assists in integrating new families into the area (many of the new houses in the area have been built by families from outwith). These connections go on throughout the community, as their children go through youth clubs and play schemes. Parents gain valuable committee experience and skills through their experience at Little Tikes, which are transferable to both further and voluntary work and committees, and to their working lives.

If Little Tikes Playgroup has to close, and the children are divided up and sent to other providers, this community capacity is lost, and ongoing benefits to other community groups and committees in the area are lost. The local community involvement in a pre-school group sows the seeds for the future strength of the community.

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**Legal obligations**

Direction under the Standards in Scotland's Schools Act 2000 requires local authorities to make provision to ensure that all 3 and 4 year olds have access to at least 412.5 hours of pre-school provision per annum. In November 2007, the new Scottish Government, through its Concordat, increased this entitlement to 475 hours. This works out a minimum of 2.5 hours per day for 5 days a week for the 38 weeks of term time.

**Financial Impact**

The Community Planning partnership intends to submit a bid to ERDF for funding and Little Tikes would be one of the projects which this funding would be used to support if they were successful in their bid. This would cover 40% of the costs. Eligibility for the bid is subject to the group offering a childcare element as well as pre-school education.

**Options**

There are a number of options which have been explored in the feasibility study.

**The do nothing option**

If the Council were to do nothing in respect of supporting the provision of premises for the group the Group have indicated that they would find it difficult to continue to provide the service beyond the school session 2008-09. If at this point they were to close, then the children who attend the group would be relocated into other pre-school settings. There are currently places available in the two closest nursery classes (Whiteness and Scalloway) which could accommodate all the children.

A stand-alone portakabin built adjacent to the Tingwall Primary School would cost £416,500. This is the cheapest option involving portakabin.

A stand-alone traditional build adjacent to Tingwall Primary School would cost £458,500.

A larger portakabin extension to Tingwall Primary School would cost £420,000.

A larger traditional build extension to Tingwall Primary School would cost £383,000. This is the cheapest option except the do nothing option.

A portakabin unit extension to Nesting Primary School and to Tingwall Primary School would cost £588,000.

A traditional built extension to Nesting Primary School and to Tingwall Primary School would cost £530,000.

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**Schools Service**

**Lerwick Library Redevelopment, including replacement Adult Learning**

**Purpose/Objectives**

To enlarge public library provision in Lerwick enabling a high proportion of the book stock to be on public display (60% currently in reserve), to improve children and young people's areas, provide dedicated parking and loading areas for the two Mobile Libraries, and to provide study space for young people and adults and

**Service Need**

Widespread public dissatisfaction with the current public library building in Lerwick was presented through the external Public Library User Survey, representations to elected members and library staff and through extensive public consultation exercises undertaken 2006 – 2008, with views of all sectors of the Shetland community being sought and received.

Council considered the issues and options during 2006 and 2007, and in the light of a comprehensive Feasibility Study, the council in September 2007 confirmed its decision to improve public library provision in Lerwick through re-modelling the former Old Library Centre, former Museum and St. Ringans, with an added remit to consider the increased revenue costs. During discussion, Members were in general agreement that the existing Library was "inadequate for its current use." (min. ref. 120/06) It was further decided to include the project in the Capital Programme, with £100,000 being immediately available for Design Costs. £80,000 of this was carried forward to the financial year 2008/9. This intention was confirmed in the council's consideration of the Capital Programme in February 2008.

**Implications of no further capital investment**

- A decision not to proceed with the redevelopment would result in widespread public dissatisfaction
- In line with the council's policies on public involvement, consultation and information, there is high public awareness and support for the project
- In line with the council's wish to capitalise on existing, rather than new buildings, this project seeks to renovate the semi-derelict and deteriorating former museum
- The council has an obligation to maintain its estate. The roof, glazing and upstairs cladding of the former museum are in extremely poor condition, with significant leaks causing instances of flooding to the Old Library Centre.

**Socio-economic Impacts**

As one of the council's universal, public services, a successful, accessible, Library makes an important contribution to personal, social and commercial development. Throughout history, ready and free access to learning through a public library has reaped demonstrable results. With the exciting new addition of web-based resources and Internet access an improved service would add significant benefit, particularly in the remote, fragile economic context of Shetland.

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A welcoming, well-designed, comfortable, user-friendly 'county' library is an important draw for both visitors and Shetland residents, providing learning opportunities, recreational stimulus and an important and proven contribution to positive mental health.

A significant proportion of the Shetland population would benefit from the proposed improvements. In recently published Performance Indicators from Audit Scotland, Shetland Library came second in Scotland in two categories; with 35% of the population (7595) borrowing materials from the library and 24% of folk (5158) using Learning Centre facilities. Library computer terminals were accessed last year on 24,684 separate occasions

### **Legal obligations**

The provision of a public library service is statutory under Section 163(2) of the Government (Scotland) Act 1973. The Council is required "to secure the provision of adequate library facilities for all persons in their area".

The Scottish Government has defined the term 'adequate' through the introduction of the Public Library Quality Improvement Matrix. Shetland Library was inspected against the national standards set out in the Matrix in June 2008 and the existing buildings were seen to be a barrier to the delivery of high quality services.

In addition, St Ringans and the Kirk Hall (currently the Learning Centre) are Category B Listed Buildings, which the council has legal obligation to maintain.

### **Financial impacts**

The 2007 Feasibility Study estimated the project costs as:

£2,477,000 Capital costs

£74,780 p.a. Revenue costs

£130,000 has already been spent / committed in Capital Programme Feasibility and Design costs

### **Options**

A range of options from 'Do Nothing' through renovation and new build on a range of sites was explored in the 2007 Feasibility Study, with the Redevelopment being favoured. This approach was subsequently endorsed by the new council in late 2007 (Min Ref 36/07)

A Project Board is overseeing the development and further, detailed options on scale and style of redevelopment are scheduled to be presented to council in December 2008

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**Schools Service**

**Sandwich Junior High School Additional Classrooms**

**Purpose / Objectives / Service Need - identifying the service need and what would happen if the capital investment did NOT happen.**

- Sandwich Junior High School Primary department currently has a roll of 107 pupils split into five composite classes. The classes have between 20 and 23 pupils in each class.
- Projections for session 2010-11 show a P1 intake of 27 pupils.
- Maximum allowable number for a composite class is 25 pupils.
- It will be very difficult to retain the current 5 class structure within the existing accommodation.
- There would be very little room for accommodating even a modest increase in pupil numbers which result from the proposed housing developments.
- The Scottish government's concordant gives a commitment to reducing class sizes for pupils in P1 to P3 to 18 whilst also expanding pre-school entitlement.

**Social / Economic / Environmental impacts**

- The proposed extension would offer an enhanced facility for the community to access during out of school hours.
- There will be possible employment and training opportunities through community use of the school.
- The primary department currently employs approximately 15 members of staff on a full time, part time and visiting basis. Over a period of 10 years the extension would expect to directly benefit 200 pupils.
- It is expected that this contract would be attractive to local contractors.

**Legal Obligations**

The Education authority has a statutory duty under The Standards in Scotland's Schools etc Act 2000, to provide:

- a free nursery place for all three and four year olds
- accommodation to "secure the education is directed to the development of the personality, talents, and mental and physical abilities of the child or young person to their fullest potential"

Minimum class sizes are detailed in Education (lower primary class sizes) regulations 1999

**Financial Impacts - capital and ongoing running costs**

Probable costs of £451,600 (2007 prices)

There will be an additional revenue cost in maintenance. This is estimated to be c. £1600 per annum.

Additional staff may be required but these are likely to be redeployed from elsewhere in the service.

**Options for considering how to deliver objectives / service need**

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The land on which the proposed extension is to be built is owned by the schools service. The restricted site and existing buildings mean that there is only one realistic outline option for this project however there is some flexibility in the internal details.

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**Schools Service**

**Happyhansel Primary School, Additional Classrooms**

**Purpose / Objectives / Service Need - identifying the service need and what would happen if the capital investment did NOT happen.**

Happyhansel primary school's accommodation has become too small for the effective delivery of its service. Detailed below are the main areas of concern:

- There is an extreme lack of storage facilities.
- There is no facility at present for meetings of a confidential nature to take place – the office is currently shared by the school secretary and the head teacher.
- The support for learning teacher has no base to provide either one-to-one or small group sessions.
- By necessity, the small staffroom, in addition to its prime function, is utilised for the storage of teaching and learning equipment and professional reference material, support for learning and a venue for interviewing parents at a time when the office is being used by the secretary. On days when visiting staff are in the school there is insufficient room to house all members of staff.

**Social / Economic / Environmental impacts**

- The proposed extension would offer an enhanced facility for the community to access during out of school hours.
- The school currently employs approximately 25 members of staff on a full time, part time and visiting basis. Over a period of 10 years the extension would expect to directly benefit 200 pupils.
- It is expected that this contract would be attractive to local contractors.

**Legal Obligations**

The Education authority has a statutory duty under The Standards in Scotland's Schools etc Act 2000, to provide:

- a free nursery place for all three and four year olds
- accommodation to "secure the education is directed to the development of the personality, talents, and mental and physical abilities of the child or young person to their fullest potential.
- Minimum class sizes are detailed in Education (lower primary class sizes) regulations 1999.
- The current accommodation makes meeting the legislative requirements of the ASL act 2004 increasingly difficult.

**Financial Impacts - capital and ongoing running costs**

Probable costs of £300,000 est.

There will be an additional revenue cost in maintenance. This is estimated to be c. £1600 per annum.

Additional staff may be required but these are likely to be redeployed from elsewhere in the service.

**Options for considering how to deliver objectives / service need.**

The feasibility study for this project is outdated and would need to be revisited.



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**Schools Service**

**Lerwick Pre-School and Primary Provision**

**Purpose/Objectives**

To consider the needs for primary school provision throughout Lerwick. Capital Projects Management Team approved funding for a feasibility study at a meeting on 2 October 2006. This feasibility study is being progressed currently.

**Service Need**

To consider the condition of the fabric of the buildings and services at Bells Brae Primary School, Sound Primary School and Bressay Primary School and to assess the fitness for purpose of these buildings for the pupil numbers for Curriculum for Excellence.

**Implications of no further capital investment**

The maintenance cost for each school needs to be considered as the Council has an obligation to maintain its estate.

**Socio-economic Impact**

The present site at Bells Brae Primary School is highly developed, with insufficient parking space for staff and visitors. There is an issue with traffic management around the site at drop off and pick up times. There have been some traffic calming measures but it continues to be hazardous.

The access to the buildings is not ideal particularly for pupils with additional support needs.

**Legal obligations**

The Local Authority has a statutory duty, the Standards in Scotland's Schools etc Act 2000, to provide accommodation to secure that the education is directed to the development of the personality, talents and mental and physical abilities of the child or young person to their fullest potential.

**Financial Impact**

The feasibility study will indicate the financial implications for any option which is suggested.

**Options**

There are a number of options being explored for each school.

Do nothing

Extension

Replacement

Refurbishment

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**Shetland College**

**Development of Phase 3**

**Summary of Option 1 for Phase 3, Shetland College**

The strategy for Option 1 is to create a 2-storey building that provides 1300sq.m of floor space to cater for the needs of Shetland College. The additional accommodation is situated directly to the West of Phase 2 on the existing car park. A new central foyer area with reception can be designed at the interface between the two buildings and the existing access stairs, lift and core service facilities can be adapted and re-used. This will enhance and improve the both the appearance and overall efficiency of the new and the existing buildings. The external appearance of the new build could either replicate the existing structure or can be designed to enhance the visual appearance of the college.

Communal facilities such as the library, canteen and break out spaces are clustered near the entrance foyers for Phase 1 and Phase 2/3 giving a focal point for student amenities. It is also proposed to block up the central access road and improve the external landscaping between the buildings to enhance the overall appearance of the site and go some way to improving the pedestrian circulation, quality of space and the creation of a college campus atmosphere.

The construction of a new building will only partially solve the identified shortfall in accommodation and the re-organisation of existing departments will be required as part of an overall strategy

**Purpose, Objectives and Service Need**

“Shetland College UHI seeks to make a major contribution to the local economy through the provision of high quality further and higher education and training which meets the needs of the population and employers”.

*(Shetland College Mission Statement)*

This is translated into a set of vision statements:

- To encourage staff and students to realise their potential
- To be innovative and responsive providers of high quality tertiary education
- To be dynamic and innovative in meeting industry needs
- To respond to community needs
- To promote distinctive research, scholarship and learning in Shetland

With values of:

- A culture of enterprise and innovation
- Effective working partnerships

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- Sound governance and management
- Consistently meeting and exceeding customer expectations
- A commitment to quality standards
- Research, scholarship and learning

The College is managed by a Board of Management of 9, of whom 6 are members of Shetland Islands Council with further representation from HIE, the Federation of Small Businesses and NHS Shetland.

The Board of Management have agreed 8 Strategic Priorities for the period 2008-2011. These are as follows:

1. To promote broad-based Further and Higher Education, Lifelong Learning and Social Inclusion through the identification of the training, education and vocational needs in Shetland and delivery of provision to meet them;
2. To play a significant role in developing the Shetland economy through meeting the needs of established and new industries and services;
3. To promote social and cultural development and Shetland's heritage;
4. To maintain a position of financial health and stability;
5. To strengthen the governance and management arrangements;
6. To develop the physical environment and IT infrastructure through continued investment, and use of ICT and maintenance of the College properties;
7. To promote achievement of excellence through commitment to Quality Standards and continued investment in staff development;
8. To ensure a quality experience for all learners.

The Board therefore, have a strategic priority to develop the physical environment and infrastructure of the College to ensure the provision of high quality further and higher education in Shetland.

I presented a report to the Board of Management on 09 January 2008 which introduced a feasibility study commissioned by the Board for the development of a Phase 3 building at Shetland College to address the accommodation shortages identified.

The Background section sets out clearly the service need for additional accommodation.

The feasibility study was carried out by Redman and Sutherland and a copy can be made available.

The Board, at its meeting on 09 January 2008 determined that Option 1 in the Feasibility Study should be pursued.

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If this capital investment were not to happen, the College would not be able to meet its strategic priorities and fulfil its potential.

- Construction skills would continue to be limited to carpentry and joinery with no opportunity to expand numbers or consider additional trades;
- Studio space for arts students would continue to be inadequate for professional development;
- There would be continued pressure on teaching spaces with the need to use spaces outwith the College from time to time;
- The social and recreational spaces required to give students a “full student experience” would not be available;
- Hospitality would continue to be delivered off campus in unsuitable premises with no prospect of developing courses or numbers;
- There would continue to be a lack of meeting spaces and staff accommodation – office, workspaces – would be cramped;
- Storage would continue to be inadequate;
- There would be continuing challenges in meeting Health and Safety requirements.

**Social, Economic and Environmental Impacts**

As stated, the College seeks to make a major contribution to the local economy through the provision of high quality further and higher education and training. This is currently hampered by not having sufficient space to deliver learning and by having accommodation which is shed-like in appearance. It is not in keeping with the high standards set by the Council for its schools buildings or by organisations such as the Museum or NAFC Marine Centre. This undoubtedly has an impact on students (and parents) perceptions of the College.

The College has a critical role to play in the social and economic future of Shetland and it is therefore vital that it has an estate which is fit for purpose for now and into the future. Currently that is not the case.

**Legal Obligations**

The Further and High Educational (Scotland) Act 1992 requires local authorities to “secure adequate and efficient provision of further education”

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### **Financial Impacts**

The capital costs of Option 1 have been revised through discussion with Capital Project team in July 2008 to reflect today's prices.

The total cost is now estimated to be £4,522,000 broken down as follows:

Design	726,000
Construction	3,300,000
Furniture Fittings, Equipment	330,000
Contingencies	<u>166,000</u>
	<b>£4,522,000</b>

The estimated building works costs are based on the information available at this very early stage and these costs should be treated as indicative and figures recognised as ballpark only.

Shetland College has made approaches to the Scottish Funding Council for funds but there is currently no funding available and there won't be till at least the next comprehensive spending review outcome is known. The College does however, receive an annual sum from the Funding Council for capital works and over the next three years, this could amount to £300,000 towards Phase 3.

An application has been submitted to UHI for ERDF Funds of £1.8million but is not being advanced by UHI at this time as the bid scored low against UHI priorities. Initial enquiries have also been made with HIE re. potential funding under their transformational projects funding but this is at a very early stage.

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**Shetland College**

**Adult Learning  
Train Shetland (Vocational)**

Consideration for the accommodation of Adult Learning and Train Shetland (Vocational) is required as part of the Library development and the Anderson High School respectively.

An accommodation schedule has been completed for Adult Learning.

Consideration for Train Shetland (Vocational) to relocate to North Ness Business Park or as part of development of WAG site should be considered.

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**Sport and Leisure Services**

**Capital Rolling Programme – Play Areas**

**Purpose**

Following a review of play area provision throughout Shetland, targeted communities were found to:

- Have play areas which were in poor condition with ageing and un-challenging equipment
- Have play areas with few items of equipment and low play values
- Have multiple play areas in close proximity with duplication of equipment
- Have play areas situated in communities where there are few or no children residing close by

The Council agreed to undertake a 4-year programme of works to build 3 new play areas, refurbish 12 existing play areas and decommission 11 existing play areas. Much of this work has now been done and in addition to the work identified in the review, there is now a need to continue the ongoing refurbishment of the remaining play areas throughout Shetland to ensure that they are fit for purpose and meet current health and safety standards.

**Objectives**

The main objective for these proposed Capital works is to rationalise the number of play areas on the Council's portfolio by decreasing the overall number of areas, while developing higher quality sites in locations more suited to communities. Fewer play areas with more modern equipment will decrease pressure on maintenance budgets and will have a positive impact on the general safety and condition of all Council owned play areas.

**Service Need**

The provision of Play Areas throughout Shetland provides the following service benefits:

- Promotes fitness, health and well being of children in a controlled and safe environment
- Develops children's involvement in outdoor activities
- Promotes children's social skills
- Promotes community involvement

**Impact of Service Need not being met**

Without capital expenditure, Council revenue budgets would not be sufficient to undertake the required equipment replacement, repairs and DDA adjustments that are required on an annual basis. To comply with safety regulations play equipment would have to be removed and in some cases popular play areas might have to be closed to protect children.

**Capital Programme Prioritisation**  
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**Social – Economic – Environmental Impacts**

Play is an essential part of every child's development. Play areas provide children with an outdoor facility where they can undertake physical and mental challenges and make decisions involving aspects of danger and risk but within a controlled and safe environment.

Play areas also provide an important meeting point for social interaction between children of varying ages and abilities and provide an important focal point for communities.

Play area refurbishments also provide a boost to the Shetland economy as local contractors and professional consultants undertake projects.

Most play areas in Shetland are located in green space area. They provide a healthy and welcoming environment for all children and young people that use them and they are all built to a high standard with minimal impact on the environment in which they are situated.

**Legal Obligations – Is their one?**

Shetland Islands Council is responsible for all unsupervised, publicly used children's play areas and has a legal and moral responsibility for the care of children using these sites. Therefore, by virtue of these responsibilities the Council is required to insure, inspect, repair and maintain all play areas to the required European Standards BS EN 1176 and BS EN 1177.

**Financial Impacts – Capital and Revenue**

**Capital** – The proposed project and estimated timescale and expenditure of future play area projects are illustrated in the table below:

**Revenue** - Fewer play areas will have a direct effect on insurance costs; with each decommissioned play area a sum of £150 will be saved on the annual insurance premium. For 2009/10 the saving will be £300. Time required by staff to undertake regular inspections and initiate repairs will also decrease.



**Capital Programme Prioritisation**  
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<b>Play Area</b>	<b>Action</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14</b>
<b>Gulberwick</b>	Add equipment	5,000				
<b>Mossbank</b>	Add equipment	5,000				
<b>Staney Hill 1</b>	Refurbish	75,000				
<b>Staney Hill 2</b>	Decommis sion	2,500				
<b>Voderview</b>	Refurbish	65,000				
<b>Nederdale 1</b>	Refurbish	55,000				
<b>Nederdale 2</b>	Decommis sion	2,500				
<b>Twageos</b>	Refurbish		50,000			
<b>Tarland</b>	Refurbish		45,000			
<b>Cullivoe</b>	Refurbish		80,000			
<b>Uyeasound</b>	Refurbish			70,000		
<b>Toogs</b>	Refurbish			55,000		
<b>Sycamore Ave</b>	Refurbish			50,000		
<b>Skelladale</b>	Refurbish				65,000	
<b>Stucca</b>	Refurbish				50,000	
<b>Mossbank PS</b>	Refurbish				50,000	
<b>Nesting PS</b>	New Build					80,000
<b>Stendaal</b>	Decommis sion					5,000
<b>Sandwick Central</b>	Refurbish					45,000
<b>Port Arthur</b>	Refurbish					45,000
		<b>210,000</b>	<b>175,000</b>	<b>175,000</b>	<b>175,000</b>	<b>175,000</b>

The table below show further potential projects, which are to be considered for possible future inclusion in the programme of works.

<b>Play Area</b>	<b>Action</b>	<b>Approx Cost</b>
<b>Foula PS</b>	Refurbish	<b>50,000</b>
<b>Fetlar PS</b>	Refurbish	<b>50,000</b>
<b>Sandness</b>	New Build	<b>35,000</b>

All projects are professionally managed to ensure best value and all works are competitively tendered to secure the most competitive price for the works.

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**Option Appraisal to deliver objectives – service need**

In advance of reporting this review to Council, Officers undertook significant amounts of community consultation with elected members, communities, schools and user groups. The purpose of this consultation was to identify the most suitable options for the provision of play facilities in each of the communities identified for action. Therefore, based on this consultation, community agreed solutions were identified for the long-term development of play facilities in each area. For further projects that were not included in the original review it is intended that this level of community consultation will be continued to ensure that the best options are identified to meet the needs of each community throughout Shetland.

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**Sport and Leisure Service**

**Summary Sheet - Parks Grounds Maintenance**

**Capital Funding – “One off” Machinery Replacement – Gang Mower**

**Purpose**

The Council owns, manages and maintains the following parks and recreational areas, which are used extensively for sporting activities and events.

- Gilbertson Park
- Clickimin North and South pitches
- Seafield Pitches
- Knab Golf course
- King George V park and Jubilee Flower park

On request from voluntary groups, Sport and Leisure also undertakes ground maintenance works on various other rural parks and pitches throughout Shetland.

Some items of Council owned grounds maintenance plant and machinery are 10–15 years old and are nearing the end of their useful lives. Existing plant is becoming more difficult to maintain and there is now requirement for the provision of a replacement set of specialist lawn mowers (gang mowers) during the next financial year.

**Objectives**

The main objectives of this service area is to provide the residents of Shetland with quality, well maintained out-door sporting facilities catering for numerous sports and activities such as football, rugby, golf, bowls, cricket, archery and equestrianism.

Essential grounds maintenance works carried out by Sport & Leisure staff on these facilities enables all activities to be undertaken regularly and safely throughout the summer months.

**Service Need**

The provision of well maintained parks and outdoor recreational areas throughout Shetland provides the following service benefits:

- Promotes fitness, health and well being of people of all ages and abilities in a controlled and safe environment
- Develops people’s involvement in outdoor activities
- Promotes people’s social skills
- Promotes community involvement

The regular mowing of grass to specific lengths is an essential part in the maintenance of sports turf and contributes greatly to a strong, durable and healthy grass sward. The type of mower, which we are seeking to replace, is tractor mounted and has the capacity to cut

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numerous large areas in a short period of time. This is important in the peak of summer when grass is growing at its optimum.

**Impact of Service Need not being met**

Without capital expenditure on ground maintenance plant, revenue budgets would not be sufficient to undertake the required equipment replacement. The service provided would suffer directly as unreliable, inefficient plant may lead to poorer quality facilities, which in turn may result in parks and playing fields not being suitable or safe for use.

Mowers are the most used item of plant and spare parts are difficult to source, therefore some repairs are being undertaken on a “bespoke” basis. Although currently safe to operate if this type of procedure becomes more regular the welfare of staff operating equipment could become an issue.

**Social – Economic – Environmental Impacts**

Provision of well maintained sporting and recreational areas enhances and promotes the physical fitness; health and mental well being of users and can develop people's involvement in outdoor activities.

Areas are available to all groups and individuals and can promote people's social skills and community involvement. Sporting and community groups throughout Shetland benefit from regular use of these areas.

Schools throughout Shetland regularly use sports fields for recreational and competitive activities and PE classes. These activities include school sports days and various inter school primary and secondary competitions, which are held during the summer months. These types of events help to promote health and an active lifestyle for school pupils and pre-school groups.

**Legal Obligations – Is their one?**

By virtue of ownership the Council has an obligation to ensure that the sports areas at the Gilbertson Park, Seafield Parks, Clickimin South parks, Clickimin North parks and the Knab Golf Course are maintained to suitable standard to allow safe use of these facilities for sporting and recreational use.

**As landowner, the Council has a duty of care for the people who use the facilities, operate plant and work on the land under the following legislation:**

- Occupiers Liability (Scotland) Act 1960
- Health and Safety at Work Act 1974 Sections 3 (1&2)
- Management of Health and Safety at Work Regulations 1999

**Financial Impacts – Capital and Revenue**

This application is not part of any previous rolling programme and is to be considered as a one off procurement of parks equipment.

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Capital - The quoted cost to supply and deliver a set of Ransome Hydraulic Gang Mowers is - **£13,695 +vat** delivered to Lerwick.

Revenue - There would be revenue savings as a new set of mowers would require fewer repairs and less maintenance than what is currently undertaken on the existing machinery, approx £1000 per annum

**Option Appraisal to deliver objectives – service need**

There is only one type of mower available on the market, which fits the required criteria i.e. area of work (sports turf maintenance), suitability for use with existing tractor, availability of replacement wearing parts therefore a reliable and existing supplier was approached. As the Council has regularly used the proposed supplier in the past a discount of £2417 was included in the mower quotation.

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**Sport and Leisure Services**

**Capital Grants to Voluntary Organisations General**

**Purpose**

This grant budget is designed to assist community groups and voluntary organisations to maintain, develop and upgrade community facilities in Shetland. The Grants Unit currently operates the following grant aid schemes on behalf of the Council:

Feasibility Grant	-	up to 90% of eligible costs up to £5,000
Design Grant	-	up to 90% of eligible costs up to £15,000
Capital Grant	-	up to 75% of eligible costs up to £100,000

The Council has a general policy to continue to promote improvement in the range and quality of community facilities and services in the islands for all sections of the population.

**Objectives**

Shetland has well over 100 community owned facilities that are managed by committed local volunteers. These facilities include public halls, youth centres, play areas, community museums, sports fields, marinas, breakwaters, piers and slipways.

The main objective of the Capital Grant Aid Scheme is to provide a source of funding that is available to local voluntary organisations and community groups to assist them with the costs of developing and delivering community lead capital projects.

This grant budget will contribute to the following objectives:

- To maintain, develop and upgrade community facilities throughout Shetland;
- To assist voluntary organisations to obtain Professional technical advice and project management expertise for their projects;
- To ensure community facilities comply with building regulations and other statutory legislation such as Access requirements, Health and Safety, Environmental Health and Energy Efficiency;
- To assist community projects to lever in match funding;
- To assist rural communities to strengthen, develop and sustain quality community facilities that meet local needs and assists in the retention of people living in these rural areas.

**Service Need**

This grant aid budget has historically been part of a wider rolling programme budget to deliver community led capital projects throughout Shetland. The various grant aid schemes were reviewed and approved by the Council in May 2004 (Min Ref: 31/04), following a period of extensive community consultation throughout Shetland.

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The overwhelming demand for funding from this grant aid budget continues to exceed the budget provision, and as a result there is a long waiting list with many projects expecting to wait for up to 5 years to be funded.

The current waiting list has over 30 projects on it, all seeking financial assistance from the Council towards a wide range of community projects. A copy of the waiting list is attached to this report, which highlight the number and diversity of projects seeking funding.

Many of the community groups on the waiting list are in need of urgent upgrading to prevent their facility further deteriorating, becoming unsafe and/or falling foul of regulations. For example a number of groups require grant assistance to replace their facilities roof, and / or external doors and windows. There are also a number of projects seeking to do internal improvements such as renew the heating and lighting, replace old plumbing systems and modernise kitchens to comply with current legislation.

#### **Impact of Service Need not being met**

Failure to provide a Capital Grants scheme budget would remove an important source of local funding for community groups and make it almost impossible for many groups to raise the necessary finance to upgrade their facilities and/or employ professional technical assistance. Therefore fundraising and project development work would either stop or take much longer to achieve and groups would be unable to secure the necessary professional advice that is funded through the Feasibility and Design Grant schemes.

Another serious impact would be a potential reduction in external funding secured for community projects in Shetland. Identifying, and successful obtaining significant levels of external funding is becoming much more difficult to achieve due to the nationwide competition for funds. For example, in 2005/06 the Scottish Government's Local Capital Grant Scheme was scrapped and not replaced, and this has resulted in a well-utilised funding source of up to 50% of costs up to a maximum award of £100,000 no longer being available to community projects.

Other traditional funding sources for capital projects such as the Carnegie (UK) Trust, Esmée Fairbairn Foundation and National Lottery are now less likely to fund capital works. HIE Shetland has also recently revised its funding priorities and no longer invest in the development of community facilities unless there is a clear income generating opportunity.

This difficulty in raising capital funding for projects is further exacerbated by the fact that building inflation costs in Shetland have increased considerably over the last 5 years. As a result some projects have nearly doubled in cost over this period.

Without the input of grant assistance from these schemes, it is unlikely that community groups will have the opportunity and/ or staying-power to fundraise the necessary amounts of funding needed to improve and upgrade their facilities. Consequently the condition and quality of community facilities will begin to deteriorate, or deteriorate at a faster rate, which will see community groups spending more of their income on maintenance costs, and possibly seeing usage levels drop off.

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In addition, because of a lack of local funding many community facilities might fail to comply with statutory regulations and run the risk of being closed due to safety issues, access or other building regulatory problems.

#### **Social – Economic – Environmental Impacts**

The Capital Grant Aid budget helps to upgrade and preserve the fabric and quality of many community facilities in Shetland. Historically community managed and owned facilities such as village halls and youth centres perform an important role in community life acting as a hub for community activity. These community facilities host a wide range of community activities including sport, arts, heritage, education, social, environment and culture. Accordingly Shetland's vibrant voluntary sector makes a significant contribution towards the social fabric and improves the quality of life in Shetland.

The majority of the facilities that are funded through the Capital Grant Aid Scheme benefit whole communities and are used by a variety of local groups and individuals for a wide range of activities and events. For example public halls are regularly used for meetings, social and recreational activities, local events, weddings, funerals, parties, teas, dances, festivals and many other community activities. Therefore, support for these projects bring communities and families together, improves quality of life for individuals and communities and helps to sustain rural areas.

The Capital Grant Aid Scheme helps to maintain, develop and upgrade this infrastructure and ensure the range of community facilities remain available, safe and accessible. Local professional consultants and contractors are employed by grant aided voluntary organisations to deliver their projects and this spending makes a valuable contribution to the local economy.

The development of these projects provide a boost to the Shetland economy as the budget expenditure is mainly spent locally on contractors, suppliers and professional consultant, thus helping to sustain employment in Shetland. In 2007/08, the total grants budget of £795,592 helped to secure an additional £273,842 of match funding for local projects.

Community projects that are supported through this grant aid scheme make a positive environmental impact. Environmental improvements to community facilities include works such as installing new energy efficient heating systems and insulation, replacement windows and doors and landscaping works.

#### **Legal Obligations – Is their one?**

There is no legal or statutory obligation to provide Grant Assistance to the local Voluntary Sector.

#### **Financial Impacts – Capital and Revenue**

The capital funding request is for a budget of £300,000 per annum over a 5 year period from financial year 2009/10 through to 2012/13. A budget breakdown for each year is attached.



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There are no revenue implications of this budget for the Council. The grant budget provides capital funding only and therefore community groups and voluntary organisations are required to meet their own ongoing running costs.

**Option Appraisal to deliver objectives – service need**

All projects to be funded through the Capital Grant Aid Scheme must in the first instance join the department's Capital Grant Aid Scheme priority programme (a waiting list) for consideration of funding.

Voluntary organisations are required to submit regular updates to the Council on their projects. From these updates, projects are prioritised on the following criteria and are brought forward for consideration of funding:

- Evidence of need for the project;
- Evidence of community consultation and support for the project
- Likelihood of project securing external funding
- Consideration of how much grant assistance the organisation has received from the Council in the last 5 years
- Projects previously funded by Feasibility and/or Design stage

In addition to the main criteria, voluntary organisations are required to consider what alternatives there are to their proposed project and to produce a Business Plan to demonstrate the sustainability of their project.

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**CAPITAL GRANTS TO VOLUNTARY ORGANISATIONS - GENERAL**

<b>Organisation Name</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14</b>	
Contractual commitments c/fwd						
Shetland Golf Club	£10,000.00	£10,000.00	£10,000.00	£10,000.00	£10,000.00	Shetland Wide
Sandness Public Hall	£50,000.00	£40,000.00	£5,000.00			West Mainland
North Unst Public Hall (Haroldswick)	£50,000.00	£40,000.00	£5,000.00			North Isles
Cunningsburgh History Group	£50,000.00	£35,000.00	£5,000.00			South Mainland
North Roe and Lochend Public Hall	£35,000.00	£5,000.00				North Mainland
Ness Boating Club	£20,000.00	£5,000.00				South Mainland
Bressay Sports Club	£50,000.00	£38,000.00	£5,000.00			Lerwick & Bressay
Sullom and Gunnister Public Hall	£5,000.00	£35,000.00	£45,000.00	£5,000.00		North Mainland
St. Olaf Community Club (Ollaberry Hall)	£5,000.00	£35,000.00	£45,000.00	£5,000.00		North Mainland
Hillswick Public Hall	£10,000.00	£5,000.00	£45,000.00	£35,000.00	£5,000.00	North Mainland
Shetland Ladies Hockey Association	£5,000.00	£12,000.00	£25,000.00	£50,000.00	£25,000.00	Shetland Wide
Bixter Public Hall	£5,000.00	£15,000.00	£30,000.00	£33,000.00	£5,000.00	West Mainland
South Nesting Public Hall	£5,000.00	£15,000.00	£40,000.00	£5,000.00	£5,000.00	North Mainland
Unst Boating and Swimming Club		£5,000.00	£10,000.00	£20,000.00	£10,000.00	North Isles
Symbister Public Hall		£5,000.00	£15,000.00	£25,000.00	£50,000.00	North Mainland
Old Haa Trust			£5,000.00	£15,000.00	£50,000.00	North Isles
Fair Isle Public Hall			£5,000.00	£20,000.00	£10,000.00	South Mainland
Walls Marina Users Association			£5,000.00	£10,000.00	£30,000.00	West Mainland
Skeld Public Hall				£42,000.00	£50,000.00	West Mainland
Whalsay History Group				£25,000.00	£25,000.00	North Mainland
Whiteness and Wesidale Boating and Sports Club					£25,000.00	West Mainland
	<u>£300,000.00</u>	<u>£300,000.00</u>	<u>£300,000.00</u>	<u>£300,000.00</u>	<u>£300,000.00</u>	

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<b>Other Projects on Waiting List</b>	<b>Estimated Funding Required</b>	
Bressay Public Hall	£100,000.00	Lerwick & Bressay
Uyeasound Boating Club	£45,000.00	North Isles
Burra Boating Club	£30,000.00	West Mainland
Brough Lodge Trust	£100,000.00	North Isles
Yell Crafts	£100,000.00	North Isles
The Equestrian Association of Shetland	£100,000.00	Shetland Wide
Walls Regatta Club	£30,000.00	West Mainland
North Nesting Public Hall	£20,000.00	North Mainland
Strom Park Development Trust	£100,000.00	West Mainland
Unst Youth Centre Trust	£20,000.00	North Isles
Fraser Park Trust	£30,000.00	West Mainland
Skeld Waterfront Development Trust	£100,000.00	West Mainland
Westsandwick Play Area	£100,000.00	North Isles

<b>TOTAL</b>	<b>£875,000.00</b>
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<b>Priority projects</b>	<b>Priority projects</b>	<b>Other projects</b>	<b>Totals</b>
Shetland Wide	2	1	3
West Mainland	3	5	8
North Mainland & Whalsay	7	1	8
North Isles	3	5	8
South Mainland	3	0	3
Lerwick & Bressay	1	1	2
<b>TOTAL</b>	<b>21</b>	<b>13</b>	<b>34</b>

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**Sport and Leisure Service**

**Indoor Children's Activity Centre (former Islesburgh Squash Courts)**

**Purpose**

To provide a dedicated town-centre indoor Children's Activity Centre for the children and young people of Shetland. This to be achieved by demolishing the existing building and erecting a similar size new building on the same site.

**Objectives**

The main objective for these proposed Capital works is to provide a year-round wet weather facility where children can meet to have fun, learn, exercise and develop their social interaction skills in a safe and regulated environment.

**Service Need**

Through consultation with various children's groups such as the Islesburgh Pre-School and Out-of-School Club; noting requests from these groups and parents of young children, and through local media sources it has become apparent that there is a need for this type of facility, available to all young children in Shetland, whether visitors or locals.

The provision of a Children's Activity Centre would provide the following service benefits;

- Provides an indoor wet weather facility for nursery and pre-school groups to visit as part of their annual programme of activities;
- Provides an indoor wet weather facility, which is designed to meet, and accommodate the needs of children with Additional Support Needs.
- Provides a family friendly activity centre for winter activities when there is less opportunity to play and to be active outdoors.
- Promotes fitness, health and well being of children in a controlled and safe environment
- Develops children's involvement in physical activities
- Promotes children's social skills
- Promotes community involvement

Tourism in Shetland would also benefit from the availability of a wet weather facility.

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**Impact of Service Need not being met**

Shetland would continue to lack a dedicated indoor Children's Activity Centre, thereby missing out on a number of benefits, most of which are detailed elsewhere in this report.

**Social – Economic – Environmental Impacts**

Play is an essential part of every child's development. A dedicated Children's Activity Centre would provide children with an indoor facility where they can undertake physical and mental challenges and make decisions involving aspects of danger and risk but within a controlled and safe environment.

This play area would provide an important meeting point for social interaction between children of varying ages and abilities and provide an important focal point for communities.

This project would provide a boost to the Shetland economy as local contractors and professional consultants would be involved. Improvements in leisure facilities are of great assistance to the local tourism industry.

Shetland currently lacks a dedicated Children's Activity Centre. The intention is to provide a healthy and welcoming environment for all children and young people who use it, ensuring it is built and operated to a very high standard with minimal impact on the environment in which it is situated.

**Legal Obligations – Is their one?**

There is no legal obligation to provide an indoor Children's Activity Centre.

**Financial Impacts – Capital and Revenue**

Capital – The proposed project would require an estimated capital expenditure of approximately £850,000.00, including demolitions costs, construction costs, professional fees, statutory consents, and equipment purchase. It excludes VAT.

Revenue – At this stage the revenue costs cannot be determined with any accuracy as this depends on a number of operational factors such as staffing costs, energy costs, final design and layout, potential income etc. Therefore, when this project continues to design stage then many of these factors can be considered in more detail to establish likely revenues costs.

This project will be professionally managed by a Project Board to ensure best value and all works are competitively tendered to secure the most competitive price for the works.

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**Option Appraisal to deliver objectives – service need**

This project is at a very early stage of development and will require an Option Appraisal to determine the type of building, equipment, services, facilities and staffing level in order to achieve the best possible value.

A survey of the building has shown that with regular maintenance it can, in the short term, continue to be used for storage purposes. However, any application for a change of use for this building will not pass current Building Standards. Therefore, demolition is the only long term solution for this building, which if reconstructed for this purpose would provide a valuable facility and range of services for children and young people in Shetland, which is not currently available to them.

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**Sport and Leisure Services**

**Capital Rolling Programme – Capital Grants to Water Based Facilities**

**Purpose**

This grant budget is designed to assist community groups and voluntary organisations to maintain, develop and upgrade water based facilities in Shetland. The Grants Unit currently operates the following grant aid schemes on behalf of the Council:

Feasibility Grant	-	up to 90% of eligible costs up to £5,000
Design Grant	-	up to 90% of eligible costs up to £15,000
Capital Grant	-	up to 80% of eligible costs up to £400,000 for new facilities
Capital Grant	-	up to 50% of eligible costs up to £100,000 for existing facilities

The Council has a general policy to continue to promote improvement in the range and quality of community facilities and services in the islands for all sections of the population.

**Objectives**

Shetland has a healthy provision of community owned water based facilities that are managed by committed local volunteers. These facilities include marinas, breakwaters, piers and slipways.

The main objective of the Capital Grants to Water based Facilities scheme is to provide a source of funding that is available to local voluntary organisations and community groups to assist them with the costs of developing and delivering community lead capital projects.

This grant budget will contribute to the following objectives:

- To assist voluntary organisations to construct new water based facilities in communities where there is currently none;
- To maintain, develop and upgrade existing water based community facilities throughout Shetland;
- To assist voluntary organisations to obtain Professional technical advice and project management expertise;
- To ensure community facilities comply with construction regulations and other statutory requirement such as Access requirements, Health and Safety, and maritime legislation;
- To assist rural communities to strengthen, develop and sustain quality community facilities that meet local needs and assists in the retention of people living in these rural areas.



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- To assist community organisations to lever in matching funding for their projects.
- To preserve Shetland's long association with the sea and considerably improve safety and access to water based activities such as sailing, rowing, sea angling and diving through the provision of new or upgraded water based facilities that provide shelter, berthing and easy access to leisure craft.

### **Service Need**

The Capital Grants to Water Based Facilities scheme has been in existence for a number of years, assisting voluntary organisations throughout Shetland to develop and maintain various community owned and managed water based facilities. The Council approved the current Water Based Scheme in May 2008, following a review of the scheme by a Short Life Officer / Member working group.

The overwhelming demand for funding from this grant aid budget continues to exceed the budget provision, and as a result there is a long waiting list with many projects expecting to wait for up to 5 years to be funded.

The current waiting list has over 10 projects on it, all seeking financial assistance from the Council towards a wide range of water based projects. A copy of the waiting list is attached as Appendix A to this report, which highlights the number and diversity of community projects seeking funding. Many of these groups are proposing to construct new marina's with berthing provision in communities where none currently exist, while other groups are proposing to carry out repairs to existing facilities such as pontoon replacement or restoration works.

### **Impact of Service Need not being met**

Failure to provide a grant aid budget will remove the primary source of funding for local groups seeking to develop water based facilities. This would likely result in most of the water based projects becoming unachievable.

Since the mid 1990s large water based projects have been unable to attract any substantial amounts of external funding to their projects. This has been due to changes in funding priorities. Consequently, water-based facilities that have been constructed and/or upgraded in Shetland over the last 15 years, have only happened because of the financial assistance that has been made available by the Council towards these projects.

This difficulty in raising capital funding for projects is further exacerbated by the fact that building inflation costs in Shetland have increased considerably over the last 5 years. As a result some projects have nearly doubled in cost over this period.

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Without the input of grant assistance from these schemes, it is unlikely that community groups will have the opportunity and/ or staying-power to fundraise the necessary amounts of funding needed to construct, improve and upgrade their water based facilities.

Consequently a number of communities without water based facilities are unlikely to see a development take place. Communities that have an existing facility that is in need of upgrading will begin to see their facilities deteriorate, or deteriorate at a faster rate, which will see these community groups spending more of their income on maintenance costs, and possibly seeing usage levels drop off.

In addition, because of a lack of local funding many water based facilities might fail to comply with statutory regulations and run the risk of being closed due to safety issues, access or other regulatory problems. This would have a knock on effect on the level of sport and leisure activities taking place in these communities.

### **Social – Economic – Environmental Impacts**

Over the last 20 years, the Capital Grants to Water Based Facilities Scheme has played a significant role in the development of new marinas and other community managed water based facilities throughout Shetland.

These facilities such as marinas, piers and slipways perform an important role in community life, acting as a hub for water based sport and leisure activities such as sailing, rowing, diving, water skiing, wind surfing and sea angling.

Therefore, new facilities that are funded through this scheme benefit communities and are used by a variety of local groups and individuals for a wide range of activities and events. For example, in recent years a number of rowing events and sailing regattas have been established that involve competition, social and cultural activity and entertainment. Therefore, support for these projects bring communities and families together, improves quality of life for individuals and communities and helps to sustain rural areas.

Furthermore, this scheme supports Shetland's long association with the sea, and helps to preserve its maritime culture and heritage. Knowledge and skills are passed down through the generations, with young people learning skills in boat maintenance and handling, many of whom go on to pursue a career at sea whether it be fishing, aquaculture or other maritime employment. Therefore, water based facilities make a significant contribution towards the social fabric and improves the quality of life in Shetland.

The Capital Grant to Water Based Facilities schemes helps to maintain, develop and upgrade the local infrastructure and ensures that a range of community facilities are available, safe and accessible. Local professional consultants and contractors are employed by grant aided voluntary

Capital Projects Review of Prioritisation  
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organisations to deliver their projects and this spending makes a valuable contribution to the local economy. In 2007/08, the total grants budget of £835,000 helped to secure an additional £209,456 of match funding for local projects.

Community projects that are supported through this grant aid scheme make a positive environmental impact. Environmental improvements to water based facilities include works such as coastal protection and landscaping works.

### **Legal Obligations – Is their one?**

There is no legal or statutory obligation to provide Grant Assistance to the local Voluntary Sector.

### **Financial Impacts – Capital and Revenue**

The capital funding request is for a budget of £500,000 per annum over a 5-year period from financial year 2009/10 through to 2012/13. A budget breakdown for each year is attached.

There are no revenue implications of this budget for the Council. The grant budget provides capital funding only and therefore community groups and voluntary organisations are required to meet their own ongoing running costs.

### **Option Appraisal to deliver objectives – service need**

All projects to be funded through the Capital Grants to Water Based Facilities Scheme must in the first instance join the Department's Capital Grant Aid Scheme priority programme (a waiting list) for consideration of funding.

Voluntary organisations are required to submit regular updates to the Council on their projects. From these updates, projects are prioritised on the following criteria and are brought forward for consideration of funding:

- Evidence of need for the project;
- Evidence of community consultation and support for the project
- Likelihood of project securing external funding
- Consideration of how much grant assistance the organisation has received from the Council in the last 5 years
- Projects previously funded by Feasibility and/or Design stage

In addition to the main criteria, voluntary organisations are required to consider what alternatives there are to their proposed project and to produce a Business Plan to demonstrate the sustainability of their project.

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**CAPITAL GRANTS TO VOLUNTARY ORGANISATIONS - WATER BASED FACILITIES**

<b>Organisation Name</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14</b>	
Contractual commitments c/fwd						
Toft Marina Users Association	£365,000.00	£30,000.00	£5,000.00			North Mainland
Sandwick Social Economic and Development Co.	£95,000.00	£5,000.00				South Mainland
HEARD	£5,000.00	£170,000.00	£5,000.00			North Mainland
South Nesting Boating Club	£15,000.00	£235,000.00	£160,000.00	£5,000.00		North Mainland
Gruting Marina Users Association	£5,000.00	£15,000.00	£310,000.00	£85,000.00	£5,000.00	West Mainland
Scalloway Boating Club	£15,000.00	£15,000.00				West Mainland
Whiteness Voe Marina Users Association		£15,000.00	£5,000.00	£285,000.00	£115,000.00	West Mainland
Lerwick Boating Club		£15,000.00	£5,000.00	£95,000.00	£5,000.00	Lerwick & Bressay
Mid Yell Waterfront Trust			£5,000.00	£15,000.00	£370,000.00	North Isles
Uyeasound Waterfront Trust			£5,000.00	£15,000.00	£5,000.00	North Isles
	<u>£500,000.00</u>	<u>£500,000.00</u>	<u>£500,000.00</u>	<u>£500,000.00</u>	<u>£500,000.00</u>	

<b>Other Projects on Waiting List</b>	<b>Estimated Funding Required</b>	
Symbister Marina Users Association	£100,000.00	North Mainland
Fetlar Boating, Angling and Recreation Club	£100,000.00	North Isles
<b>TOTAL</b>	<u><b>£200,000.00</b></u>	



Capital Projects Review of Prioritisation  
Education and Social Care Department for Services Committee – October 2008







## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### HOME EDUCATION POLICY

#### 1. Introduction

- 1.1 The purpose of this report is to inform Members of the Schools Service of the updated Home Education Policy.

#### 2. Link to Council Priorities

- 2.1 One of the Outcomes held within the Corporate Plan 2008-2011 for Schools is to, 'Help us create and maintain a culture where individual learners can strive to realise their full potential.'

#### 3. Background

- 3.1 The current policy required updating.

#### 4. Proposals

- 4.1 This revised Home Education Policy takes into account changes in legislation. In particular the 'Home Education Guidance' document published by The Scottish Government in January 2008, and issued under Section 14 of the Standards in Scotland's Schools etc. Act 2000.
- 4.2 The Home Education Policy and appendices are included as Appendix A for approval.

#### 5. Financial Implications

- 5.1 There are no direct financial implications arising from the content of this report.

## **6. Policy and Delegated Authority**

- 6.1 In accordance with Section 13 of the Council's Scheme of Delegation, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by Council, in addition to appropriate budget provision.
- 6.2 Services Committee has delegated authority to consider individual service policy proposals and make appropriate recommendations to Council.

## **7. Recommendation**

- 7.1 I recommend that the Services Committee recommend that the Council adopt the Home Education Policy.

September 2008

Our Ref: HB/LR/sm

Report No: ED-46-F

# Shetland Islands Council



**Education &  
Social Care**

**Schools  
Service**

## **Home Education Policy**

**October 2008**

# Home Education Policy

## Contents

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- 3 Shetland Islands Council Policy**
  - 3.1 Working Together with Parents<sup>1</sup>***
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## Appendices

- 1. Parent Leaflet**
- 2. Introduction to Home Education**
- 3. Summary of approach (sample)**
- 4. Flow-chart**
- 5. Extract from Managing Inclusion 2 - Guidelines for Head Teachers**
- 6. Proforma letter to parents**

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<sup>1</sup> The definition of a parent includes a guardian and any person who is liable to maintain or has parental responsibilities (see Section 135(1) of the Education (Scotland) Act 1980) in relation to, or has care of, a child or young person

**1. Introduction**

- 1.1 Parents have a legal responsibility to ensure that their children receive an education which is suited to their age, ability and aptitude. Most choose to do this by sending their children to school. Where parents exercise their right to educate their children at home, the Schools Service has a duty to ensure that these arrangements are efficient and suitable in the following areas:

- a) where a child has attended public school on one or more occasion. In these circumstances, where a parent decides to provide other education for the child, the consent of the Schools Service is required before the child can be withdrawn from school
- b) where a child has not attended a public school in the area and the Schools Service is made aware of the child
- c) where a child has attended but has been withdrawn with the consent of the Schools Service
- d) where a child has been excluded.

The Schools Service should assume that efficient educational provision is taking place, which is suitable for the child, unless there is evidence to the contrary. If there is reason to believe that an efficient education is not being provided, the Service has a duty to intervene.

- 1.2 Parents may decide to home educate for a number of reasons. They may, for example, wish to educate their children in accordance with their own wishes, including any religious and philosophical convictions. In some cases, a decision to home educate is made when difficulties have been experienced at school. The Schools Service will ask all parents, who are withdrawing their children from Shetland schools to home educate, why they wish to do so, in order to find out if there is any dissatisfaction with current school provision.
- 1.3 Parents of children who have attended an education authority school must seek the consent of the Schools Service before withdrawing them to educate at home. There is no such requirement for children who have never attended a public school or an independent school; or who have never attended school in this area; who have finished primary education in one school but have not started secondary education in another; or if the school the child has been attending has closed.
- 1.4 Decisions on home education should be made in light of the circumstances of the individual child. It is essential that such decisions meet the legislative requirements and that the policy and procedures adopted by the Schools Service are based on best practice and advice.
- 1.5 This guidance sets out the legislative position and provides advice on the roles and responsibilities of the Schools Service and of parents in relation to children who are educated at home.

- 1.6 It is important that education staff and home educating parents work together to develop mutual respect and a positive relationship which functions in the best interests of the child.

## **2. Legislative Position**

- 2.1 Parents of children who have started to attend a public school must seek the School's Service's consent before withdrawing their child from school. Otherwise they will be guilty of an offence under Section 35 of the Education (Scotland) Act 1980 and the Schools Service could report the parents to the Procurator Fiscal.
- 2.2 The Schools Service must not unreasonably withhold consent to withdraw a child from school. Reasons for withholding consent are not defined in legislation, but might reasonably include circumstances where:
- there is no evidence of the parent's educational objectives and proposed resources;
  - the child is on the Child Protection Register, or a matter is being investigated;
  - the child is the subject of a supervision requirement, court order or referral to reporter on care and protection grounds.
- 2.3 Parents of children who have never attended a public school are not required to seek the consent of their education authority in order to educate their children at home.
- 2.4 The Schools Service may intervene if there is reason to believe that parents are not providing an efficient education for their children. This responsibility applies both to children who have previously been withdrawn from a public school and to children who have never attended a public school, or have been excluded from a public school.
- 2.5. In either case, if the Schools Service is not satisfied that the parent is providing efficient education for their child, they have a duty to serve a notice on the parent requiring him or her to appear before the Schools Service and provide information on the education that is being provided. The Schools Service has no right of access to the home. If the parent fails to satisfy the Schools Service that an efficient education is being provided, the authority has a duty to make an attendance order requiring the parent to ensure their child attends school.
- 2.6 The UK Government supports the principle in the UN Convention on the Rights of the Child which states that children and young people have the right to freely express an opinion in all matters affecting them, and to have that opinion taken into consideration. This principle has been incorporated into the Standards in Scotland's Schools etc. Act 2000 in respect of school education, which makes it a duty to have regard to a child's views so far as reasonably practicable and taking

into account the child's age and understanding. The Schools Service will therefore wish to establish the child/young person's view of a request that they be home educated.

- 2.7 The Education (Additional Support for Learning) (Scotland) Act 2004 requires that a child with additional support needs requiring a Co-ordinated Support Plan should receive support from appropriate agencies. Home-educating parents assume responsibility for the identification of additional support needs and for the co-ordination of the plan.

### **3. Shetland Islands Council Policy**

Shetland Islands Council Schools Service recognises that home education is a legitimate option for parents which may offer distinctive benefits for some children and young people. A principal concern is always that a child should receive the best possible education, wherever they are educated. The Schools Service offers advice and support to parents who choose to home educate.

#### **3.1 *Working Together with Parents***

- 3.1.1 Information for parents on home education (see Appendix 1: Parent Leaflet) sets out the legal position and explains the procedures for considering any application to withdraw children from school, as well as the arrangements that will be made to maintain contact with parents.
- 3.1.2 The Home-Link Teacher is the named contact for parents, and is familiar with home education policy and practice. S/he will be able to provide advice and support to parents and will hold the initial discussion with parents. (see Appendix 2: Introduction)
- 3.1.3 Parents will be required to provide the Schools Service with a summary of the approach they are planning to take in providing education for their child at home.
- 3.1.4 The Home-Link teacher will in every case meet the family to discuss their proposals; explain legal obligations; outline Schools Service duties, and obtain written confirmation of parents' intentions. Parents may use the pro forma (see Appendix 3: Summary Approach) or they may choose to provide the required information in a different format such as a statement setting out the general aims and objectives of their proposed approach. Future contact will also be agreed between parents and the Home-Link teacher but ordinarily this will be on an annual basis.
- 3.1.5 An educational psychologist will normally be consulted about the proposed provision for a child with additional support needs and a meeting may take place at a mutually acceptable location. This

meeting should involve the child where appropriate. More frequent contact with the Home-Link teacher may be necessary in the case of children with additional support needs.

- 3.1.6 The Home-Link teacher will then prepare a report which will be copied to the applicant. Withholding a report, or more usually a part of it, will only be considered in exceptional cases.
- 3.1.7 *Where consent to withdraw is given*, the Schools Service will write to the parents with an agreed start date and inform the child's school. (see Appendix 6)
- 3.1.8 *If consent to withdraw is withheld*, the reasons should be discussed with the family. The family may be given time to amend and resubmit their proposals for reconsideration. There is no statutory right to appeal against an authority's decision to withhold consent. The Head of Service will also notify the school where consent to withdraw is withheld (see Appendix 4). All decisions on home education will be reviewed annually by the Quality Improvement Officer with responsibility for Home Education.
- 3.1.9 The time taken to consider applications will vary depending on the individual circumstances of each case, but in normal circumstances, the process should be finalised within 6 weeks of receipt of the family's proposals.
- 3.1.10 The Schools Service is committed to working closely with the families to ensure that the outcome of any decision is in the best interests of the child (see Appendix 5).
- 3.1.11 In general, **children should continue to attend school pending a decision on their application**, with due sensitivity to individual circumstances. If a child fails to attend school without the consent of the authority, the normal procedures for dealing with unauthorised absence will apply, including the making of an attendance order if necessary.
- 3.1.12 Home educating families do not need to follow a school-based curriculum and home education proposals will reflect the diversity of approaches and interests of home educators. However, when a parent intimates a decision to educate her or his child at home, the Schools Service will ask:
- the parents' reason for wishing to home educate, and in particular whether their decision has been prompted by dissatisfaction with the schools' service;
  - how parents will provide evidence of a child's progress;
  - about social contact with other children of a similar age;
  - how skills in literacy and numeracy will be developed.

These questions will be asked in order to ensure that the child is prepared for life in a modern, civilized society and to enable them to



achieve their full potential. Parents and their children may require a period of adjustment before finding their preferred mode of learning.

- 3.1.13 Parents do not need to have any special qualifications or training to provide their children with an effective education, but they should be expected to demonstrate their commitment to providing an education which is suited to their child, and provide some indication of their objectives.
- 3.1.14 If parents are considering home education *as a temporary measure*, and want their child to return to school at some point in the future, it is important that the education provided is broadly based on a school curriculum. In these circumstances, the Home-Link teacher may involve the child's school in planning temporary home education provision to ensure optimum coherence and continuity in education, and a smooth transition when the child returns to school.
- 3.1.15 Wherever possible, all of those with parental rights and responsibilities for the child should be given a copy of the written agreement to the proposed provision.
- 3.1.16 Parents may choose to engage other people to educate their child, though they themselves will continue to be responsible for the education provided. They will also be responsible for ensuring that those they engage are suitable persons to have access to children.
- 3.1.17 The Schools Service will expect that parents who employ someone to teach their children will ensure that the appropriate Disclosure Checks are carried out (see Appendix 1: Parent Leaflet).
- 3.1.18 Where parents apply to withdraw their child from school in order to educate them at home, they and the education authority must be able to show evidence that they have listened to the views of the child and taken their opinions into account.
- 3.1.19 Although there is no requirement for children who are educated at home to take a particular set of qualifications, the Schools Service will support parents by providing advice on a range of options for accreditation.
- 3.1.20 Shetland Islands Council will not meet any costs associated with external candidates taking examinations or other qualifications.
- 3.1.21 That a child has additional support needs should not in itself be a reason to refuse an application to educate at home. Additional considerations do, however, apply.
- 3.1.22 Where a child's additional support needs are such as to require a Co-ordinated Support Plan, the Plan may nominate a school which the child should attend – the basis of the nomination being that the

school has the expertise and resources to meet the child's needs if the parents are unable to provide an appropriate education at home.

- 3.1.23 It is therefore reasonable to ask parents to indicate how they propose to cater for a child's support needs at home. In the case of children with additional support needs, the Schools Service will review arrangements to meet the child's needs at least twice a year and may opt to carry out more frequent reviews if it is considered to be in the best interests of the child or young person concerned.
- 3.1.24 Shetland Islands Council has no statutory obligation to provide financial or other support for children with additional support needs who are educated at home, except where measures are specified in a Record of Needs / Co-ordinated Support Plan (CSP) with the stipulation that they must be effected in the home.
- 3.1.25 If a child has a Co-ordinated Support Plan, the Schools Service has a duty to review arrangements annually. This duty also applies in the case of children who are being educated at home. The child's parents continue to have responsibility for the education provided, and the Schools Service continues to have a legal duty to ensure that the child's needs are met.
- 3.1.26 Although there is no statutory duty upon parents to inform the Schools Service that they are home educating if they do not require consent, Shetland Islands Council prefer home educators in their area, or moving into their area, to contact them.
- 3.1.27 The Schools Service may take reasonable steps to identify children who may not be attending school or are being officially educated at home, by using sources such as Social Work or NHS Shetland in order to offer support to parents and children.

### **3.2 *Ensuring efficient and suitable home education***

- 3.2.1 The Schools Service has a statutory duty to satisfy itself that all children in Shetland are receiving an efficient and suitable education. The Schools Service should assume that efficient educational provision is taking place, which is suitable for the child, unless there is evidence to the contrary.
- 3.2.2 It is desirable that parents allow access to a home educated child in order for the Home-Link teacher to ascertain the child's progress and satisfy him/herself that the child is receiving a suitable education. This will also be an opportunity to ensure that the child has the right to freely express an opinion in all matters affecting them and to have their opinion taken into consideration. Parents may prefer to provide information through other means – eg electronic.
- 3.2.3 The Schools Service will respect the view of parents who may not feel comfortable in allowing the Home-Link teacher to meet their child

in the family home and the meeting may take place in a mutually acceptable alternative location such as a library or community centre.

- 3.2.4 The Schools Service can reasonably expect provision to include the following characteristics:
- consistent involvement of parents or other significant carers
  - the presence of a philosophy or ethos (not necessarily a recognized philosophy) where parents have thought through their reasons for home educating, showing signs of commitment and enthusiasm and recognition of the child's needs, attitudes and aspirations
  - opportunities for the child to be stimulated by their learning experiences
  - involvement in activities – a broad spectrum of activities to cater for wide varieties of interests appropriate to the child's stage of development
  - access to resources/materials required to meet the objectives of the parents – such as paper and pens, books and libraries, arts and crafts materials, ICT
  - an appropriate level of physical activity
  - the opportunity to interact with other children and other adults.
- 3.2.5 Where one or more of the characteristics listed above appear to be lacking, the Schools Service may choose to investigate whether or not an efficient education is being provided. A full report on the findings will be made and copied to the parents promptly, specifying the grounds for concerns and any reasons for concluding that provision is unsuitable.
- 3.2.6 In exceptional circumstances, where the Schools Service has serious concerns about the child's progress, they may ask the home educating family for access to the child's learning environment to assess its suitability. If, in those circumstances, the family refuses access, the authority might reasonably conclude that they have insufficient information to satisfy themselves under Section 37 of the Education (Scotland) Act 1980 as to the suitability of the family's education provision, and consequently make an attendance order.
- 3.2.7 Following any meeting with a family, a report will be prepared by the Home-Link teacher, setting out the nature of the education being provided and any specific recommendations that have been made. Parents will be given a copy of this report, or feedback on it.
- 3.2.8 Where a pupil is in their final year of statutory education, the Home-Link teacher will arrange, with the parents and young person's agreement, a meeting prior to the official finishing date. This will provide an opportunity to discuss the young person's future plans and for the Home-Link teacher to offer guidance and support where appropriate.

- 3.2.9 For young people with a Co-ordinated Support Plan, the Schools Service must arrange a meeting with the parent and young person to review what provision would benefit that young person after they cease to be of school age. This meeting should include what services may be required by other agencies and should take place no later than six months before the date on which the young person ceases to be of school age.
- 3.2.10 The Educational Maintenance Allowance (EMA) is available to eligible young people who are undertaking full-time non-advanced level study by home education. Applications should be made to the Schools Service and will be considered in the context of a recorded history of home education, prior to reaching the student's official school leaving age and on submission of a signed learning agreement between the adult responsible for home education, and the student.

### **3.3 *Making an Attendance Order***

Only in extreme cases will the Schools Service serve notice on a parent under Section 37 of the Education (Scotland) Act 1980, to enforce attendance at school. This would only happen where:

- the education being provided is clearly not efficient and suited to the age, ability and aptitude of the child
- the parent has not provided the Schools Service with information to satisfy the Service that the education is efficient and suited to the age ability and aptitude of the child, despite every effort to secure this information.

- 3.3.1 Under Section 37, notice will allow between 7 and 14 days for the parent to provide the Schools Service with whatever information they require to satisfy themselves about the suitability of the education. The parent may choose to do this by meeting with the Quality Improvement Officer, or by supplying the information in writing. The authority should make an attendance order where the parent, on whom notice has been served, fails to satisfy the Service that efficient education is being provided, suitable to the age, ability and aptitude of the child, or that there is reasonable excuse for his/her failure to do so.

### **3.4 *Review***

These arrangements to support effective home education will be reviewed on a regular basis in consultation with parents in order to promote partnership between Shetland Islands Council Schools Service and parents who choose to educate their children at home. Additional advice from the Scottish Government will be incorporated in the local policy (ref. Home Education Guidance, Scottish Government 2008).

### Introduction to Home Education

Child's Name

Date of Birth

Parent/Guardian's Name

Tel. No.

Address

Brief Record of Achievement/Learning/school experience:

Does your child have additional support needs?  
(*Note whether child has Record of Needs/CSP*)

Why do you wish to home educate? (optional):

What is your child's statutory school leaving date?

What support would you like from the Schools Service?

Any further comments/information

Parent signature \_\_\_\_\_

Home-Link teacher \_\_\_\_\_

## Summary of Approach

**These questions are not prescriptive but can be used as guidance for parents who are beginning to home educate where they have not yet decided on an approach**

Please outline how you intend to educate your child to ensure a broad and balanced education.

eg.      *Primary: English, Maths including problem-solving\*, Science, Environmental Studies, Expressive Arts (Music, Art, Drama, Physical Education) Religious and Moral Education*  
            *Secondary: English language, Maths \*, Modern Language, Social Subject, Art, Music, Technology, PE.*

*NB: Your proposals may not be detailed in the early stages of your commitment to home educated but your initial proposals should show how you intend to provide an efficient education for your child.*

How do you intend to support education in the following areas:

- personal and interpersonal skills, including working with others
- careers
- health, including education about drugs and alcohol
- environmental education
- outdoor education
- use of information technology

What will your child's working week and working day look like?

How will your child have social contact with other children of a similar age?

Where will teaching mainly take place?

What are the qualifications and experience of those who will teach the child?  
(optional)

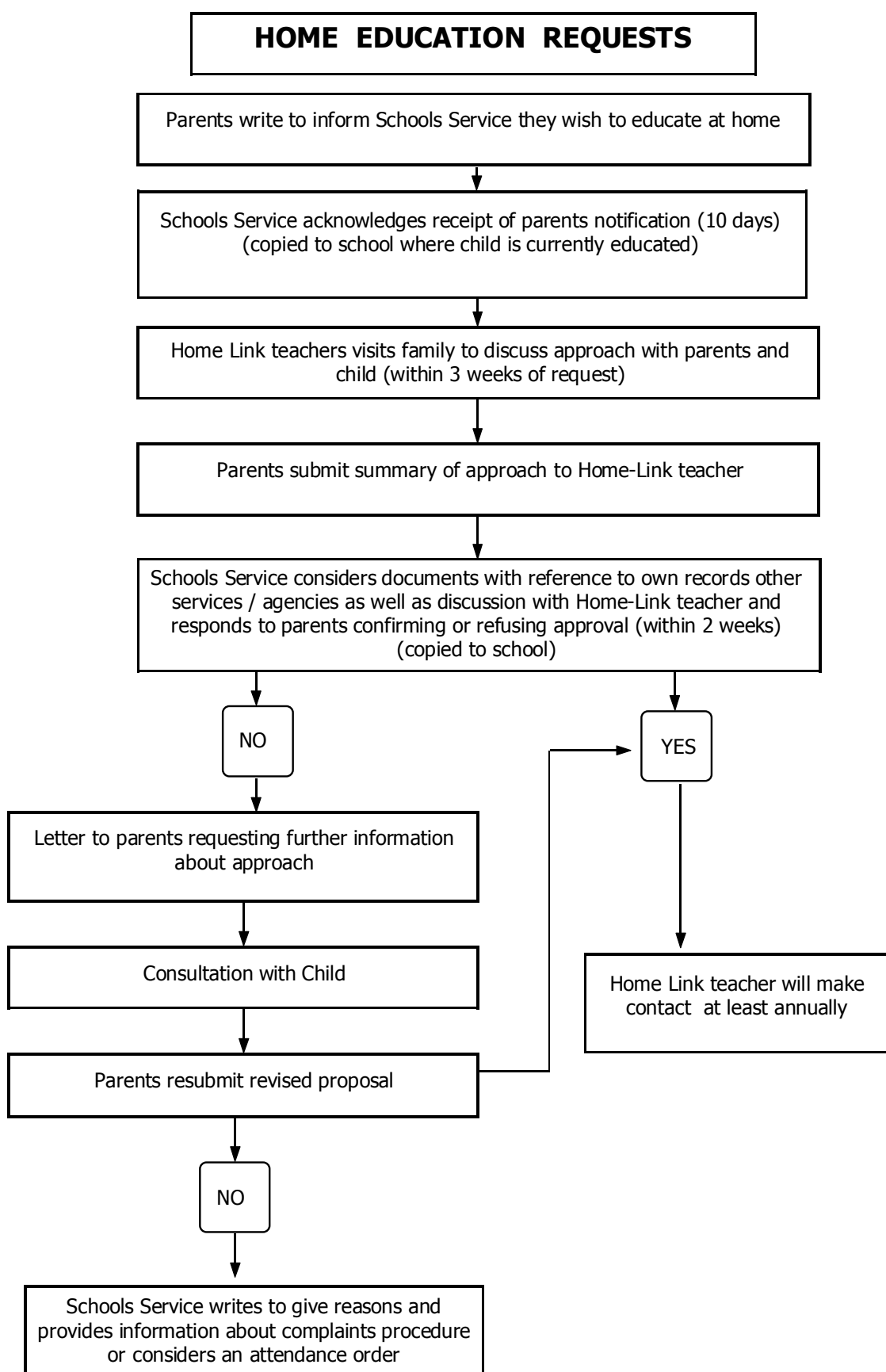
How will you record your child's progress?

What evidence can you provide of your child's opinion on his/her education?

Further details/comment:

Parent's signature \_\_\_\_\_ Home-Link Teacher \_\_\_\_\_

*Please note that active learning is recognized to be a successful approach. Reading, numeracy, and the use of information technology are considered essential skills by most employers. Similarly, opportunities to develop social competence and to explore the environment are key features of an effective educational programme.*





*Extract from:*

## **Managing Inclusion 2 - Guidelines for Head Teachers**

### **19a. Children Educated at Home**

***Education authorities and home educators should “work together to develop trust, mutual respect and a positive relationship that functions in the best interests of the child”***

*(Guidance on the circumstances in which parents may choose to educate their children at home, Scottish Government)*

The Schools Service supports the right of parents to educate their children at home and is committed to working closely with the family to ensure that the education is in the best interests of the child.

The Home Link teacher should inform Head Teachers of the young people in their catchment area who are home educated. She will liaise between the school and the home-educating parents regarding any access to resources/links with school pupils.

Good practice in supporting home educating parents may include

- e-mail links with pupils in school
- offering opportunities to home-educated children to attend school concerts
- sending home-educated children copies of school newsletters
- lending resources where appropriate
- use of school buildings to sit certificated exam

In all cases, the child's interests should be considered paramount. A copy of the Parent leaflet on Home Education is available from the Schools Service.

#### **Read these for more information**

Guidance on the circumstances in which parents may chose to education their children at home  
(Scottish Government)

Home Education Policy (SIC)

Children Education at Home through Ill Health Guidelines (Managing Inclusion, SIC)

## Appendix 6

Head of Schools: Helen Budge  
**Executive Director: Hazel Sutherland**

Schools Service  
**Education and Social Care Department**  
Hayfield House  
Hayfield Lane  
Lerwick  
Shetland ZE1 0QD

Telephone: 01595 744000  
Fax: 01595 744074

If calling please ask for  
**Helen Budge**  
Direct Dial: 01595 744064

E-mail: [Helen.Budge@shetland.gov.uk](mailto:Helen.Budge@shetland.gov.uk)

Date:

Your Ref:  
Our Ref:

Dear .....

### Home Education

I write now to confirm our approval for your request to educate (child/young person's name), on the basis of the information you have provided from (date).

In line with our policy, (name of teacher) our Home Link Teacher will be in touch with you at least annually to assist us in ensuring an efficient and suitable education for (child/young person's name)

I wish you well in your decision to home educate and hope that this may be effective in ensuring (child/young person's name) is a successful learner, and a confident, responsible young person.

Please contact our Home Link Teacher if you have any further queries.

Yours sincerely

Helen Budge  
Head of Service

cc: Home Link Teacher  
School (where appropriate)



## REPORT

To: Services Committee

9 October 2008

From: Executive Director of Education and Social Care

### **New Anderson High School Capital Project Update**

#### **1 Introduction and Key Decisions**

- 1.1 At the Council meeting in June 2008, Members agreed a way forward for the Anderson High School capital project (Minute Reference 94/08). This Report provides an update for Members on the actions which were agreed to progress this project. Specifically, this Report asks Members to approve the overall Brief, to enable the detailed design to progress (the framework for which is included at Appendix 1 as a work in progress, which will be updated and circulated prior to the meeting).

#### **2 Links to Council Priorities**

- 2.1 Schools – Ensure a model for education is developed by 2009 that considers the educational and financial viability for schools and communities and its outputs are then implemented.
- 2.2 Schools – Consider the development of ‘Centres of Excellence’ and building on existing high quality facilities.
- 2.3 The overall purpose of the Schools Service is to, “to create and maintain a framework and culture in which individual learners can strive to realise their full potential”.
- 2.4 For any capital investment decision, the Council has to satisfy itself that it is achieving value for money.

- 2.5 At Services Committee, in November 2007, a Report was presented entitled, “Developing a Blueprint for the Education Service”. Members considered the Report and agreed,

“that (a) the key drivers should be to provide the best quality educational opportunities and learning environment for all; (b) in so doing, the opportunities for savings to bring budgets to a sustainable level should be considered; and (c) the final blueprint comes back to Services Committee with an action plan to look at all schools, internal management, the necessary investment required, quality of education, new ways of delivering education and the potential for each school within a realistic timescale”.

### **3 Background**

- 3.1 A summary of the decision taken by Council in June 2008 is set out below.

- There is a target budget of £49m set for the whole cost of the project (subject to an inflationary increase year on year).
- There is a need to report progress to Services Committee, every cycle of meetings.
- Services Committee will be asked to make decisions on the detail of the project, in particular:
  - the overall design size; and
  - the revised brief and accommodation schedule; and
  - the principles of the redesign and siting of the new school on the Knab site, such as to seek as far as possible to minimise the disruption to the existing school during the construction phase and minimise the dominance and visual impact on the Knab site; and
  - the detailed educational and technical impacts of the possibility of any demolition or decant options, which might be developed.
- The Chief Executive was tasked with:
  - appointing a dedicated project manager with a proven record of successfully managing large capital projects;
  - investigating and reporting on whether Early Contractor Involvement (ECI) remains the best option for the SIC in relation to this particular project;
  - investigating what advice and assistance Scottish Government experts can contribute to this process.

- 3.2 In August 2008, Members considered reports on the site appraisal and the Early Contractor Involvement arrangements. Members also approved an Accommodation Schedule for the school, to meet the target size of 15,000

m<sup>2</sup>, set by the Council in June 2008. The planning application is scheduled to be submitted by March 2009.

#### **4 School Assessment of Concept Designs**

- 4.1 Over the past few weeks, the Architect has drawn up concept designs, to determine if it is possible to build an affordable 15,000 m<sup>2</sup> school on the Knab site, without compromising the educational experience of the pupils during the construction phase. The concept drawings were shared with staff at the Anderson High School in September.
- 4.2 The concept design moves the proposed site of the new school down from the original location – to the north and east.
- 4.3 The current idea involves the demolition of the Physical Education (PE) block and the huts which Train Shetland use. Alternative premises are being explored for Train Shetland, nearer to the centre of town. Decant alternatives are being explored and costed for PE, as well as exploration of use of existing facilities at Clickimin, Gilbertson Park and Islesburgh. Alternative PE facilities would be required for a year so affecting one or two year groups (depending on when construction started in relation to the school year). The options for the Music block are also currently being explored, as it is possible that decant will be required for that subject area.
- 4.4 The concept would require 7 separate phases and the construction period would be 3 years.
- 4.5 The Head of Schools and the Head Teacher of the Anderson High School are using the concept drawings to undertake a detailed assessment of the impact on the operation of the school and the possible educational impact on pupils during construction.

#### **5 Developing the Brief**

- 5.1 The focus of the work at the moment is to develop a full and complete Brief, which describes in detail to the contractor what it is that Shetland Islands Council wants to build. The Contractor, through the Architect, then works that specification into a detailed design. The initial designs will be available by mid-November. Revised costings will be worked up over the same period.
- 5.2 Appendix 1 is a revised Brief, including the School Accommodation Schedule, for approval. It was not possible to achieve all the requirements which the Council approved in August 2008, due to circulation space requirements, so the school has had to re-size the specification downwards by about 850 m<sup>2</sup>.

- 5.3 The overall Brief for the project also includes design parameters, sustainability requirements, outside space, traffic management considerations, etc. This is presented as a work in progress at Appendix 1, the latest version of which will be updated and circulated prior to the meeting.

## **6 General Update**

- 6.1 The team continue to make good progress, with most of the target dates for completion of the various tasks being achieved.
- 6.2 Approval of the detailed Brief will enable the Contractor and various consultants to work up a detailed design and start the process of re-costing the construction works.
- 6.3 The project team have now started to share the concept designs with other interested partners, such as planning, roads, etc. A dialogue has started with Sport and Leisure Services and Shetland Recreational Trust over possible solutions to the loss of the PE facility for a year. A newsletter has been circulated to near neighbours and presentations have been made to Lerwick Community Council and the Parent Council at Anderson High School. Regular meetings of the AHS Member Liaison Group and the Project Team have been established.
- 6.4 Contact with the Scottish Government has been made and guidance provided on the ideas to include in the detailed Brief to ensure that the Council builds a School which is fit for purpose for changing teaching and learning methods and structures. Unfortunately, the Scottish Government do not have enough dedicated staff to second someone to work on the project.
- 6.5 The Scottish Government recommended that the Project Team contact Architecture and Design Scotland (A+DS), which is Scotland's national champion for good architecture, design and planning in the built environment. A+DS is an advisory Non Departmental Public Body (NDPB) and operates as a company limited by guarantee funded directly by the Scottish Government. A+DS acts as a key delivery mechanism for the objectives of the Scottish Government's Policy on Architecture for Scotland. Their main aim is to inspire better quality in design and architecture in the public and private sectors so that Scotland's built environment contributes in a positive way to our quality of life and our built heritage. The Scottish Government support the Architecture and Design Scotland (A+DS) schools design programme. The A+DS schools programme gives all councils access to specialist, one-to-one, advice on their school building projects. The three year scheme will involve:
- An Education Design Champion promoting and inspiring good design in schools;

- Tailored assistance for all councils to provide impartial advice on their school projects;
- Design evaluations of some projects, reviewing the design process at key stages.

The Project Team are in discussion with A+DS to determine the nature of the support they will be able to provide to Shetland Islands Council.

- 6.6 A healthy number of expressions of interest were received for the Project Management contract and a shortlist of interested parties have been invited to tender for the service.

## 7 Financial Implications

- 7.1 There are no direct financial implications arising from this Report. The cost of preparing the various studies required by the Council was met from the existing consultants budget for the project (currently £1.4m for 2007/08). To date, the project spend is £3m, as detailed in Table 1 below.

Table 1: Cost of Developing the new AHS Capital Project (2003 – September 2008)

### AHS Spend by Item

	£
Direct Employee Costs	20,603
Contractors Costs	1,634,168
Misc Operating Costs	49,159
Travel & Subsistence Costs	39,282
Advertising	20,682
External/Professional Fees	906,796
Recharges Other Council Services	305,311
Total	<u><u>2,976,001</u></u>

- 7.2 In Financial Year 2008/09, expenditure to date stands at £0.6m, the detail of which is shown in Table 2.

Table 2: Cost of Developing the new AHS Capital Project (Current Financial Year Only to September 2008)

### AHS Spend by Item

	£
Direct Employee Costs	1,985
Contractors Costs	470,252
Misc Operating Costs	585
Travel & Subsistence Costs	5,643
Advertising	-
External/Professional Fees	138,683
Recharges Other Council Services	-
	<u><u>617,147</u></u>

- 7.3 The cost of a dedicated Project Manager is estimated at £200K - £300K. No specific provision was made in the original budget for this cost but it will be contained within the overall target of £49m, agreed by the Council.

## **8 Policy and Delegated Authority**

- 8.1 Section 13 of the Council's Scheme of Delegations enables Services Committee to approve capital expenditure within any allocation delegated to the Committee by the Council.
- 8.2 Shetland Islands Council, at its meeting in June 2008 [Minute Reference 94/08], made a specific recommendation to remit the detailed development of the Anderson High School project to Services Committee.
- 8.3 However, Shetland Islands Council holds overall responsibility for the capital programme so recommendations will be made from Services Committee to the Council, as the project develops.

## **9 Conclusions**

- 9.1 The Project Team is making good progress in working through the actions to develop the project and all timescales have been met so far, by the Contractor, Consultants and Council staff.

## **10 Recommendations**

- 10.1 I recommend that Services Committee recommend to the Council to:
- (a) note that good progress is being made against the tasks and timescales established to be in a position to submit a planning application by March 2009; and
  - (b) consider and agree the revised Brief, including the Accommodation Schedule, at Appendix 1, for submission to the Contractor and Design Team to further develop initial design options and costings for building a new school on the Knab site.

Our Ref: HAS/sa

Report No: ESCD-56-F



## **New Anderson High School Capital Project**

### **Appendix 1: Overall Brief and Accommodation Schedule**

#### **Justification**

The current AHS does not fully meet modern educational and building standards in the following areas:

- disabled access is restricted in some areas of the site
- the maintenance liability is high, due to the lifespan and condition of the current building
- dining room space is very limited (so the school will have difficulty in meeting new healthy eating legislation)
- the Halls of Residence is used to provide meals as lunchtime and their dining room space is limited and operating at near capacity
- circulation and gathering spaces (to acknowledge the local weather conditions) is insufficient and not suitable for pupil's needs
- examples of recent school disruption include:
  - during the past winter, the school had to close unexpectedly as a result of health and safety issues concerning plumbing and electrical problems.
  - last session, a partition wall was dismantled, over a weekend, to try to repair a burst pipe in a stairwell
  - before the summer holidays, the school experienced a burst heating pipe, flooding three floors
  - problems in external pipework have caused flooding and loss of heating to parts of the school
- School closure causes disruption to the pupils' learning as well as transport and childcare difficulties. It also causes problems for the Halls of Residence, where the heating and electrical systems are linked to the school, and pupils are being sent to another building with the same problems as the school.

The overall purpose of the Anderson High School project set out below.

A school to deliver secondary education from Secondary 1 (S1) to Secondary 6 (S6), for the pupils of Lerwick and the surrounding area, pupils transferring from the small islands and pupils transferring from junior high schools. Although to be built in Lerwick, it is a school which serves the needs of the whole Shetland community.

The space should meet the learning needs of all pupils at present and be flexible enough to accommodate learning needs of the future (through technological advances, changes to models of delivery such as the Curriculum for Excellence, etc). It must be fully compliant with the disabled access requirements.

The space should embrace the concept of community use and have the ability to serve pupils, parents, learners and other service users beyond the school day. Where possible spaces for community use should be located in areas which can be closed off from the rest of the building (for reasons of safety, security and supervision).

When planning for future service needs, the following factors need to be considered in deciding on the scope and size of the new Anderson High School:

- Implementing the Curriculum for Excellence;
- The Additional Support for Learning Act;
- The forthcoming review of the structure of the curriculum and the qualifications framework in terms of what that might mean for pupils in Secondary 3 and Secondary 4 and how that might impact on the current Junior High School model (currently out to consultation by the Scottish Government); and
- A national drive to deliver more vocational learning opportunities.
- School Roll
- New developments in learning and teaching, and exam provision, using ICT
- Blueprint for Education
- This accommodation schedule allows for linking into the Gressy Loan Additional Support Needs Unit.

It might be worth explaining why the recommendation is for a size of school to accommodate 1,000 pupils. If it were the case that the proposed examination structure changes under the Curriculum for Excellence, resulting in secondary 4 pupils starting Higher and Intermediate grade courses earlier, building to Advanced Higher and Baccalaureate courses, this may change the point of transfer for pupils from junior high schools. Setting the size of the school to accommodate 1,000 pupils would mean that more pupils could be accommodated than at present, without an extension to facilities at an early stage in the life of the new school. In addition, the reasons for the size set in the original brief remain valid and are set out below:

- One teacher – one classroom (this is generally consistent with educational experience across Shetland)
- A higher than national percentage of pupils in Class 5/6. This means more small “higher” and “advanced higher” classes for university preparation, hence more independent or small group learning situations
- Designated social space to accommodate total pupil roll. The area needs to be able to accommodate all year groups in bad weather
- Integration of the behavioural support base
- The science technician service which supports all Shetland Schools is based at Anderson High School
- Good practice in modern school design would suggest that each child benefits from having a secure locker space and a peg for outdoor clothing. Space for 1000 lockers and pegs is included within this accommodation schedule.

## Capacity

The school should have the capacity for up to 1,000 pupils.

The current school roll, and projections for the next 10 Years is set out in the Table below. These are shown as the “status quo” and also what the numbers might be should all Secondary 4 (S4) pupils transfer earlier under the changes to exam structure through the Curriculum for Excellence developments.

Ten Year projection of AHS under three scenarios

	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Status Quo	846	820	765	744	683	684	690	718	734	755
Curriculum for Excellence	977	948	880	881	823	846	829	848	864	875

Notes:

Status Quo - School estate remains unchanged with existing cluster primaries feeding existing high and junior high schools.

Curriculum for Excellence - Under Scottish Government Curriculum for Excellence all S4 pupils would transfer to AHS.

For reasons of future planning, it is proposed to build in the capacity to accommodate Secondary 4 (S4) pupils who are currently educated in junior high schools, as it is likely that changes to the exam structure at a national level will mean that the current model of delivery will need to change.

The design should be flexible enough to accommodate future extensions to the building should the current pupil number trends significantly change (for example as a result of the Community Planning Board’s aspirations to increase the population of Shetland).

## **Requirements**

### Community Use Requirements

- Evening classes
- Sport and leisure facilities
- Meeting spaces for community groups

### Environmental Factors / Sustainability

- that the design has taken account of SIC policies relating to design including the size, scale and dominance of the building in relation to the site;
- that the design and the external finishes and building materials will help integrate the building successfully into the Lerwick skyline;
- that appropriate access to the ASN building and for disabled visitors and pupils is in place;
- that the school design and grounds offer educational opportunities;

- that the landscape helps integrate the school into its surroundings and provides areas for encouraging physical activities;
- that all aspects of the school have been designed to take account of national and local sustainability targets and responded to these (and where this has not been possible robust reasons for not meeting them)
- that whole life costs have been considered in the decision making process;
- that environmental aspects have been addressed (identification of potential impacts; agreed mitigation; residual effects) and demonstration of Council commitments in the design (for example meeting the Council's Biodiversity Duty);
- access to natural daylight has been maximised
- re-use of existing resources, where possible

#### Affordability

- Capital
- Revenue
- Whole Life Costs, including Transport

#### Maintainability

- Building maintenance "friendly"
- Adopting types or equipment and levels of technology that can be serviced and maintained locally
- Easily cleaned

#### Outside Space / Landscaping

- PE Curriculum outside space requirements
- Informal outside gathering spaces for pupils and staff
- Landscaping easily maintained
- Pedestrian Access
- Vehicular Access and Parking
- Pupil Drop Off / Collection
- Deliveries Access

#### Energy Efficiency

- An energy efficient building

#### Security

- Appropriate security measures for pupils, visitors and community use.

#### Technology

- Up to date ICT infrastructure, to support modern learning methods.

## Furniture and Equipment

- Moveable furniture and furniture to transfer to new school
- Estimated value of moveable furniture and equipment in new build will be (£to be determined)
- Removal assumptions

## Demolition Assumptions

- CLASP buildings
- Huts
- Block D (New Science Block)

## Design Criteria

The Council would wish to ensure that the new Anderson High School is designed to inspire pupils, in line with guidance provided by national agencies such as The Commission for Architecture and the Built Environment (CABE) and Architecture and Design Scotland (A+DS).

CABE has produced a design guide called, “*Creating excellent secondary schools*”

<http://www.cabe.org.uk/default.aspx?contentitemid=1935>

A+DS has produced a range of publications on School Design, Sustainability, Optimising the Internal Environment, and Building Excellence, which focuses on the implications of the Curriculum for Excellence for school design.

<http://www.scotland.gov.uk/Topics/Education/Schools/Buildings/Design>

Case studies are available which highlight good practice in school design across Scotland, and includes plans, images, user views and information on the design features of 20 projects covering all sectors.

[www.scotland.gov.uk/schoolestate-casestudies](http://www.scotland.gov.uk/schoolestate-casestudies)

## Accommodation Schedule

Department	Room	Floor Area (sqm)	Adjustments	Approved August 2008	For Approval October 2008
<b>English</b>					
General teaching	Classroom (English)	60			
General teaching	Classroom (English)	60			
General teaching	Classroom (English)	60			
General teaching	Classroom (English)	60			
General teaching	Classroom (English)	60			
General teaching	Classroom (English)	60			
General teaching	Classroom (English)	60			
General teaching	Classroom (English)	60			
General teaching	Classroom GP/PSE	49			
General Teaching	Seminar Room - English	17			
Non-Teaching Spaces	Faculty Base - English	42			
<b>Mathematics</b>					
General teaching	Classroom (Mathematics)	60			
General teaching	Classroom (Mathematics)	60			
General teaching	Classroom (Mathematics)	60			
General teaching	Classroom (Mathematics)	60			
General teaching	Classroom (Mathematics)	60			
General teaching	Classroom (Mathematics)	60			
General teaching	Classroom (Mathematics)	60			
General teaching	Classroom (Mathematics)	60			
General Teaching	Seminar Room - Maths	17			
Non-Teaching Spaces	Faculty Base - Maths	42			
<b>Humanities</b>					
General teaching	Classroom (Humanities:History)	60			
General teaching	Classroom (Humanities:History)	60			
General teaching	Classroom (Humanities:Geography)	60			
General teaching	Classroom (Humanities:Geography)	60			
General teaching	Classroom (Humanities:Geography)	60			
General teaching	Classroom (Humanities:Modern Studies)	60			
General teaching	Classroom (Humanities:Modern Studies)	60			
General teaching	Classroom (Humanities:RMPS)	60			
General teaching	Classroom (Humanities:RMPS)	60			
General Teaching	Seminar Room - Humanities	17			
Non-Teaching Spaces	Faculty Base - Humanities	42			
<b>Sciences - Chemistry</b>					
Science	Science Laboratory (Chemistry)	87			
Science	Science Laboratory (Chemistry)	87			
Science	Science Laboratory (Chemistry)	87			

Storage	Science Prep/Storage	42
Science	Science Laboratory (AH)	53

<b>Sciences - Physics</b>		
Science	Science Laboratory (Physics)	87
Science	Science Laboratory (Physics)	87
Science	Science Laboratory (Physics)	87
Storage	Science Prep/Storage	42
Science	Science Laboratory (AH)	53

<b>Sciences - Biology</b>		
Science	Science Laboratory (Biology)	87
Science	Science Laboratory (Biology)	87
Science	Science Laboratory (Biology)	87
Non-Timetabled Spaces	Greenhouse	12
Storage	Science Prep/Storage	42
Science	Science Laboratory (AH)	53

<b>Sciences - Shared</b>		
Science	Science Laboratory (Biology/Physics/Chemistry)	87
Non-Teaching Spaces	Faculty Base - Science	42

<b>Modern Languages</b>		
General teaching	Classroom (Languages)	60
General teaching	Classroom (Languages)	60
General teaching	Classroom (Languages)	60
General teaching	Classroom (Languages)	60
General teaching	Classroom (Languages)	60
General teaching	Classroom (Languages)	60
General teaching	Classroom GP/PSE	60
General Teaching	Seminar Room - MFL	17
Non-Teaching Spaces	Faculty Base - MFL	39

<b>Business Studies</b>		
General teaching	Classroom (Business Studies)	60
General teaching	Classroom (Business Studies)	60
Practical Teaching	Computer Studies (Business Studies)	68
Practical Teaching	Computer Studies (Business Studies)	68
Non-Teaching Spaces	Faculty Base - ICT	39

<b>ICT</b>		
Practical Teaching	Computer Studies (ICT)	68
Practical Teaching	Computer Studies (ICT)	68
Practical Teaching	Computer Studies (ICT)	68
General Teaching	Seminar Room - ICT	17

<b>Technology</b>		
Practical Teaching	CDT - Craft (wood/metal)	116
Practical Teaching	CDT - Craft (wood)	87
Practical Teaching	CDT - Craft (metal)	87
Practical Teaching	CDT - Non Craft (Drawing/Design)	78
Practical Teaching	CDT - Non Craft (Drawing/Design)	78
Practical Teaching	CDT - Non Craft (Drawing/Technology)	78
Practical Teaching	CDT - Non Craft (Drawing/Technology)	78
Non-Teaching Spaces	Faculty Base - CDT	34
Storage	Wood Store (CDT)	49
Storage	Craft Store	35

Storage	Non Craft Store	23
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<b>Art and Design</b>		
Practical Teaching	Art and Design (3D)	112
Practical Teaching	Art and Design (2D)	87
Practical Teaching	Art and Design (2D)	87
Practical Teaching	Art and Design (2D)	87
Non-timetabled space	Art and Design resource area	42
Non-timetabled space	Kiln	10
General Teaching	Seminar Room - A&D	17
Non-Teaching Spaces	Faculty Base - A&D	34
Storage	Art & Design Store	31

<b>Music</b>		
Practical Teaching	Music	69
Practical Teaching	Music	69
Practical Teaching	Music	69
Non-timetabled space	Music Group Room	15
Non-timetabled space	Music Group Room	15
Non-timetabled space	Music Group Room	15
Non-timetabled space	Music Group Room	15
Non-timetabled space	Music Group Room	57
Non-timetabled space	Music Group Room	57
Non-Teaching Spaces	Faculty Base - Music	25
Storage	Music Store	29
Storage	Music (Large Instrument store) pupils	39

<b>Home Economics</b>		
Practical Teaching	Home Economics	84
Practical Teaching	Home Economics	84
Practical Teaching	Home Economics	84
Practical Teaching	Vocational Training	29
Non-Teaching Spaces	Faculty Base - HE	29
Storage	Home Economics Store	42

<b>ASN</b>		
Non-timetabled space	ASN General	29
Non-timetabled space	ASN General	29
Non-timetabled space	ASN General	58
Non-timetabled space	ASN General/Life Skills	58
Non-timetabled space	ASN/Learning Support	29
Non-timetabled space	ASN/Learning Support	29
Non-timetabled space	ASN/Learning Support small	10
Non-timetabled space	ASN/Learning Support small	10
Non-timetabled space	ASN/Learning Support small	10
Non-timetabled space	ASN/Learning Support small	10
Non-timetabled space	ASN/Learning Support large	19
Non-timetabled space	ASN/Learning Support large	19

<b>Pupil Support</b>		
Non-Teaching Spaces	Guidance Office	58
Non-Teaching Spaces	Guidance / Interview Rooms	12
Non-Teaching Spaces	Guidance / Interview Rooms	12
Non-Teaching Spaces	Guidance / Interview Rooms	12
Non-Teaching Spaces	Pupil Support / Behaviour	29
Non-Teaching Spaces	Pupil Support / Behaviour	29
Non-Teaching Spaces	Pupil Support / Behaviour	29



Non-Teaching Spaces	Pupil Support / Behaviour Office	12
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<b>Physical Education</b>		
General teaching	Classroom (PE)	60
PE	Games Hall(s)	1048
PE	Gymnasium (19X10)	190
Non-Teaching Spaces	Fitness Suite	87
Non-Teaching Spaces	Faculty Base - PE	34
Non-Teaching Spaces	Changing PE	26
Non-Teaching Spaces	Changing PE	26
Non-Teaching Spaces	Changing PE	26
Non-Teaching Spaces	Changing PE	26
Non-Teaching Spaces	Changing PE	26
Non-Teaching Spaces	Changing PE	26
Storage	Games Hall Store	78
Storage	Gymnasium Store	39

<b>Whole School</b>		
Non-timetabled space	Library (inc. Librarians office)	252
	Stage (fixed)/Drama	106
Assembly / Social Space	Main Hall/Social/Dining areas	1300
Non-timetabled space	Recording/control room	15
Non-Teaching Spaces	Changing Drama	31
Non-Teaching Spaces	Changing Drama	31
Storage	Drama Store	19
Storage	Assembly/Social Space store (furniture)	34
Non-Teaching Spaces	Meeting Room	49
Non-Teaching Spaces	Lockers (3-5 blocks)	100
Non-Teaching Spaces	Staffroom	97
Non-Teaching Spaces	Medical Suite	29
Non-Teaching Spaces	Kitchen	160
Non-Teaching Spaces	Toilets (Pupils, staff, visitors)	174
Non-Teaching Spaces	Disabled Toilets	41
Non-Teaching Spaces	Hub / Server	10
Non-Teaching Spaces	Plant Rooms	668
Non-Teaching Spaces	Exam Office & Store	19
Storage	Exam Desk Store (near Games Hall)	24
Storage	Exam Desk Store (near Main Hall)	10
Storage	Cleaners' office, central and local stores	20
Storage	General Classroom Storage across the school	98

<b>SMT</b>		
Non-Teaching Spaces	Head Teacher	24
Non-Teaching Spaces	Depute Head Teacher	19
Non-Teaching Spaces	Depute Head Teacher	19
Non-Teaching Spaces	Depute Head Teacher	19

<b>Janitorial</b>		
Non-Teaching Spaces	Janitor	19
Storage	Janitor (Workshop and Office)	29
Storage	Garage for tractor, quad, outdoor sports	19

<b>Administration</b>		
Non-Teaching Spaces	Admin / Repro	107
Storage	Admin / Repro store	19

<b>Shetland Science Technician Service</b>		
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Non-Teaching Spaces	Technicians (store)	87
Non-Teaching Spaces	Technicians (Chemicals prep and store)	63
Non-Teaching Spaces	Technicians (workshop and office)	24

<b>IT Technician Service</b>		
Non-Teaching Spaces	ICT Technician Workshop	32
Storage	ICT Technician Store	16

<b>Total Room Area</b>	11981
<b>Circulation and Partitions - (25%)</b>	2995
<b>Total Floor Area</b>	14976



## **REPORT**

**To: EJCC  
Services Committee**

**23 September 2008  
9 October 2008**

**From: Head of Community Care**

**Report No: SC-11-08-F  
Creation of Post of Adult Protection Co-ordinator**

### **1. Introduction**

- 1.1 This report seeks approval for the creation of a new post of Adult Protection Co-ordinator, to assist the Council in meeting its obligations under the Adult Support and Protection (Scotland) Act 2007, the funding for which will be met from an additional grant from the Scottish Government.

### **2. Links to Corporate Priorities**

Shetland Islands Council and Shetland NHS Board are committed to:

- Ensuring that all individuals have the right to feel safe in their communities
- Decreasing social inequalities
- Reducing harm
- Partnership working with parents, the public, staff and other stake holders.

### **3. Background**

- 3.1 The Adult Support and Protection (Scotland) Act 2007 was passed by the Scottish parliament in Spring 2007. Part 1 is due to be implemented from the end of October 2008.
- 3.2 In the last cycle of meetings, Members approved arrangements to establish the Adult Protection Committee, supported by a multi-agency working group (Minute Reference SC 64/08) and noted that there would be a need for a follow up Report to explain the staffing implications arising from the new Act.

3.3 In discharging its statutory functions the Adult Protection Committee will be required to:

- Encourage collaborative interagency working to ensure that agreed joint policies and procedures are in place to respond effectively to protect Vulnerable Adults.
- Ensure the development and implementation of a multi agency Adult Protection Strategy
- Monitor and evaluate the effectiveness of both multi agency and single agency practice and compliance with agreed procedures
- Audit interagency adult protection practice
- Establish an agreed mechanism for the multi agency review of critical incidents to promote continuous improvement in service quality
- Ensure that multi agency and individual training and support needs are identified and met through the development and implementation of a multi agency training strategy
- Establish and maintain good communication and collaboration practices between local agencies with a responsibility for adult protection
- Agree the requirements for collecting and analysing management and performance information
- Produce and disseminate public information on adult protection to raise awareness and influence attitudes of abuse
- Promote direct links between child protection, adult protection and offender management services
- Prepare a biennial report covering the activity of all constituent agencies

3.4 The Scottish Government invited bids from authorities, in recognition of the new responsibilities, set up costs and training requirements. The Council bid for additional resources of approximately £250,000 per annum but the award is expected to be approximately £65,000 per annum, based on the overall allocation announced for Scotland. The allocation falls well short of the estimated costs presented via the Association of Directors of Social Work (ASDW) and COSLA, which included:-

- an Adult Protection Co-ordinator;
- two additional social workers; and
- additional training resource and administrative support.

## **4. Proposals**

4.1 Taking account of the funding allocation, the immediate priority is to develop and recruit to a new post of Adult Protection Co-ordinator. The role will develop the service and ensure compliance with the legislation (in the same way that the Child Protection Co-ordinator ensures compliance on all Child Protection issues). The timescales for implementing the new arrangements are particularly challenging and can only be achieved with the support of additional staff time

being dedicated to the tasks. Otherwise, the task would fall to the Chief Social Work Officer, who already carries a significant workload. The Co-ordinator would be able to assist the Chief Social Work Officer in monitoring any increase in demand for social work services due to adult protection investigations and report these to COSLA and the Scottish Government to inform the process for funding based on actual service needs in future years.

4.2 The key tasks which the new post will be required to complete are:

- The establishment of a multi-disciplinary Adult Protection Committee for Shetland, including the appointment of a Chair and appropriate training
- The establishment of multi-disciplinary systems and procedures, for practitioners and managers.
- Training needs assessments
  - Clarifying the roles and responsibilities in adult protection, including appropriate care pathways and advocacy support
  - Establishing systems and procedures for the protection orders which are defined in the Act including: assessment orders; removal orders; and banning orders
  - To create appropriate communication and marketing material to explain the new arrangements.

4.3 The funding allocation would be sufficient to establish the Co-ordinator's post, cover the immediate costs of training and provide some administration support. At this stage the intention would be to employ one part time admin support worker to provide support to the co-ordinator's post, similar to the arrangements in place for child protection.

## 5. Financial Implications

5.1 Shetland's allocation for 2008/09 is for the period from October to March. It includes £3,000 for recruitment of the chair of the Adult Protection Committee, set up costs and six months running costs (based on population figures for adults aged 16 and over). The total allocation for 2008/09 is £35,885. The Department will manage the workload to ensure that the additional staffing, set up and training costs can be met from the additional funding from the Scottish Government. It is inevitable, however, that other staff will spend more time in the implementation of the new Act, than might have been the case had the Council been successful in securing funding for all the additional costs.

5.2 A total figure for all Scotland of £15.6M for 2009/2010 has been agreed in principle, which would suggest that the allocation for Shetland would be approximately £65,000. However, there is a commitment in the letter from the Scottish Government to make the allocation for 2009/2010 based on actuals from the first 6 months operation of the Act. The new costs and income will be built into the 2009/10 revenue estimates.

- 5.3 The process of evaluation is underway but is not as yet complete. Subject to confirmation of Job Evaluation, the financial implications for the proposals in this report are expected to be as follows. This table shows the costs for a full year.

1FTE Adult Protection Co-ordinator post Full Employers costs per annum	£45,043
1 Part time Admin Support Worker 0.6FTE, initially	£14,961
Recruitment Costs	£120
Training Costs per annum	£4,850
	<b>£64,974</b>

- 5.4 The intention would be to recruit the adult protection co-ordinator locally, however, if this was unsuccessful an additional £3,000 would be required up to approximately £8,000, to cover the costs of external recruitment and this would be found within existing budgets.
- 5.5 The expenditure in 08/09 is likely to be a maximum of 4 months for the co-ordinator post, plus pump priming for the adult protection scheme locally, including recruitment costs for the Convener of the committee and initial training programmes. This sum will not be more than the £35,885 allocated for 2008/09.

## **6. Policy and Delegated Authority – Shetland Islands Council**

- 6.1 All Social Work matters stand referred to the Services Committee. The Committee has delegated authority to make decisions on matters within its remit and for which the overall objectives have been approved by the Council, in addition to appropriate budget provision, in accordance with Section 13 of the Council's Scheme of Delegations.
- 6.2 The proposals within this report are covered by the Council's overall objectives for the Social Care Services and are within existing budget provision, however, it requires a decision of Council to create additional posts.

## **7. Conclusions**

- 7.1 In order to progress the work required to implement the new Adult Support and Protection (Scotland) Act 2007, there is a need to establish and appoint to a new post of Adult Protection Co-ordinator. The costs will be met from an additional allocation from the Scottish Government. In addition, the post will require some administrative support and we will need to meet the start up costs of the new arrangements (specifically establishing the new Adult Protection Committee) and a significant amount of multi-agency training.

## **8. Recommendations**

I recommend that the Shetland Islands Council Services Committee recommends to Council to create the new post of Adult Protection Co-ordinator, with some administrative support, to be met from the additional funding from the Scottish Government, as detailed in this report.

Date: 15 September 2008  
Ref: CF'HS'SC-11-08

Report No: SC-11-08-F







## REPORT

To: Services Committee

9 October 2008

From: Executive Director of Education and Social Care

### Shetland's Cultural Strategy: Draft for Consultation

#### 1. Introduction

- 1.1 This reports asks Services Committee to agree the Draft Cultural Strategy, for consultation.

#### 2. Links to Corporate Priorities

- 2.1 Culture is embedded in the Community Planning Board's aim to, "create a secure livelihood, look after our stunning environment and care well for our people and our culture".
- 2.2 The Council's Corporate Plan, aims to, "... support individuals and communities to help them reach their full potential, cherish and promote our traditions and seek to promote cultural activities." Further, there is a commitment to, "deliver the actions set out in a refreshed Cultural Strategy ..." in order to, "help us to celebrate, promote and invest in the islands' distinctive creativity, diverse culture, heritage and environment".

#### 3. Background

- 3.1 The original Shetland Cultural Strategy was approved by the Council in February 2004. The Strategy was formally launched in June 2005 and copies have been widely distributed both within Shetland and outwith to national agencies and local authorities.
- 3.2 In October 2007, Services Committee agreed to refresh the Cultural Strategy [Minute Reference 58/07]. Services Committee acknowledged that there is a considerable amount of cultural activity and projects already taking place. The proposal to update the Strategy sought to provide focus and clarity on

the objectives which we are seeking to achieve, around leisure, learning and economic opportunities.

- 3.3 The Cultural Strategy Partnership includes Councillors Florence Grains and Caroline Miller and is chaired by the Cultural and Recreation Spokesperson, Councillor Rick Nickerson. A wide range of partners participated in the development work and were enthusiastic as to the value of refreshing the strategy, to take the work forward for the next 5 years or so. The Strategy is seen as particularly valuable when seeking funding from sources outwith Shetland.
- 3.4 A drafting group was formed, to write the new strategy, based on the original (which is still considered to be appropriate and relevant) but updated to take account of new areas of activities and policy direction.

#### **4. Proposal**

- 4.1 The refreshed Draft Cultural Strategy, "On the Cusp ....", is attached as Appendix 1. The key themes which flow from this work are very similar to the original strategy and are set out below.

##### **1 Access, participation and potential**

Encourage active and participative lifestyles, equality of opportunity, health and well-being, personal growth and community development through increasing access to, and participation in, the broadest range of cultural activities throughout Shetland, particularly for people who may be excluded or marginalised at present.

##### **2 Creativity and heritage**

Celebrate, promote and invest in the islands' creativity, diverse culture, distinctive heritage and environment, and develop and promote them within Shetland and to the wider world.

##### **3 Learning**

Recognise the value of creative and cultural skills as a source of self-fulfillment and a foundation for community identity, ensuring that the broadest practicable range of related educational opportunities is available.

##### **4 Culture and the Economy**

Ensure that the connections between culture and economic development are explored and understood and that investment in cultural assets and creative activities is actively pursued as a means to increasing prosperity.

- 4.2 It is proposed to undertake a focused consultation exercise, to determine if there is community support for the direction which we propose to embark upon through the Strategy.
- 4.3 The Draft Strategy includes an indicative Action Plan. The examples are intended mainly to illustrate the kinds of actions that might be included. In its final form, the Action Plan will take account of comments from consultees. This Cultural Strategy cannot encompass every project or initiative now contemplated, far less anticipate those that may emerge over its lifetime. However, certain actions are fundamental; they can be seen as foundations that will strongly support cultural activity, raise confidence and enhance Shetland's reputation as a place that is creative, clever and connected. They fall into three categories:
- physical resources
  - human resources
  - events

#### Physical Resources

Seven projects involving work on the ground are seen as essential catalysts; in alphabetical order, they are:

- Garrison Theatre refurbishment
- Lerwick Library redevelopment
- Mareel
- Old Scatness
- Shetland Textile Museum
- Sumburgh Head
- Viking Unst

#### Human Resources

Creative activity can only happen if creative people are attracted to stay in Shetland, or move here, and if there are suitable opportunities for development, training and support. Actions here include:

- Ensuring that means are in place to identify talented people and offer them appropriate training and support
- Developing a campaign aimed at encouraging creative people to live and work in Shetland
- Actively involving the people of Shetland in cultural and creative activity
- Recognising the role played by volunteers in the cultural life of Shetland and ensuring that local groups have access to training and support

#### Events

Events offer opportunities to discover and highlight talent. They can also contribute strongly to efforts to raise confidence and develop reputation.

An attractive and diverse events programme can help attract people to visit Shetland and can also persuade some of those visitors to come and live here.

The key action required is the development of an Events Strategy that will:

- Define the ways in which events may contribute to cultural and economic development, including tourism and in-migration
- Establish criteria to assist in assessing the value of existing and proposed new events and determining the level of support that they should receive
- Indicate how benefits to Shetland can best be realised from one-off or irregular events to which commitments have been made, including:
  - The Year of Architecture (Power of Place) 2009/10
  - Hamefarin' 2010
  - Inspire – Festival of Light 2010
  - Tall Ships Races 2011
  - Cultural Olympiad – London 2012

It is proposed that an Events Strategy be developed by June 2009.

## **5. Financial Implications**

- 5.1 There are no significant financial implications arising from this Report. Any expenses incurred in carrying out a consultation exercise will be minimal and met from existing budgets of the partner agencies. Any future bids for funding to support capital investment proposals will be developed in line with the Council's prioritisation of capital projects system.

## **6. Policy and Delegated Authority**

- 6.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to make decisions on the matters within approved policy and for which there is a budget. Culture and Recreation services fall within the remit of Services Committee. As this Report concerns the development of a new Strategy, the recommendations from this Committee will need to be endorsed by the Council.

## **7. Recommendations**

- 7.1 I recommend that Services Committee recommend to the Council to:

(a) approve the refreshed Draft Cultural Strategy, "On the Cusp...", as set out in Appendix 1, for the purpose of consultation with the local community.

# On the Cusp....

## Shetland's Cultural Strategy

### A vision for cultural life in Shetland 2009 - 2012

Shetland's culture is at the heart of our lives. We are very proud of our cultural heritage; we keep our traditions alive and learn from the past, but we are also a forward looking community and have a continual thirst for new cultural experiences and influences. The Strategy recognises Shetland's extraordinarily rich heritage, traditions and creativity and its unspoilt natural environment.

This strategy has been prepared by a number of organisations in Shetland which, working in partnership and individually, will fulfill its aims and objectives. It seeks to offer a shared view of the way in which Shetland's citizens would like life in the islands to develop. The Strategy sets out objectives for developing cultural facilities, services and activities for the benefit of the Shetland community. It recognises that there is a vital contribution to be made by public agencies and private enterprise, but that the essence of Shetland cultural life flows from local communities and individuals. This strategy is therefore for everyone in Shetland.

As the Chairman of the Community Planning Board, I am confident that this Strategy, and the Action Plan flowing from it, will help us work together to achieve the goals in our Community Plan - a prosperous economy; a society which is vibrant, healthy, safe and in which everyone can take part; an environment which is conserved and enhanced; and a cultural identity which is celebrated and promoted.

This is a crucial time for Shetland. On the one hand, we must try to shape our economy to meet new and very challenging circumstances. On the other, our islands' culture is at last being recognised for the resource it is and some very positive developments are under way or contemplated. We really are 'on the cusp'; I believe that we have the potential to be the most exciting creative and cultural island community in the world.

I wish those involved in leading on cultural activity well. I look forward to seeing continuing progress throughout Shetland.

**Sandy Cluness**

Chair, Community Planning Board



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Appendix: List of relevant strategies or partnerships

Acknowledgements [TO BE REVISED]:

[Poem required here]

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# Foreword

***By Rick Nickerson, Spokesperson - Culture & Recreation  
and Hazel Sutherland, Executive Director, Community Services***

In promoting this second Shetland Cultural Strategy, we recognise that the term 'culture' can mean different things to different people. However, for the purposes of this strategy, it includes visual arts, music, song, theatre, dance, film, prose, poetry, food and the built and natural heritage. Sport and physical recreation, which were included in the first Cultural Strategy, will henceforth be covered by a separate strategy.

Shetland is blessed with a rich and diverse culture; it has Pictish, Norse and Scottish roots, but there were other important historical connections, particularly with Germany and the Netherlands. Shetland's geographical remoteness has helped preserve customs, traditions and artifacts; but that remoteness has been tempered by contacts with many peoples, not only around the North Atlantic and North Sea but also much farther afield. Over centuries, this northern crossroads has seen thousands of travellers come and go for every conceivable purpose: fishing, trade, kinship, war and oil are just the more obvious ones. Shetlanders are also conspicuously well-travelled themselves; thanks in part to the Press Gang, they were prominent in the Royal Navy but also sailed the world on merchant ships or whalers. Today's young Shetlanders forge links with their contemporaries in many countries, from Japan to the USA and the Czech Republic to South Africa or southern India.

The islands' fishing and agricultural traditions are essential foundations for the islands' culture, but Shetlanders have also responded to many new influences. Today, island life is enriched by the participation of people from many different parts of the world. The result is a culture that is distinctive, strong and dynamic. It is an enviable legacy.

Culture is central to any community's quality of life; it largely defines the identity of a place and its people and it promotes personal growth and community cohesion. A vibrant and distinctive culture is also a hugely important economic asset. Investment in culture, which can take many forms, may therefore be expected to produce many different benefits. In Shetland, physical infrastructure provided over the last 30 years has included many new or improved community halls, the Bonhoga Gallery, improved interpretation at many sites, the restoration of many significant buildings, archaeological excavations, a new library and, last but most certainly not least, a new Museum and Archives that is a stunning achievement in both conception and execution.



However, there have also been many other kinds of investment, not only in cash but also in time, imagination and energy. Shetland's education system helps nurture traditional skills and knowledge but also provides a springboard for creative talent in every sphere; its record in the encouragement of local music and musicians is exemplary. Local voluntary groups have undertaken all kinds of cultural projects, from dialect recording through the operation of local heritage centres to the promotion of the work of Shetland's contemporary artists. There has been important private investment too, for example in recording facilities and in gallery space. Among the many events staged each year, at least three – Up Helly Aa, the Shetland Folk Festival and the Shetland Fiddle and Accordion Festival – already have a worldwide reputation. Several other events have become well-established, including Wordplay, Screenplay and the Johnsmas Foy, incorporating Flavour of Shetland.

There can be no doubt that these developments have been a source of pride and confidence in the community, that they have made life in the islands so much more rewarding and that they have significantly strengthened Shetland's reputation. In all these respects, they have improved the prospects for economic development, most obviously through tourism but in other ways too. They contribute, too, to health and well-being. To the extent that the Council supports these facilities, it discharges its statutory duty to 'ensure that there is adequate provision of facilities for the inhabitants of their area for recreational, sporting, cultural and social activities'<sup>1</sup>.

The foundation for further development is sound and we must aspire to make progress on all fronts, for culture is at the heart of any new Shetland, vital for future health, social strength and economic prosperity. It has been estimated that Shetland's creative industries contribute around £25m to the economy. Within the lifetime of this strategy, Shetlanders can look forward to the provision of Mareel, one of the outcomes of the first Cultural Strategy. It will be a first class cinema and music venue with facilities for creative education. Mareel will not only bring a real cinema experience and celebrate one of Shetland's most robust resources, namely the islands' musical heritage, it will also demonstrate confidence in the creative industries in general, a sector which is seen as having real growth potential. We hope that other important projects will also come to fruition over the period of the strategy.

This strategy brings together a partnership of agencies and communities with the aim of ensuring that cultural life sector continues to thrive and develop. Each of these partners will, where appropriate, prepare or revise their own strategies, but we have included what we regard as the 'flagship' projects and opportunities in the Action Plan that forms part of this strategy. There are opportunities for everyone in Shetland to participate at whatever level they wish. We want them to have the chance to be challenged, excited, inspired and educated and, above all, to fulfill their potential.

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<sup>1</sup> Local Government and Planning (Scotland) Act 1982, Section 14

# Background

The Shetland Cultural Strategy is a strategy for all of Shetland, for all who live or work here and all who visit us. It's also for all those people elsewhere, some of whom have never lived in the islands, who are ambassadors for Shetland. The strategy could not have been prepared without the assistance of many individuals and organisations that contributed their knowledge, opinions and recommendations during 2008. A Steering Group, convened by Shetland Islands Council, has guided the development of the strategy.

The strategy is important because it covers so many areas of people's lives. It touches on all the things we do and enjoy, the things in which we believe or take pride and the things we want to achieve, whether as individuals or communities. It must conserve our inheritance while capturing Shetland's potential for the future. It needs to reach into our outlying communities.

In developing strategies of this kind and putting them into effect, we must also bear in mind the interests of people beyond the islands, because our cultural heritage is one of the things that attract people to visit us or to join us as new Shetlanders. Shetland, as a whole or in its parts, has been recognised by growing numbers of writers and broadcasters. We must recognise the islands' value in their terms as well as in ours; it will be important not to take our strengths for granted.

When we refer to Shetland's potential, we do not only mean the cultural value of our heritage or the sheer skill that may be displayed by our artists, musicians, cooks or craftspeople, though developing these for their own sake is essential in itself. We also mean the economic potential of Shetland's culture. Because it is distinctive and authentic, it not only attracts visitors but is partly responsible for building the kind of reputation that can inspire people to seek out the best of Shetland products, wherever they live. A cherished, vibrant culture is an indispensable tool in building a healthy economy.

The Cultural Strategy builds on existing cultural strengths. It is intended to influence policies, activities and investment across all aspects of Shetland life. By exposing the possibilities and options, it should assist communities and politicians when they need to decide between competing priorities. . It seeks to identify important cultural development opportunities and suggest means by which they can be seized. These opportunities include:

- Improving access for all, removing barriers (including lack of transport) where possible and promoting the use of information technology
- Improving recognition of the value of volunteers
- Making more and better use of the available facilities

- Encouraging new facilities where they will strengthen what Shetland has to offer
- Increasing the range of cultural activities to meet local and visitor needs
- Developing and improving promotion of the unique Shetland natural environment, archaeology and cultural traditions
- Ensuring that cultural activities are available from pre-school age throughout school years and beyond
- Using cultural resources to improve health and well-being
- Exploring new partnerships to support fresh approaches to creative industries, tourism and regeneration
- Recognising the importance of diverse cultural provision in retaining young people in Shetland and attracting new people to settle in the islands
- Maximising financial support and sponsorship so that more can be achieved within available resources

By explaining how individual cultural developments fit into an overall framework that has the support of the partners and the community, the Strategy should provide evidence to local and external funding bodies that new projects are being brought forward in a considered and coherent manner.

In general terms, the principles behind this second Shetland Cultural Strategy echo national policy. The Shetland partners would wish to endorse the need for equality of opportunity and the participation of all sections of the community. This Strategy seeks to:

- unite the community and service providers in partnership
- support and involve all individuals and communities wishing to engage in cultural activity, wherever they are in Shetland
- improve Shetland's economic prospects
- preserve and conserve Shetland's heritage, culture and environment
- nurture new Shetland talent and provide an environment in which creative skills can flourish both in and outside Shetland
- strengthen confidence, pride and a sense of place

The development of cultural opportunities in Shetland should satisfactorily balance economic, environmental and social considerations; in other words, the process should be sustainable.

The Shetland Cultural Strategy is a means of enriching life in Shetland. It is expected to have a four-year life, but it will be reviewed at least once during that period.

# Vision, Themes and Objectives

A vision for cultural life in Shetland

*We seek to ensure that Shetland's cultural resources are conserved and developed in order to allow everyone to reach his or her potential, strengthen community identity, pride and confidence and secure prosperity for the benefit of present and future generations. We intend that Shetland's cultural resources will be recognised as among the richest and most diverse to be found anywhere. We want Shetland to be the most exciting creative and cultural island community in the world.*

## Themes

### 1 Access, participation and potential

Encourage active and participative lifestyles, equality of opportunity, health and well-being, personal growth and community development through increasing access to, and participation in, the broadest range of cultural activities throughout Shetland, particularly for people who may be excluded or marginalised at present.

### 2 Creativity and heritage

Celebrate, promote and invest in the islands' creativity, diverse culture, distinctive heritage and environment, and develop and promote them within Shetland and to the wider world.

### 3 Learning

Recognise the value of creative and cultural skills as a source of self-fulfillment and a foundation for community identity, ensuring that the broadest practicable range of related educational opportunities is available.

### 4 Culture and the Economy

Ensure that the connections between culture and economic development are explored and understood and that investment in cultural assets and creative activities is actively pursued as a means to increasing prosperity.

## Aims

Within each of these four themes, it is possible to set out three or four main aims linked to aspects of Shetland life and culture and identify methods of achieving them. These aims may be pursued by the community in general or, more

usually, by the Council, Shetland Arts, Shetland Amenity Trust or other organisations, including the voluntary and private sectors.

## **Theme 1**

### **Access, participation and potential**

*Encourage active and participative lifestyles, equality of opportunity and personal and community development through improved access to, and participation in, the broadest range of cultural activities throughout Shetland, particularly for people who may be excluded or marginalised at present.*

#### **Aim 1.1**

**Support the contribution of cultural life to the vitality and economic prosperity of Shetland**

##### **Methods**

1.1.1 Promote cultural initiatives in order to build community confidence and increase the sustainability of communities throughout Shetland.

1.1.2 Develop partnerships between organisations within Shetland and between those organisations and the community.

1.1.3 Recognise the benefits of cultural exchange between communities in Shetland and elsewhere and promote links with communities in other parts of the United Kingdom and around the world.

SUITABLE QUOTE HERE

1.1.4 Invest in and promote new technologies relevant to culture, heritage and the creative industries.

#### **Aim 1.2**

**Maintain and develop the services and facilities necessary for the vitality and prosperity of Shetland's cultural life**

##### **Methods**

1.2.1 Support people who volunteer and recognise those who work in the cultural sectors throughout Shetland; promote their value in terms of the cultural life of the islands and provide the training they need to enable them to contribute effectively.

1.2.2 Promote the intrinsic value of cultural facilities, activities and services throughout Shetland.

1.2.3 Develop a Shetland Heritage Association Action Plan in consultation with community history groups.

1.2.4 Adopt an active and systematic approach to the attraction of sponsorship from business and other organisations.

### **Aim 1.3**

**Promote activities and facilities that encourage individuals of all ages and abilities to pursue a lifestyle that supports their health and well-being**

#### Methods

1.3.1 Ensure that diverse cultural activities and facilities are provided throughout Shetland to meet the needs of local communities

1.3.2 Support strategies and activities that encourage individuals to develop healthy lifestyles and participate (and achieve their potential) in cultural activities

1.3.3 Promote access to and understanding of Shetland's natural environment

### **Aim 1.4**

**Support participation in the cultural life of the islands**

#### Method

1.4.1 Improve access to, and participation in, a diverse range of cultural activities for all residents and visitors, especially those in outlying communities or at risk of social exclusion

1.4.2 Seek to ensure that external air and ferry services are convenient and affordable and that internal transport services offer opportunities to participate in cultural events for everyone, whether or not they have personal transport.

## **Theme 2**

### **Creativity and heritage**

*Celebrate, promote and invest in the islands' distinctive creativity, diverse culture, heritage and environment and promote these within Shetland and to the wider world.*

### **Aim 2.1**

**Celebrate and build on the diversity and excellence of artistic and creative activity that is characteristic of Shetland**

#### Methods

- 2.1.1 Provide strategic support for cultural and creative infrastructure including training and career development opportunities
- 2.1.2 Support and develop a programme of bringing cultural activities and artists into Shetland for the benefit of residents of Shetland
- 2.1.3 Maintain and develop arts education in schools, further and higher education; develop facilities which enable young artists to perform and develop their careers
- 2.1.4 Support individual and collective expression in traditional and new forms of creative activity
- 2.1.5 Develop, promote and support Shetland talent outwith Shetland.
- 2.1.6 Promote cultural exchange between Shetland and other places, recognising both our traditional links and the potential of new ones.

SUITABLE QUOTE  
HERE

## **Aim 2.2**

### **Sustain and promote Shetland's dialects and place names within the Islands and beyond**

#### Methods

- 2.2.1 Support and promote the use and culture of, and develop interest in, Shetland's dialects, place names and literature
- 2.2.2 Continue to encourage the use of Shetland dialects in schools.
- 2.2.3 Support organisations that seek to record and promote dialect.

## **Aim 2.3**

### **Maintain, develop and promote the rich cultural and natural heritage, arts and crafts, architecture, built environment and archaeology of Shetland**

#### Methods

- 2.3.1 Maintain, develop and promote Shetland's museums, galleries, libraries, archives, recognising them as centres of excellence
- 2.3.2 Support the recording of Shetland's cultural heritage
- 2.3.3 Ensure the long-term preservation of Shetland artefact, archive, heritage and library collections within the islands including the repatriation of key artefacts and digitising of library material
- 2.3.4 Continue to manage Shetland's built environment, including the archaeological heritage, in ways that respect its outstanding quality.

2.3.5 Encourage traditional skills such as drystane dyking, peat casting, boat building, lime work and thatching

2.3.6 Record and promote Shetland food traditions

2.3.7 Encourage appropriate habitat management in order to secure and strengthen biodiversity.

## **Aim 2.4**

### **Safeguard, promote and ensure access to the natural environment of Shetland and its outstanding landscape, flora and fauna**

#### **Methods**

2.4.1 Recognise that Shetland's exceptional landscapes and seascapes are among our strongest assets and ensure that development within them is carefully considered and appropriate.

2.4.2 Support efforts to have the special qualities of Shetland's natural environment recognised and promoted, for example through Geopark designation.

2.4.3 Safeguard, promote, and ensure appropriate access to, Shetland's wildlife, sea life and high quality natural environment.

## **Aim 2.5**

### **Encourage and promote creative industries**

#### **Methods**

2.5.1 Support sustainable creative industries and clusters of related industries in Shetland, recognising that they offer potential for employment and the generation of activity in rural areas

2.5.2 Ensure that public art is incorporated where appropriate in new development proposals and encouraged as part of refurbishment projects

2.5.3 Recognise the value of architecture and planning in creating surroundings that are distinctive, memorable, rewarding and stimulating

2.5.4 Develop traditional and contemporary craft industries and use their products to strengthen Shetland's identity throughout the world

2.5.5 Seek to revitalise craft industries where they are at risk or in decline, promoting the teaching of traditional skills and exploring new market opportunities

2.5.6 Encourage the use of Shetland locations in film and television productions and the use of Shetland stories and themes in screenplays



## Theme 3

### Learning

*Ensure that, whatever their age, background or interests, people have the opportunity to learn about Shetland's culture and heritage.*

#### Aim 3.1

**Invest in and support the contribution of cultural activities to school education and to the lifelong learning process for the wider community**

Methods

3.1.1 Offer diverse cultural and multicultural teaching and activities within schools and further and higher education establishments

3.1.2 Promote the cultural benefits of learning, whether formal or informal, for individuals and communities

## Theme 4

### Culture and the Economy

*Ensure that the value of cultural activity in securing a prosperous future is recognised and captured*

#### Aim 4.1

**Recognise the contribution made by cultural heritage and activity to sustainable economic development and make appropriate investments to support appropriate projects**

Methods

4.1.1 Support development based on cultural heritage, cultural activity and creative enterprise that is appropriate in environmental, economic and social terms

4.1.2 Place cultural assets at the heart of the marketing and promotion of Shetland and support activity by Shetland talent outwith the islands where doing so will help to advance these aims

4.1.3 Consider opportunities for the more effective marketing, in and beyond Shetland, of products related to Shetland culture.

SUITABLE QUOTE HERE

#### Aim 4.2

**Recognise that the principal foundations for developing tourism are Shetland's rich and diverse cultural life and outstanding built and natural heritage**

#### Methods

4.2.1 Work with all relevant agencies to ensure that cultural and heritage assets are conserved, that appropriate new facilities are developed and that the quality of related services provided to visitors is as good as it can be

4.2.2 Promote, by the most effective means, the diversity and quality of available cultural and heritage assets, facilities and activities

#### **Aim 4.3**

**Promote Shetland's cultural life and activities in order to contribute to the retention and growth of the population of the islands, especially in rural and outlying communities.**

#### Methods

4.3.1 Invest in culture to provide facilities, activities and employment opportunities which attract individuals and organisations to locate in Shetland.

4.3.2 Recognise that, in attracting people to live in Shetland, the cultural heritage and the presence of a vibrant creative community are both vital.

4.3.3 Recognise that events such as Up Helly Aa, the Shetland Folk Festival, the Johnsmas Foy, Fiddle Frenzy, the Shetland Food Festival, the Fiddle and Accordion Festival, WordPlay and ScreenPlay have an important role in building community confidence and strengthening Shetland's reputation.

SUITABLE QUOTE HERE

4.3.4 Support volunteering, recognising that it makes a vital contribution to creative activities; ensure that training is provided to deal with new challenges; and support efforts to ensure that the legislative framework within which volunteers work is realistic and appropriate.

4.3.5 Work with the media to promote and report cultural issues, activities and achievements

# Action Plan

*[The Strategy is intended to contain an Action Plan that will highlight some of the most important actions, based on the proposals in the Strategy, that need to be undertaken if we are to release as much as possible of Shetland's creative potential.]*

*However, the Steering Group is anxious to hear your views about what actions are most important. The examples set out below are intended mainly to illustrate the kinds of actions that might be included. In its final form, the Action Plan will take account of comments from consultees]*

This Cultural Strategy cannot encompass every project or initiative now contemplated, far less anticipate those that may emerge over its lifetime. However, certain actions are fundamental; they can be seen as foundations that will strongly support cultural activity, raise confidence and enhance Shetland's reputation as a place that is creative, clever and connected. They fall into three categories:

- physical resources
- human resources
- events

## Physical Resources

Six projects involving work on the ground are seen as essential catalysts; in alphabetical order, they are:

- Garrison Theatre refurbishment
- Mareel
- Old Scatness
- Shetland Textile Museum
- Sumburgh Head
- Viking Unst

## Human Resources

Creative activity can only happen if creative people are attracted to stay in Shetland, or move here, and if there are suitable opportunities for development, training and support. Actions here include:

- Ensuring that means are in place to identify talented people and offer them appropriate training and support

- Developing a campaign aimed at encouraging creative people to live and work in Shetland
- Actively involving the people of Shetland in cultural and creative activity

### Events

Events offer opportunities to discover and highlight talent. They can also contribute strongly to efforts to raise confidence and develop reputation. An attractive and diverse events programme can help attract people to visit Shetland and can also persuade some of those visitors to come and live here.

The key action required is the development of an Events Strategy that will:

- Define the ways in which events may contribute to cultural and economic development, including tourism and in-migration
- Establish criteria to assist in assessing the value of existing and proposed new events and determining the level of support that they should receive
- Indicate how benefits to Shetland can best be realised from one-off or irregular events to which commitments have been made, including:
  - The Year of Architecture (Power of Place) 2009/10
  - Hamefarin' 2010
  - Inspire – Festival of Light 2010
  - Tall Ships Races 2011
  - Cultural Olympiad – London 2012

It is proposed that an Events Strategy be developed by June 2009.

# Monitoring and review

## Monitoring

This Cultural Strategy provides a framework for policy and the development of action plans by many different organisations, most of which have their own more detailed strategies. This Strategy and the accompanying Action Plan indicate practical methods of achieving goals. Initially the Council, the Charitable Trusts, and the many potential partner organisations should revise their departmental and corporate strategies in order to ensure that, as far as practicable, they reflect the proposals outlined here.

## Review

This second Shetland Cultural Strategy builds on the work done between 2004 and 2008. It is intended to stimulate progress and change rather than being seen as something static, for that is how it can remain relevant to the Shetland community. This Strategy covers a four year period from 2009 to 2012, and within the Council it is the responsibility of the Executive Director, Community Services. It is recommended that the Strategy be formally reviewed at least once during its lifetime by the Cultural Strategy Planning Group. The reviews should allow account to be taken of changing circumstances and new ideas. A summary review and progress report should be prepared annually and distributed widely; revisions should appear on the section of the Council's web site devoted to the Cultural Strategy.

# Communication

This Strategy is for everyone in Shetland, not just the Council. It is important that it is widely available and relevant. The Strategy is available in three forms:

the full Strategy document  
a summary leaflet version  
on the Council's web site ([www.shetland.gov.uk/cultural\\_strategy](http://www.shetland.gov.uk/cultural_strategy))

Print and online versions are obtainable through the Library service. The web site offers updates and opportunities for feedback.

## APPENDIX

### List of relevant strategies or partnerships

**[NB: This list derives directly from the first Cultural Strategy and it needs review and revision. It would be helpful if you could check that references to any relevant strategies for which you are responsible are correct and up-to-date and that any new strategies are included here.]**

(in alphabetical order)

A Healthy Shetland (Joint Health Improvement Plan  
Area Regeneration Partnership  
Better Integrated Children's Services  
Community Learning Strategy  
Emerging social justice and equalities frameworks  
Library Service Aims & Objectives  
Local Economic Forum  
Modernising Government  
Music Development Project,  
Shetland 2012: Economic Development Strategy  
Shetland Amenity Trust's Strategic Plan)  
Shetland Arts Trust's 4 Year Plan  
Shetland Community Plan  
Shetland Cultural Heritage Strategy  
Shetland Enterprise's Business Plan  
Shetland Interpretive Plan  
Shetland Local Plan  
Shetland Marketing Strategy  
Shetland Sport & Recreation Strategy  
Shetland Structure Plan  
Shetland Tourism Plan  
SIC Joint Future Objectives  
Strategy for Cultural Education in Shetland Schools)  
Strategy for Further & Higher Education  
Transport Strategy  
UHI Community Learning Centres

**To be added (so far):**

Heritage Tourism Investment Plan 2007-2012  
Shetland Arts 5 Year Plan (replacing 4 year plan)  
Shetland Local Biodiversity Action Plan  
VALDO Group



## **REPORT**

**To: Services Committee**

**9 October 2008**

**From: Head of Capital Programmes and Housing**

**Report No: HS-22-08**

### **Housing Issues from the Community Services Forum**

#### **1. Introduction**

- 1.1 On the 6<sup>th</sup> August 2008, the Community Services Forum held a meeting based on "Housing in Shetland". This forum identified areas for policy development into the future.
- 1.2 This report advises Services Committee on the themes for development and how it will be done.

#### **2. Links to Corporate Priorities**

- 2.1 Sustainable Organisation - Help us to make sure that we are making best use of our resources and delivering services as effectively as possible.

#### **3. Background**

- 3.1 All policy development will be directed through the Housing Strategies Steering Group (HSSG). HSSG is a multi agency group tasked with the development and review of all housing strategy documents.
- 3.2 The Local Housing Strategy (LHS) is the principle document used for the formulation, review and implementation of all housing strategies.
- 3.3 The LHS has to be considered and approved by Services Committee.
- 3.4 The Community Services Forum identified areas of policy development and / or promotion of existing schemes that the HSSG should consider as part of their ongoing review. These areas are:
  - 3.4.1 Mortgage rescue and low cost home ownership schemes – The Chartered Institute of Housing (CIH) advise us that mortgage repossessions across Scotland are rising by 48% and mortgage lending is at its lowest level ever. This will inevitably have an impact in Shetland and all measures available to alleviate these problems should be explored;

- 3.4.2 Right To Buy (RTB) – RTB is a contributing factor in the current shortage of houses available to SIC. There is currently a mechanism that allows suspension of RTB in some cases. However, this is limited to properties that were let after 2001 when the legislation was introduced. Further consideration is to be given to the periods suspension might apply, the latent demand at the end of such a period, further distortion of the housing market and the criteria to be applied;
- 3.4.3 Lead Tenancy Scheme – is a Hjaltsland Housing Association (HHA) scheme, whereby people can approach HHA to lease their property for an agreed period of time. HHA would then maintain and manage the property and retain a proportion of the rent. The Community Services Forum would like to raise awareness of this scheme.
- 3.4.4 Zoning and Structure / Development Plan – It was suggested at the Community services Forum that policies should be flexible in order to encourage people to build in, and live in, rural areas. It was further suggested that as planning came under the remit of Infrastructure Committee, it would be useful for the Infrastructure Committee to hold a further forum meeting to discuss development in rural areas;
- 3.4.5 Sheltered Housing – This is the subject of a current review and will be the subject of reporting to Services Committee in due course. The Community Services Forum felt there was a need to review the actual numbers of sheltered housing units required, and the locations they were required:

#### **4. Financial Implications**

- 4.1 There are no financial implications arising from this report.

#### **5. Policy and Delegated Authority**

- 5.1 All matters relating to Housing stand referred to the Service Committee (Min Ref: SIC70/03), and the Committee has delegated authority to make decision on matters within it's remit for which the overall objectives have been approved by the council, in addition to appropriate budget provision.

#### **6. Recommendations**

- 6.1 I recommend that Services Committee note, the subject areas identified by the Community Services Forum in 3.4, to be considered by the Housing Strategies Steering Group, in the preparation of the new Local Housing Strategy, which will be produced during 2009/10

Date: 9 October 2008  
Our Ref: CM/SP

Report No: HS-22-08





## **REPORT**

**To: Services Committee**

**9 October 2008**

**From: Head of Capital Programmes and Housing**

**Report No: HS-20-08**

### **FOCUSED FUTURES PROJECT**

#### **1. Introduction**

- 1.1 This purpose of this report is to provide members with information about a new way of working, called Focused Futures.

#### **2. Links to Corporate Priorities**

- 2.1 Housing - Improve services that prevent and alleviate homelessness in Shetland.

#### **3. Background**

- 3.1 The first Foyers in the UK opened in 1992 and there are now more than 130 Foyers across the UK. Foyers take many shapes and forms, but all Foyers have certain characteristics in common, namely the integration of accommodation and support services for disadvantaged young people.
- 3.2 They enable young people at risk to escape the 'no home-no job-no home' cycle by delivering a holistic service that integrates accommodation with training, job search, personal support and motivation.

#### **4. Focused Futures**

- 4.1 Focused Futures is a 'foyer' style project, which aims to develop skills and employability for young tenants and those in homeless accommodation aged between 16 – 25 years. The intention is to develop a 'foyer' style provision in Shetland to support young tenants and those in homeless accommodation.
- 4.2 It is a multi-agency project, which involves Hjaltland Housing Association as lead agency; SIC Housing; Bridges Project; Moving On Employment Project; Shetland College; Shetland Careers Service and Support Training.

- 4.3 The project aims to promote and build on an individual's skills, expand their experiences and self-confidence, thereby, acting as a catalyst for these individuals to access opportunities for employment, further training or volunteering work.
- 4.4 A further aim of the project is to ensure that a greater number of people going through the homeless system are able to gain the skills and hopefully employment, which means that they are more able to sustain a future tenancy successfully.
- 4.5 The project will develop a core and cluster approach, utilising 51 Burgh Road as the core, providing a supportive environment for those residing in the unit, but also a base from where additional support can be given to young tenants who reside in Council or Housing Association properties.
- 4.6 Housing Outreach staff are currently being recruited to provide support for the project participants out with normal office hours. The aim will be to provide support up to 8pm at night and for about four hours on Saturdays and Sundays, 365 days per year.
- 4.7 This is a service development and fills a gap in service provision, in that we are currently unable to offer support to vulnerable tenants after 5pm or at the weekends. Vacant established posts within the Outreach team have been used to provide staffing for the project.
- 4.8 This multi-agency programme approach is a pilot to ascertain whether this is the most effective means of providing employability and life skills to this client group, and will run for one year.
- 4.9 It is expected that housing support services being provided at 51 Burgh Road as part of this project will continue beyond the end of the project as supported accommodation is a planned extension to existing Outreach services as well as a pilot project in relation to the multi agency way of working.
- 4.10 An open day will be arranged during October 2008, to enable members, support agencies and prospective project participants to learn more about the project and the programme that will be offered.

## **5. Financial Implications**

- 5.1 The project has been funded by the Scottish Government through Wider Action Role funding to Hjaltsland Housing Association, the Council through Fairer Scotland Fund funding to Hjaltsland Housing Association and through contributions from existing approved capital and revenue budgets.
- 5.2 The posts, which have been converted for this project noted at 4.6 above, were budgeted for in the current year as part of the redesign of Ladies Drive Hostel and are therefore being funded through existing budgets within the Housing Service.
- 5.3 There are therefore no additional financial implications to this report.

## **6. Conclusions**

- 6.1 Focused Futures is a new project, which will develop a 'foyer' style provision in Shetland to support young tenants and those in homeless accommodation.
- 6.2 It will involve a number of agencies in providing a range of options to develop the project participant's skills, knowledge and confidence.
- 6.3 It will also further develop the housing support service currently provided by the Housing Service and will fill a gap in providing support to vulnerable people out with normal office hours.

## **7. Policy and Delegated Authority**

- 7.1 In accordance with Section 13 of the Council's Scheme of Delegation, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by council, in addition to appropriate budget provision.

## **8. Recommendations**

- 8.1 I recommend that the Committee:
- 8.2 Note the content of this report.
- 8.3 Note that invitations will be extended to all members to attend an Open Day at the project, which will be held during October 2008.

Date: 9 October 2008  
Our Ref: VS/SP

Report No: HS-20-08





## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### Changes to the Inspection Model for Schools

#### 1. Introduction

- 1.1 The purpose of this report is to make members more aware of the new inspection model for Scottish schools, adopted by Her Majesty's Inspectors of Education (HMle) in September 2008.
- 1.2 HMle representatives provided training to centrally based staff from the Education and Social Care Department on 7 August 2008 and to Head Teachers at a meeting on 28 August 2008.
- 1.3 To date this model has been used in two inspections in Shetland, those of Whalsay School and Brae High School. These inspections will be the subject of further reports to Services Committee in November 2008.

#### 2. Link to Council Priorities

- 2.1 Equal Opportunities - Shetland will benefit from everyone having the same chances to make their fullest contribution in every field.
- 2.2 Challenging. Achieving Potential - The Council will continue to provide the best learning environment for all. A Best Value Education Service continues to be Council policy. (Achieving Potential)
- 2.3 Excellence - The Council must set excellent standards for its own outlook and services to fulfil its leadership role in Shetland society.
- 2.4 Consistent Planning and Action - Making sure all our planning and decisions focus on delivering our priorities and work with public sector partners to maximise resources within Shetland.

#### 3. Background

- 3.1 From September 2008 HMle introduced a new proportionate model for school inspections.



### 3.2 The main features of the new approach to HMle inspection:

- All schools will continue to have an HMle inspection leading to a published report
- All inspections will deliver rigorous evaluations of the three core Quality Indicators (QIs) identified in the National Performance Framework and at least *5.1 The Curriculum* and *5.9 Improvement Through Self-Evaluation*
- Schools/centres requiring significant improvement or support (probably fewer than at present) will have further structured HMle engagement and new follow-through activities
- clear and consistent assurance
- proportionate - self-evaluation as the starting point – shortened fieldwork
- reduced pre-inspection requirements
- capacity building - extended professional feedback
- greater user involvement
- concise reports in plain English.

### 3.3 Key features from September 2008:

- Inspections shorter and more focused
- Evaluate the quality of the school's / centre's provision and record of improvement
- Planned response to self-evaluation
- Use key QIs, three of which feed into the Government's National Performance Framework (NPF)
- Point 3 on the six-point scale, Adequate, to be replaced by Satisfactory.

## 4 The timetable for inspections:

### 4.1 Inspection teams and timings

- Inspection teams smaller; fewer days per inspection.
- All inspection activity within a single calendar week.
- Possible conclusion of evaluative activity at an early stage.
- Draft inspection report e-mailed to the school and authority early in the week after the inspection. Comments by return.
- Report finalised by end of week.

### 4.2 Pre-inspection

- 3 week notification period

### 4.3 During the 3 weeks:

- Inspection administrator contacts school, organises set – piece meetings, acquires / asks for key information
- Managing inspector contacts the Head Teacher to discuss key elements of inspection / start to build relationship

- Pre-inspection pack is prepared including the pre-inspection report from the education authority if provided

#### 4.4 The shape of the week

- Monday: Staff briefing. Self-evaluation discussion. Managing inspector plans the response to self-evaluation.
- Tuesday: Inspection fieldwork. Learning and teaching across the school in response to the school's self-evaluation. Lay Member activities. Professional engagement taking education forward.
- Wednesday: Continue with fieldwork. Mid Wednesday team meeting.
- Thursday: Inspection fieldwork continues until lunchtime. Team meeting.
- Friday and beyond:  
Friday 11 am. Feedback to the school and education authority officer.  
Draft inspection report e-mailed to the school and authority early in the week after the inspection. Comments by return.  
Report finalised by end of week.

### 5. Community Learning and Development (CLD) Involvement

- 5.1 The revised inspection process is designed to recognise the increased integrated working between departments in local authorities, and with other agencies and organisations.
- 5.2 A CLD professional HM Inspector will join school inspection teams and contribute to the evaluation of the school.
- 5.3 At the same time, CLD provision not directly related to the school will be evaluated within the learning community surrounding it. This will evaluate CLD provision from all agencies and organisations.
- 5.4 The revised model is also designed to maximise and recognise the contribution to the inspection process of the self-evaluation and quality improvement activities of providers of CLD. It will give CLD providers fast and detailed feedback to help them improve provision and will provide stakeholders with clear messages on the quality of CLD provision.

### 6. Conclusion

- 6.1 The new inspection model will be a more proportionate model than previously used, concentrating on key features of school performance, especially around self-evaluation and capacity for improvement. It will result in shorter, more concise reports in a user-friendly format written in plain English. The reports will be published within a much



shorter timescale than in the past, which will allow schools and local authorities to focus on the findings of the report with immediate effect.

## **7. Financial Implications**

7.1 There are no financial implications arising from this report.

## **8. Policy and Delegated Authority**

8.1 In accordance with Section 13 of the Council's Scheme of Delegation, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by Council, in addition to appropriate budget provision.

## **9. Recommendation**

I recommend that

9.1 Services Committee note the content of this report.

October 2008

Our Ref: HB/JR/sm

Report No: ED-51-F





## REPORT

To: Services Committee

9 October 2008

From: Head of Schools

### Attainment in Shetland Schools, 2007 - 08

#### 1. Introduction

1.1 As part of its quality-assurance procedures, the Schools Service monitors on an ongoing basis the levels of attainment in Shetland schools. In addition, in term 1 (September-October) each year, the Service reports on attainment for the previous academic year.

1.2 The levels of attainment reported on are:

- 5-14 attainment in Mathematics, Reading and Writing as at June of the previous academic year
- Levels of attainment in the previous academic year's SQA examination diet.

These are the nationally-recognised indicators of attainment which are reported on by both Her Majesty's Inspectorate of Education (HMIe) in their school inspections and the Scottish Government in its regular statistical bulletins.

1.3 This is the first year that a report of this kind has been produced for members but it is intended that it will in future be an annual report.

1.4 Nationally, attainment continues to have a high priority - although it is now recognised that academic attainment does not provide the whole picture of young persons' achievements - and the Four Capacities which the Curriculum for Excellence aims to develop include as the first 'Successful Learners'. The concept of successful learners is defined in part as individuals who possess a "determination to reach high standards of achievement" and who are able to "use literacy, communication and numeracy skills".

#### 2. Link to Council Priorities

2.1 Schools Service will improve attainment levels by seeking to:

- increase the percentage of Primary 3, 4, 6 and 7 attaining or exceeding minimum 5-14 levels for their stage in Maths, Reading and Writing

- increase the percentage of pupils who achieve at least 5 Standard Grades at Level 4 or above by the end of Secondary 4
- increase the percentage of pupils who achieve at least 3 Highers at level 6 or above by the end of Secondary 6.

### 3. Background

#### 3.1 5-14 attainment

3.1.1 Attainment in the 5-14 age range is measured by evaluating the percentage of pupils achieving the designated level for their age-group in the areas of Reading, Writing and Mathematics. It should also be noted that, within the 5-14 reports, the performance of primary schools is reported on separately from secondaries. Primary attainment is normally reported on by considering attainment at the end of primaries 3, 5 and 7. Secondary attainment is normally reported on by considering attainment at the end of secondary 2.

3.1.2 The Scottish Government no longer collects and reports on data school by school in the same way as authorities themselves do and so there are no national averages with which to compare our 5-14 attainment figures, simply the authority one.

3.1.3 The 5-14 attainment figures for 2006-2008 are given in Appendix 1a. The Main Findings for 5-14 are listed in the following paragraph.

#### 3.1.4 Main Findings:

- Performance at primary level is broadly in line with the high attainment levels of previous years
- As in previous years, performance at secondary level is lower than at primary but has increased markedly since 2007
- In both sectors, performance in Writing remains poorer than in Reading and Mathematics. Compared with 2007, there has been a marked increase in performance in this area as far as the secondary sector is concerned
- In both primary and secondary, the attainment of girls is higher than boys across all three areas.

3.2 For SQA attainment, the Scottish Credit and Qualifications Framework(SCQF) is used as the basis for reporting attainment.

3.2.1 The SCQF levels are shown below for information. Levels of Qualifications included are:

Scottish Credit and Qualifications Framework	
Level	Qualifications Included
7	Advanced Higher at grades A-C
6	Higher at grades A-C
5	Standard Grade at grades 1-2, Intermediate 2 at grades A-C
4	Standard Grade at grades 3-4, Intermediate 1 at grades A-C
3	Standard Grade at grades 5-6, Access 3 Cluster

3.2.2 Any attainment below SCQF level 3 is not reported on in this report.

3.2.3 For SQA attainment, there are comparator-authority and national figures with which to compare Shetland performance.

3.2.4 Again, SQA attainment figures for 2006-2008 are given in Appendix 1b. The Main Findings in this area are listed in the following paragraph.

3.2.5 Main findings:

- Overall SQA attainment in Shetland schools in 2007/08 was notably high, even in showing an improvement over the very good attainment levels of previous years.
- The attainment figures are well above the national pattern for those candidates achieving five or more awards at SCQF Level 5 by the end of S4 and candidates achieving five or more awards at SCQF Level 6 by the end of S5.
- In 2008, female candidates out performed males by the end of S4 but this difference disappeared at S5.

#### **4. Conclusion**

4.1 Attainment in Shetland schools is generally high. For SQA attainment, it is very high by national standards. There are however areas which require to be addressed by the authority. The main one is the difference between 5-14 attainment in primary and secondary. The HMle report on the Education Function of this authority, published in July 2008, identified this difference and charged the authority with improving the performance in reading, writing and mathematics by the end of S2.

4.2 In addition, it is important that the Schools Service examine the reasons for the difference in attainment between males and females at levels below S5 and attempt to implement strategies to close this particular gap.

#### **5. Financial Implications**

5.1 There are no financial implications arising from this report.

#### **6. Policy and Delegated Authority**

6.1 In accordance with Section 13 of the Council's Scheme of Delegation, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have

been approved by Council, in addition to appropriate budget provision.

## **7. Recommendation**

I recommend that

7.1 Services Committee note the content of this report.

October 2008

Our Ref: HB/RS/sm

Report No: ED-50-F

**5-14 Attainment Figures: 2006-08****Overall Attainment for 5-14: Primary****Reading**

	<b>Shetland Islands</b>					
	<b>Male</b>		<b>Female</b>		<b>All Pupils</b>	
	No	%	No	%	No	%
2008	417	81	478	87	895	84
2007	470	85	479	88	949	86
2006	464	82	485	88	949	85

**Writing**

	<b>Shetland Islands</b>					
	<b>Male</b>		<b>Female</b>		<b>All Pupils</b>	
	No	%	No	%	No	%
2008	377	73	458	83	835	78
2007	411	74	448	82	859	78
2006	403	71	468	85	871	78

**Mathematics**

	<b>Shetland Islands</b>					
	<b>Male</b>		<b>Female</b>		<b>All Pupils</b>	
	No	%	No	%	No	%
2008	438	85	475	86	913	85
2007	480	87	487	89	967	88
2006	484	85	476	86	960	86

**5-14 Attainment Figures: 2006-08****Overall Attainment for 5-14: Secondary (Level E or better by the end of S2)****Reading**

	Shetland Islands					
	Male		Female		All Pupils	
	No	%	No	%	No	%
2008	122	73	110	79	232	76
2007	91	59	108	73	199	66
2006	117	66	121	81	238	73

**Writing**

	Shetland Islands					
	Male		Female		All Pupils	
	No	%	No	%	No	%
2008	94	57	95	68	189	62
2007	60	39	95	65	155	52
2006	73	41	105	70	178	55

**Mathematics**

	Shetland Islands					
	Male		Female		All Pupils	
	No	%	No	%	No	%
2008	121	73	99	71	220	72
2007	102	67	101	69	203	68
2006	129	73	113	76	242	74



## SQA Attainment Figures: 2006-08

## Cumulative Whole School Attainment

By the end of S4

## All Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	94		95		90		49		1	
2007	95	2	95	1	88	1	42	1	1	3
2006	94	3	93	3	85	2	45	2	0	5
2005	98	1	97	1	89	1	43	2	0	4
2004	96	1	95	1	90	1	45	1	1	3
2003	96	1	94	2	86	1	44	1	0	3
2002	97	1	97	1	91	1	49	1	0	2
2001	99	1	99	1	93	1	47	1	0	0
2000	99	1	98	1	90	1	43	1	0	0
1999	98	1	96	2	88	1	47	1	0	0

## Male Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	95		94		87		41			
2007	93	5	93	2	87	1	39	1	1	3
2006	93	4	93	2	80	2	39	2	1	2
2005	98	1	96	1	87	1	33	4	1	1
2004	94	2	93	3	85	1	35	2	1	2
2003	96	1	95	1	84	1	40	1	1	1
2002	96	1	96	1	88	1	38	1	0	0
2001	100	100	100	100	93	1	40	1	0	0
2000	101	100	100	100	93	1	34	3	0	0
1999	98	1	96	1	85	1	44	1	0	0

## Female Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	93		95		93		59		1	
2007	97	1	97	1	90	1	46	2	1	4
2006	95	4	93	4	89	2	51	2	0	0
2005	98	1	97	1	91	1	52	1	0	0
2004	98	1	98	1	95	1	56	1	1	2
2003	96	2	92	6	88	2	49	1	0	0
2002	98	1	98	1	93	1	62	1	1	1
2001	97	1	97	1	92	1	56	1	0	0
2000	98	1	95	2	88	2	51	1	0	0
1999	98	2	96	3	90	1	49	1	0	0

## By the end of S5

## All Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6		3+ Level 6		5+ Level 6		1+ Level 7	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	96		96		89		54		44		29		14		0	
2007	94	4	94	3	85	2	58	2	46	2	28	2	10	5	1	1
2006	99	1	97	1	90	1	57	2	46	2	29	1	13	1	0	2
2005	98	1	97	1	91	1	59	1	46	2	27	3	14	1	0	0
2004	96	1	94	2	87	1	55	2	47	2	28	2	12	2	0	2
2003	98	1	98	1	92	1	62	1	52	1	32	1	12	2	0	0
2002	99	1	99	1	93	1	60	1	49	2	27	4	10	4	0	0
2001	99	1	97	1	90	1	56	1	48	1	27	3	6	9	0	0
2000	98	1	96	2	88	1	54	1	51	1	33	1	8	6	0	0
1999	99	1	98	1	87	1	47	1	47	3	25	3	3	10	0	0

## Male Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6		3+ Level 6		5+ Level 6		1+ Level 7	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	94		94		88		50		37		24		14		1	
2007	93	5	93	2	81	3	48	2	36	5	21	4	9	4	1	1
2006	99	1	96	1	89	1	46	3	37	5	21	5	13	1	1	1
2005	96	1	96	1	87	1	49	1	34	7	15	8	6	9	0	0
2004	96	2	96	1	85	1	51	1	43	1	24	2	10	2	1	1
2003	96	1	96	1	89	1	51	2	42	2	25	2	8	4	0	0
2002	100	100	100	100	93	1	54	1	42	2	21	3	9	4	0	0
2001	99	1	99	1	91	1	49	1	40	3	20	5	4	9	0	0
2000	98	1	96	1	85	1	51	1	46	1	30	1	8	4	0	0
1999	101	100	99	1	86	1	38	2	39	4	22	2	5	8	0	0

## Female Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6		3+ Level 6		5+ Level 6		1+ Level 7	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	97		97		90		58		51		34		14			
2007	95	4	95	4	90	2	66	2	55	1	35	2	10	7	1	1
2006	98	1	97	1	92	1	67	1	55	2	36	1	14	3	0	0
2005	99	1	99	1	96	1	69	1	60	1	39	1	22	1	0	0
2004	96	2	93	5	89	2	59	2	51	3	31	3	13	2	0	0
2003	100	100	100	100	95	1	75	1	64	1	39	1	16	1	0	0
2002	98	1	98	1	93	1	66	2	57	1	33	3	13	4	0	0
2001	98	1	95	2	89	2	63	1	57	1	34	2	8	9	0	0
2000	98	2	96	3	90	1	57	2	55	3	36	2	7	9	0	0
1999	97	1	96	1	88	2	58	1	56	2	29	3	1	10	0	0

## By the end of S6

## All Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6		3+ Level 6		5+ Level 6		1+ Level 7	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	90		90		83		58		49		37		26		14	
2007	99	1	97	1	91	1	59	2	52	2	38	2	26	1	13	6
2006	98	1	97	1	91	1	59	2	50	2	34	2	23	2	12	8
2005	97	1	95	2	87	1	57	2	51	2	38	2	26	1	15	4
2004	98	1	98	1	91	1	62	1	55	2	44	1	29	1	15	3
2003	98	1	98	1	93	1	61	1	53	2	37	3	24	3	11	7
2002	99	1	97	1	90	1	58	1	53	2	39	2	22	4	11	7
2001	98	2	96	2	88	1	57	1	54	2	41	2	25	2	10	7
2000	99	1	98	1	87	1	51	1	52	3	37	3	23	4	8	8
1999	98	1	96	1	83	2	46	2	54	2	36	2	15	8	6	10

## Male Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6		3+ Level 6		5+ Level 6		1+ Level 7	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	91		91		79		49		40		29		21		15	
2007	99	1	97	1	89	1	49	3	41	5	28	4	20	3	11	6
2006	97	1	96	1	87	1	49	2	36	8	22	8	11	10	6	10
2005	96	2	96	1	85	1	53	1	47	2	33	2	23	1	13	5
2004	96	2	96	2	88	1	51	2	46	3	35	2	21	2	14	3
2003	100	100	100	100	93	1	58	1	47	2	31	3	21	2	12	6
2002	99	1	99	1	91	1	51	1	46	3	33	2	16	6	10	6
2001	99	1	97	1	86	1	54	1	50	1	37	1	23	1	9	6
2000	101	100	99	1	86	1	43	2	45	3	31	4	20	3	9	5
1999	96	1	94	3	76	3	34	5	41	4	32	2	14	6	5	9

## Female Candidates

	Eng & Maths		5+ Level 3		5+ Level 4		5+ Level 5		1+ Level 6		3+ Level 6		5+ Level 6		1+ Level 7	
	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD	%	NCD
2008	89		90		85		65		57		43		30		13	
2007	98	1	97	1	92	1	68	1	61	1	46	1	32	1	15	6
2006	99	1	99	1	96	1	70	1	66	1	47	1	37	1	18	3
2005	97	1	94	5	90	2	61	3	55	3	44	2	30	1	18	3
2004	101	100	100	100	95	1	76	1	66	1	54	1	39	1	17	3
2003	96	3	96	2	92	1	65	2	59	2	46	2	26	4	11	8
2002	98	1	95	2	89	2	66	1	59	1	46	2	28	3	11	8
2001	98	3	96	4	90	1	59	2	58	3	46	2	27	4	10	8
2000	98	1	97	1	89	2	60	1	60	2	46	2	26	3	7	10
1999	101	100	99	1	90	1	59	1	67	1	41	3	17	8	7	10





## REPORT

To: Services Committee

9 October 2008

From: Library and Information Services Manager  
Education & Social Care Department

### **Report by Scottish Library and Information Council: Shetland Library**

#### **1 Introduction**

- 1.1 The provision of a public library service is statutory under Section 163(2) of the Government (Scotland) Act 1973. The Council is required "to secure the provision of adequate library facilities for all persons resident in their area". The Scottish Government has defined the term 'adequate' through the introduction of the Public Library Quality Improvement Matrix. Shetland Library was inspected against the national standards set out in the Matrix in June 2008.
- 1.2 The purpose of the report is to give members an opportunity to consider the quality of library provision as evaluated by the Scottish Library and Information Council report.
- 1.3 A copy of the report has been placed in the Members' Room and the Library and has been posted on the Shetland Library website.

#### **2 Link to Council Priorities**

- 2.1 The Council will continue to increase the quality of life in Shetland.
- 2.2 The Council will work to create and maintain a culture where individual learners can strive to realise their full potential.

#### **3 Report Summary**

- 3.1 Shetland Library used the Public Library Quality Improvement Matrix (PLQIM) to review its provision across all seven Quality Indicators. From detailed discussions with staff, visits to libraries and a review of the evidence, it is clear that the Shetland Library staff are working hard to ensure that a range of quality library services are delivered across the authority and, in particular, to engage across communities in a purposeful and effective way. Dedicated staff use the community planning framework and informal opportunities to identify hard-to-reach

groups and to develop and deliver services to meet the needs of communities. Feedback from the public clearly shows that whilst the services are highly valued by their users, the facilities in Lerwick are in need of development. This is currently being addressed by the Council.

- 3.2 Services have important strengths which are having a positive impact on individuals and community life. Key strengths lie in Community and Personal Participation, Meeting Readers' Needs and Ethos and Values. These include the mobile library service, the Welcome Project, the range of innovative reader development approaches for children and adults and the involvement of staff in the development of the Library. The choice of reading activities and resources provided by the library is regarded as excellent practice for such a small population base.
- 3.3 Other important strengths include the use of the media, the range of online subscription services available in a small authority, learning partnerships and the range of innovative projects delivered by a small team.
- 3.4 A number of areas for improvement have been identified and this will form the basis of an action plan on which to build better services.

## **4 Indicators**

- 4.1 The report uses a six level scale, as follows:

- excellent – outstanding, sector-leading
- very good – major strengths
- good – important strengths with areas for improvement
- adequate - strengths just outweigh weaknesses
- weak – important weaknesses
- unsatisfactory – major weaknesses

- 4.1.1 Quality Indicator 1: Access to information

### *Strengths*

- All IT equipment is part of the ICT department's rolling programme of replacement and upgrade
- National entitlement card development
- Wide range of electronic subscription services to support communities and individuals
- Introduction of self issue to encourage independent use

### *Areas for improvement*

- Provision of online booking system
- Upgrade broadband capacity
- Funding for staff training and development needs
- Continue developments with national entitlement card
- Develop links with Glow as it is introduced

<i>Sufficiency, range and suitability of resources</i>	<i>Good</i>
<i>Arrangements for access</i>	<i>Good</i>
<i>Staff interaction and support</i>	<i>Good</i>

#### 4.1.2 Quality Indicator 2: Personal and community participation

##### *Strengths*

- Mobile Libraries
- The Welcome Project - world language materials for new workers and families, plus self-issue and out-of-hours return
- Strong links with community and heritage groups
- Community-focused approach to service development
- Use of media to reach into communities

##### *Areas for improvement*

- More flexible space for library-based community activities

<i>Planned approaches promoting personal and community development</i>	<i>Very good</i>
<i>Provision of community space for a range of activities</i>	<i>Good</i>
<i>Supporting, recording and providing access to community heritage and culture</i>	<i>Very Good</i>

#### 4.1.3 Quality Indicator 3: Meeting readers' needs

##### *Strengths*

- Wide range of stock to which the public has access
- Poet Partner Project
- Range of innovative reader development approaches for adults and children
- Partnership with Literature Development Officer

##### *Areas for improvement*

- Introducing robust and effective evidence based stock management and improving stock selection and promotion
- Continued development and promotion of language materials

<i>Identification of reading interests</i>	<i>Very good</i>
<i>Choice of activities and resources</i>	<i>Excellent</i>
<i>Opportunities to improve literacy and numeracy</i>	<i>Good</i>

#### 4.1.4 Quality Indicator 4: Learners' experiences

##### *Strengths*

- Partnership working
- Informal learning environment

##### *Areas for improvement*

- Continue to work in partnership whilst exploring ways in which the library learning offer can be extended
- Improve access for all users

<i>Extent to which the environment stimulates and motivates learners</i>	<i>Good</i>
<i>The range of learning opportunities offered</i>	<i>Adequate</i>
<i>Provision for learners with differing abilities and aptitudes</i>	<i>Adequate</i>
<i>Partnerships enabling progression with others</i>	<i>Good</i>

#### 4.1.5 Quality Indicator 5: Ethos and values

##### *Strengths*

- Team working and the contribution of individual members of staff
- Welcome Project
- Involvement of staff in development of Library
- Recognition of the broad cultural interests of the small community

##### *Areas for improvement*

- More flexible space for library-based community activities

<i>Sense of identity and pride in the civic space</i>	<i>Very good</i>
<i>Reception and atmosphere</i>	<i>Very good</i>
<i>Customer service</i>	<i>Very good</i>

#### 4.1.6 Quality Indicator 6: Organisation and use of resources and space

##### *Strengths*

- The Welcome Project - world language materials for new workers and families, plus self-issue and out-of-hours return
- Mobile Libraries
- Involvement of staff in development of the Library and its planning

##### *Areas for improvement*

- Introduction of evidence based stock management
- Funding for staff training and development needs
- Budget for library materials
- Progression with refurbishment

<i>Accommodation and facilities</i>	<i>Good</i>
<i>Organisation and promotion of resources and services</i>	<i>Good</i>
<i>Deployment of skilled staff</i>	<i>Good</i>
<i>Use of funding</i>	<i>Adequate</i>

#### 4.1.7 Quality Indicator 7: Leadership

##### *Strengths*

- Team working and the contribution of individual members of staff
- Range of innovative projects delivered by small team
- Community-focused approach to service development

##### *Areas for improvement*

- Improving equality of access to services and promoting equality in all its activities
- Developing services for those experiencing health difficulties
- Re-evaluating provision for individuals and households at risk of social exclusion



<i>Vision and policy making</i>	<i>Good</i>
<i>Planning for improvement</i>	<i>Good</i>
<i>Innovation</i>	<i>Very good</i>
<i>Management of change</i>	<i>Good</i>

## **5 Funding Implications**

- 5.1 To be eligible for funding through the Scottish Government Public Library Improvement Fund, authorities must have achieved satisfactory levels of assessment against the standards in the past three years.
- 5.2 Last year Shetland Library was successful in attracting over £23,000 from the Improvement Fund to expand provision in language materials, install a self-issue machine and an out-of-hours return point, to promote usage of the Library amongst new workers and families from abroad.
- 5.3 Notification has just been received that this year's bid for £17,200 to improve library provision for those with disabilities, has also been successful.

## **6 Financial Implications**

- 6.1 There are no financial implications arising from this report.

## **7 Policy and Delegated Authority**

- 7.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to make decisions relating to matters within its remit for which the overall objectives have been approved by Council, in addition to appropriate budget provision.

## **8 Recommendation**

- 8.1 I recommend that the Services Committee note the contents of the report by the Scottish Library and Information Council on Shetland Library.

October 2008

Our Ref: SC/aja/sm

Report No: ED-45-F





## REPORT

To: Services Committee

9 October 2008

From: Executive Director - Education and Social Care

### Service Performance of Funded Organisations for financial year 2007/08

#### 1. Introduction

- 1.1 The purpose of this report is to update Members with information regarding the various services that were funded by the Council's Education and Social Care Department during financial year 2007/08.

#### 2. Links to the Corporate Plan

- 2.1 This report supports the Council's corporate objectives in terms of organising its business efficiently and effectively.

#### 3. Background

- 3.1 The Council has a legal duty to secure "best value" in how it chooses to deliver services. In essence, this is an assessment that the method of delivery (in house, in partnership, by private sector or by voluntary organisations) is appropriate in terms of quality, price, equality and community aspirations.
- 3.2 At a meeting of the Shetland Islands Council on 17 May 2006 (Min Ref: 91/06) the Council signed up to apply the principles of the "Following the Public Pound" where it is required to be explicit about the services it wishes to provide and how it will monitor performance and costs, where the Council elects to out source services.
- 3.3 In terms of the "Following the Public Pound" guidance, it is recommended that, "when agreeing to transfer funds to an external body we must be clear about the reasons for doing so". This means that Service Managers must have consciously thought that funding a particular organisation to provide a particular set of services is preferred method of delivering that service for this community. There are other options for delivering services – employ people directly, put it

- out to tender for an individual, company or organisation to bid to provide the service or grant aid a voluntary or community organisation.
- 3.4 The circumstances under which it makes sense for the Council, not to deliver the services directly in-house is where, either: -
- It is cheaper to do so (and where wage levels are comparable, this can only be achieved through having more efficient management systems or securing funding from sources out with Shetland); or
  - The service can be done better (in the sense that the voluntary sector may be able to provide more flexible and innovative solutions out with a formal statutory agency setting and often with volunteer support).
- 3.5 Recent Best Value guidance on Community Care has encouraged the Council to work in partnership with voluntary and community organisations to help develop their skills and expertise. Practically, this has resulted in moving towards putting in place Service Level Agreements with a range of organisations, with 3-year funding arrangements. This was seen to be beneficial to both parties, building a long-term working relationship.
- 3.6 At a meeting of the Services Committee on 1 May 2008 reports entitled “A Standardised Approach to Service Level Agreements” (Min Ref: 37/08) and “System for Applying EU Procurement Regulations to the Purchase of services from the voluntary sector” (Min Ref: 37/08) were considered and approved. These decisions ensured that services bought in by the Education and Social Care Department will use the same Service Level Agreement framework, and will comply with EU Regulation on the procurement of goods and services.
- 3.7 For the voluntary organisations detailed in this report, therefore, there is an understanding that providing funding to those voluntary organisations is the best method at the moment for delivering that range of services to the local community.

#### **4. Present Position**

- 4.1 The Education and Social Care Department had 14 Service Level Agreements in place for financial year 2007/08. Voluntary sector Service Providers received funding totalling £1,606,543 from the following service areas:
- Children’s Services
  - Community Care
  - Culture
  - Sport and Leisure
- 4.2 Officers within the Education and Social Care Department have been working closely with these Service Providers in order to develop and improve the content of service performance reports provided to the Council. This task is still a “work-in-progress” but has already resulted

in the voluntary organisations becoming more specific about the services that they are providing to the community for the funding provided.

- 4.3 Where possible, Council officers have tried to use the data that organisations already provide to their own Boards, in order to avoid duplication and minimise the quantity of paper being used.
- 4.4 Members should note that the majority of these Service Level Agreements are due to expire in March 2009 and the respective Heads of Service and Service Managers will shortly be reviewing each agreement. It is likely future funding agreements will be carried out in line with procedures of the Department's proposed new Commissioning Strategy, which is scheduled for presentation to a Services Committee meeting later the current year.
- 4.5 All service reports for financial year 2007/08 have been submitted by the organisations concerned and are attached in Appendix A.
- 4.6 It is intended that this Service Performance report will be presented to Elected Members annually in the autumn.

## 5. Progress Report

- 5.1 Appendix A sets out a complete set of the service performance reports received during financial year 2007/08. The Service Level Agreements which organisations sign up to prior to any monies being released detail the agreed service targets and the monitoring requirements. Generally information is received on a quarterly basis, both in terms of service performance and financial reports.
- 5.2 Table 1 below provides a summary of progress and highlights any major variations to the set targets, with explanations for these variances as required.

**Table 1**

Organisation	Funding	Comment
Advocacy Shetland	£49,502.00	Advocacy Shetland has undergone significant changes in its staff and management committee in recent years. However the situation is improving, and service usage levels are increasing again.
Citizens Advice Bureau – Direct Payments	£12,484.00	Usage levels continue to be low due to lack of demand for Direct Payments service. Service to be continued by CAB in 2008/09 but for a reduced sum.
Citizens Advice Bureau – Restorative Justice Project	£10,000.00	Demand for this relatively new service is steadily growing and the results to date are generally positive.
Shetland Community Drugs Team – Aftercare and	£30,600.00	Shetland Community Drugs Team successfully merged with Shetland Alcohol Advice Service in September 2007. The

Resettlement Service		new merged organisation (Community Alcohol and Drugs Service Shetland – CADSS) continues to be very busy with client numbers on the increase.
<b>Organisation</b>	<b>Funding</b>	<b>Comment</b>
COPE Ltd – Support Worker	£21,420.00	Service is currently operating at capacity and future provision for this service will require to be addressed in order to avoid any unmet demand.
Crossreach – Walter and Joan Gray Day Care Service	£176,598.00	Well established service and client levels remain near to capacity.
Crossroads Care Attendant Scheme (Shetland)	£38,378.00	Service levels remain fairly constant although Crossroads have had difficulties recruiting more carers in the South Mainland.
Moving On Employment Project	£52,880.00	Moving On Employment Project has had a very successful year and has significantly increased client numbers and placements in addition to maintaining its Job Crew service. Highlights in 2007/08 included launch of its Recipe Book and winning a Shetland Environmental Award.
Shetland Amenity Trust – Museum and Archive Service	£1,100,032.00	Museum and Archives building is fully operational and proving to be very popular with visitor numbers well in excess of predicted levels. Shetland Amenity Trust continues to be successful in developing and delivering new projects, however this success is placing a burden on core Trust functions such as finance, administration and ICT.
Shetland Council of Social Service	£10,000.00	This service was established to provide free disclosure checks for local volunteers and to raise awareness of Child Protection requirements for community groups. Service likely to be phased out after 2008/09 when Government's new "Vetting and Barring" Scheme comes into effect.
Shetland Golf Club	£41,600.00	The last couple of years have seen a significant improvement in the standard and presentation of the course. Shetland Golf Club's volunteer coaches are helping to attract more beginners, especially junior members.
Shetland Youth Information Service – Children's Rights	£42,024.00	Shetland Youth Information Service has recently gone through a period of significant change and work is ongoing to review and develop services being provided.
Shetland Women's Aid – Children and	£19,325.00	This service continues to show steady usage levels.

Young People's Support Worker		
W.R.V.S. – Emergency Services	£1,700.00	WRVS have a pool of trained volunteers in place, ready to respond to any call outs.

## **6. Financial Implications**

6.1 There are no financial implications arising from this report.

## **7. Policy and Delegated Authority**

7.1 In accordance with Section 13 of the Council's Scheme of Delegations, the Services Committee has delegated authority to make decisions on the matters within approved policy and for which there is a budget.

## **8. Conclusions**

- 8.1 Overall the quality and quantity of service performance information produced by the organisations has improved in recent years, but officers will continue to work with the Service Providers to further develop and improve the monitoring data provided.
- 8.2 The data now being received enables officers to make better assessments in terms of value for money and level of service being delivered. The process also complements the requirements of "Following the Public Pound" and is part of the department's objective of improving and developing monitoring systems.
- 8.3 In terms of performance there are no major issues of concern with regard to service delivery. However, several organisations have gone through significant change in recent years and this will require a period of time to settle down in order to see their results significantly improve.
- 8.4 It should be noted that by out sourcing services to the voluntary sector, a considerable "in kind" contribution is generated by organisations through volunteers who perform a valuable service and offer a wide range of skills and expertise for free. This represents good value for money for the Council.

## **9. Recommendations**

9.1 I recommend that Services Committee note the report.

## **Appendix A**

### **Purpose**

This Appendix sets out the purpose of most of the organisations for which funding was provided by Shetland Islands Council for financial year 2007/08. It details the key targets that were agreed for the funding provided and compares actual performance against that, for the 12-month period to March 2008.

The Appendix is presented by service area:

- Children's Service
- Community Care
- Culture
- Sport and Leisure



## Appendix A

### Children's Services

**Organisation:**

**Citizens Advice Bureau – Restorative Justice Project**

**Purpose:**

To provide an independent Restorative Justice service for young offenders. This mediation service brings together persons responsible and persons harmed to resolve issues following an incident.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Number of case referrals (30)	No. of persons responsible contacted = 21
	No. of persons harmed contacted = 17
Provision of restorative justice training / awareness to relevant agencies (1)	No. of professionals contacted = 14
	No. of parents/carers contacted = 25
Volunteer contribution (100 hours)	141 volunteer hours worked

**Organisation:**

**Shetland Women's Aid – Children and Young People's Support Worker**

**Purpose:**

To provide a Children and Young People's Support worker to undertake a range of duties including specific responsibility for intervention with children and young people affected by domestic abuse.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Therapeutic 1-2-1 sessions for domestic abuse victims (30 per week)	18 per week
Children community group sessions (8 per year)	7 e.g. group sessions held at various schools and youth clubs around Shetland
Refuge outreach work sessions (6 per year)	33 sessions held

Satisfaction survey	Service user survey successfully completed – positive feedback and results
Partnership working	A range of partnership working has been completed. Awareness raising sessions and focus groups have been delivered to schools, community groups and statutory partners around Shetland

**Organisation:**

**Shetland Youth Information Service – Children’s Rights Service**

**Purpose:**

To provide a Children’s Rights Service to undertake a range of duties including informing children and young people of their rights and responsibilities and responding to children’s rights issues raised by children, young people and other stakeholders.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Information and advice to children and young people (150)	55 clients assisted during 2007/08 with 146 significant contacts.  The service has also delivered presentations to 637 secondary school pupils and during drop in sessions at Brae, Sandwick, Scalloway, Mid Yell and the Anderson High School.  Issues and advice include mental health, finances, addictions, housing, lifeskills, employment, relationships, education and bullying.
Advocacy and representation at statutory, children’s hearings and other review meetings (15)	The Children’s Rights Service (CRS) has accompanied clients to: <ul style="list-style-type: none"> <li>• 3 Local Support Network meetings</li> <li>• 1 court appearance</li> <li>• 1 child protection statement to the Police.</li> </ul>
Visits to children and young people place in foster care, residential or secure accommodation (20)	0 visits made during the year.
Representing children and young people’s rights at strategic and operational groups/forums (5)	The CRS has met with a range of agencies and organisations re operational matters.

### Community Care

**Organisation:**  
**Advocacy Shetland**

**Purpose:**

To provide a range of independent advocacy services.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Generic advocacy services for service users (150)	58
Generic advocacy services for unpaid/family carers (100)	23
Specialist advocacy services for people with a mental health issue (100)	20
Instances of detention (40)	4 – positive outcomes for clients, some ongoing work with Advocacy Shetland
Tribunals/Reviews (10)	6 – positive outcomes for client/medical team  Advocacy Shetland has also worked with the Council to review, consult and produce a new Advocacy Development Plan for 2008-2011  50 hours volunteer hours worked – new volunteer recruitment work ongoing

**Organisation:**  
**Citizens Advice Bureau – Direct Payments Service**

**Purpose:**

To provide a Direct Payment Support Service for people who have opted for Direct Payments as an alternative to services arranged by Shetland Islands Council.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Support for Direct Payments recipients (25)	11 referrals received during year, 2 of which resulted in a direct payment.
Publicity and information	A range of service promotion was undertaken including CAB's attendance at

Training for service users	<p>local events such as agricultural shows and Carers Rights Day.</p> <p>Training information and packs have been developed and are available to service users. CAB staff has been educated to deliver training as and when requested by service users, their carers and others involved in the care service provision.</p>
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### **Organisation:**

### **Community Alcohol and Drugs Service Shetland – Aftercare and Resettlement Service**

### **Purpose:**

To provide a Substance Misuse Aftercare and Resettlement Transition service (SMARTs) to undertake a range of duties including aftercare service, resettlement service, provision of a support group, care co-ordination service and alternative therapies to support problem drug and alcohol users.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Increase number of individuals keying into SMARTS by 10% (56)	SMARTs currently has 65 individuals using their services. 24 of these remain in contact with services from the previous reporting period and 37 of these are new contacts in this reporting period (e.g., since April 2007).
Increase number of contacts to SMARTS by 10% (1,920)	There have been 1385 client contacts and 1721 professional contacts to SMARTs in 07/08. CADSS are clearly having more professional contacts than previously, which is likely to be an indication of complex client need and ever increasing confidence in A&R services.
Newly or soon to be “clean” and/or “dry” clients assessed and offered Aftercare and Resettlement Services (35)	SMARTs has seen 37 newly ‘clean and/or ‘dry’ clients to its services in 07/08.
Service users remaining drug and/or alcohol free 6 months after referral and acceptance to SMARTS (42)	SMARTs currently has 22 clients who remain drug and/or alcohol free 6 months after initial contact to SMARTs.
Service users maintaining or attaining training / employment / education (18)	SMARTs have worked with 19 clients who continue to be in training/employment/education.
Rehab / detox assessments completed (14)	SMARTs has completed initial assessment with 14 clients who were referred for Residential treatment assessment. 6 people completed the assessment process in 07/08.
Problem drugs users undertaking and completing rehab (3)	1 problem drug user has completed residential rehabilitation.

Problem alcohol users undertaking and completing detox / rehab (3)	3 (ex) problem drinkers have completed Residential Rehabilitation and are keyed into Aftercare services.  There are currently 3 people in residential treatment 2 alcohol users and one poly drug user. These clients will return to aftercare in the next financial year.
Maintain client "drop off" rate (up to 18%)	Current drop-off rate is 7.7%

**Organisation:**  
**COPE Ltd – Support Worker**

**Purpose:**

To provide a Support worker service on a full time basis offering dedicated support to COPE participants with more complex needs in a supportive business environment.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Support for COPE participants with complex disabilities and/or challenging behaviour (4)	4 participants with complex disabilities supported throughout the year.
A range of stimulating activities to promote client's independence, health and well being	Participants are involved in three of the company's departments:  Weighing and packing department The craft project Shetland Soap Company  Participants are involved in a range of tasks across these departments including weighing, labelling, making greetings cards, key rings and bracelets, pricing and making up gifts.

**Organisation:**  
**Crossroads Care Attendant (Shetland) Scheme**

**Purpose:**

To provide a respite service for carers following an assessment of need in accordance with the Single Shared Assessment (SSA) Joint Procedure for Community Care.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Provide a respite service to carers of adults with learning, sensory and physical disabilities (60)	69
Provide a respite service to carers of adults with mental health problems including	28

<p>dementia (20)</p> <p>Provide a respite service to carers of children with learning and physical disabilities (20)</p> <p>Provide approximately 550 care hours per month</p>	<p>1</p> <p>Provided an average of 752 hours per month</p> <p>Crossroads cater for clients from all other Shetland with a range of conditions including dementia, learning and physical disabilities. Clients vary in age from young people through to the very elderly.</p>
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**Organisation:**  
**Moving On Employment Project**

Purpose:

To provide supported employment opportunities for adults with physical, sensory or learning disabilities and/or mental health problems.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Support clients with complex cases (20)	58
Support clients with less complex cases (50)	28
Build up closer links with local partners in the development of supported employment opportunities	<p>41 clients left Moving On during this period and 29 went on to secure full time or part time employment, training or volunteering work</p> <p>Moving On Employment Project (MOEP) have participated in various local forum groups, presentations and health related events, and have actively been raising its profile through local media features, display boards and leaflets.</p> <p>MOEP held a successful Employers Event in March. This event was attended by over 30 local employers and is expected to create more work placements for Moving On clients. MOEP again received very positive results in its service evaluation from clients and stakeholders.</p>
Take positive steps to explore, develop and implement new services	<p>MOEP rolled out its new job crew service in April 2007. This project involves taking a group of clients, supported by Moving On staff and volunteers, to carry out various projects in the community.</p> <p>Whilst on the Job Crews clients learn and develop a range of new skills that also build their confidence and self-esteem. Job crew projects vary from painting, gardening,</p>

	<p>grass cutting and beach cleaning amongst other things.</p> <p>A number of community facilities such as public halls and community gardens benefited from the work of Moving On last year. In December 2007 MOEP received a Shetland Environmental Award for a successful job crew project. MOEP also created and sold almost 800 Recipes Books, which helped to raise awareness of mental health issues.</p>
Volunteer contribution (720 hours)	506 volunteers hours worked

**Organisation:**

**Crossreach – Walter and Joan Gray Day Care Service**

**Purpose:**

To provide day care facilities for older people in the Scalloway area.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
Day care places for 5 days per week (10)	10 day care places available 5 days per week
Optimum use of day care provision (95% occupancy levels)	Occupancy levels at 68% (levels down due to illness and referral rates)
Daily transport and meals service	Most clients are collected and put home each day and all day care participants are provided with a meals service
Provide a range of stimulating activities	Day care clients receive a varied programme of activities and entertainment including craftwork, gardening, outings, chair exercises, board games, quizzes, musical activities like signing and reminiscing
Undertake an annual satisfaction survey with its users	Annual survey of service users successfully completed and the results were very positive

**Organisation:**

**W.R.V.S. – Emergency Services**

**Purpose:**

To provide an Emergency Service to undertake a range of duties including the provision of support and assistance to Shetland Islands Council and local emergency services in the event of an emergency situation in the Shetland area.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
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100% response rate to all emergency situations in the Shetland area	There were no emergency situations to attend during 2007/08. However WRVS took part in one major exercise in June 2007.
Provide training exercises (2 per year)	<p>The local team of volunteers have met 6 times during the year including 2 training sessions.</p> <p>The WRVS currently has 12 volunteers recruited, trained and retained that are ready to respond to an emergency situation in Shetland. Recruitment of new volunteers is ongoing.</p>

## Culture

### **Organisation:**

#### **Shetland Amenity Trust – Museum and Archive service**

#### **Purpose:**

To provide a museum and archive service in Shetland.

Since the Shetland Museum and Archives opened on 1 June 2007, visitor numbers have far exceeded expectations with 74,645 visitors to the end of March 2008.

Museum curators have been busy dealing with new donations and many enquiries, and the Archives staff has welcomed 1,579 researchers to the new searchroom. Visit Scotland 5star status has also been achieved by the Museum and Archives service.



<b>Key Targets 2007/8</b>	<b>Actual Service Delivery</b>
<b>Collections</b> Review of collections, conservation, storage, cataloguing post opening           Create and update Museum conservation care plan and documentation procedures           Review boat collection specific to floating boats; continue restoration of LOKI and BRENDA           SMC Scottish Significance Scheme           Complete transfer of maps/plans and oral history archive from King Harald Street	The review of Museum collections is ongoing. All roller racks in museum store repacked by students. Repacking of trays complete. Work has started on the textile collection.           Stock take of Archives collections is ongoing; transfer of catalogues to C.A.L.M. database complete, with assistance from volunteers.           Conservation survey with National Archives of Scotland due to take place in late 2008. Digitisation of oral history collections is well advanced.           Conservation Care plan is in draft format. Documentation Procedures policy also in draft.           Restoration of LOKI has begun. Review of overall boat collection is ongoing.           Museum to apply for this in 2008.           Almost achieved (problems with air handling units in new building ongoing)

<b>Exhibitions</b> Complete exhibition policy, additional documentation and forms, and draft 3 year programme           Develop and action programme of updates to permanent displays           Investigate and develop partnered exhibitions and events, beginning with Jack Chesterman           Develop pre- and post-opening exhibitions and events that integrates exhibitions service with lifelong learning service	Policy complete – ongoing revision, key exhibitions over next 3 years complete           The programme for 2008/09 is complete           2 exhibitions with Shetland Arts; Textile working museum collections on display; Heritage display case at Sumburgh, ongoing           Ongoing series of events linked to exhibitions
<b>Lifelong Learning</b> Develop a range of learning opportunities for different audiences e.g. workshops and tours for formal education, and events programme including 2007 conference ‘A woman’s island?’	Conference and workshops well attended and successful. Planning for St Ninian’s Isle treasure conference well advanced. Range of formal and informal tours, workshops and learning opportunities have been developed

<p>Plan events and exhibitions to tie in with local and national events e.g. Johnsmas Foy, Scottish Archaeology Month</p> <p>Continue to develop the outreach service e.g. new discovery boxes</p> <p>Develop a series of publications on aspects of Shetland's culture beginning with facility catalogue</p>	<p>Event help to tie in with Johnsmas Foy, the "Big Draw", Archaeology Month. Work is ongoing.</p> <p>Outreach visits to schools. New boxes discovery boxes created</p> <p>Museum and Archives guide at publishers. Other publications are in preparation and/or being planned</p>
<p><b>Heritage Hub and Community Museums</b> Consult with community groups to assess requirements and need, create action plan</p> <p>Support in accreditation and improvements of standard of interpretation, collections management</p> <p>Develop museum and archives newsletter</p>	<p>Consultation is ongoing</p> <p>Support to community groups is ongoing</p> <p>"Unkans" newsletter has been developed, and has completed 6 issues</p>
<p><b>Readers / Researchers</b> Carry out an evaluation of the service and create a co-ordinated documentation and enquiry procedures</p> <p><b>Facilities</b> Develop core products and improve/maintain retail products</p> <p>Relate restaurant to events and activities within museum and archives</p> <p>Work on achieve VSQA 5 star for Museum and Archives facility, maintain and improve for CHM and Böd</p>	<p>Enquiry forms have been created, duty rota system in Archives is now in place and successful; duty curatorial system now being trialled</p> <p>Completed. Retail products produced and development of new products is ongoing</p> <p>Ongoing – have completed the "Big Draw" and Christmas events. Also held successful film/food themed events (3)</p> <p>5 star status is now complete. CHM toilets updated</p>

<b>ICT</b> Investigate integration of museum and archive databases  Develop a new website for the Museum and archives  Develop search room public access to databases	To be discussed  Draft website completed, to go online May 2008  Archives catalogue to go online in 2008
<b>Marketing</b> Develop and range of guides and leaflets to promote all aspects of the service  Work with Coleman Getty to continue marketing plan + opportunities for the promotion of the service	Ongoing with trail guides and facility guide  Colman Getty marketing plan now complete
<b>Staffing</b> Develop and maintain training plan and CPD opportunities  Monitor staff performance and service delivery against detailed service work plans.	This is ongoing  This is ongoing

### **Sport and Leisure**

#### **Organisation:**

**Shetland Council of Social Service – Free Disclosures**

**Purpose:**

To provide support for community groups in Shetland to meet their child protection responsibilities and help keep children and young people safe. This will include providing free disclosure checks to all volunteers attached to community groups in Shetland.

<b>Key Targets for 2007/08</b>	<b>Actual service delivery</b>
<p>A free disclosure check service to all volunteers attached to community groups in Shetland</p> <p>Assist community groups to ensure all necessary policies and procedures are in place</p>	<p>72 enhanced disclosure checks were processed for volunteers attached to a total of 36 different local community groups.</p> <p>SCSS staff worked in partnership with Council officials to deliver 15 Child Protection roadshows at locations across Shetland.</p> <p>The SCSS also met with a number of groups to ensure they had the necessary policies and procedures in place.</p>

**Organisation:**  
**Shetland Golf Club**

**Purpose:**

To provide quality golf facilities for both recreation and competitive golfers and to develop the sport of golf in Shetland.

Key Targets for 2007/08	Actual service delivery
Maintain and provide a 18 hole golf course	The course has been successfully maintained with a marked improvement in overall presentation. A number of improvement works was carried out last year including drainage upgrade, creating a pond on the 16th hole, replacing four bridges around the course and some re-turfing works.
Take positive steps to increase membership levels	<p>Shetland Golf Club have increased the promotion of its facilities and golf with the introduction of a website. The Club has also begun offering coaching sessions to beginners and junior golfers.</p> <p>Overall membership levels have increased during the past year to almost 400, with junior membership and corporate booking levels in particular rising significantly.</p>
Develop the sport of golf in Shetland	<p>Working with “clubgolf”, the National Junior Golf Development Programme has helped to develop golf locally.</p> <p>This partnership includes creating new junior tee offs throughout the course and 15 volunteers have undertaken the “clubgolf” Level 1 instructors training, enabling them to deliver weekly coaching sessions to beginners and junior members.</p>
Volunteer contribution (700 hours)	1,650 volunteer hours worked





## MINUTE

A

**Shetland College Board of Management**  
**Room 4, Train Shetland, Gremista, Lerwick**  
**Wednesday 24 September 2008 at 2.30 p.m.**

**Present:**

A J Hughson	L Angus
L F Baisley	J Irvine
W H Manson	R C Nickerson
J L B Smith	

**Apologies:**

G Robinson	A Black
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**Observer:**

L Sinclair

**In attendance (Officers):**

G Smith, Director  
S Smith, Operations Manager  
M Simpson, Vocational Training Manager  
A Cogle, Service Manager – Administration

**Also:**

R J Cormack, Principal UHI  
J Fraser, Secretary - UHI Board of Governors  
D Green, Principal, Lews Castle College

**Chairperson**

Mr A Hughson, Chair of the Board, presided.

**Circular**

The circular calling the meeting was held as read.

**Declarations of Interest**

There were no declarations of interest made.

35/08

**Minute**

The minute of meeting held on 26 June 2008, having been circulated, was confirmed on the motion of Mr A Hughson, seconded by Mr J L B Smith.

36/08

**Welcome**

The Chairperson welcomed Mr Joe Irvine, representative of the NHS Shetland Board to his first meeting of the Board, and said he looked forward to his contribution to meetings.

The Chairperson also welcomed Professor Robert Cormack and Mr James Fraser from the UHI, and Mr David Green from Lews Castle College. The Chairman thanked them all for attending, and thanked Mr Green for his hospitality at Lews Castle College during his and the Director's visit earlier in the month.

37/08

## **UHI Report**

### **European Funding**

The Director said that, as the Board would be aware from earlier circulars, there were some concerns surrounding the process of gaining European funding through the UHI strategic funding process. The Director said that the purpose of the visit from UHI today was to try and find a way forward that would be acceptable to both Shetland College and the UHI. The Chairperson invited Mr Fraser to address the Board.

Mr J Fraser said he appreciated there was concern regarding the processes involved in securing funding, and these would be reported to the UHI Board of Governors meeting next week. He said that the outcome being sought, as he understood it, was a review of the process employed by the infrastructure committee, and in this regard Shetland College were invited to submit a PID (project initiation document) so that if any changes to the agreed priority list occurred, Shetland College would be in the same position as other applicants and ready to have their bid assessed accordingly. Mr Fraser confirmed that a report would be put to the Board of Governors on these matters by 10 October 2008.

During the discussion that followed, the Board noted the procedures for the presentation of bids, the scoring system and criteria used.

Mr Fraser concluded by confirming that his report to the Board of Governors would provide them with the options available to them to address the problems and it would be a matter for the Board to then decide its course of action. However, Mr Fraser said that in order not to prejudice Shetland College, a full PID should be ready for consideration next week.

### **Awarding Powers**

Prof R Cormack then addressed the Board and referred to the UHI's recent granting of taught degree awarding powers by the Privy Council. He said that the next step was the achievement of University title, and he went on to detail the various stages that would have to be gone through, and highlighting some of the issues that were being addressed with the QAA. The Board noted with interest the issues emerging from this process and looked forward to further updates as matters developed.



The Chairperson thanked Prof Cormack, Mr Fraser and Mr Green for their attendance at the Board's meeting, and for their input.

[Prof Cormack, Mr Fraser and Mr Green left the meeting.]  
[The Director left the meeting, and the meeting adjourned for 10 minutes.]

The meeting reconvened at 3.10 p.m.

38/08

### **Director's Report**

#### **1. NAFC and SUMS**

The Director advised that discussions were being held with the NAFC Marine Centre about SUMS into the future. It was noted that SUMS had been received initially for the provision of engineering courses at Shetland College for the NAFC, and those SUMS had come to Shetland College. However, the Director said it was likely now that more engineering courses would be delivered by the NAFC, but that the NAFC did not have a relationship with the funding Council. The Director said that any SUMS acquired through new courses for the NAFC should go to the NAFC to allow them to deliver their programmes. The Director said that, in this regard, there was a need to quantify the level of SUMS being generated by the NAFC now and into the future, how that matched with their enrolments, and to enter into a dialogue with the funding council with a view to allowing the NAFC to receive funding. The Board noted that the Director would be progressing this matter and in the meantime the SUMS generated remained part of the Council's funding package to the NAFC.

#### **2. Lews Castle College**

The Director advised that he, along with the Chairperson, had recently visited Lews Castle College in Stornoway, with the main purpose of the visit being to find out more about their music courses. The Chairperson went on to summarise the visit, and a copy of a summary prepared by the Director is attached as Appendix 1.

39/08

### **Report by HM Inspectorate of Education: Shetland College**

The Board noted a report by the Director, Shetland College (Appendix 2A). A copy of the HMIE report was circulated at the meeting (Appendix 2B).

The Chairperson, on behalf of the Board, congratulated management and staff for an excellent report.

40/08

### **Shetland College Student Enrolments**

The Board noted a report by the Director, Shetland College (Appendix 3).

41/08

**Shetland College Student Participation in Quality Scotland**

The Board noted a report by the Director, Shetland College (Appendix 4)

42/08

**Train Shetland – Vocational Training**

The Board considered a report by the Vocational Training Manager (Appendix 5).

The Vocational Training Manager summarised the terms of the report, and sought the Board's advice on information to give employers. The Board noted that the future position was still unclear but that local employers should be made aware of the possible changes in funding for modern apprenticeships. The Board also noted that the possible way forward for vocational training was already adopted in Shetland by its method of seeking to match employer and industry needs, rather than simply trying to increase student numbers as was evident in other areas. The Board hoped that any national proposal would allow the continuance of this local solution, but were concerned at the short-term implications that uncertainty could have on enrolments.

The Board asked that the Director begin early dialogue on this matter with the Chairman of Skills Development Scotland, who would be visiting Shetland in the near future.

The Board also agreed that dialogue with local employers should be held to alert them to possible changes in the system, and to seek an indication of the number of apprenticeship places that employers could offer in order to illustrate possible demand, but without raising expectations.

The Board further agreed that the future qualifications requirements of the Council over the next few years also needed to be addressed, particularly with the implication of Single Status. The Director agreed to take forward these matters, and would arrange an early meeting with the Head of Organisational Development with regard to the Council's position.

**In order to prevent the disclosure of exempt information, Mr A Hughson moved, Mr W H Manson seconded, and the Board resolved, in terms of the relevant legislation, to exclude the public during consideration of the following item of business.**

*[Mr L Sinclair and the Operations Manager left the meeting.]*

43/08

**2008/09 Lecturer's Salary Increase Claim**

The Board considered a report by the Director (Appendix 6) and approved the recommendation contained therein, on the motion of Mr J L B Smith, seconded by Mr L Angus.

The meeting concluded at 3.25 p.m.

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A J Hughson  
CHAIRPERSON