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08 September 2025

**To: Councillors Saxton (Chair), Bell, Cochrane, Ferry, Lyons,  
McGinley, Scott and Weir**

**All other Elected Members for information only**

Dear Councillor

## **SERVICE AND PARTNERSHIPS PERFORMANCE PANEL**

You are requested to participate in the above Panel to be held on **Tuesday, 16 September 2025 at 10.00 a.m.** for the purpose of considering the undernoted business.

This meeting will be held in the County Hall, County Buildings, Ayr on a hybrid basis for Elected Members, will be live-streamed and available to view at <https://south-ayrshire.public-i.tv/>

**Yours sincerely**

**CATRIONA CAVES**  
**Chief Governance Officer**

## **B U S I N E S S**

1. Declarations of Interest.
2. Minutes of previous meeting of 20 August 2025 (copy herewith).
3. Action Log and Work Programme (copy herewith).
4. Strathclyde Partnership for Transport (SPT) – Performance Report 2024/25 - Submit joint report by the Depute Chief Executive and Director of Housing, Operations and Development and Director of Communities and Transformation (copy herewith).
5. The Quay Zone - Annual Performance Report – Submit report by the Director of Communities and Transformation (copy herewith).
- 6./

6. Shaping Our Future Council – Submit report by the Director of Communities and Transformation (copy herewith).
7. Community Wealth Building Programme 2021-2025 - Submit report by the Director of Communities and Transformation (copy herewith).
8. Employee Absence 2024/2025 – Submit report by the Chief HR Officer (copy herewith).

For more information on any of the items on this agenda, please telephone June Chapman,  
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**Agenda Item No 2****SERVICE AND PARTNERSHIPS PERFORMANCE PANEL**

Minutes of hybrid webcast meeting on  
20 August 2025 at 10.00 a.m.

Present  
in County  
Buildings: Councillors Philip Saxton (Chair), Brian McGinley, Gavin Scott and George Weir.

Apologies  
Due to  
Technical  
Difficulties: Councillors Ian Cochrane and Lee Lyons.

Apologies: Councillors Kenneth Bell and Stephen Ferry.

Attending  
in County  
Buildings: K. Braidwood, Depute Chief Executive and Director of Housing, Operations and Development; K. Anderson, Assistant Director – Corporate Policy, Strategy and Performance; G. Hunter, Assistant Director – Communities; K. Dalrymple, Assistant Director – Housing and Operations; C. Cox, Assistant Director – Planning and Development; W. Carlaw, Service Lead – Democratic Governance; S. McCardie, Service Lead - Performance, Community Planning and Sustainability; J. Tait, Service Lead – Thriving Communities; G. Cockburn, Service Lead – Education Support Services; T. Burns, Service Lead – Asset Management and Community Asset Transfer; C. Robertson, Local Heat and Energy Efficiencies Strategy Officer; J. Hall, Co-ordinator (Planning Strategy); D. McIntosh, Solicitor; A. Gibson, Committee Services Officer; and C. McCallum, Clerical Assistant.

Attending  
Remotely: C. McGhee, Chief Internal Auditor; and T. Simpson, Service Lead – Corporate Accounting;

Also  
Attending  
in County  
Buildings: J. McMillan, S. McGrath, and S. Dougan, Police Scotland; and K. Murphy and G. Hoey, Scottish Fire and Rescue Service.

**Chair's Remarks.**

The Chair

- (1) welcomed everyone to the meeting;
- (2) outlined the procedures for conducting this meeting and advised that this meeting would be broadcast live; and

- (3) that the report on today's agenda entitled "Quay Zone – Annual Performance Report" would now be considered at the next meeting of this Panel, scheduled to take place on 16 September 2025.

**1. Sederunt and Declarations of Interest.**

The Chair called the Sederunt for the meeting and having called the roll, confirmed that there were no declarations of interest by Members of the Panel in terms of Council Standing Order No. 17 and the Councillors' Code of Conduct.

The Chair raised an issue regarding an item in the Action Log, to be considered later on the agenda at item 3 of this minute relating to a response received from the Service Lead – Democratic Governance for her to ascertain if this Panel had the remit to examine the business plans relating to Belleisle and Darley Golf courses, prior to consideration at Cabinet. Having noted that Members had received an explanation advising that this Panel did not have the remit to examine these business cases, it was noted that this would be the subject of a Briefing to Members on 27 August 2025.

**Adjournment.**

Due to technical difficulties, the Panel adjourned for ten minutes.

**2. Minutes of previous meeting.**

The Minutes of 10 June 2025 (issued) were submitted and approved, subject to an amendment to item 8 "The International Ayr Show – 2024: Economic Impact Assessment" to read "to continue consideration of the Economic Impact Assessment for the 2024 International Ayr Show to a future meeting of this Panel, to allow the full Economic Impact Assessment to be included with the report and not only the executive summary, as attached to this report."

**3. Action Log and Work Programme.**

There was submitted an update of the Action Log and Work Programme (issued) for this Panel.

Having heard the Assistant Director - Corporate Policy, Strategy and Performance intimate that in relation to the Work Programme, and as mentioned previously, the report on today's agenda entitled "Quay Zone – Annual Performance Report" would now be considered at the next meeting of this Panel, scheduled to take place on 16 September 2025. It was also noted that the report entitled "Local Housing Strategy Annual Update (Year 1 2024/25)" would now be considered at the meeting of this Panel, scheduled to take place on 21 October 2025.

The Assistant Director - Corporate Policy, Strategy and Performance also advised that all the outstanding actions in the Action Log were now complete.

The Panel

**Decided:**

- (1) to agree the current position with regard to the Action Log; and
- (2) to otherwise note the current status of the Work Programme.

**4. Local Performance Report: Police Scotland**

There was submitted a report (issued) of 7 August 2025 by the Chief Executive providing the Panel with information about the year-end performance (quarter four) of Police Scotland in South Ayrshire for 2024/25.

The Panel heard Superintendent McMillan give a brief outline to the contents of the report.

The issue of drug supply charges was raised and it was noted that the public could report this anonymously to Police Scotland with trends seen in its reduction but that it was difficult to measure figures relating to this crime.

Having heard a Member of the Panel in relation to cases relating to rape and sexual assault, it was noted that “non-recent” related to cases not in the last few days or weeks.

Members of the Panel expressed their thanks to Police Scotland for the work they had undertaken in the Wallacetown area of Ayr.

The Panel noted that the figures for South Ayrshire were not overly different to the national figures.

There was discussion on the difficulties faced in tackling drug related crimes.

A Panel Member raised the issue of the difficulties Police Scotland faced by rural police stations and how difficulties were alleviated.

Following various matters being raised by a Panel Member, it was noted that in relation to shoplifting, a partnership between Police Scotland and retailers was important; that 101 calls were now being better managed; what was being done in the protection of young people; and that there were currently eight campus officers employed in South Ayrshire.

Stuart Dougan, Police Scotland, who was leaving his current role, thanked the Council for their support over the years.

Having scrutinised the performance report of Police Scotland in South Ayrshire, the Panel

**Decided:** noted the contents of the report.

**5. Local Performance Report: Scottish Fire and Rescue Service.**

There was submitted a report (issued) of 7 August 2025 by the Chief Executive providing information about the year-end performance (quarter four) of the Scottish Fire and Rescue Service in South Ayrshire for 2024/25.

The Panel heard Area Commander Kevin Murphy provide a background to the contents of the report.

Having heard a Member of the Panel, it was noted that it was not clear if the fall in numbers for deliberate fire setting was due to a rise in convictions.

A Member of the Panel praised the partnership work the Scottish Fire and Rescue Service had undertaken in the Wallacetown area of Ayr.

The issue of false alarms was raised by a Member of the Panel and it was noted that the number of false alarms was falling but still frustrating.

Having heard a Member of the Panel, it was noted that the early detection of fire with the installation of fire alarms reduced the severity of incidents; and the forthcoming consultation with this Council and local communities to produce a Plan for this area.

Having hear the Chair thank the Scottish Fire and Rescue Service for the work they did withing South Ayrshire and having scrutinised the performance report of the Scottish Fire and Rescue Service in South Ayrshire, the Panel

**Decided:** to note the contents of the report.

**6. Local Government Benchmarking Framework – Overview of 2023/2024**

There was submitted a report (issued) of 7 August 2025 by the Chief Executive updating the Panel on the publication of the Local Government Benchmarking Framework (LGBF) data for 2023/2024 for this Panel to consider where scrutiny of this information could help drive improvement.

Having heard the Service Lead – Performance, Community Planning and Sustainability, the Panel

**Decided:** to continue consideration of this report to a special meeting of this Panel, to allow detailed scrutiny of the various Services of the Council.

**7. Participatory Budgeting Activity 2024/2025 Update.**

There was submitted a report (issued) of 7 August 2025 by the Chief Executive advising of the Participatory Budgeting (PB) Activity undertaken by Council Services for the period 2024/25.

Following discussion and having heard the Assistant Director – Corporate Policy, Strategy and Performance, it was noted that there had not been a consistent approach to date in consultation by the various Services but that it was hoped that there would be a more consistent approach to consultation next year.

Having considered the contents of the PB Activity Report, attached as Appendix 1 to the report, the Panel

**Decided:** to note the value of budgetary spend influenced through the PB processes during 2024/2025.

**8. Developer Contributions Update Relative to Planning Permissions 2024/2025.**

There was submitted a report (issued) of 7 August 2025 by the Depute Chief Executive and Director of Housing, Operations and Development providing an update on the Developer contributions, obtained through legal agreements, gathered and utilised during the period 2024/2025.

The Panel discussed Section 75 legal agreements between the Council and developers in agreeing developer contributions and the process involved.

The Panel heard from the Service Lead – Education Support Services following discussion on the risk that some of the contributions from the Greenan development would not be able to be justifiably utilised, due to the school rolls for Kyle Academy and St. Johns being lower than projected. It was noted that lessons required to be learned from previous experiences for the future.

The Panel

**Decided:** to note the developer contributions collected from developers relative to their Planning Permissions and utilised to mitigate the impact of their development within the reporting period April 2024 to March 2025.

**9. Local Heat and Energy Efficiency Strategy – Progress and Update Report.**

There was submitted a report (issued) of 8 August 2025 by the Depute Chief Executive and Director of Housing, Operations and Development providing an update on the progress of the Local Heat and Energy Efficiency Strategy ('LHEES'), agreed at a meeting of South Ayrshire Council on 19 August 2024; and requesting agreement for the developed and new actions for the LHEES in the delivery plan.

Following questions and having heard various officers, it was noted that the Energy Agency was a key partner; the current position with the Member/Officer Working Group; due to the cost of heat pumps etc, there required to be consideration of any recommendations made to the public in respect of alternative solutions; and that in most cases the installation of solar panels was via permitted development rights.

The Panel

**Decided:**

- (1) to note the progress made in year 1 of the LHEES strategy and delivery plan; and
- (2) to agree the developed and new actions for the LHEES delivery plan.

**10. The International Ayr Show – 2024: Economic Impact Assessment.**

There was submitted a report (issued) of 7 August 2025 by the Director of Communities and Transformation providing an update on the Economic Impact Assessment (EIA) for the 2024 International Ayr Show - Festival of Flight.

Having heard a Member of the Panel, the Assistant Director – Communities advised that it was the intention to do a further impact assessment following the next Ayr Show.

A Member of the Panel expressed his concern that out of the reported 260,000 attendees at the Ayr Show in 2024, only 434 people had been approached for survey purposes. It was noted that it was proposed for the 2025 Ayr Show that more people would be made available during the event to gather the views of the attendees.

A Member of the Panel stated that there needed to be more evidence that the Ayr Show was value for money and sustainable.

Following discussion on making the Ayr Show a ticketed event, the Assistant Director – Communities advised that that it would not be possible to fence-off due to the costs involved and that the event was billed as a community type event.

It was agreed that the Assistant Director – Communities would provide Panel Members with details of how the Event in the past had impacted local traders. It was noted that details of the cost of the Ayr Show had been provided in a report to the Council meeting in December 2024.

The Panel

**Decided:** to note the Economic Impact Assessment for the 2024 Airshow.

**11. UK Shared Prosperity Funding (UKSPF) Year 3 (2024/25) Progress Report.**

There was submitted a report (issued) of 7 August 2025 by Director of Communities and Transformation providing an update on the UK Shared Prosperity Fund and the Year 3 progress.

Having heard a Panel Member, it was noted that no priority areas had been identified with the funding being made available maximised.

Following a question, the Service Lead – Thriving Communities advised that it was not feasible to employ staff full-time, due to the uncertainty surrounding funding.

The Panel, having considered the report and noted the activity and performance during 2024/25,

**Decided:** to request that officers report outcomes and achievements of UKSPF Year 4 in August 2026.

**12. Exclusion of press and public.**

The Panel resolved, in terms of Section 50A(4) of the Local Government (Scotland) Act 1973, that the press and public be excluded during consideration of the remaining item of business on the grounds that it involved the likely disclosure of exempt information in terms of paragraphs 8 and 9 of Part 1 of Schedule 7A of the Act.

**13. Ayrshire Growth Deal Prestwick Proposition.**

There was submitted a report (Members only) of 7 August 2025 by Depute Chief Executive and Director of Housing, Operations and Development providing an update on the Ayrshire Growth Deal Prestwick Proposition.

Following discussion, the Panel

**Decided:**

- (1) to note the progress by officers identified in the report towards the strategic recommendations agreed for the Ayrshire Growth Deal Prestwick Proposition;
- (2) to note the further work identified in the activity work schedule; and
- (3) to agree a further update be provided to the Service and Partnerships Performance Panel in March 2026.

14. **Consideration of Disclosure of the above confidential report.**

The Cabinet

**Decided:** not to authorise the disclosure of this report under Standing Order 32.4:-

- Ayrshire Growth Deal Prestwick Proposition

The meeting ended at 12.50 p.m.

Draft

**SERVICE AND PARTNERSHIPS PERFORMANCE PANEL – ACTION LOG**

<b>No.</b>	<b>Date of Meeting</b>	<b>Issue</b>	<b>Actions</b>	<b>Assigned to</b>	<b>Update</b>	<b>Completed</b>
1.	20 August 2025	The International Ayr Show – 2024: Economic Impact Assessment	To provide Panel Members with details of how the Event in the past had impacted local traders.	Assistant Director - Communities	To be provided by 16 September 2025	No

**SERVICE AND PARTNERSHIPS PERFORMANCE PANEL – WORK PROGRAMME**

	<b>Issue</b>	<b>Actions</b>	<b>Assigned To</b>	<b>Due Date To Panel</b>	<b>Latest update</b>
1.	Community Wealth Building Programme	Scrutiny of annual progress report	Director of Communities and Transformation	16 September 2025	Report to this Panel
2.	Employee Absence 2024/25	Annual update report	Chief HR Officer	16 September 2025	Report to this Panel
3.	Shaping our Future Council	Six-monthly update on progress of transformation activity and requesting referral to Cabinet	Director of Communities and Transformation	16 September 2025	Report to this Panel
4.	Strathclyde Partnership for Transport (SPT) – Performance Report 2023/24	Outline the work of SPT and the impact its services have on the public transport network in South Ayrshire and across the west of Scotland.	Director of Housing, Operations and Development	16 September 2025	Report to this Panel
5.	The Quay Zone – Annual Performance Report	Update Panel on the operation of the Quay Zone facility in Girvan	Director of Communities and Transformation	16 September 2025	Report to this Panel
6.	Local Government Benchmarking Framework – Overview of 2023/24	To advise Members regarding difference benchmarking is making within South Ayrshire	Chief Executive	1 October 2025 (Special)	Awaiting Report
7.	2025-30 Council Workforce Plan	Scrutiny (prior to referral to Cabinet)	Chief HR Officer	21 October 2025	Awaiting Report

	<b>Issue</b>	<b>Actions</b>	<b>Assigned To</b>	<b>Due Date To Panel</b>	<b>Latest update</b>
8.	Child Poverty Strategy Annual Progress Report (Year 1 2024/25)	Scrutiny of report	Chief Executive	21 October 2025	Awaiting Report
9.	Integration Joint Board (IJB) Annual Performance Report 2024-2025	Scrutiny of report	Director of Health and Social Care	21 October 2025	Awaiting Report
10.	Local Housing Strategy Annual Update (Year 1 2024/25)	Scrutiny of report	Chief Executive	21 October 2025	Awaiting Report
11.	Local Outcome Improvement Plan Annual Progress Report (Year 1 2024/25)	Scrutiny of report	Chief Executive	21 October 2025	Awaiting Report
12.	Complaints – Scrutiny Update – Period: 1 April to 30 September 2025	Provide statistics for scrutiny (6-monthly report)	Chief Governance Officer	18 November 2025	Awaiting Report
13.	Business Support – Refreshed Ambition Programme Update	Performance update	Director of Communities and Transformation	18 November 2025	Awaiting Report
14.	Council Plan (2023-2028): Third Year: Quarter Two Update (2025/26)	Scrutiny of report	Chief Executive	18 November 2025	Awaiting Report

	<b>Issue</b>	<b>Actions</b>	<b>Assigned To</b>	<b>Due Date To Panel</b>	<b>Latest update</b>
15.	FOISA/EIR Annual Report 2024/25	Scrutiny of report	Chief Governance Officer	18 November 2025	Awaiting Report
16.	Local Performance Report: Police Scotland	To provide information about mid-year performance	Chief Executive	18 November 2025	Awaiting Report
17.	Local Performance Report: Scottish Fire and Rescue	To provide information about mid-year performance	Chief Executive	18 November 2025	Awaiting Report

**South Ayrshire Council**

**Report by Depute Chief Executive and Director of Housing,  
Operations and Development  
to Service and Partnerships Performance Panel  
of 16 September 2025**

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**Subject: Strathclyde Partnership for Transport (SPT) -  
Performance Report 2024/25**

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**1. Purpose**

- 1.1 The purpose of this report is to outline the work of Strathclyde Partnership for Transport (SPT) and the impact its services have on the public transport network in South Ayrshire and across the west of Scotland. It also provides the opportunity to identify any areas for further discussion or development of partnership activity.

**2. Recommendation**

- 2.1 **It is recommended that the Panel scrutinises the performance of SPT relating to their activities in South Ayrshire.**

**3. Background**

- 3.1 The remit of the Service and Partnerships Performance Panel includes 'to monitor, review and challenge the performance of services in South Ayrshire which are delivered through or in partnership with external bodies.' SPT falls within the scope of the Service and Partnerships Performance Panel's scrutiny role.
- 3.2 SPT is the Regional Transport Partnership for the West of Scotland, and it is a partnership of twelve Councils. SPT was established by the Transport (Scotland) Act 2005, which created Scotland's seven Regional Transport Partnerships. SPT is also the Public Transport Authority for the west of Scotland, and they are a statutory participant in Community Planning and a 'key agency' in the Development Planning process.
- 3.3 SPT has a range of planning, operational and project delivery responsibilities including the Regional Transport Strategy, Glasgow Subway, bus stations and bus infrastructure, supporting socially necessary bus services, delivering school transport on behalf of eleven of the constituent Councils including South Ayrshire and the MyBus demand responsive transport service. SPT also operates and administers the Strathclyde Concessionary Travel Scheme (SCTS) on behalf of Councils, and co-ordinates ticketing schemes, such as the ZoneCard multi-modal scheme.

3.4/

- 3.4 SPT works in partnership with all Community Planning Partnerships (CPPs) in the west of Scotland, including South Ayrshire, across a range of themes including health, education, accessibility, social inclusion, equalities and community safety.
- 3.5 SPT, South Ayrshire Council, Ayrshire Roads Alliance and partners work together to deliver a range of solutions to enhance and develop the transport network, infrastructure and services; to promote sustainable development; to mitigate and adapt to the impacts of climate change on the transport network and to promote accessible travel choices. This includes investment in and delivery of public transport infrastructure including park and ride.

#### 4. Proposals

- 4.1 SPT receives funding and income from a range of sources, including the 12 constituent Councils, the Scottish Government, income from services (e.g. fares) and other sources (see [Appendix 1](#) for details). Further information on the most recent figures associated with SPT funding and income is contained within the SPT Budget Book 2024/25 which is available from the SPT website: SPT budget book-2024-25.
- 4.2 A summary of the Council Revenue Funding and Capital Grants with respect to SPT is included within [Appendix 1](#) of this report.
- 4.3 Capital grant awards received by Council from SPT will be used to deliver a combination of public transport facility enhancements, and delivery of active travel behavior change in line with projects approved by Cabinet as set out within ARA’s Road Improvement Plan each year.

#### 5. Legal and Procurement Implications

- 5.1 There are no legal implications arising from this report.
- 5.2 There are no procurement implications arising from this report.

#### 6. Financial Implications

- 6.1 In SPT’s 2024/25 Budget Book, SPT indicate revenue funding of £1.794m from South Ayrshire Council. This was provided via requisition for core SPT services.
- 6.2 SPT received £3.024m from South Ayrshire Council relating to school transport for 2024/25.
- 6.3 For the 2024/25 financial year, SPT provided the following funding awards to the Council:

People & Place Behavior Change - Revenue	£0.049m
People & Place Behavior Change - Capital	£0.102m
<b>Total SPT Capital Programme for South Ayrshire Council</b>	<b>£0.151m</b>

- 6.4 Additional detail in relation to the Council projects associated with these grant awards is included in [Appendix 1](#).



**Person to Contact**      **Jane Corrie, Head of Roads – Ayrshire Roads Alliance Opera House, 8 John Finnie Street, Kilmarnock, KA1 1DD; or County Buildings, Wellington Square, Ayr, KA1 1DR**  
**Phone 01563 503164**  
**E-mail [jane.corrie@ayrshireroadsalliance.org](mailto:jane.corrie@ayrshireroadsalliance.org)**

**Date: 5 September 2025**

## Strathclyde Partnership for Transport

### Revenue and Capital Funding

#### 1. Revenue Funding

- 1.1 In SPT's 2024/25 Budget Book, SPT indicate revenue funding from South Ayrshire of £1.794m. This was provided via requisition for core SPT services and represents a decrease from the equivalent 2023/24 cost which was £1.821m.
- 1.2 SPT received £3.024m from South Ayrshire relating to school transport for 2024/25.
- 1.3 Responsibility for the provision of school transport rests with local authorities. The Council contracts SPT to undertake this on their behalf. At present 92 School contracts are in place, catering for 1,613 pupils from 8 Secondary Schools, and 368 pupils from a total of 25 Primary Schools. SPT also carry out regular monitoring of mainstream and Additional Support Needs Transport to ensure that contracts are carried out to the standard required by the Council.
- 1.4 SPT provides this service in relation to school transport to 11 of 12 Councils in the Strathclyde area, and through this regional, cross-boundary approach seeks to ensure an efficient service through economies of scale and regional knowledge, expertise and experience in the provision of school transport. It is difficult to compare the cost per pupil for school transport between council areas as the school transport arrangements differ significantly in each authority – for example, the costs in a rural area where longer trips are required for fewer pupils will naturally be higher than in an urban area, but SPT considers they achieve a competitive price from operators for school transport, and an effective service, for the funding it receives from Councils. With regard to quality, SPT's focus is on ensuring a safe and secure service for transporting pupils, as can be seen from the monitoring undertaken in this regard, noted above.
- 1.5 SPT also operates and administers the Strathclyde Concessionary Travel Scheme (SCTS), providing discounted travel for eligible National Entitlement card holders on rail, subway and ferry services. During 2024/25 financial year the funding provided by South Ayrshire for the Concessionary Travel Scheme was £0.261m. This represents a marginal decrease from the equivalent 2023/24 cost which was £0.263m.
- 1.6 The cost of the SCTS is shared between the 12 Councils based on population statistics for older people. The total funding requisition for the Strathclyde Concessionary Travel Scheme for 2023/24 was £4.094m.
- 1.7 The cost of SPT core services is shared among the 12 partners, as required by the Transport (Scotland) Act 2005. The proposed budget and distribution over the 12 Councils is discussed with all Council Directors of Finance (or equivalent) prior to the budget setting process. The agreed formula for the requisition is based on population statistics relative to each area as published by the General Registers Office for Scotland. The Scottish Government also provides a proportion of funding that represents SPT's share of the contribution to the running costs of Regional Transport Partnerships in Scotland.

1.8 With respect to current financial year 2025/26 contributions levels, SPT is due to receive £1.817m for delivery of SPT core services (an increase of £0.023m), and £0.267m towards the Strathclyde Concessionary Travel Scheme from Council (an increase of £0.006m).

## 2. Capital Funding

2.1 The Category 1 Programme for SPT in 2024/25 was £32.803m. The Category 1 Programme is set greater than the available funding – this is a standard approach adopted by SPT to ensure that the plan delivery is maximised within the funding available and project delivery movements. As a consequence, there was a projected shortfall of £7.884m on the general capital element of SPT’s 2024/25 budget.

2.2 In 2024/25, the Scottish Government did not provide any capital funding to SPT, resulting in a projected funding gap. Consequently, the criteria for Category 1 and Category 2 projects were revised to reflect this financial position. SPT’s capital programme has therefore been focused on Category 1 projects, prioritising those that are legally committed or operationally essential.

2.3 As a result of the funding position of a total available 2024/25 SPT Capital funding, £1.240m was allocated towards “Local Authorities and Others”. This equates to a decrease of £13.277m with SPT requiring draw on earmarked reserves for other projects and a contribution from revenue to fund most of this gap. Full details of the breakdown of programme funding are contained within SPT’s Budget Book 2024/25 publication (attached)

## 3. People and Place Programme’ (Active Travel)

3.1 As part of a new approach to the model for delivering active travel and behavior change projects and initiatives, Regional Transport Partnerships (RTPs) on behalf of Transport Scotland, are leading on delivery of the ‘People and Place Programme’ covering active travel and behavior change initiatives, with capital and revenue funding for the west of Scotland coordinated through SPT.

3.2 With respect to the current financial year 2025/26, SPT awarded Ayrshire Roads Alliance on behalf of South Ayrshire Council the following ‘People and Place Programme’ funding:

### **Ayrshire Link (People and Place Programme)**

Revenue Funding	
South Ayrshire	£0.020m
Capital Funding	£0.150m
<b>Total SPT People and Place Programme for SAC:</b>	<b>£0.170m</b>

3.3 Funding will be used to complement SAC funding already secured to upgrade and relocate the Active Travel HUB, provide welfare facilities for staff & also additional storage for cycles.

**South Ayrshire Council**

**Report by Director of Communities and Transformation  
to Service and Partnerships Performance Panel  
of 20 August 2025**

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**Subject: The Quay Zone – Annual Performance Report**

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**1. Purpose**

1.1 The purpose of this report is to invite Panel members to scrutinise the performance of The Quay Zone.

**2. Recommendation**

**2.1 It is recommended that the Panel scrutinises the performance of the Quay Zone as detailed in Appendix 1.**

**3. Background**

3.1 The Quay Zone in Girvan is operated by South Carrick Community Leisure under arrangements agreed by Council in March 2017. A Service Level Agreement provides the framework for the Council's financial support of £220,000 per annum. The Partnerships Panel receives scrutiny reports on an annual basis for organisations receiving more than £50,000 in Council contribution.

3.2 Following the severe storm damage sustained in January 2024, operations at the Quay Zone were suspended to allow for essential repairs and a comprehensive renovation of the facility. As a result, the building was temporarily closed, with reinstatement of works currently underway at the Knockcushan Street site in Girvan.

3.3 To ensure continuity of service for Quay Zone members and the wider community during the 2024–2025 period, alternative temporary accommodation was secured. This has enabled the delivery of a reduced but meaningful programme of swimming, gym, and fitness class provision.

3.4 In a timely development, the closure of the Quay Zone in January 2024 coincided with the opening of the new Maybole Community Campus. This allowed for the successful negotiation of a temporary lease of the recently vacated Maybole Swimming Pool. Within a month of the Quay Zone's closure, the Maybole pool was operational and made available to residents of Girvan and South Carrick.

3.5 Further enhancing the interim offer, a temporary gym facility was established in July 2024 within the Girvan Community Centre. This space has been equipped with a full range of gym equipment and includes a dedicated area to support a limited schedule of weekly fitness classes.

- 3.6 These interim arrangements have been instrumental in maintaining community access to key health and wellbeing services while restoration of the Quay Zone progresses.

#### **4. Proposals**

- 4.1 Members are asked to consider the update on progress as outlined within the performance report prepared by South Carrick Community Leisure and attached as Appendix 1 to support scrutiny by the Panel.
- 4.2 Members are asked to request that the Director of Communities and Transformation provides a follow up report to Service and Partnerships Performance Panel in August 2026.

#### **5. Legal and Procurement Implications**

- 5.1 There are no legal implications arising from this report.
- 5.2 There are no procurement implications arising from this report.

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

- 6.1 There are no financial implications arising from this report. The Service Level Agreement provides for the financial support from the Council to South Carrick Community Leisure to be reviewed on a five yearly basis. The next review should be concluded by March 2027.

#### **7. Human Resources Implications**

- 7.1 There are no HR implications arising from this report.

#### **8. Risk**

##### ***8.1 Risk Implications of Adopting the Recommendations***

- 8.1.1 There are no risks associated with adopting the recommendations.

##### ***8.2 Risk Implications of Rejecting the Recommendations***

- 8.2.1 There is a risk that Members are not kept apprised of progress against the performance of The Quay Zone.

#### **9. Integrated Impact Assessment (incorporating Equalities)**

- 9.1 The proposals in this report allow scrutiny of performance. The report does not involve proposals for policies, strategies, procedures, processes, financial decisions, and activities (including service delivery), both new and at review, that affect the Council's communities and employees, therefore an Integrated Impact Assessment is not required.

#### **10. Sustainable Development Implications**

- 10.1 ***Considering Strategic Environmental Assessment (SEA)*** - This report does not propose or seek approval for a plan, policy, programme or strategy or document

otherwise described which could be considered to constitute a plan, programme, policy, or strategy.

**11. Options Appraisal**

11.1 An options appraisal has not been carried out in relation to the subject matter of this report.

**12. Link to Council Plan**

12.1 The matters referred to in this report contribute to Priority 1 of the Council Plan Spaces and Places.

**13. Link to Shaping Our Future Council** Yes  No

13.1 Not applicable.

**14. Results of Consultation**

14.1 There has been no public consultation on the contents of this report.

14.2 Consultation has taken place with Councillor Brian Connolly, Portfolio Holder for Corporate and Strategic, and the contents of this report reflect any feedback provided.

**Background Papers** Report to South Ayrshire Council of 2 March 2017 - [Formal Agreements Relating to the Quayzone, Girvan](#)

**Person to Contact** Ali Mutch, Service Lead - Sport, Leisure & Golf  
County Buildings, Wellington Square, Ayr, KA7 1DR  
Phone 01292 617616  
E-mail [Alistair.mutch@south-ayrshire.gov.uk](mailto:Alistair.mutch@south-ayrshire.gov.uk)

**Date:** 12 August 2025



**Subject:** South Carrick Community Leisure, The Quay Zone – Performance Update 2023/25

**Purpose:** The purpose of this report is to outline the work of South Carrick Community Leisure in its management of The Quay Zone Community Leisure Centre for the period 1<sup>st</sup> April 2023 to 31<sup>st</sup> March 2025

## 1. Background

- i. South Carrick Community Leisure (SCCL) was formed in 2012 and is a Scottish Charitable Incorporated Organisation (SC043090). Amongst other things, it has as one of its purposes, **“the establishment and operation of a community arts and leisure facility in Girvan, Ayrshire (incorporating accommodation for community groups and a cafe/restaurant)”**.
- ii. The Quay Zone (TQZ) is operated by SCCL under a 40-year lease and Minute of Agreement with South Ayrshire Council (SAC). As part of the Minute of Agreement SCCL receives an annual grant of £220,000 from South Ayrshire Council to support the operation of the facility and the services provided therein.
- iii. The Quay Zone comprises a 25m 4 lane deck level swimming pool, gym equipped with a wide range of cardio and resistance training equipment, a double studio space with wooden sprung floor for fitness classes and other activities, a soft play area with an 8m high play structure installed and a café offering hot and cold refreshments.
- iv. Reports to previous Performance Panels have outlined the progress SCCL has made in its management of the community leisure centre in Girvan. In January 2024 TQZ was so severely damaged by storm Isha and subsequent storms as to be uninhabitable. This resulted in the closure of the building and the temporary dislocation of the services it provided. This report outlines the progress made by SCCL in reinstating temporary services and of its plans for a full resumption of services at TQZ.
- v. Governance of the charity is provided by a Board of Trustees who meet at regular intervals. Trustees together with South Ayrshire Council observers scrutinize and direct the activities delivered on behalf of the Charity. The Board is supported by The General Manager of TQZ who, together with his team, are responsible for day to day operations at The Quay Zone.

## 2. Service and General Operations

- i. Previous reports to the Panel have covered progress up to April 2023. The financial year 2023/ 24 was on track to be a good, post Covid recovery year. However, as previously reported it was de-railed when TQZ was extensively damaged by Storm

Isha in late January, 2024. Indeed, water ingress following the storm rendered the building uninhabitable and it has since then been closed to the public.

- ii. In the period prior to the closure of TQZ attendance levels for all activities were good and income overall was expected to be around 7.5% up on the previous year. However, faced with the closure Trustees immediately focused their efforts on replacing the lost facilities.
- iii. For swimming the demise of TQZ coincided with the opening of the Maybole Community Campus. Consequently, it was possible to negotiate a temporary lease of the recently vacated Maybole Swimming Pool, which within a month of the closure of TQZ was opened for Girvan and South Carrick residents.
- iv. Once Maybole was opened SCCL were able to provide a near full range of activities including general and lane swimming, fun float and aquafit sessions, our Learn to Swim programme for junior swimmers and a full primary schools swimming programme.
- v. Although a near full programme of activities has been possible the availability of trained and qualified staff has meant that opening hours had to be restricted to three full days and a Saturday morning. Initially it had been hoped to increase this as the year progressed but, in the event, this was not possible because of constraints imposed by the logistics, practicality and cost of deploying the right numbers of skilled staff in both Girvan and Maybole.
- vi. When we closed in January 2024 we were in the throes of starting our annual programme of school swimming lessons. Discussion with the schools revealed that they were unable to meet the additional cost of transporting pupils to Maybole. Faced with this SCCL contacted Carrick Futures and were successful in securing a £10,000 grant to assist schools with this unbudgeted expenditure. In light of this SCCL was able to operate a full primary school programme, although due to timetabling and other practical difficulties it was not possible to include Girvan Primary in the 2024 programme.
- vii. As Girvan Primary had not been able to participate SCCL was able to agree with Carrick Futures a carry forward of the unspent funds to support a second year of the programme. Of the initial £10K approximately £6K had been spent on school transport for the first year. Additional support was obtained from the Tralorg Community Benefit Fund (£1,700) and Girvan and South Carrick LPP (£1,000) and in 2025 the cost was £10,860. As shown in the Table below all schools were able to participate in 2025 and as a charity SCCL met the £4K additional cost required to provide the programme.
- viii. Table 1 below shows that 242 and 289 children participated in 2024 and 2025 respectively and feedback from school teachers for the lessons and organisation of the programme has been positive.
- ix. In addition to the schools programme the TQZ Learn 2 Swim programme was re-started in March 2024 and more that 75% of our junior swimmers were able to participate at Maybole. While the number of junior swimmers has reduced since the move to Maybole, 210 were still making the weekly journey in March 2025.
- x. The three TQZ Aquafit classes at Maybole continue to be well supported as they had been in Girvan as does the early morning lane swimming sessions. Less well patronised is public and other swimming sessions although there has been better attendance during holiday periods over both years.

**Table 1 Number Pupils per primary School Participating in Swimming Programme**

Primary School	Number of Pupils Learning to Swim Each Year	
	2024	2025
Colmonell	38	31
Barr	3	3
Barrhill	6	4
Dailly	17	7
Dailly Early years	10	6
Sacred Heart	122	119
Ballantrae	46	37
Girvan	0	82
<b>Total</b>	<b>242</b>	<b>289</b>

- xi. The provision of a swimming pool in Maybole was complimented in July 2024 by the addition of a temporary gym located in the Girvan Community Centre. This accommodation allowed the provision of a fully equipped gym with a small space to facilitate limited weekly programme of 19 or so fitness classes.
- xii. Prior to closure TQZ operated a single tier membership structure that enabled members to participate in swimming, gym and classes for £28 per month. As a result of the disruption all memberships were suspended but once temporary facilities were available, reintroduced at a reduced rate of £20 per month reflecting the slightly lower overall provision and, in the case of Maybole, the additional transport requirement.
- xiii. Maintaining services at two locations over a protracted period of time has, at times, been difficult. In addition to the routine staff resourcing issues, supervisory difficulties and the age and reliability of pool plant in particular, have all contributed to a challenging 18 months or so. However, staff have repeatedly risen to the challenge and it is because of that effort that we have been able to maintain the comprehensive range of facilities and services on offer.

**3. Finance**  
**Annual Accounts**

- i. The audited financial accounts for 1<sup>st</sup> April 2023 to 31<sup>st</sup> March 2024 are included with this report. Prior to the damage to TQZ the charity was on course to make a trading surplus but as a result of the loss of two months' income ended up making a small trading loss of £2,598 for the year. Given the catastrophic end to the years trading Trustees considered this an acceptable outturn.
- ii. The accounts for 2024 to 2025 are in the process of being audited and are anticipated to be available in August 2025. The preliminary out-turn indicates that the trading loss for the year would have been circa £150K. However, following the inclusion of insurance contributions (see below) the operating statement will show an overall balanced trading position for the year. Given the challenging circumstances covered by the accounts this represents a positive outcome.
- iii. A copy of the audited accounts will be provided to the Council as soon as they are available and once complete will be presented at an AGM in Girvan.

**Insurance**

- i. South Carrick Community Leisure is required under the terms of its lease to maintain building insurance by paying South Ayrshire Council an annual premium. As a consequence, SAC undertakes to insure the building and in light of the storm damage has been responsible for reaching a settlement with the Council's insurers to facilitate the reinstatement of the Quay Zone.
- ii. In addition to the building insurance SCCL also maintains its own contents, public liability and business interruption insurance (BI). The policy maintained by SCCL provides for 2 years of Business Interruption cover which in practice supports us until January 2026. As mentioned above, some financial support from this element of our insurance cover has already been forthcoming. It is anticipated that a final settlement for the remainder of the insured period will be agreed shortly.
- iii. Management at TQZ have continued to work with insurers to agree a building contents settlement. To date a "write-off" has been agreed for gym equipment and the soft play structure and it is expected that the remainder of the contents claim will be settled in the coming weeks. As outlined below this will allow SCCL to plan for its immediate future.

#### 4. Current Position

- i. Since TQZ was forced to close SCCL have worked with SAC to:
  - a. Introduce temporary facilities and services as quickly and comprehensively as possible;
  - b. Facilitate the repair of the building within the timeframe imposed by SCCL's business interruption insurance; and
  - c. Agree the details of an extension of TQZ to improve café provision, provide a function and meeting space and an external balcony with views to Ailsa Craig.
- ii. Details relating to i.a have been provided above and in the last report to this Panel. Overall the last 18 months or so has been operationally challenging. Whilst we have been very fortunate and grateful to be able to use Maybole Swimming Pool its age brings with it a host of minor, but frustrating operational difficulties for staff to wrestle with on a daily basis. Providing and supporting staff at Maybole and Girvan has also stretched SCCL resources. However, at times it has only been because of staff flexibility and commitment that we have been able to maintain the levels of services that we have.
- iii. In relation to i.b above, SAC through its Professional Design Services and Asset Management Team and insurers have specified, contracted and are delivering much anticipated repairs to TQZ. Although local frustration has been expressed at the time taken, it has not always been easy to explain the complexities and extent of the damage done to TQZ by water penetration. However, the repair work is now underway and it is anticipated that the pool, gym and studio spaces together with ancillary changing accommodation will be returned to SCCL towards the end of December, 2025 allowing TQZ to re-open early in 2026 for its core services.
- iv. Lastly, in relation to i.c Members of the Panel will doubtless be aware that earlier this year SAC agreed a further investment in TQZ to improve and extend its café provision, increase accommodation for meetings and events and provide a balcony extension to the café facilitating views west to Ailsa Craig and south to Woodlands Bay. Unfortunately, it was not possible to include this latter aspect of the building in the original build, but it was always on the wish list for a building in such a prominent position relative to the Craig. Although work on this extension will be undertaken

concurrently with the repairs it is not expected that it will be complete until March 2026.

- v. A full up-to-date position can be verbally given to members of the Panel at the meeting should this be required.

Peter Linton  
General Manager The Quay Zone  
South Carrick Community Leisure  
1<sup>st</sup> March, 2024

REGISTERED COMPANY NUMBER: SC043090 (Scotland)  
REGISTERED CHARITY NUMBER: SC43090

Report of the Trustees and  
Financial Statements for the Year Ended 31 March 2024  
for  
South Carrick Community Leisure

Colin McNally B.A. Hon's; F.C.M.A  
6 Crofthead Road  
Prestwick  
Ayrshire  
KA9 1HW

South Carrick Community Leisure

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for the Year Ended 31 March 2024

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South Carrick Community Leisure

Report of the Trustees  
for the Year Ended 31 March 2024

The trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the year ended 31 March 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

**OBJECTIVES AND ACTIVITIES**

**Objectives and aims**

To assist in the provision of recreational facilities and, where appropriate, the organisation of recreational activities available to members of the public at large, with the object of improving their conditions of life;

To advance citizenship and community development (including urban and rural regeneration);

To promote civic responsibility, volunteering, the voluntary sector and the effectiveness and efficiency of charities; and

To advance public participation in sport; in particular within the area (the Community) shown outlined in red on the map attached to the Charities constitution, (principally within the KA26 post code area) through:

- a) The establishment and operation of a community arts and leisure facility in Girvan, Ayrshire (incorporating accommodation for community groups and a café/ restaurant); and
- b) The provision of support (whether financial or otherwise) to a range of organisations, initiatives, activities and events which further one or more of the above purposes.

## **OBJECTIVES AND ACTIVITIES**

### **Significant activities**

The financial year has been the first year during which it was possible to operate The Quay Zone in "normal" conditions and while the first nine or so months were normal, normality was brought to an abrupt halt by storm Isha and subsequent named storms in late January early February 2024. Indeed, such was the impact of the initial storm that damage to the roof caused us to close the building over safety concerns related to flying roof debris. Whilst initially it had been hoped to "fix" the roof, it soon became apparent that in the prevailing stormy conditions and the extent of the damage this would not be possible. Further, the water ingress resulting from the roof damage quickly rendered the building uninhabitable.

Service delivery and trading up to 21st January 2024 had been healthy and the enterprise was on track to achieve income expectations for the year as a whole. This situation was achieved in part by an upturn in general membership together with junior learn to swim membership numbers. Income from these sources increased from around £20,000 per month at the beginning of the year to £21,500 by January, a 7.5% improvement.

Attendance levels during the summer of 2023 were good and although efforts had been made prior to the summer to re-vamp the café offer we still struggled at times to deliver the levels of service reasonably expected and further work to improve this will be required. Although income from the café was 13.5% up on the previous year, when cost of sales and wages were factored in this aspect of the enterprise made a trading loss which will have to be addressed once we resume trading at TQZ.

Although membership numbers showed a month on month improvement over the course of the year Trustees considered that a simplification of the membership structure would yield financial dividends in the longer term, whilst also being consistent with wider trends in the leisure fitness market. As a result, an attractively priced full access (swim, gym and classes) membership was introduced in January 2024. January membership income was comparable with that of October to December and early indications were that future income would increase due to the popularity of the simplified membership structure and the value for money it represented.

Notwithstanding the overall favourable trading position Trustees continued to actively monitor all aspects of the routine operation of The Quay Zone. As a result, alterations to the management structure were implemented to safeguard the long-term vision of the charity enterprise. These were beginning to take effect when operations at TQZ had to cease.

Immediately following the closure, we began discussions with South Ayrshire Council and others to explore options for the continuance of some services as advice from disaster recovery experts was that it would take 18 to 24 months to dry out the building and effect repairs. Serendipitously the Council had recently closed, but not decommissioned, its pool in Maybole as it had opened a new Community Campus including a swimming pool on the adjacent Carrick Academy site. As a result, SCCL were able to agree a temporary lease with South Ayrshire Council and the swimming pool was re-opened for use by TQZ members less than four weeks from the closure of TQZ. The replacement pool enabled us to re-start our Learn to Swim programme with 75% of our former members willing to travel and support us. In addition to swimming lessons we offered a full programme of activities (lane swimming, public swimming, fun sessions, school swimming lessons and Aquafit session) albeit on a reduced opening schedule of three and a half days per week.

The Junior Learn to Swim programme benefitted from the appointment of a new Swim Coordinator and numbers participating increased to stand at around 320 in January when operations ceased. Our Learn to Swim programme is an important component of activity and specifically relates to the Charity's aims and objectives.

In addition to the in-house learn to swim programme we also continued to support all the local primary schools in bringing their pupils to our pool for a 6-week block of swimming lessons. In previous years schools local to Girvan had been able to walk their pupils to the swimming pool. However, with the closure of TQZ and the relocation of swimming services to Maybole schools were unable to meet the new transport costs. This was overcome with the support of Carrick Futures who made available a grant of £10k to SCCL. As a result, it was possible to conclude a programme of lessons.

Although it had been hoped to find premises for a replacement gym this has proved problematic and although a potential site has been identified its availability cannot be confirmed until late April 2024. Once a suitable location is available gym equipment will be installed and a seven-day service will be provided.

## **OBJECTIVES AND ACTIVITIES**

As the financial year drew to a close the uncertainty surrounding the immediate future of the Quay Zone had eased. Insurers on behalf of South Ayrshire Council (property) and SCCL (contents and business interruption) had been engaged with and work was ongoing to repair the roof ahead of drying out the building and carrying out extensive repairs to the interior. Separately SCCL have been in discussion with South Ayrshire Council over the possibility of improving some aspects of the building layout together with increasing the facilities provided. It is intended that these alterations will be completed as part of the repairs and renovations required as a result of the storm damage.

Trustees are indebted to South Ayrshire Council together with the Falck Assel Valley Community Benefit Fund administered by Foundation Scotland and the Tralorg Community Benefit Company for their continued financial support.

### **Looking forward to 2024/25**

During 2024/25 Trustees will be focused on a number of key areas:

- Working with South Ayrshire Council to repair, refurbish and extend The Quay Zone for future operation;
- Building on the temporary swimming pool provision by keeping current arrangements under constant review so as to add extra opening times and services as resources permit;
- Securing a suitable venue to facilitate the provision of a gym and associated fitness classes; and
- Strengthening the management of TQZ for re-opening.

### **The contribution of Government and other Agencies**

South Carrick Community Leisure agreed with South Ayrshire Council that under the Minute of Agreement the Council would maintain its current annual contribution toward the running costs of TQZ of £200,000. Subsequently it agreed to a further contribution of £20,000 towards the provision of discounts for members of TQZ meeting specific qualifying criteria.

Additional unrestricted grant support was provided by the Girvan and District Assel Valley Community Fund funded by Falck Renewables and administered by Foundation Scotland together with support from Tralorg Community Benefit Fund now owned by the railway pension fund Railpen. The extent of these contributions is acknowledged elsewhere in these accounts (see Note 2)

### **The Contribution of Volunteers**

The Board of Trustees is made up of members of the local community and all are unpaid volunteers. Their continued support and contribution enable TQZ to be sustained as a much-needed asset for the South Carrick community.

## **ACHIEVEMENT AND PERFORMANCE**

### **Charitable activities**

The continued successful operation of The Quay Zone represents a significant milestone in the life of South Carrick Community Leisure and fulfils one of the key objectives and aims of the charity as set out in its constitution. However, significant as achieving that challenge has been the new circumstances facing the charity will require the continued commitment and contribution of all Trustees to successfully navigate the next year.

## **FINANCIAL REVIEW**

### **Financial position**

Having weathered the Covid years the charity recorded an operational loss in the last financial year as a result of the extraordinary inflationary pressures brought about by a deterioration in the world economic conditions and turmoil in parts of Eastern Europe. During 2023/24 that loss making position was reversed and had we not had to suspend operations in late January the end of year financial position would have been a positive out-turn. In reality a trading loss of circa £16K was sustained. However, the contribution from our Business Interruption insurance claim has offset this. We received £5,000 from Assel Valley Community Fund which is held as restricted funds to support economically disadvantaged families in the community.

## FINANCIAL REVIEW

### Reserves policy

As a volunteer led community enterprise trustees consider that the enterprise faces a number of risks that require it to maintain financial reserves in relation to the following:

- Unforeseen cost pressure brought about by either a loss of a major grant funder or an unforeseen significant increase in, for example, energy costs.
- In the event that TQZ could not continue to trade on a break-even basis and trustees considered that it was not a viable ongoing concern. In such circumstances Trustees would need to affect an orderly wind-up of all trading activities.
- Under our property lease responsibility for replacement/ refurbishment of plant and equipment is the charity's responsibility and given the scale and complexity of the plant and machinery in use for heating, power, ventilation and water treatment, could present significant cost implications, particularly as the building ages.
- Significant components of our income relate to the gym, the soft play and the café. We require to periodically invest in replacement and upgrades to these facilities beyond the routine investment in timely maintenance and repair. Failure to invest in this way could result in a trading loss.
- The reserves fund will also function as a buffer for cash flow issues arising as a result of grants and income funds being received in arrears.

### Level of Reserves Required

Based on the foregoing reserves policy rationale, Trustees have concluded that the following level of reserves needs to be maintained:

Cost Description	Amount or Basis of Calculation	Amount
Unforeseen cost pressures	Doubling of utility costs	£88,000
Winding up of enterprise	3 Months operating costs	£212,000
Major plant / equipment replacement	Fixed amount	£50,000
Major refurbishment / investment	Fixed amount	£50,000
<b>Total</b>		<b>£400,000</b>

### FUTURE PLANS

2023/24 saw a return to more normal levels of activity at TQZ and as set out elsewhere Trustees were expecting to end the year in a positive financial position. However, the impact of January storms has derailed this year's financial out-turn and while a loss has not occurred the charity is less well off than would otherwise have been expected. Worse still there is little prospect of a return to operations at TQZ in 2024/25 and, therefore, all efforts will be directed to managing any shortfall in income over expenditure in conjunction with our insurers with whom we have business interruption insurance.

Trustees are committed to doing everything in their power to provide alternative facilities for swimming, gym and classes for the Girvan and South Carrick Community. An alternative swimming pool has been re-commissioned at Maybole and all efforts will now be directed towards a gym and classes provision.

## **STRUCTURE, GOVERNANCE AND MANAGEMENT**

### **Governing document**

South Carrick Community Leisure was formed in 2012 and is a Scottish Charitable Incorporated organisation (SCIO). A SCIO provides limited liability and separate legal identity to organisations that want to become charity's, but do not want or need the complex legal structure of company law. SCIOs are regulated by the Office of the Scottish Charity Regulator (OSCR) and do not need to register with Companies House. South Carrick Community Leisure is operated in accordance with its 2012 Constitution.

### **Recruitment and appointment of new trustees**

Trustees are appointed to the Board by the membership at an Annual General meeting. Three trustees must stand down each year at an AGM, but may be re-elected if they are willing to stand. Where there is a vacancy between Annual General Meetings then members may be co-opted to the Board, however, anyone co-opted in this way must also put themselves up for election at the next Annual General Meeting.

### **Organisational structure**

The full Board of Trustees meets every two months, but as circumstances dictated additional meetings were added into the schedule as required by the exigencies of the charity and the operation of TQZ. At each meeting the progress of TQZ in operational and financial terms was considered as required by the constitution. No sub committees were in operation during the year although individual groups of Trustees were involved in the delivery of specific initiatives as directed and agreed by the Board.

### **Induction and training of new trustees**

Training and relevant information on South Carrick Community Leisure and the operation of The Quay Zone is given to new trustees.

## **REFERENCE AND ADMINISTRATIVE DETAILS**

### **Registered Company number**

SC043090 (Scotland)

### **Registered Charity number**

SC43090

### **Registered office**

Town House  
25 Knockcushan Street  
Girvan  
KA26 9AG

### **Trustees**

Mr K S Johnston	Member for Full Year	Treasurer
Mr A Rattray	Member for Full Year	Chairperson
Ms S Clark	Member for Full Year	
Mr H Sheddon	Member for Full Year	
Mr J Parkhill	Member for Full Year	Secretary
Mr S Clark	Resigned January 2024	

### **Company Secretary**

Mr J Parkhill

### **Senior Statutory Auditor**

Nitika Kaur Gandhi

### **Auditors**

Colin McNally B.A. Hon's; F.C.M.A  
6 Crofthead Road  
Prestwick  
Ayrshire  
KA9 1HW

**REFERENCE AND ADMINISTRATIVE DETAILS – continued**

**Bankers**

Royal Bank of Scotland and  
Bank of Scotland

**STATEMENT OF TRUSTEES' RESPONSIBILITIES**

The trustees (who are also the directors of South Carrick Community Leisure for the purposes of company law) are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing those financial statements, the trustees are required to

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and to enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware;  
and
- the trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

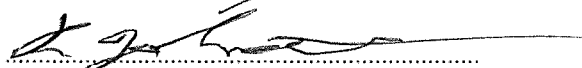
**AUDITORS**

The auditors, Colin McNally B.A. Hon's; F.C.M.A, will be proposed for re-appointment at the forthcoming Annual General Meeting.

Approved by order of the board of trustees on 30.09.24..... and signed on its behalf by:



A Rattray - Trustee



K Johnston – Trustee and Treasurer

Report of the Independent Auditors to the Trustees and Members of  
South Carrick Community Leisure

Independent auditor's report to the members and trustees of South Carrick Community Leisure

Opinion

We have audited the financial statements of South Carrick Community Leisure (the 'charitable company') for the year ended 31 March 2018 which comprise a Statement of Financial Activities, Balance Sheet, and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' (United Kingdom Generally Accepted Accounting Practice).

This report is made solely to the company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the company's members those matters we are required to state to them in an auditors report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the company and the company's members as a body, for our audit work, for this report, or for the opinions we have formed.

In our opinion, the financial statements:

o give a true and fair view of the state of the charitable company's affairs as at 31 March 2024 and of its income [and receipt of endowments] and expenditure for the year then ended;

o have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and

o have been prepared in accordance with the requirements of the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended).

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs UK) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

We have nothing to report in respect of the following matters in relation to which the ISAs (UK) require us to report to you where:

o the trustees' (who are also the directors of the company for the purposes of company law) use of the going concern basis of accounting in the preparation of the financial statements is not appropriate; or

o the trustees have not disclosed in the financial statements any identified material uncertainties that may cast significant doubt about the charitable company's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from the date when the financial statements are authorised for issue.

Other information

The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

Report of the Independent Auditors to the Trustees and Members of  
South Carrick Community Leisure

In our opinion, based on the work undertaken in the course of the audit:

- o the information given in the directors' report, prepared for the purposes of company law and included within the trustees' annual report, for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- o the directors' report, included within the trustees' annual report, has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report, included within the trustees' annual report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006, the Charities and Trustees Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended) require us to report to you if, in our opinion:

- o adequate and proper accounting records have not been kept, [or returns adequate for our audit have not been received from branches not visited by us]; or
- o the financial statements are not in agreement with the accounting records; or
- o certain disclosures of trustees' remuneration specified by law are not made; or
- o we have not received all the information and explanations we require for our audit; or
- o the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report, included within the trustee' annual report, and from the requirements to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and under the Companies Act 2006 and report in accordance with the Acts and relevant regulations made or having effect thereunder.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with ISAs (UK), we exercise professional judgment and maintain professional scepticism throughout the audit. We also:

Report of the Independent Auditors to the Trustees and Members of  
South Carrick Community Leisure

- o Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- o Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the internal control.
- o Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the trustees.
- o Conclude on the appropriateness of the trustees' use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the company's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the company to cease to continue as a going concern.
- o Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

Nitika Kaur Gandhi (Deputy Manager)  
For and on behalf of  
Noida Office  
3<sup>rd</sup> Floor  
B-151  
Sector-6  
Noida – 201301  
India

Date:

Nitika Kaur Gandhi  
Colin McNally B.A. Hon's; F.C.M.A  
Eligible to act as an auditor in terms of Section 1212 of the Companies Act 2006  
6 Crofthead Road  
Prestwick  
Ayrshire  
KA9 1HW

Date: .....

South Carrick Community Leisure

Statement of Financial Activities  
for the Year Ended 31 March 2024

	Notes	Unrestricted fund £	Restricted fund £	Endowment fund £	31.3.24 Total funds £	31.3.23 Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>						
Donations and legacies	2	351,048	-	-	351,048	319,157
<b>Charitable activities</b>	3					
General		444,421	-	-	444,421	485,903
Other income		<u>20,000</u>	<u>-</u>	<u>-</u>	<u>20,000</u>	<u>-</u>
<b>Total</b>		<u>815,469</u>	<u>-</u>	<u>-</u>	<u>815,469</u>	<u>805,060</u>
<b>EXPENDITURE</b>						
Raising funds	4	524,084	-	-	524,084	487,862
<b>Charitable activities</b>	5					
General		270,368	-	-	270,368	319,796
Other		<u>15,569</u>	<u>-</u>	<u>-</u>	<u>15,569</u>	<u>-</u>
<b>Total</b>		<u>810,021</u>	<u>-</u>	<u>-</u>	<u>810,021</u>	<u>807,658</u>
<b>NET INCOME/(EXPENDITURE)</b>		5,448	-	-	5,448	(2,598)
<b>RECONCILIATION OF FUNDS</b>						
Total funds brought forward		435,555	-	-	435,555	438,153
<b>TOTAL FUNDS CARRIED FORWARD</b>		<u>441,003</u>	<u>-</u>	<u>-</u>	<u>441,003</u>	<u>435,555</u>

The notes form part of these financial statements

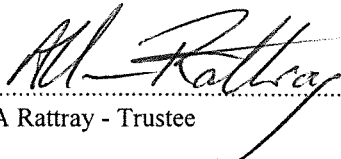
South Carrick Community Leisure

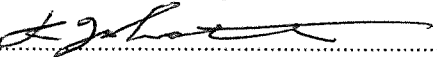
Balance Sheet  
31 March 2024

	Notes	Unrestricted fund £	Restricted fund £	Endowment fund £	31.3.24 Total funds £	31.3.23 Total funds £
<b>FIXED ASSETS</b>						
Tangible assets	11	42,125	-	-	42,125	54,643
<b>CURRENT ASSETS</b>						
Stocks	12	4,588	-	-	4,588	-
Debtors	13	5,097	-	-	5,097	1,600
Cash at bank		<u>495,314</u>	<u>5,000</u>	<u>-</u>	<u>500,314</u>	<u>426,889</u>
		504,999	5,000	-	509,999	428,489
<b>CREDITORS</b>						
Amounts falling due within one year	14	(106,121)	(5,000)	-	(111,121)	(47,577)
<b>NET CURRENT ASSETS</b>						
		<u>398,878</u>	<u>-</u>	<u>-</u>	<u>398,878</u>	<u>380,912</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>						
		<u>441,003</u>	<u>-</u>	<u>-</u>	<u>441,003</u>	<u>435,555</u>
<b>NET ASSETS</b>						
		<u>441,003</u>	<u>-</u>	<u>-</u>	<u>441,003</u>	<u>435,555</u>
<b>FUNDS</b>						
Unrestricted funds	15				<u>441,003</u>	<u>435,555</u>
<b>TOTAL FUNDS</b>						
					<u>441,003</u>	<u>435,555</u>

These financial statements have been prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

The financial statements were approved by the Board of Trustees and authorised for issue on 30.09.24 and were signed on its behalf by:

  
.....  
A Rattray - Trustee

  
.....  
K Johnston – Trustee and Treasurer

The notes form part of these financial statements

South Carrick Community Leisure

Cash Flow Statement  
for the Year Ended 31 March 2024

	Notes	31.3.24 £	31.3.23 £
<b>Cash flows from operating activities</b>			
Cash generated from operations	1	<u>101,805</u>	<u>124,422</u>
Net cash provided by operating activities		<u>101,805</u>	<u>124,422</u>
<b>Cash flows from investing activities</b>			
Purchase of tangible fixed assets		(6,846)	-
Sale of tangible fixed assets		<u>3,007</u>	<u>-</u>
Net cash (used in)/provided by investing activities		<u>(3,839)</u>	<u>-</u>
<b>Change in cash and cash equivalents in the reporting period</b>		97,966	124,422
<b>Cash and cash equivalents at the beginning of the reporting period</b>		<u>426,889</u>	<u>281,105</u>
<b>Cash and cash equivalents at the end of the reporting period</b>		<u>500,314</u>	<u>426,889</u>

The notes form part of these financial statements

Notes to the Cash Flow Statement  
for the Year Ended 31 March 2024

**1. RECONCILIATION OF NET INCOME/(EXPENDITURE) TO NET CASH FLOW FROM OPERATING ACTIVITIES**

	31.3.24 £	31.3.23 £
<b>Net income/(expenditure) for the reporting period (as per the Statement of Financial Activities)</b>	5,448	(2,598)
<b>Adjustments for:</b>		
Depreciation charges	16,357	24,841
Increase in stocks	(4,588)	-
(Increase)/decrease in debtors	(3,497)	99,358
Increase in creditors	<u>88,085</u>	<u>2,821</u>
<b>Net cash provided by operations</b>	<u>101,805</u>	<u>124,422</u>

**2. ANALYSIS OF CHANGES IN NET FUNDS**

	At 1.4.23 £	Cash flow £	At 31.3.24 £
<b>Net cash</b>			
Cash at bank	<u>426,889</u>	<u>73,425</u>	<u>500,314</u>
	<u>426,889</u>	<u>73,425</u>	<u>500,314</u>
<b>Total</b>	<u>426,889</u>	<u>73,425</u>	<u>500,314</u>



## 1. ACCOUNTING POLICIES

### **Basis of preparing the financial statements**

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

### **Income**

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

### **Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

### **Tangible fixed assets**

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Category	COA	No. of months	Average Rate (SL)
F&F	Office Equipment	60	20%
IT	IT Systems	60	20%
IT	Website	60	20%
P&M	Soft Play	120	10%
P&M	Pool Equipment	48	25%
P&M	Audio Visual	60	20%
P&M	Gym	60	20%
P&M	Kitchen	60	20%

### **Stocks**

Stocks are valued at the lower of cost and net realisable value, after making due allowance for obsolete and slow moving items.

### **Taxation**

The charity is exempt from corporation tax on its charitable activities.

### **Fund accounting**

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

### **Pension costs and other post-retirement benefits**

The charitable company operates a defined contribution pension scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

South Carrick Community Leisure

Notes to the Financial Statements - continued  
for the Year Ended 31 March 2024

**2. DONATIONS AND LEGACIES**

	31.3.24	31.3.23
	£	£
Gifts	1	-
Donations	518	-
Grants	220,000	200,000
Community Benefit Funding - Falk Assel	44,818	40,200
Community Benefit Funding - Tralorg	<u>85,711</u>	<u>78,957</u>
	<u>351,048</u>	<u>319,157</u>

Grants received, included in the above, are as follows:

	31.3.24	31.3.23
	£	£
Other grants	<u>220,000</u>	<u>200,000</u>

**3. INCOME FROM CHARITABLE ACTIVITIES**

	31.3.24	31.3.23
	£	£
Charitable Activities	<u>444,421</u>	<u>485,903</u>

**4. RAISING FUNDS**

**Raising donations and legacies**

	31.3.24	31.3.23
	£	£
Staff costs	<u>472,169</u>	<u>441,856</u>

**Other trading activities**

	31.3.24	31.3.23
	£	£
Purchases	51,915	54,853
Staff costs	<u>-</u>	<u>(8,847)</u>
	<u>51,915</u>	<u>46,006</u>

Aggregate amounts	<u>524,084</u>	<u>487,862</u>
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Notes to the Financial Statements - continued  
for the Year Ended 31 March 2024

**5. CHARITABLE ACTIVITIES COSTS**

	Direct Costs £	Support costs (see note 6) £	Totals £
General	<u>9,807</u>	<u>260,561</u>	<u>270,368</u>

**6. SUPPORT COSTS**

	Management £	Finance £	Information technology £	
General	<u>56,226</u>	<u>22,226</u>	<u>67,419</u>	
	Human resources £	Other £	Governance costs £	Totals £
General	<u>21,801</u>	<u>88,555</u>	<u>4,334</u>	<u>260,561</u>

**7. NET INCOME/(EXPENDITURE)**

Net income/(expenditure) is stated after charging/(crediting):

	31.3.24	31.3.23
	£	£
Depreciation - owned assets	<u>16,357</u>	<u>24,841</u>

**8. TRUSTEES' REMUNERATION AND BENEFITS**

There were no trustees' remuneration or other benefits for the year ended 31 March 2024 nor for the year ended 31 March 2023.

**Trustees' expenses**

There were no trustees' expenses paid for the year ended 31 March 2024 nor for the year ended 31 March 2023.

**9. STAFF COSTS**

	31.3.24	31.3.23
	£	£
Wages and salaries	472,169	441,856
Other pension costs	<u>-</u>	<u>(8,847)</u>
	<u>472,169</u>	<u>433,009</u>

The average monthly number of employees during the year was as follows:

	31.3.24	31.3.23
Staff	<u>36</u>	<u>34</u>

No employees received emoluments in excess of £60,000.

**10. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES**

	Unrestricted fund £	Restricted fund £	Endowment fund £	Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>				
Donations and legacies	319,157	-	-	319,157
<b>Charitable activities</b>				
General	485,903	-	-	485,903
<b>Total</b>	<u>805,060</u>	<u>-</u>	<u>-</u>	<u>805,060</u>
<b>EXPENDITURE ON</b>				
Raising funds	487,862	-	-	487,862
<b>Charitable activities</b>				
General	319,796	-	-	319,796
<b>Total</b>	<u>807,658</u>	<u>-</u>	<u>-</u>	<u>807,658</u>
<b>NET INCOME/(EXPENDITURE)</b>	(2,598)	-	-	(2,598)
<b>RECONCILIATION OF FUNDS</b>				
Total funds brought forward	438,153	-	-	438,153
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u>435,555</u>	<u>-</u>	<u>-</u>	<u>435,555</u>

**11. TANGIBLE FIXED ASSETS**

	Plant and machinery £	Fixtures and fittings £	Computer equipment £	Totals £
<b>COST</b>				
At 1 April 2023	300,780	42,328	39,482	382,590
Additions	158	5,739	949	6,846
Disposals	-	(2,868)	(139)	(3,007)
At 31 March 2024	<u>300,938</u>	<u>45,199</u>	<u>40,292</u>	<u>386,429</u>
<b>DEPRECIATION</b>				
At 1 April 2023	270,763	22,218	34,966	327,947
Charge for year	7,258	5,706	3,393	16,357
At 31 March 2024	<u>278,021</u>	<u>27,924</u>	<u>38,359</u>	<u>344,304</u>
<b>NET BOOK VALUE</b>				
At 31 March 2024	<u>22,917</u>	<u>17,275</u>	<u>1,933</u>	<u>42,125</u>
At 31 March 2023	<u>30,017</u>	<u>20,110</u>	<u>4,516</u>	<u>54,643</u>

Notes to the Financial Statements - continued  
for the Year Ended 31 March 2024

**12. STOCKS**

	31.3.24	31.3.23
	£	£
Stocks	<u>4,588</u>	<u>-</u>

**13. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	31.3.24	31.3.23
	£	£
Trade debtors	<u>5,097</u>	<u>1,600</u>

**14. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	31.3.24	31.3.23
	£	£
Trade creditors	18,539	22,769
Social security and other taxes	(3,575)	267
Other creditors (Payroll, accountancy, Aviva Insurance & Falk Assel)	<u>96,157</u>	<u>24,541</u>
	<u>111,121</u>	<u>47,577</u>

**15. MOVEMENT IN FUNDS**

	At 1.4.23	Net movement in funds	At 31.3.24
	£	£	£
<b>Unrestricted funds</b>			
UNRESTRICTED	435,555	5,448	441,003
	<u>435,555</u>	<u>5,448</u>	<u>441,003</u>
<b>TOTAL FUNDS</b>	<u>435,555</u>	<u>5,448</u>	<u>441,003</u>

Net movement in funds, included in the above are as follows:

	Incoming resources	Resources expended	Movement in funds
	£	£	£
<b>Unrestricted funds</b>			
UNRESTRICTED	815,469	(810,021)	5,448
	<u>815,469</u>	<u>(810,021)</u>	<u>5,448</u>
<b>TOTAL FUNDS</b>	<u>815,469</u>	<u>(810,021)</u>	<u>5,448</u>

**Comparatives for movement in funds**

	At 1.4.22	Net movement in funds	At 31.3.23
	£	£	£
<b>Unrestricted funds</b>			
UNRESTRICTED	438,153	(2,598)	435,555
	<u>438,153</u>	<u>(2,598)</u>	<u>435,555</u>
<b>TOTAL FUNDS</b>	<u>438,153</u>	<u>(2,598)</u>	<u>435,555</u>

**15. MOVEMENT IN FUNDS - continued**

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
UNRESTRICTED	805,060	(807,658)	(2,598)
	<u>          </u>	<u>          </u>	<u>          </u>
<b>TOTAL FUNDS</b>	<u>805,060</u>	<u>(807,658)</u>	<u>(2,598)</u>

A current year 12 months and prior year 12 months combined position is as follows:

	At 1.4.22 £	Net movement in funds £	At 31.3.24 £
<b>Unrestricted funds</b>			
UNRESTRICTED	438,153	2,850	441,003
	<u>          </u>	<u>          </u>	<u>          </u>
<b>TOTAL FUNDS</b>	<u>438,153</u>	<u>2,850</u>	<u>441,003</u>

A current year 12 months and prior year 12 months combined net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
UNRESTRICTED	1,620,529	(1,617,679)	2,850
	<u>          </u>	<u>          </u>	<u>          </u>
<b>TOTAL FUNDS</b>	<u>1,620,529</u>	<u>(1,617,679)</u>	<u>2,850</u>

**16. RELATED PARTY DISCLOSURES**

There were no related party transactions for the year ended 31 March 2024.

**17. RESTRICTED FUNDS**

**Assel Valley Grant for Swimming Lessons**

In June 2023, a £5,000 grant was received from Assel Valley, designated to provide swimming lessons for children from financially challenged families. Due to unforeseen circumstances, this initiative was delayed, and the funds remain as restricted. The £5,000 will be utilised in the forthcoming period for its intended purpose.

South Carrick Community Leisure

Detailed Statement of Financial Activities  
for the Year Ended 31 March 2024

	31.3.24	31.3.23
	£	£
<b>INCOME AND ENDOWMENTS</b>		
<b>Donations and legacies</b>		
Gifts	1	-
Donations	518	-
Grants	220,000	200,000
Community Benefit Funding - Falk Assel	44,818	40,200
Community Benefit Funding - Tralorg	<u>85,711</u>	<u>78,957</u>
	351,048	319,157
<b>Charitable activities</b>		
Charitable Activities	444,421	485,903
<b>Other income</b>		
Aviva Insurance Claim	<u>20,000</u>	<u>-</u>
<b>Total incoming resources</b>	815,469	805,060
<b>EXPENDITURE</b>		
<b>Raising donations and legacies</b>		
Wages	472,169	441,856
<b>Other trading activities</b>		
Purchases	51,915	54,853
Pensions	<u>-</u>	<u>(8,847)</u>
	51,915	46,006
<b>Charitable activities</b>		
Sundries	9,807	7,955
<b>Other</b>		
Storm Damage Expenses	15,569	-
<b>Support costs</b>		
<b>Management</b>		
Insurance	22,235	22,526
Telephone	9,208	3,889
Postage and stationery	770	863
Advertising	10,771	9,175
Cleaning	4,267	4,190
Consulting	1,680	3,767
Gym Equipment Expense	653	301
Pool Equipments	127	421
Residual VAT	6,156	19,555
Event Costs	<u>359</u>	<u>665</u>
	56,226	65,352

This page does not form part of the statutory financial statements

South Carrick Community Leisure

Detailed Statement of Financial Activities  
for the Year Ended 31 March 2024

	31.3.24	31.3.23
	£	£
<b>Management</b>		
<b>Finance</b>		
Bank charges	5,869	6,095
Plant and machinery	7,258	24,841
Fixtures and fittings	5,706	-
Computer equipment	<u>3,393</u>	<u>-</u>
	22,226	30,936
<b>Information technology</b>		
Repairs and renewals	67,419	56,474
<b>Human resources</b>		
Software licences	17,607	17,800
Staff Training	<u>4,194</u>	<u>4,440</u>
	21,801	22,240
<b>Other</b>		
Light and heat	88,555	127,365
<b>Governance costs</b>		
Accountancy and legal fees	2,391	7,500
Subscriptions	<u>1,943</u>	<u>1,974</u>
	<u>4,334</u>	<u>9,474</u>
Total resources expended	<u>810,021</u>	<u>807,658</u>
<b>Net income/(expenditure)</b>	<u>5,448</u>	<u>(2,598)</u>

**South Ayrshire Council**

**Report by Director of Communities and Transformation  
to Service and Partnerships Performance Panel  
of 16 September 2025**

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**Subject:        Shaping Our Future Council**

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**1.        Purpose**

1.1        The purpose of this report is to provide the Panel with an update on the progress of *Shaping Our Future Council* transformation activity.

**2.        Recommendation**

**2.1        It is recommended that the Panel:**

**2.1.1        notes that the 2025 Best Value thematic Transformation audit improvement actions are either on track or complete, as detailed at Appendix 1;**

**2.1.2        notes the update provided in the ‘*Shaping Our Future Council*’ transformation Dashboard Report at Appendix 2i; the updated Portfolio On A Page Appendix 2ii; Portfolio Risk Register Appendix 2iii, and Benefits Report at Appendix 2iv;**

**2.1.3        notes the actions being progressed through the Transformation Board at 3.7 including a refresh of the transformation programme to focus on initiatives that realise significant savings/ income generation and support the Council’s short to medium term budget strategy; and;**

**2.1.4        agrees with the recommendation of the Transformation Board and recommends to Cabinet, that the transformation portfolio be extended from 3 to 5 years to allow for the sufficient time required to develop and implement change projects and reflect benefits realisation timelines; and**

**2.1.5        notes that the next update on *Shaping Our Future Council* will be presented to Service, Partnerships and Performance Panel in March 2026, in line with the agreed scrutiny and reporting arrangements.**

**3.        Background**

3.1        The Transformation Board and ‘*Shaping Our Future Council*’ (SOFC) portfolio of transformation projects were established in June 2024. The projects reflect the Council’s agreed priority areas for transformation (our workforce; our technology;

our assets and; our delivery model). Each transformation project has a Senior Responsible Officer (SRO) with the relevant delegated authority from the Council to oversee project activity who is supported day-to-day by a Business Lead (usually a service manager). Each project has an assigned project support lead from the Transformation Service to assist with project development, management and implementation. The Council's Portfolio Management Office (PMO) monitor and report on transformation activity across the portfolio and Council.

- 3.2 In March 2025, the Council's Audit & Governance Panel considered Audit Scotland's Best Value thematic audit report on Transformation in South Ayrshire Council. The report highlighted a requirement to prioritise transformation projects that meet the key aim of supporting the financial sustainability of the Council. The improvement actions arising from the audit are incorporated within the existing Best Value Action Plan and reported quarterly to the Audit and Governance Panel and the Best Value Working Group. All improvement actions highlighted in the March 2025 audit report are either complete or on track and are noted at Appendix 1.
- 3.3 The first scrutiny report on '*Shaping Our Future Council*' was presented to Service, Partnerships and Performance Panel (SPPP) on 11 March 2025. The Panel recommended at the meeting that reporting frequency to SPPP be increased to six monthly and this was subsequently agreed at Cabinet in April 2025.
- 3.4 Quarterly portfolio dashboard reports to the Transformation Board provide project progress against delivery expectations and highlight issues for escalation and actioning. The Programme Plan and Portfolio Risk Registers are reviewed quarterly by the Transformation Board. Risk escalation arrangements are in place to the Council's Strategic Risk Register. The latest version of the dashboard reports considered by the Transformation Board are attached within Appendix 2.
- 3.5 A Benefits Realisation Plan has been in place since 1 May 2024. It sets out the process and roles and responsibilities for tracking and reporting benefits realised from project delivery. Benefits are categorised in the Benefits Realisation Plan as being cashable (productivity gain, income generation or rationalisation) and/ or non-cashable (qualitative being a defined service or delivery improvement and quantitative being a measurable increase in service delivery).
- 3.6 In March 2025, new options appraisal and benefits monitoring processes were introduced across the Council for wider change projects where activity results in a positive impact on the Council's financial sustainability. Adherence to the new arrangements is monitored by the PMO who also provide advice and guidance to officers on benefits tracking. All benefits monitoring and reporting is carried out by the PMO and incorporated within benefits reporting arrangements.
- 3.7 Officers are reviewing opportunities to refresh the transformation programme to focus on initiatives that realise significant cashable benefits (savings/ income generation) and support the Council's short to medium term budget strategy, in line with Audit Scotland's recommendations, including:
- Increased engagement with the Improvement Service, APSE and SOLACE transformation programme – to identify further improvement and transformation opportunities as well as joint and shared working arrangements.
  - A re-prioritisation of current transformation projects – A focus on projects that generate savings and income generation, reducing the number of

transformation projects to 19 and removing/ transferring those initiatives that do not realise cashable benefits. The updated Portfolio On A Page reflecting the changes is provided at Appendix 2ii.

- Extending the timescales of the programme – officers recommend a proposal to Cabinet that the work programme be extended from 3 years to 5 years to allow for the sufficient time required to develop and implement change projects and to reflect benefits realisation timelines. The proposed revised end date of the programme is 31 March 2029.
- Increased capability to identify and deliver change - In July 2025, EY completed an 8 week Discovery Phase of work to highlight potential savings and efficiencies options to support the Council's transformation. A final (commercially sensitive) report has been provided and shared with the Directors and interim Chief Executive for consideration.
- Greater strategic input to the transformation programme – refresh of the role of the Transformation Board and clarification on the requirement to focus on initiatives that will support the budget deficit, as well as reviewing further potential for investment projects.
- Additionally, a maturity assessment of Oracle Fusion and transformational opportunities and efficiencies achievable is being instigated.

#### **4. Proposals**

4.1 The Panel is asked to:

- 4.1.1 note that the 2025 Best Value thematic Transformation audit improvement actions are either on track or complete, as detailed at Appendix 1;
- 4.1.2 note the update provided in the '*Shaping Our Future Council*' transformation Dashboard Report at Appendix 2i; the updated Portfolio On A Page Appendix 2ii; Portfolio Risk Register Appendix 2iii, and Benefits Report at Appendix 2iv;
- 4.1.3 note the actions being progressed through the Transformation Board at 3.7 including a refresh of the transformation programme to focus on initiatives that realise significant savings/ income generation and support the Council's short to medium term budget strategy; and;
- 4.1.4 agree with the recommendation of the Transformation Board and recommend to Cabinet, that the transformation portfolio be extended from 3 to 5 years to allow for the sufficient time required to develop and implement change projects and reflect benefits realisation timelines and;
- 4.1.5 note the next update on '*Shaping Our Future Council*' will be presented to Service, Partnerships and Performance Panel in March 2026, in line with the agreed scrutiny and reporting arrangements.

#### **5. Legal and Procurement Implications**

5.1 The recommendations in this report are consistent with legal requirements.

5.2 The recommendations in this report are consistent with procurement requirements.

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

- 6.1 In March 2024, the opening balance of the Transformation Fund was £5.053m. Since then, £882,065 has been committed from the Fund, with the following projects having funding in place:
- Early Payment Discount Scheme;
  - Property Maintenance Process Improvement;
  - Talentlink (Recruitment Process Improvement);
  - Shared Drive to SharePoint (Records Management);
  - Digital Training Suite;
  - Data Analytics and Data Maturity
  - Solar Farm (Phase 2), and
  - Process Automation.
- 6.2 This also incorporates funding of the Transformation Partner Discovery Phase 1 work and tranche 1 of South Ayrshire Council's contribution towards the Solace Transformation Programme.
- 6.3 The current value of the SOFC portfolio is projected at £36,427,866, with 8 transformation projects still to confirm benefits values. £36,014,645 is from transformation projects and £413,221 from wider Council change initiatives. This includes the Solar Farm which proposes £35,100,000 in income generation over a 25 year period. £850,542 (savings and income generation) has been realised as of 25 August 2025.
- 6.4 As the majority of benefits will not be realised for a number of years, the Council will need to take urgent action in the short term to deliver a balanced budget.

## **7. Human Resources Implications**

- 7.1 Not applicable.

## **8. Risk**

### **8.1 *Risk Implications of Adopting the Recommendations***

- 8.1.1 A Programme Risk register is in place for the Transformation Portfolio and Risk Registers in place for all transformation projects. Risks are managed in accordance with the Risk Management Strategy.
- 8.1.2 A strategic risk has been added in the Corporate Risk Register for Transformation. Reporting is provided quarterly via the established CRR process.

### **8.2 *Risk Implications of Rejecting the Recommendations***

- 8.2.1 Not scrutinising the information presented within this report may impact the transformation of the Council and the Council's ability to meet the budget deficit;

- 8.2.2 Rejecting the recommendations may negatively affect the reputation of the Council.

## 9. Integrated Impact Assessment (incorporating Equalities)

The proposals in this report allow scrutiny of performance. The report does not involve proposals for policies, strategies, procedures, processes, financial decisions and activities (including service delivery), both new and at review that affect the Council's communities and employees, therefore an integrated impact assessment is not required.

## 10. Sustainable Development Implications

- 10.1 **Considering Strategic Environmental Assessment (SEA)** - This report does not propose or seek approval for a plan, policy, programme or strategy or document otherwise described which could be considered to constitute a plan, programme, policy or strategy.

## 11. Options Appraisal

- 11.1 An options appraisal is not required for these proposals.
- 11.2 Individual transformation projects are approved on the basis of a satisfactory Business Case which includes the undertaking of an options appraisal, prior to proposing a preferred delivery option.

## 12. Link to Council Plan

- 12.1 The matters referred to in this report contribute to Priority 1, 2 and 3 of the Council Plan: Spaces and Place; Live/ Work/ Learn; Civic and Community Pride.

## 13. Link to Shaping Our Future Council Yes No

- 13.1 The matters referred to in this report contribute to the Council's transformation priority area(s): our workforce; our technology; our assets; our delivery model and will deliver cashable, qualitative and quantitative benefits.

## 14. Results of Consultation

- 14.1 There has been no public consultation on the contents of this report.
- 14.2 Consultation has taken place with Councillor Brian Connolly, Portfolio Holder for Corporate and Strategic, and Councillor Ian Davis, Portfolio Holder for Finance, Human Resources and ICT, and the contents of this report reflect any feedback provided.

## 15. Next Steps for Decision Tracking Purposes

- 15.1 If the recommendations above are approved by Members, the Director of Communities and Transformation will ensure that all necessary steps are taken to ensure full implementation of the decision within the following timescales, with the completion status reported to the Cabinet in the 'Council and Cabinet Decision Log' at each of its meetings until such time as the decision is fully implemented:

<b><i>Implementation</i></b>	<b><i>Due date</i></b>	<b><i>Managed by</i></b>
'Shaping Our Future Council' report to Cabinet including SPPP recommendations	28 October 2025	Assistant Director – Transformation
Update report 'Shaping Our Future Council' to Service and Partnerships Performance Panel	31 March 2026	Assistant Director – Transformation

**Background Papers**    **Report to South Ayrshire Council of 6 March 2024 – [Shaping Our Future Council](#)**

**Report to Cabinet of 29 October 2024 – [Shaping Our Future Council Update](#)**

**Report to Audit and Governance Panel of 26 March 2025 [Transformation - Best Value Thematic Work in South Ayrshire Council 2024/25](#)**

**Person to Contact**    **Louise Reid, Assistant Director - Transformation**  
**County Buildings, Wellington Square, Ayr, KA7 1DR**  
**Phone 01292 612032**  
**E-mail [louise.reid@south-ayrshire.gov.uk](mailto:louise.reid@south-ayrshire.gov.uk)**

**Date: 8 September 2025**

## Appendix 1. 2025 Best Value thematic audit on Transformation – South Ayrshire Council – Improvement actions update

Issue/ risk	Recommendation	Agreed management action	Update as of 12 August 2025
<p><b>1. Impact and ambition of transformation plans</b></p> <p>The council has significant budget savings to make in 2025/26 and 2026/27 and transformation is urgently needed to bridge this gap. While not all savings are forecast across the Transformation portfolio, the savings projected so far are only around £1 million.</p>	<p>The council should ensure its plans are sufficiently ambitious to credibly respond to its financial challenges. It should clearly set out the extent to which savings from transformation will contribute to bridging its budget gap, prioritising transformation projects that will deliver the most savings.</p>	<p><b>Management response</b></p> <p><b>Action 1-</b> Update council reporting format to ensure all transformation activity and proposed benefits are captured.  <b>Responsible officer-</b> Assistant Director - Transformation. <b>Due date-</b> April 2025.</p> <p><b>Action 2-</b> Develop a new workforce plan linked to the medium-term financial plan, Council Plan and LOIP.  <b>Responsible Officer-</b> Chief HR Officer. <b>Due date-</b> December 2025.</p> <p><b>Action 3-</b> Deliver briefings to members and partners as discussions relating to shared services progress.  <b>Responsible officer-</b> Chief Executive. <b>Due date-</b> March 2026.</p> <p><b>Action 4-</b> Develop a project brief relating to Radical Place Leadership in Ayr North for consideration/approval by the Transformation Board.  <b>Responsible officer-</b> Assistant</p>	<ol style="list-style-type: none"> <li>1. Action complete - The Council reporting format has been updated to ensure all transformation activity and proposed benefits are captured.</li> <li>2. Action ongoing – the new WFP is in development.</li> <li>3. Action ongoing - to be provided through a series of budget seminars with members between Sept and February 2026.</li> <li>4. Action complete – Project Brief approved by the Transformation Board in July 2025.</li> </ol>

Issue/ risk	Recommendation	Agreed management action	Update as of 12 August 2025
		<p>Director - Corporate Policy Strategy and Performance <b>Due date-</b> June 2025.</p> <p><b>Action 5-</b> Provide an update report to Council detailing the financial and carbon impact of the 'Transforming our Estate' strategy. <b>Responsible officer-</b> Assistant Director of Planning and Development. <b>Due date-</b> July 2025</p>	<p>5. Action ongoing – update on 'Transforming the Estate' provided to SPPP in May 2025 with follow up planned in the Autumn.</p>
<p><b>2. Community engagement</b></p> <p>Projects are still being developed, and so we have yet to see any evidence of this being carried out and influencing planned changes.</p>	<p>The council should demonstrate it is engaging with its communities as it progresses its revised transformation programme, particularly on those projects that affect vulnerable groups. It should set out clearly how these activities influence any planned changes.</p>	<p><b>Management response</b></p> <p>We will include details of the impact community engagement has had on relevant transformation projects as part of the reporting regime. Responsible officer- Assistant Director -Transformation. <b>Actioned by</b> March 2026.</p>	<p>Action ongoing – community impact is being incorporated within reporting structure and processes.</p>
<p><b>3. Benefits tracking and delivery reporting</b></p> <p>Benefits trackers are still being developed to report progress on projects to elected members</p>	<p>The council is introducing benefits trackers and realisation reports. These reports are to be provided to members and should set out clearly what has been achieved compared to the expected benefits and the outcomes these changes have delivered.</p>	<p><b>Management response</b></p> <p>Benefits realisation and tracking reports now clearly set out what has been achieved compared to the expected benefits and is reported to Members.</p> <p><b>Responsible officer-</b> Assistant Director -Transformation. <b>Actioned by</b> March 2025.</p>	<p>Action complete - Benefits reporting is in place 6 monthly to elected members (Service, Partnerships &amp; Performance Panel and Cabinet)</p>

Shaping our Future Council

Quarterly Portfolio Dashboard Report

September 2025

<b>Portfolio Dashboard – Transformation Portfolio</b> Service Lead: Stewart McCall Reporting period: May 2025 – August 2025	Portfolio health	Time	Costs	Quality	Benefits

Highlights this period

- Supported the activities of the Transformation Partner.
- Phase 1 of Talentlink project now live.
- Concluded the public engagement on Visitor Levy and presented findings/recommendations to Council.
- Digital Training Suite project completed and facility now operational.
- Leadership sessions held in May (HSCP) and June (Council) on Our Future Workforce and workforce planning.
- Options Appraisal with preferred option for the Business Support project has been developed and approved.
- Chatbot successfully deployed to Council website as part of Customer Assistance project.
- Procurement carried out on the Solar Farm project for Phase 2 Consultancy Support (Auchincruive and Cockhill) and Phase 1 Greenan.
- Policy on Generative AI completed and approved by Council.
- Delivery of a series of learning and development sessions for Service Leads/Coordinators on Options and Appraisals and Benefits.
- Temporary resource now appointed to Information Governance and work now underway on records management and document retention policies.
- Good progress being made in the Community Venues project with some transfers nearing completion.

Key activity next period

- Progress draft Workforce Plan.
- Progress approved Directorate model in the Business Support project.
- Continue the development of further project briefs and business cases for Board approval.
- Project and programme delivery.
- Support Solar Farm working group.
- Commence first phase of automation projects.

Issues and risks

- Risk: Process Automation - rather than explore automation opportunities, Services recruit into posts where elements could instead be automated.
- Other issues and risks, including mitigations are now included in the Portfolio Risk Register.

Programme plan

- One issue to report on the overall programme plan – resourcing on M365/SharePoint project with mitigating activities now underway.
- The majority of projects are continuing on track within accepted tolerances.
- **Amber:** Early Payment Discount Scheme. Supplier sign up is less than anticipated meaning approved benefits may not be achieved.
- **Amber:** Process Automation. Procurement delays may impact timescale for benefits realisation.
- **Amber:** Service Re -design project. Clarity required on post -implementation ownership and support without which Service (Re)Design will not become embedded corporately.
- **Amber:** Telephony Platform. A number of technical issues may impact project timeline.

Transformation Fund

Opening Balance of Fund:	£5,028,000	Total Budget Committed from Fund:	£882,065	Remaining/Uncommitted:	£4,145,935
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Transformation Board considerations

- Changes to the Transformation Portfolio, reducing the number of projects, with a greater focus on the delivery of cashable benefits.

Year 1 Priority (24/25)	Year 2 Priority (25/26)	Year 3 Priority (26/27)
Business Case Approved	Benefits Realisation	

# Shaping Our Future Council Transformation Portfolio 2024 - 2029

28<sup>th</sup> August 2025

## Our Workforce

<p><b>Our Future Workforce</b> SRO:Chief Executive BL:Wendy Wesson PL:James Andrew</p>	<p>✔ <b>Service Review &amp; Service Redesign</b> SRO:Chief Executive BL:Bernie Sanderson PL:James Andrew</p>
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## Our Technology

<p>✔ <b>Shared Drive To SharePoint</b> SRO:Catriona Caves BL:Deborah McVey PL:Laura Bone</p>	<p><b>Applications Rationalisation Programme</b> SRO:Louise Reid BL:Stewart McCall PL:Chris Richards</p>
<p><b>Customer Contact</b> SRO:Louise Reid BL:Stewart McCall PL:Laura Bone</p>	
-----ICT Enabling Projects-----	
<p>✔ <b>Talentlink</b> SRO: Wendy Wesson BL: Noemi Cecconi PL:Bryan Mulgrew</p>	<p>✔ <b>PPM Tool</b> SRO:Louise Reid BL:Stewart McCall PL: Danny Gibbons</p>
<p>✔ <b>Telephony Platform</b> SRO:Louise Reid BL:Kevin Mullen PL:Danny Gibbons</p>	<p>✔ <b>Social Care Replacement System</b> SRO:Tim Eltringham BL: Tbc PL:Vikas Kalra</p>

## Our Assets

Income Generation	Rationalisation
<p>✔ <b>Private Property Maintenance &amp; Factoring</b> SRO:Kenny Dalrymple BL: Billy Andrew PL:Simon Yeardley</p>	<p>✔ <b>Community Venues</b> SRO:Chris Cox BL:Tom Burns PL:Simon Yeardley</p>
<p>✔ <b>Solar Farm</b> SRO:Chris Cox BL:Tom Burns PL:Simon Yeardley</p>	
<p><b>Funeral Director Service</b> SRO:Kenny Dalrymple BL:Fiona Ross PL:Simon Yeardley</p>	

## Our Delivery Model

Operating Models	Charging Models
<p>✔ <b>Process Automation</b> SRO:Louise Reid BL:Stuart MacMillan PL:Laura Bone</p>	<p><b>Finance Transformation Programme</b> SRO:Tim Baulk BL:Tom Simpson PL:Bryan Mulgrew</p>
<p><b>Business Support Model</b> SRO:Chief Executive BL:Wendy Wesson PL:Stuart MacMillan</p>	<p><b>Credit Cards</b></p>
<p><b>Shared Services</b> SRO:Chief Executive BL:Louise Reid PL:Stuart MacMillan</p>	<p><b>Central Grants</b> SRO:Tbc BL:Tbc PL: Stuart MacMillan</p>
	<p><b>PPP Contracts &amp; SLAs Review</b> SRO:Kevin Braidwood BL:Chris Cox PL: Stuart MacMillan</p>

### Feasibility Activity

- Income Generation: Advertising [TBC]
- Fleet Management & Maintenance [Kenny Dalrymple]
- Community Venues – Phase 2 [Chris Cox]
- Asset Challenge & Review [Chris Cox]
- Scotland Excel Procurement Review [Tim Baulk]
- Overtime Review [Wendy Wesson]
- New Leisure Developments [George Hunter]
- Renewable Energy Generation [Chris Cox]
- Review of Capital Spend & Projected Loan funds [Tim Baulk/Kevin Braidwood]
- Spend to Save on Energy Plant [Chris Cox]

### Completed/Benefits Realisation

- Digital Training Suite [Louise Reid]
- Netcall Upgrade [Louise Reid]
- Technology Roadmap & ICT Investment [Louise Reid]
- Property Maintenance Process Improvement [Kenny Dalrymple]
- Pop-Up Licence Scheme [Chris Cox]
- Early Payment Discount Scheme [Tim Baulk]
- HRA/CRA Recharging [Tim Baulk]



# Shaping Our Future Council

## Transformation Portfolio

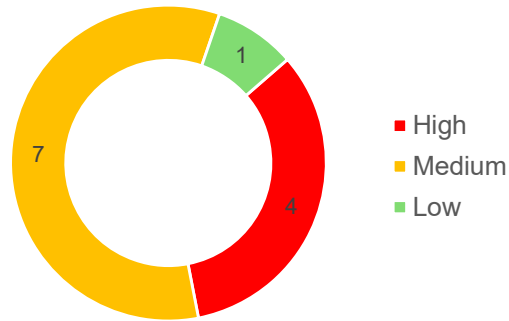
### Risk Register



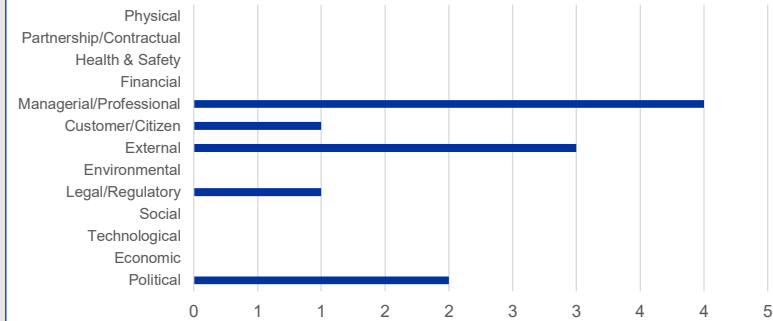
No. of Open Risks  
**11**

No. of Closed Risks  
**2**

Open Risks by Severity



Open Risks by Category



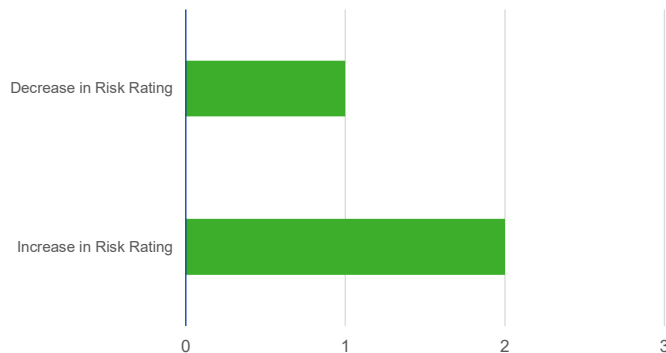
### This Quarter

New Risks  
**4**

No Change  
**4**

Closed Risks  
**2**

Risk Rating Movement



#### PMO Summary

Since the previous report, the number of risks at a portfolio level has increased by 4 due to an increase in risks escalated from a project level. 2 project level risks have been closed. The average risk rating is currently 8.4 and therefore the overall risk to the portfolio is Medium.

2 risks have increased in severity due to their likelihood increasing. This is in relation to elongated process timescales and capacity issues in other Services, causing potential delays to project delivery, but are not specific to the transformation portfolio and work to mitigate is underway.



# Risk Register

## Transformation Portfolio

RAO	Scoring	Risk Rating
Red	12-25	High
Amber	4-10	Medium
Green	1-3	Low

Description of likelihood  
 1 **Unlikely** - Unlikely or virtually impossible  
 2 **Dislikely** - Only fairly likely to occur  
 3 **Likely** - More likely to occur than not  
 4 **Very Likely** - Almost certainly will occur  
 5 **Almost Certain** - Becomes 100%, move to Issue

Description of Impact  
 1 **Minor** - Unacceptable loss, but no threat to strategic objectives or delivery  
 2 **Modest** - Localised impact on strategic objectives or operation  
 3 **Medium** - Impact on some elements of overall objectives or operations  
 4 **Significant** - Widespread or highly disruptive impact on the delivery of the portfolio and its expected benefits.  
 5 **Catastrophic** - Has critical impact but is certain to occur - likely an issue

### 20250828 Transformation Portfolio Risk Register Copy

SPPP September 2025



Use dropdown - DD-MM-YY is this a portfolio  
 Use dropdown - what is the agreed approach?  
 Who is accountable for the risk?  
 Description of the identified risk.  
 What would cause the risk to occur?  
 risk management was last DD-MM-YY  
 How would the portfolio be affected if the risk occurred?  
 Use this when Auto risk?  
 If the risk management option is to Treat the risk, what action(s) Who will manage the managing this risk?  
 DD-MM-YY - include the latest update on actions taken or whether the risk rating will be taken to reduce the risk rating?  
 reviewed by the  
 How has the risk become an mitigation action?  
 has changed due to external  
 since previous issue log

Risk ID	Date Raised	Risk Source	Risk Author	Risk Owner	Risk Category	Title (Short heading)	Risk Description ("There is a risk that...")	Risk Cause ("This is due to...")	Risk Impact ("This may result in...")	Likelihood	Impact	Risk Rating	Risk Management (dropdown)	Mitigating Action(s)	Actionee	Latest Update (Please include dd/mm/yy - ahead of update)	Last Review Date	Target Risk Closure Date	review date Movement since last review	Issue ID	Actual Date Closed
R001	02-Jul-24	Portfolio	Louise Reid	Chief Executive	Political	Transformation for the Council is not seen as a priority by officers or Elected Members.	There is a risk that the Council will fail to deliver its vision for transformation 'Shaping Our Future Council' set out in the four priority transformation areas (our workforce, our assets, our technology, our delivery model).	This is due to a potential lack of clarity of the scope and breadth of change required to meet the 'Shaping Our Future Council' aspirations.	This may result in a failure to deliver on the objectives of the portfolio, and benefits would fail to be realised.	1	4	4	Treat	Ongoing, planned, managed and sustained communication and engagement with officers, elected members, customers and stakeholders.	Chief Executive and Corporate Leadership Team	09/08/25 Most of the actions from the Audit Scotland Transformation audit are complete (workforce planning incorporation into MTEP is ongoing). Cabinet agreed in April 2025 to more regular reporting to the Council's Service Partnerships & Performance Panel on progress of Shaping Our Future Council. Ongoing engagement with Portfolio Holders is in place. Transformation Board continue to meet as scheduled.	10-Jul-25	31-Mar-27	No Change		
R002	02-Jul-24	Portfolio	Louise Reid	Transformation Board	Managerial/Professional	Lack of staff engagement buy-in	There is a risk that staff will not engage with the Council's transformation approach or develop 'change fatigue'	This is due to a lack of communication with staff on the transformation requirements. Staff not being informed or engaged with change proposals. Changes are not what staff require to deliver more effectively. Staff do not see the value in changes being made or proposed. There is no incentive for staff to make changes to ways of working.	This may result in a lack of business change activity required by Services, which will lead to benefits not being realised.	2	4	8	Treat	Regular communications and sessions for staff and Service Leads incl. 'hunch and learn' sessions on aspects of transformation i.e. Benefits Realisation, Risk Management, project planning etc. Transformation Network to be established. Trade Unions engagement. Risk and issues evaluation to Transformation Board and where appropriate, elected members.	Chief Executive and Corporate Leadership Team	09/08/25 A Service Leads forum has been established by Service Leads. Issues on lack of Future Operating Model and expectations from management raised which is challenging service re-design requirements. Inconsistent messaging on expectations including financial impact of Service Re-design is impacting progress. This has been raised at the Transformation Board and requires to be addressed by the Chief Executive. Discussions must be progressed on the development of a Council TOM blueprint.	10-Jul-25	31-Mar-27	Increase		
R003	02-Jul-24	Portfolio	Louise Reid	Transformation Board	Managerial/Professional	Lack of capacity within Council services to deliver transformation	There is a risk that operational and corporate enabling services do not have the capacity to deliver transformation objectives.	This is due to Services currently working at full capacity and do not have the capacity to lead or take on project work.	This may result in a lack of traction. The portfolio would fail to deliver and benefits would fail to be realised.	3	3	9	Treat	CLT to ensure that services are implementing change alongside their usual work practices. Where additional temp resource is required to deliver the Transformation Fund can provide access.	Chief Executive and Corporate Leadership Team	09/08/25 Issues identified with elongated timescales for procurement and DPFA process which is impacting on BAU and transformation projects. PMO is exploring opportunity for transformation projects to trigger procurement interventions at an earlier stage.	10-Jul-25	31-Mar-27	Increase		
R004	02-Jul-24	Portfolio	Louise Reid	Transformation Board	Customer/Citizen	Non-adoption of change	There is a risk that customers cannot adopt or adapt to changes brought about by transformation	This is due to the inability to adapt to new technology or processes, lack of clarity or understanding on changes to service delivery or new services, or inability to enable or accept those changes.	This may result in identified benefits not being realised.	1	3	3	Treat	Good provision of comms support where required from services to update customers on changes. Services to engage with customers in development of Business Cases.	Chief Executive and Corporate Leadership Team	09/08/25 Use of Viva Engage and Transformation forum keeps staff up to date with any planned or actual service changes. Regular engagement with TU's ongoing. Regular Service Leads session to share information on Council strategies and priorities. Transformation Delivery Group is attended by wide range of services and stakeholders. Digital Training Suite is now open to support digital skills development.	10-Jul-25	31-Mar-27	Decrease		
R005	02-Jul-24	Portfolio	Louise Reid	Transformation Board	Managerial/Professional	Council lacks the necessary capability to deliver breadth of change required	There is a risk the Council do not have the required capability to identify or deliver the transformation required across its services and four priority areas.	This is due to a lack of suitable experience or capability to propose new ways of working or large-scale changes, e.g. Development and implementation of new operating models, new income generation projects, and undertaking of complex reviews requiring specialist advice.	This may result in the portfolio not delivering the change outputs required, and ultimately failing to provide agreed strategic objectives and desired benefits.	1	4	4	Treat	A tendering exercise to appoint a Transformation partner to enhance the Council's capability has recently concluded. A further update will be provided upon any contract award.	Assistant Director - Transformation	09/08/25 Phase 1 of the Transformation Partner work has concluded and a final report produced has been shared with the Chief Executive for consideration. Partner proposals taken to the Transformation Board in July. AD Transformation has contacted Chief Officers to provide benchmarking data for services. Further information to be shared with CLT at appropriate time (as decided by CEO)	10-Jul-25	31-Mar-27	No Change		
R006	02-Jul-24	Portfolio	Louise Reid	Council Leader/ Administration	Political	Lack of political buy-in	There is a risk that Officer proposals for transformation, or those identified via an audit or external reviews, do not have the political support required to deliver.	This is due to potentially conflicting priorities or lack of political support for proposals.	This may result in a failure to deliver on the objectives of the portfolio, and benefits would fail to be realised.	1	5	5	Treat	Ongoing engagement with all Elected Members, including Member's Briefings. Regular reporting to Cabinet and Panels.	Council Leader and Portfolio Holders CLT	09/08/25 Transformation activity is progressing in line with Council and Cabinet commitments and approval. Regular meetings with portfolio holders ongoing.	10-Jul-25	31-Mar-27	No Change		
R008	18-Mar-25	Portfolio	Stewart McCall	Transformation Board	Legal/Regulatory	Delay in project DPFA approval	There is a risk that the time to approve a DPFA will impact the delivery of transformation projects.	This is due to the backlog of existing requests that are being handled by Information Governance	This may result in a delay in implementation and benefit realisation.	3	4	12	Treat	Consider what additional resource can be used to support Information Governance to minimise impact on project delivery and benefit realisation.	Service Lead - Transformation	09/08/25 Engagement with HEFESTIS, a non-for-profit organisation that supports public bodies, on reducing the back log and reviewing initial assessment process to streamline the DPFA process.	17-Apr-25	27-May-25	No Change		
R009	21-Jul-25	Portfolio	Louise Reid	Council Leader/ Administration	Managerial/Professional	Transformation leadership	There is a risk that turnover in senior officer positions and change in Council leadership impacts sponsorship, decision making and delivery pace of transformation projects	This is due to a change in Council Leader, Deputy Leader, Chief Exec and Deputy Chief Exec (and remain)	This may result in delays to delivery of transformation projects and realisation of benefits	2	4	8	Treat	Liaison with new Council leaders and senior officers to seek critical decision making on transformation projects and Council approach	Chief Executive/ Assistant Director - Transformation	15/08/25 Meetings held with new Council Leader and Portfolio Holder to brief on transformation progress and activity. Ongoing engagement underway. Interim Chief Executive on board. Transformation Board on 20th August to be chaired by new Chief Exec. TDG updated on likely portfolio re-prioritisation exercise.	21-Jul-25	31-Dec-25	New		
R011	12-Aug-25	Project - Solar Farm	Robin Jamieson / Callum Robertson	Service Lead - Asset Management and Community Asset Transfer	External	Delay to project due to uncertainty around procurement route	There is a risk that the costings for GPFS and Planning appointments come in over thresholds for direct award and quick quote, resulting in delays in further processes.	This is due to an underestimation of the overall costings.	This may result in delay to the overall project delivery timescales.	3	4	12	Treat	APSE to provide more clear gated checkpoints to prevent further delays. Early engagement for soil market research to be undertaken to provide generalised costs.	Robin Jamieson / Callum Robertson	12/08/2025 - risk rating has increased and reached escalation threshold. Added to portfolio risk register for Transformation Board visibility.	12-Aug-25	31-Jan-26	New		
R012	12-Aug-25	Project - Solar Farm	Robin Jamieson / Callum Robertson	Service Lead - Asset Management and Community Asset Transfer	External	Delay to project due to delay in contract mobilisation	There is a risk that the appointed contractors delay the mobilisation outside of agreed timescales.	This is due to unknown delays and reliance on contractor availability.	This may result in delay to the overall project delivery timescales.	4	3	12	Treat	Close contract management to align with APSE gated checkpoints.	Robin Jamieson / Callum Robertson	12/08/2025 - new project risk, rating exceeds escalation threshold. Added to portfolio risk register for Transformation Board visibility.	12-Aug-25	31-Jan-26	New		
R013	12-Aug-25	Project - Solar Farm	Robin Jamieson / Callum Robertson	Service Lead - Asset Management and Community Asset Transfer	External	Uncertainty around planning process requirements	There is a risk that a lack of clarity in the APSE brief leads to unclear responsibility for concept site plans.	This is due to lack of clarity in the provided consultant brief on where responsibility lies for creation of plans.	This may result in delay to the overall project delivery timescales.	5	3	15	Treat	APSE to review and provide clear gated checkpoints for planning submission, DNO engagement, and related items	Robin Jamieson / Callum Robertson	12/08/2025 - new project risk, rating exceeds escalation threshold. Added to portfolio risk register for Transformation Board visibility.	12-Aug-25	31-Jan-26	New		



# SHAPING OUR FUTURE COUNCIL

## Benefits Realisation Report

28th August 2025



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Prepared By: Portfolio Management Office

Prepared On: 6th August 2025

# Shaping our Future Council Benefits Report

## Benefits Realisation Approach

A **benefit** is "the measureable improvement resulting from an outcome perceived as an advantage by one or more stakeholders, which contributes towards one or more organisational objectives"

To assist with reporting, defining and measuring, the Transformation Board agreed to the benefit types and categories described below:

### Benefit Types and Categories

#### Cashable Benefits (Financial)

**Income Generation:** This is a **direct** cashable benefit which contributes to the revenue income of the Council and include new income streams, an increase in existing income streams, or capital return through sale or rental of an asset.

**Rationalisation:** This is a **direct** cashable benefit which reduces revenue budget requirement or commitments. This includes cost savings, removals or reductions.

**Productivity Gain:** This is an indirect cashable benefit related to an increase in efficiency through improved processes.

**Cost Avoidance:** This is an indirect cashable benefit relating to preventative measures which prevent future costs or expenses, as opposed to reducing existing spend.

#### Non-Cashable Benefits (Non-Financial)

**Qualitative:** These benefits are subjective and are more difficult to measure, such as, improved customer satisfaction, staff morale or reputation.

**Quantitative:** These benefits can be assigned a numerical value and can be objectively measured, i.e. increase in service delivery or decrease in complaints.

### Benefit Management Process

There is a 4 stage iterative process which is carried out throughout projects to ensure each potential benefit is identified and realised.

#### Stage 1: Identification and definition

This stage begins as soon as a project or initiative begins to be defined. Benefits are identified based on the outcomes the initiative plans to achieve. They are then categorised and benefit owners are assigned. Enablers (value drivers) are defined i.e. what needs to happen or be in place in order for realisation to begin.

#### Stage 2: Baseline and Planning

Benefits are quantified. Baseline (as is) data is populated, and achievable target values and dates are agreed.

#### Stage 3: Project Delivery and Benefits Tracking

The work to realise the benefits begins and change begins being implemented. Some short term benefits, such as rationalisation (savings) may be tracked and monitored, or even realised at this point, other benefits may not be measured and realised until stage 4.

#### Stage 4: Benefits Realisation and Evaluation

Any business change element should be embedded, and it may then take some time before any initial benefits measurements can be taken.

## Shaping our Future Council Benefits Report Cashable Benefit Dashboard Report

Since the last Benefits report was presented in February 2025, Community Venues, Solar Farm and HRA/CRA Recharging Business Cases have been approved with all proposing cashable benefits via income generation or savings and contributing to the medium to long term financial sustainability of the Council.

Service budgets are adjusted to reflect savings/ income generated from transformation projects. This is the only way financial benefits are reflected in the delivery of transformation projects.

The current projected cashable benefits value of the SOFC Portfolio - over a 25-year period- is £36,427,866. This includes estimated income generation from the Solar Farm project (currently at the feasibility stage with proposals subject to further financial modelling) commencing in 2028.

A total of £850,452 has been realised to date which is a significant increase from the £50,000 realisation figure from the February 2025 Benefits Report. This has been achieved from initiatives moving into completion/ benefits realisation in the last six months including: Technology Roadmap & ICT Investment; Pop-Up Licence Scheme; Early Payment Discount Scheme; HRA/CRA Re-Charging; the Sale of St Cuthberts Primary School; Benefits Service Service Review and the Motorhome Parking Scheme.

Several initiatives have still to confirm cashable benefits proposals, which will be confirmed at the Business Case stage and reflected in future reports.

Non-cashable qualitative and quantitative benefits reporting is also incorporated where there is a projected improvement in service delivery as a result of project implementation.

# Shaping our Future Council Benefits Report

## Transformation Portfolio Projects

The following projects have robust business cases that have been approved by the Transformation Board, and, where appropriate, Cabinet/Council, and are being delivered as part of the SOFC Transformation Portfolio.

Portfolio Priority Area	Priority Area Co-ordinator	Project	Project Status	Senior Responsible Officer	Project Aim	Benefit Type	Benefit Category	Measurable Benefit	Projected Realisation Value	Target Value Description	Target Realisation Date	Realised Value to Date	Benefit Status	Note	
Our Assets	Simon Yeardeley	Community Venues	In Delivery	Chris Cox	To establish a more efficient community venues estate through a robust comprehensive review and definition of a more efficient operating model, with a specific focus on Ivy Cottage, Dailly Community Centre and Loudon Hall.	Cashable	Rationalisation	Budget reduction from a reduction of utilities and running costs for the period 2025-2026 for Ivy cottage	£16,293	Reduction of all utilities costs across identified community venues	31/03/2026	£0	Realisation not started	Delay to target realisation date - change request pending approval for date and profile to be amended.	
						Cashable	Rationalisation	Budget reduction from a reduction of Asset management CRA costs for the period 2025-2026 for Ivy cottage	£2,054	Reduction of all CRA costs across identified community venues	31/03/2026	£0	Realisation not started		
						Cashable	Rationalisation	Budget reduction from a reduction of utilities and running costs for the period 2026-2027 for Loudon Hall	£3,246	Reduction of all utilities costs across identified community venues	31/03/2026	£0	Realisation not started		
						Cashable	Rationalisation	Budget reduction from a reduction of Asset management CRA costs for the period 2026-2027 for Loudon Hall	£13,136	Reduction of all CRA costs across identified community venues	31/03/2027	£0	Realisation not started		
						Cashable	Rationalisation	Budget reduction for a reduction of Facilities Management costs costs for the period 2026-2027 Loudon Hall	£3,205	Reduction of all FM costs across identified community venues	31/03/2027	£0	Realisation not started		
						Cashable	Rationalisation	Reductions of utilities costs for the period 2026-2027 for Dailly community centre	£31,821	Reduction of all utilities costs across identified community venues	31/03/2027	£0	Realisation not started		
						Cashable	Rationalisation	Reduction of Asset management CRA costs for the period 2026-2027 for Dailly community centre	£9,098	Reduction of all CRA costs across identified community venues	31/03/2027	£0	Realisation not started		
						Cashable	Rationalisation	Reduction of Facilities Management costs costs for the period 2026-2027 for Dailly community centre	£29,742	Reduction of all FM costs across identified community venues	31/03/2027	£0	Realisation not started		
Our Delivery Model	Stuart MacMillan	Credit Cards	Mobilisation	Tim Baulk	Introduction of a virtual credit card payment scheme in order to receive rebates from the bank when paying suppliers.	Cashable	Income Generation	Additional rebate may be received with the introduction of this project to pay main suppliers via Credit Card rather than BACS payments	£35,000	Target rebate based on 50% of suppliers signing up in year 1 with an implementation date of 1/4/26	31/03/2027	£35,000	Fully Realised	Saving included in approved Administration Budget in Feb 2025.	
						Cashable	Income Generation	Additional rebate may be received with the introduction of this project to pay main suppliers via Credit Card rather than BACS payments	£50,000	Target rebate based on 75% of suppliers signing up in year 2 with an implementation date of 1/4/26	31/03/2028	£0	Realisation not started		
						Cashable	Income Generation	Additional rebate may be received with the introduction of this project to pay main suppliers via Credit Card rather than BACS payments	£64,750	Target rebate based on 100% of suppliers signing up in year 3 with an implementation date of 1/4/26	31/03/2029	£0	Realisation not started		
			Early Payment Discount Scheme	In Delivery	Tim Baulk	To generate a new income/revenue stream for the Council through early payment of invoices to suppliers who have signed up to the EPDS	Cashable	Income Generation	Income from Early Payment Scheme - Year 1	£15,000	Income generated from paying invoices early	31/03/2026	£15,000	Fully Realised	
							Cashable	Income Generation	Income from Early Payment Scheme - Year 2	£30,000	Income generated from paying invoices early	31/03/2027	£30,000	Fully Realised	Saving included in approved Administration Budget in Feb 2025.
							Cashable	Income Generation	Income from Early Payment Scheme - Year 3	£40,000	Income generated from paying invoices early	31/03/2028	£40,000	Fully Realised	
							Cashable	Income Generation	Income from Early Payment Scheme - Year 4	£50,000	Income generated from paying invoices early	31/03/2029	£0	Realisation not started	
							Cashable	Income Generation	Income from Early Payment Scheme - Year 5	£60,000	Income generated from paying invoices early	31/03/2030	£0	Realisation not started	
			HRA/CRA Recharging	Mobilisation	Tim Baulk	Review and implementation of a new HRA/CRA Recharging model	Cashable	Rationalisation	Following the data analysis, this benefit will reflect the additional sum recharged to HRA and therefore reduce costs against the CRA	£200,000	This is the additional amount that will be recharged to HRA	31/03/2028	£200,000	Fully Realised	Saving included in approved Administration Budget in Feb 2025.
			Pop-Up Licence Scheme	In Delivery	Chris Cox	To introduce a new income scheme to the Council through the provision of a pop-up licence scheme for vendors.	Cashable	Income Generation	Increase in income generation from vendor licensing scheme year 1 (2025 - 2026)	£2,000	Expected Income generation as per market value rates for vendor type.	31/03/2026	£2,000	Fully Realised	Saving included in approved Administration Budget in Feb 2025.
Cashable							Income Generation	Increase in income generation from vendor licensing scheme year 2 (2026 - 2027)	£6,000	Expected Income generation as per market value rates for vendor type.	31/03/2027	£0	Realisation not started		

## Shaping our Future Council Benefits Report Transformation Portfolio Projects

The following projects have robust business cases that have been approved by the Transformation Board, and, where appropriate, Cabinet/Council, and are being delivered as part of the SOFC Transformation Portfolio.

Portfolio Priority Area	Priority Area Coordinator	Project	Project Status	Senior Responsible Officer	Project Aim	Benefit Type	Benefit Category	Measurable Benefit	Projected Realisation Value	Target Value Description	Target Realisation Date	Realised Value to Date	Benefit Status	Note
Our Assets	Simon Yeardeley	Private Property Maintenance & Factoring	Definition	Kenny Dalrymple	Provision of a provide a comprehensive property maintenance services to private homeowners within mixed tenures of the Housing Revenue Account assets	Cashable	Income Generation	Private property maintenance and factoring Income generation delivered from new service - year 1	£55,000	Expected income generation from year 1 of new scheme	31/03/2026	£55,000	Fully Realised	Saving included in approved Administration Budget in Feb 2025.
						Cashable	Income Generation	Private property maintenance and factoring Income generation delivered from new service - year 2	£40,000	Expected income generation from year 2 of new scheme	31/03/2027	£40,000	Fully Realised	
						Cashable	Income Generation	Private property maintenance and factoring Income generation delivered from new service - year 3	£95,000	Expected income generation from year 3 of new scheme	31/03/2028	£95,000	Fully Realised	
		Property Maintenance Process Improvement	Complete benefits realised	Kenny Dalrymple	To digitise current process, removing double-keying into multiple systems.	Cashable	Rationalisation	Reduction in FTE count due to improved process efficiency	£50,000	Reduction of one level 4 administrator and one level 3 finance administrator, which will be reported as part of the service restructure for Cabinet approved in January 2025.	31/03/2025	£50,000	Fully Realised	
		Solar Farm	In Delivery	Chris Cox	A 3 phase approach to establishing a Council operated solar farm, with the current phase (2) reviewing feasibility of the identified sites before moving into implementation in phase 3.	Cashable	Income Generation	Anticipated income generation across the delivery of the project totalling £35,100,000 over 25 years.	£35,100,000	APSE anticipated Income generation produced from solar farm sites as an outcome of the project delivery across 25 years.	31/03/2028	£0	Realisation not started	Dependent on output from current phase 2 consultancy project whereby final costs and returns will be finalised. Returns are wholly dependant on the uptake and engagement of off-takers.
Our Technology (ICT enabling project)	Chris Richards	Technology Roadmap & ICT Investment	Initiation	Louise Reid	Development and implementation of a technology roadmap (2025/2028) and aligned ICT capital investment.	Cashable	Rationalisation	Related to reduction in capital borrowing and subsequent interest charges.	£13,300	Target saving in borrowing charges	31/03/2026	£13,300	Fully Realised	Saving included in approved Administration Budget in Feb 2025.
Our Workforce	James Andrew	Digital Training Suite	Complete - in benefits realisation	Louise Reid	Provision of a Digital Training suite in County Buildings, bookable by all Services.	Non-Cashable	Qualitative	Increase number of employees upskilling through the utilisation of the facility.	120	Number of bookings anticipated to be made, demonstrating the number of employees upskilling through the use of the facility.	30-Jun-26	15 Bookings over 41 days	Partly Realised	
						Non-Cashable	Quantitative	Improve employee satisfaction through the provision of the training suite.	90%	% of users of the facility reporting high satisfaction rates in its use and provisions. Users will be surveyed after using the facility.	01-May-26	66%	Partly Realised	
Our Technology	Chris Richards	Netcall Upgrade	Complete - in benefits realisation	Louise Reid	To upgrade our current customer contact platform, Netcall Liberty, to a current supported version, enabling Omni-Channel modules and the ability to trial new customer communication features.	Non-Cashable	Qualitative	Improvement to system performance measured by reduction in Netcall support calls.	2	25% reduction in the average number of monthly calls logged	10-Dec-25	1	Partly Realised	
Our Assets	Simon Yeardeley	Property Maintenance Process Improvement	Complete benefits realised	Kenny Dalrymple	To digitise current process, removing double-keying into multiple systems.	Non-Cashable	Quantitative	Removal of risk of errors due to removal of manual double-keying of information.	100%	As double-keying will be completely removed, 100% reduction in risk of errors.	31-Mar-25	100%	Fully Realised	
Our Workforce	James Andrew	Service Review and Service Redesign	Close & Sustain	Chief Executive	Creation and implementation of a Service (Re)Design Framework and programme	Non-Cashable	Quantitative	Increase in the number of Services undertaking Service redesigns	20	Number of services that undertake Service (Re)Design.	01-Jun -26	11	Partly Realised	Benefits identified from individual Service Reviews will be captured and monitored in future reports.

# Shaping our Future Council Benefits Report

## Transformation Portfolio Projects

The following projects have robust business cases that have been approved by the Transformation Board, and, where appropriate, Cabinet/Council, and are being delivered as part of the SOFC Transformation Portfolio.

Portfolio Priority Area	Priority Area Co-ordinator	Project	Project Status	Senior Responsible Officer	Project Aim	Benefit Type	Benefit Category	Measurable Benefit	Projected Realisation Value	Target Value Description	Target Realisation Date	Realised Value to Date	Benefit Status	Note
Our Technology	Chris Richards	Shared Drive to SharePoint (Records Management Resource)	In Delivery	Catriona Caves	To employ a temporary resource to assist in the classification and application of data labelling and retention of electronic records.	Non-Cashable	Qualitative	Improved data and records management compliance.	Not Defined	Creation and successful application of data retention labels to user's files.	30-Nov-26	0	Realisation not started	
Our Workforce	James Andrew	Talentlink (Recruitment Process Improvement)	In Delivery	Wendy Wesson	To improve the efficiency and effectiveness of the end-to-end recruitment process and the team that deliver this core function.	Non-Cashable	Qualitative	Reduction in lead time for the completion of the Vacancy Management Process.	-530hrs	Average lead time reduced by 106 mins approx per advertised job across a year. There are approx. 300 jobs advertised per year, 106 x 300hrs / 60	31-May-26	0	Realisation not started	System went live in May 2025 and measurements will be taken quarterly.
						Non-Cashable	Qualitative	Reduction in time taken for the creation of weekly reporting.	0	Reporting should be automated, reducing the time required for staff to run reports by approximately 65 minutes per week.	31-Aug-26	0	Realisation not started	
						Non-Cashable	Qualitative	Improvement in hiring manager (user) satisfaction/experience.	Not Defined	Satisfaction Survey to be issued post-go live to measure and capture user feedback.	31-May-26	0	Realisation not started	

## Shaping our Future Council Wider Service-Led Initiatives

The following initiatives have been approved by Cabinet/Council, align with the strategic objectives of Shaping our Future Council and contribute to the long-term financial sustainability of our Council.

Aligned SOFC Priority Area	Initiative	Senior Responsible Officer	Aim	Benefit Type	Benefit Category	Measurable Benefit	Projected Realisation Value	Description	Target Realisation Date	Realised Value to Date	Benefit Status
Our Assets	<b>Barr Community Centre Asset Transfer</b>	Tom Burns	Transfer of ownership of Barr Community Centre to Barr Community SCIO as part of a community asset transfer agreement.	Cashable	Rationalisation	Removal of running costs through transfer/disposal of the asset	£27,000	Reduction in maintenance and revenue costs through transfer of liability/ownership	01-Sep-26	£0	Realisation not started
				Cashable	Income Generation	Capital income as a result of the transfer.	£1	The income generated from the sale of the asset.	01-Sep-26	£0	Realisation not started
	<b>Motorhome Parking Scheme 2024 2025</b>	Jane Corrie	To improve and expand the current provision of motorhome parking, following previous year's success	Cashable	Income Generation	Anticipated increase in revenue by 35% through transactions via barrier system and increased usage due to reduction in "boy racers".	£12,000	Anticipated increase in revenue by 35%	01-Aug-26	£0	Realisation not started
				Cashable	Income Generation	Anticipated increase in revenue by 15% through transactions via Pay and Display Machines (in additional to existing phone payments).	£30,000	Anticipated increase in revenue by 15%	31-Mar-27	£0	Realisation not started
				Cashable	Income Generation	Introduce the offering of permanent year round facilities, as opposed to seasonal, and increase revenue by 35%.	£20,000	Anticipated increase in revenue by 35%	31-Mar-26	£19,000	Fully Realised
	<b>Pavement Parking Enforcement</b>	Jane Corrie	To implement and enforce the issuing of penalty notices due to the new pavement parking ban as introduced by the Scottish Government.	Cashable	Income Generation	Generation of income from the issuing of £50 - £100 penalty notices for vehicles parked on pavements	£25,000	Increase in revenue through the issuing of penalty notices to enforce new pavement parking ban.	31-Mar-26	£0	Realisation not started
	<b>Property Maintenance Multiskilling and Structure Implementation</b>	Billy Andrew	To create a more efficient Property Maintenance service through upskilling and multiskilling staff, and reducing the reliance on external contractors.	Cashable	Rationalisation	Saving generated from restructure	£39,678	Saving generated from restructure and staff upskilling	01-Apr-26	£0	Realisation not started
	<b>Sale of St Cuthbert's Primary School</b>	Tom Burns	Transfer of ownership and relinquishment of liability for St Cuthbert's PS.	Cashable	Income Generation	Income generated from sale of school	£100,000	Capital receipt - income generated from the sale of school	14-Feb-25	£100,000	Fully Realised
	<b>Coylton Tennis Club CAT</b>	Tom Burns	Transfer of ownership of Coylton Tennis Club to Coylton LTC	Cashable	Income Generation	Income from sale of asset	£3,000	Expected income from the transfer of ownership	31-Jul-26	£0	Realisation not started
				Cashable	Rationalisation	Revenue saving through removal of maintenance costs.	£300	Removal of annual maintenance cost.	31-Jul-26	£0	Realisation not started
Our Workforce	<b>Benefits Service Service Review</b>	Nicola Gemmell	To contribute towards a more efficient and effective Benefits Service.	Cashable	Rationalisation	Reduction of 4.4 FTE	£156,242	Anticipated saving due to reduction of 4.4 FTEs	31-Mar-26	£156,242	Fully Realised

# Shaping our Future Council

## Transformation Portfolio

### Community Benefits

Community benefits are the potential impact on individuals, groups or our local communities that may incur through the delivery of the Transformation initiatives listed below. These initiatives have completed Integrated Impact Assessments, which call out the potential impact, and this is summarised below. The outcomes will be reassessed as part of the project closure and evaluation stage and included in any project closure report.

Aligned SOFC Priority Area	Initiative	Senior Responsible Officer	Aim	Project Status	Category	Community Benefit/Outcome	Potential Impact	Description/Justification	Actual Impact
Our Assets	Community Venues	Chris Cox	To establish a more efficient community venues estate through a robust comprehensive review and definition of a more efficient operating model, with a specific focus on Ivy Cottage, Daily Community Centre and Loudon Hall.	In Delivery	Public Sector Duty	Fostering Good Relations	Uncertain / not clear		Currently Unknown
					Cross-Cutting	Our Ageing Population	Positive Impact	Transfer/disposal of assets allows these venues to continue operating in the community, which are well utilised by older people, particularly in Ivy Cottage.	Currently Unknown
					Cross-Cutting	Health and Wellbeing	Increase positive health outcomes	Properties will continue to provide health and wellbeing activities under community ownership.	Currently Unknown
					Cross-Cutting	Rurality - impact on people living outwith an urban area	Uncertain / not clear	Daily will be impacted by this change as it is in a rural community, however it is unknown at this stage what the positive and negative impact will be.	Currently Unknown
					Environmental	Sustainable Food (Glasgow Declaration)	Positive Impact	As the project will see the transfer in ownership as opposed to closure of Daily CC, who currently run a Food Pantry, this work should continue and officers will assist where possible.	Currently Unknown
Our Delivery Model	Process Automation	Louise Reid	Implementation of software which automates suitable and identified processes and tasks, generating efficiencies and productivity gains across the organisation.	Mobilisation	Equalities	Protected Characteristics - Age	Positive Impact	The project is likely to have a positive impact on particular age groups, as the processes being targeted for improvement will be predominantly used by specific age groups.	Currently Unknown
					Equalities	Protected Characteristics - Disability	Positive Impact	Automation can improve access and streamline online processes making it more simple for vulnerable people and ensuring they receive timely assistance.	Currently Unknown
					Equalities	Fairer Scotland Duty - Low Income / Income Poverty	Positive Impact	Individual processes which are to be automated will be checked for their impact on this group	Currently Unknown
					Equalities	Fairer Scotland Duty - Low and / or no wealth	Positive Impact	Automating processing affecting those on low income can speed up decisions affecting benefits or other subsidy / discount.	Currently Unknown
					Environmental	Sustainable Procurement / Sustainable resource use / circular economy / waste	Positive Impact	Individual processes which are to be automated will be checked for their impact on this group	Currently Unknown
					Cross-Cutting	Our Ageing Population	Positive Impact	It is likely the project can deliver improvements within the Waste Management Service. All processes identified for automation will be appraised for their impact on this area	Currently Unknown
					Cross-Cutting	Rurality - impact on people living outwith an urban area	Positive Impact	Process automation will enable Services to become more efficient and productive in how they operate. Therefore, if demand for support increases, the technology will be able to cope with the demands and offer flexibility to respond to changing circumstances. All processes identified for automation will be appraised for their impact on this area	Currently Unknown
Our Assets	Solar Farm - phase 2 (IA to be updated pending completion of this phase)	Chris Cox	A 3 phase approach to establishing a Council operated solar farm, with the current phase (2) reviewing feasibility of the identified sites before moving into implementation in phase 3.	In Delivery	Equalities	Protected Characteristics - Age	Positive Impact	As this project should contribute significantly to reducing the Council's budget deficit, this will have a positive impact on other Council Services upon which children, young people and the older generation rely.	Currently Unknown
					Equalities	Protected Characteristics - Disability	Positive Impact	As this project should contribute significantly to reducing the Council's budget deficit, this will have a positive impact on other Council Services relied upon by those with a disability.	Currently Unknown
					Equalities	Fairer Scotland Duty - Low Income / Income Poverty	Positive Impact	Reduction of budget deficit will reduce impact on council services for low income or income poverty.	Currently Unknown
					Equalities	Fairer Scotland Duty - Low and / or no wealth	Positive Impact	Reduction of budget deficit will reduce impact on council services for those with low or no wealth.	Currently Unknown
					Equalities	Fairer Scotland Duty - Material Deprivation	Positive Impact	Reduction of budget deficit will reduce impact on council services for those with material deprivation	Currently Unknown
					Equalities	Fairer Scotland Duty - Socio-economic background	Positive Impact	Reduction of budget deficit will reduce impact on council services across all socio-economic backgrounds	Currently Unknown
					Equalities	Fairer Scotland Duty -Area Deprivation	Positive Impact	Reduction of budget deficit will reduce impact on council services, potentially allowing for more investment in area deprivation services	Currently Unknown
					Environmental	Climate Change Mitigation - Greenhouse gas emissions	Positive Impact	This project will deliver renewable energy to high consumption businesses within South Ayrshire's Council's area. The project lifespan is 25 years, with options to renew and continue delivery post this date.	Currently Unknown
					Environmental	Sustainable Procurement / Sustainable resource use / circular economy / waste	Negative Impact	Solar panels involved in this development are not commonly a recyclable or reusable asset beyond their operational lifespan. This lifespan is however an estimated 25 years, within which time it is possible that alternative methods of recycling or reuse may be available. Routes exist for solar panel recycling including stripping of component parts, and separation and purification of key elements like silver, lead, copper, and silicon. These processes are not commercially viable at the moment, however as many materials are already in short supply, it is likely that more developed recycling processes will be available in future.	Currently Unknown
					Environmental	Climate Change Adaptation	Uncertain / not clear	The delivery stage of this plan will reduce tree shading and associated plant growth within the development area, however panels will reduce solar irradiance within the local area.	Currently Unknown
					Environmental	Just Transition, Green Jobs and Skills	Positive Impact	The delivery stage of this project will support green jobs to install the panels, as well as serving as an educational resource for local schools, colleges, and communities	Currently Unknown
					Environmental	Climate literacy, climate conversations and positive environmental behaviours	Positive Impact	Project has significant opportunity to engage schools, colleges, and local residents on the development and value of renewable energy within our society.	Currently Unknown
					Environmental	Biodiversity and ecological recovery, Soil and water health, Connecting people to nature (biodiversity duty, Edinburgh Declaration)	Negative Impact	The delivery phase of this plan will negatively impact biodiversity in the area. The Achincruive (glenburn) bing is an ex-mine head site and classed as landfill in terms of development potential. A full ecological survey will be carried out within the phase 2 feasibility alongside an SEA should the development go ahead.	Currently Unknown
Cross-Cutting	Our Ageing Population	Positive Impact	As this project should contribute significantly to reducing the Council's budget deficit, this will have a positive impact on other Council Services upon which the older generation rely.	Currently Unknown					
Cross-Cutting	Health and Wellbeing	Uncertain / not clear	There is scope to develop a portion of the wasteground that has been identified for recreational space. This will be assessed further once spatial plans have been developed	Currently Unknown					

## South Ayrshire Council

### Report by Director of Communities and Transformation to Service and Partnerships Performance Panel of 16 September 2025

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**Subject: Community Wealth Building Programme 2021-2025**

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#### 1. Purpose

- 1.1 The purpose of this report is to provide Service and Partnerships Performance Panel with an update on Community Wealth Building Programme 2021-2025.

#### 2. Recommendation

##### 2.1 It is recommended that the Panel:

**2.1.1 approves the Community Wealth Building (CWB) report including the 2021-2025 evaluation; and**

**2.1.2 notes the updates regarding Community Wealth Building and the recommendations moving forward.**

#### 3. Background

- 3.1 Community Wealth Building (CWB) is an approach to local economic regeneration, focused on five key areas: Procurement, Financial Power, Land and Assets, Plural Ownership and Fair Work. CWB is about creating a resilient and inclusive economy for the benefit of the local area through the maximisation of local assets.
- 3.2 The overarching Ayrshire Growth Deal (AGD) programme identified CWB as core to creating a strong, resilient, and inclusive local and regional economy. A CWB Commission was established with the three Ayrshire Councils and other local Anchor Institutions. South Ayrshire Council signed a CWB charter in October 2020.
- 3.3 Ayrshire Growth Deal Community Wealth Building (CWB) Programme was delivered from 2021 to 2025. The programme was the first initiative of its kind in Scotland and sought to establish a new model of economic development in Ayrshire that prioritises local resilience, fair work, community ownership, and inclusive growth.
- 3.4 CWB in South Ayrshire was initially managed by the Economy and Regeneration Service before transferring to Thriving Communities during 2023/24. In June 2024 CWB was reintegrated with the Business Support team as part of the new Thriving Economy Service Review.

- 3.5 Previous reports to Service and Partnerships Performance Panel have highlighted progress that has been made locally including local case studies, data and local spend.
- 3.6 The AGD Community Wealth Building End of Project Evaluation 2025, Appendix 1 provides an overview of the CWB programme in Ayrshire, highlighting some of the key achievements and challenges across the region.
- 3.7 In South Ayrshire CWB is now integrated with Thriving Economy and complements the already established Ambition Programme. Following the reorganisation of staff and although the CWB funded programme ended in March 2025, support is still available in South Ayrshire, this being funded by LACER and UK Shared Prosperity Funding.
- 3.8 Although the programme has finished SAC have retained one FTE CWB Officer until 31 March 2026. This officer continues to provide support to local organisations and will assist the new Thriving Economy Coordinator reviewing the new CWB Bill to help inform how SAC move forward.
- 3.9 The CWB Bill published on 20 March 2025 [CWB \(Scotland\) Bill as introduced](#) seeks to place a duty on local authorities and other public bodies. It aims to ensure CWB is implemented consistently across Scotland as an economic development tool. The Bill is still to complete the legislative process and be approved into law by the Scottish Parliament.
- 3.10 Officers will provide Cabinet with an update on any further updates and recommendations regarding CWB. It is anticipated that any recommendations to Cabinet will be June 2026 however this will be determined by the consultation and findings as part of the CWB process.

#### **4. Proposals**

- 4.1 Members are asked to review the CWB Evaluation Report (Appendix1) and acknowledge the progress made during 2021-2025.
- 4.2 Officers will present a further report to Cabinet in June 2026 providing recommendations on how SAC adopts the recommendations from the CWB Bill, if enacted, and how SAC further adopts and develops opportunities to promote CWB.

#### **5. Legal and Procurement Implications**

- 5.1 The new CWB seeks to place duties on local authorities, a further report to Cabinet will set out any legal requirements.
- 5.2 There are no procurement implications arising from this report.

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

- 6.1 CWB funded programme has ended therefore it will be down to Local Authorities to decide how they will continue to promote CWB. During 2025/26 funding for grants and staff will be funded though external funding including UKSPF and LACER Funding.

## 7. Human Resources Implications

- 7.1 The remaining 1FTE CWB Officers contract ends 31 March 2026 (LACER funded). Consideration how CWB is promoted moving forward will be considered once it becomes clearer what duties are place on local authorities.

## 8. Risk

### 8.1 *Risk Implications of Adopting the Recommendations*

- 8.1.1 There are no risks associated with adopting the recommendations.

### 8.2 *Risk Implications of Rejecting the Recommendations*

- 8.2.1 There are no risks associated with rejecting the recommendations.

## 9. Integrated Impact Assessment (incorporating Equalities)

- 9.1 The proposals within this report have been assessed through the IIA scoping process and there are no significant potential positive or negative equality impacts in agreeing the proposals, therefore an IIA is not required.

## 10. Sustainable Development Implications

- 10.1 ***Considering Strategic Environmental Assessment (SEA)*** - This report does not propose or seek approval for a plan, policy, programme or strategy or document otherwise described which could be considered to constitute a plan, programme, policy or strategy.

## 11. Options Appraisal

- 11.1 An options appraisal has not been carried out in relation to the subject matter of this report.

## 12. Link to Council Plan

- 12.1 The above recommendations relate to Priority 1 - Spaces and Place, Priority 2 - Live, Work, Learn and Priority 3 – Community and Civic Pride

## 13. Link to Shaping Our Future Council Yes No

- 13.1 Not applicable.

## 14. Results of Consultation

- 14.1 There has been no public consultation on the contents of this report.
- 14.2 Consultation has taken place with Councillor Chris Cullen, Portfolio Holder for Economic Development, and the contents of this report reflect any feedback provided.

**Report to Service and Partnerships Performance Panel of 14  
May 2024 – [Community Wealth Building Programme](#)**

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**Date: 5 September 2025**

# AYRSHIRE GROWTH DEAL

March 2025

## Ayrshire Growth Deal Community Wealth Building Project Evaluation report



**HALL  
AITKEN**

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**“To create jobs and support thriving communities we want to ensure that more money spent in Scotland stays in Scotland. This unique legislation will help to increase investment in local economies so that they become fairer, greener and more prosperous.”**

– Tom Arthur, Minister for Employment and Investment, on the Community Wealth Building (Scotland) Bill, published 20 March 2025

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# Executive Summary

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## Overview

This report presents the final evaluation of the Ayrshire Growth Deal Community Wealth Building (CWB) Programme, delivered from 2021 to 2025. As the first initiative of its kind in Scotland, the Programme sought to establish a new model of economic development—one that prioritises local resilience, fair work, community ownership, and inclusive growth. This evaluation assesses the Programme's delivery, impact, and future potential, drawing on extensive stakeholder interviews, survey data, performance analysis, and case study evidence.

## Headline Achievements

- **1,152 enterprises supported**, exceeding the original programme target by 25%
- **1,027 jobs safeguarded** and a further 164 projected new jobs
- **286 businesses received grants or consultancy support**, improving resilience, innovation and market access
- **270 enterprises engaged in Fair Work Action Planning**, embedding inclusive employment practices
- **Over 290 businesses supported in procurement-readiness**, resulting in increased local contract wins
- **27 organisations supported in developing or transitioning to cooperative or employee-owned models**
- Community and social enterprises empowered through targeted asset and grant support

## What Worked Well

- Embedded delivery models (e.g. North Ayrshire) proved highly effective in aligning CWB with core business support services
  - Flexibility in grant use allowed tailored responses to local challenges—from energy efficiency upgrades to digital innovation
  - Trusted local officers provided relational, context-sensitive support, building confidence and capacity across the enterprise base
  - CWB activities supported national goals on fair work, net zero, and inclusive growth
-

## Challenges and Barriers

- There were some recruitment issues, particularly in the early stages, meaning some council areas started later than others
- Variability in monitoring and evaluation limited cross-council learning and pan-Ayrshire coordination
- The complexity of CWB terminology and frameworks required extensive communication and culture change work

## Strategic Recommendations

1. **Sustain and scale the programme** through continued investment, mainstreamed staffing, and cross-council delivery coordination
2. **Create a shared CWB monitoring and reporting framework** to support evidence-based decision-making
3. **Target future resource allocation** towards high-impact areas such as procurement support, fair work integration, and cooperative development
4. **Formalise alignment with regional and national strategies**, including Scotland's Net Zero Route Map, Fair Work Action Plan, and forthcoming CWB legislation
5. **Use Ayrshire as a demonstration region**, developing a replicable model for other parts of Scotland

## Conclusion

The Ayrshire CWB Programme has delivered measurable economic and social benefits while piloting a new approach to place-based development. Its legacy lies in its ability to shift economic power back to communities, build fairer labour markets, and foster resilience through local ownership and collaboration. The evaluation finds a clear mandate for continuation—and a compelling case for Community Wealth Building to become a mainstream component of Scotland's wellbeing economy.

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## Introduction

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The Ayrshire Growth Deal Community Wealth Building (CWB) Programme marks a distinctive and progressive model of local economic development in Scotland. Rooted in principles of fairness, inclusion and local resilience, the programme has sought to embed structural change within Ayrshire's economy by tackling inequality and promoting economic participation across its communities.

This final evaluation has been commissioned by North Ayrshire Council (NAC) on behalf of the regional Growth Deal partnership, to understand and evidence the impact, learning and legacy of the CWB programme across North, East and South Ayrshire. It serves to inform councillors, funders and regional stakeholders about the effectiveness of the investment to date and provide strategic insights for the future sustainability and potential expansion of the CWB model.

### Purpose and objectives

The evaluation addresses five core objectives:

- To assess the effectiveness of the programme in achieving its original aims and strategic objectives.
- To examine the impact of delivery across four central CWB pillars: Procurement, Employment/Fair Work, Assets, and Plural Ownership.
- To evaluate the contribution of the programme to inclusive growth, including how opportunities have been extended across the region.
- To explore the outcomes and benefits delivered through the CWB Enterprise Support Fund.
- To generate recommendations to inform policy development, programme continuation or scaling, and wider CWB practice in Scotland and beyond.

### Scope of the report

Evaluation data covers the initial programme period from inception in 2021 through to June 2024 (Years 1-3), plus extension period (Year 4) data to end December 2024. It encompasses all three Ayrshire local authority areas and reflects the complexity of a regionally coordinated initiative delivered in locally tailored ways, acknowledging variation in context, capacity and approach across the partners.

### Background: responding to regional inequality through CWB

Ayrshire has long been challenged by structural economic disadvantages, including high levels of unemployment, low productivity, and persistent inequality in income and opportunity. In response, the

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Ayrshire Growth Deal committed to pioneering a Community Wealth Building approach, investing £3 million to drive systemic change through local economic empowerment. The programme's ambition has been to increase local spend, embed fair work, make better use of assets for community benefit, and promote inclusive ownership models.

The programme has been delivered through three interlinked components:

- CWB Locality Officers working directly with businesses and communities to promote and enable CWB practices.
- The CWB Enterprise Support Fund, offering tailored financial and consultancy support to organisations.
- Fair Work Ayrshire, a specialist advisory service promoting employment practices aligned with the principles of Fair Work.

## Evaluation methodology

This evaluation employs a mixed-methods approach, designed to balance strategic insight with operational evidence, structured around the following elements:

- **Desk Research and Data Analysis:** A detailed review of programme documentation, reporting data, budget allocations and performance metrics, alongside national policy context.
- **Stakeholder Engagement:** In-depth qualitative interviews with programme delivery teams, council leads, steering group members, and regional economic partners.
- **Enterprise Surveys:** A wide-reaching survey targeting all businesses supported through the CWB fund and Fair Work services, designed to capture views on programme accessibility, impact, and outcomes.
- **Case Studies:** Development of targeted case studies from supported enterprises to showcase tangible benefits in terms of job creation, sustainability, innovation and community impact.
- **Pillar-Specific Impact Analysis:** Assessment of outcomes for each of the four key CWB pillars, using both qualitative feedback and quantitative indicators.
- **Inclusive Growth Review:** Examination of how CWB has supported inclusive economic development, considering spatial distribution, equality impacts and contributions to the social economy.
- **Grant Funding Effectiveness:** Review of how financial support was distributed and used by recipients, and its direct and indirect outcomes.

This comprehensive methodology reflects both the strategic priorities of NAC and best practice in evaluating complex place-based economic development programmes. It ensures the evaluation is not only evidence-based but reflective of the experiences of those involved in delivering and receiving support.

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## Programme context and rationale

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Ayrshire's economy has historically been shaped by its industrial past and the subsequent impacts of deindustrialisation, particularly within the coal mining, manufacturing, and textiles sectors. This has contributed to a legacy of entrenched economic inequalities, with persistent issues around unemployment, low productivity, underemployment, and spatial disparities across urban and rural areas.

According to the Scottish Government's Inclusive Growth Diagnostic, both North and East Ayrshire have been identified as having among the least resilient local economies in Scotland. South Ayrshire also falls below the national average on many indicators of economic performance and social inclusion. These structural issues are compounded by lower-than-average business birth rates, skills mismatches, and a relatively high dependency on public sector employment in some areas.

It was against this backdrop that the Ayrshire Growth Deal (AGD) was developed—a £251 million investment package from the Scottish and UK Governments and local partners, aiming to transform the regional economy. Within this, the Community Wealth Building (CWB) programme was conceived as a foundational, system-shifting approach to inclusive economic development. Unlike traditional economic models that focus on attracting external investment, CWB seeks to harness and circulate wealth within the local economy by leveraging the economic power of local anchor institutions, enhancing social value, and building local capacity.

The CWB programme aligns strongly with national policy priorities, including:

- **The Scottish Government's National Strategy for Economic Transformation (2022)**, which emphasises fair work, wellbeing economy principles, and place-based investment.
- **The Fair Work Framework (2016–2025)**, which calls for effective voice, opportunity, security, fulfilment, and respect in all workplaces.
- **Scotland's Net Zero ambitions**, where the land and assets pillar of CWB supports the repurposing of public assets to advance climate goals.
- **Public Procurement Reform (Scotland) Act 2014**, underpinning the potential of procurement to deliver community benefits and social value.

Locally, CWB has been embedded into North Ayrshire Council's economic strategy since 2020, making it the first local authority in Scotland to adopt CWB as a core economic model. The AGD investment enabled this approach to be scaled regionally, with the three councils collaborating to pilot and embed the model across Ayrshire through the programme evaluated in this report.

In this context, the AGD CWB programme is not simply a suite of initiatives, but a strategic response to deep-rooted economic disadvantage. It provides a framework through which local government and

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partners can use their economic levers—procurement, employment, land and assets, and business support—to achieve more equitable and sustainable outcomes for Ayrshire’s people and places.

While the model has demonstrated early success, it is still evolving. This evaluation seeks to assess the extent to which the CWB approach has translated into practical benefits and to provide an evidence base for its refinement, replication, and continuation.

## Governance and delivery model

The Ayrshire Growth Deal CWB Programme was designed as a region-wide collaboration across three local authorities—North, East, and South Ayrshire—each with distinct economic contexts, internal structures, and levels of readiness to implement the Community Wealth Building model. The programme was led by North Ayrshire Council, which brought existing experience and a foundational policy commitment to CWB, having formally adopted it in 2020.

A central governance structure was established through the CWB Programme Steering Group, comprising senior representatives from the three councils. This group oversaw programme coordination, strategic alignment, and the monitoring of delivery. Additionally, the Programme Manager and Programme Coordinator roles, hosted by North Ayrshire Council, were responsible for pan-Ayrshire operational management and administrative oversight. These roles played a critical function in maintaining coherence across varied local delivery models.

At a delivery level, each council recruited CWB Locality Officers to work directly with local enterprises and anchor institutions. While the overarching objectives and funding criteria were agreed at programme outset, local teams retained the flexibility to tailor delivery to local circumstances. For instance, grant award thresholds, match funding requirements, and monitoring expectations varied between local authority areas, reflecting differing levels of maturity and administrative capacity.

The Fair Work Ayrshire (FWA) team operated as a pan-Ayrshire resource, embedded within the CWB programme but with a clear sectoral focus. The FWA team engaged directly with employers to promote the adoption of Fair Work practices, including the Real Living Wage, flexible working arrangements, and inclusive recruitment. Their remit included delivery of workshops, one-to-one support, and referrals to accreditation schemes such as Disability Confident and Carer Positive.

The governance and delivery structure was deliberately designed to promote both consistency and adaptability. While this created opportunities for local innovation, it also introduced certain challenges—particularly around contract alignment, communication flow between tiers, and data standardisation across the three delivery areas. These tensions were identified in internal reviews and Steering Group reflections as areas for improvement in any future phase of the programme.

Several delivery leads reflected that while the governance model enabled local flexibility, it was sometimes at odds with the aspiration for regional cohesion. Interviewees noted early challenges

around staff recruitment, the absence of a dedicated programme manager at inception, and variation in how each council interpreted key CWB principles. The programme's terminology, initially unfamiliar to potential recruits and stakeholders, was another limiting factor. Despite these obstacles, the eventual appointment of programme management roles and the gradual socialisation of CWB principles helped to embed a more consistent understanding across delivery areas. Flexibility at the local level was broadly praised, particularly where councils implemented creative responses to local needs—such as South Ayrshire's gift card initiative and East Ayrshire's energy audit support. However, collaboration across the three councils was said to be heavily reliant on interpersonal relationships and individual initiative, rather than being systematised.

Crucially, the governance model allowed for regular engagement with wider stakeholders, including national agencies such as Scottish Enterprise, Co-operative Development Scotland, and Skills Development Scotland. Engagement with the Ayrshire Regional Economic Partnership and the CWB Commission (where active) was intended to support wider alignment with strategic economic priorities across the region. However, the effectiveness of this wider governance engagement varied over time and between geographies.

From a financial perspective, the programme was wholly funded through a £3 million allocation from the Scottish Government via the Ayrshire Growth Deal. A detailed budget breakdown shows allocations across staff costs, the CWB Enterprise Support Fund, training and marketing, and Fair Work delivery.

In summary, the programme's governance and delivery model reflected a pragmatic balance between regional ambition and local responsiveness. While effective in enabling broad delivery and experimentation, it also revealed key learning for future governance of place-based, multi-partner economic programmes.

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## Impact assessment of each pillar

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### Procurement

#### Overview

The Procurement pillar aims to enhance local economic impact by prioritizing local suppliers and small businesses in public and institutional contracts. By redirecting procurement spending to local businesses, the project seeks to stimulate local economies and foster job creation.

- **Policy Context:** The Scottish Government's procurement strategy advocates for sustainable and inclusive growth, particularly through SME engagement in public procurement processes.
- **Evaluation:** Evidence from local businesses suggests increased participation in public contracts, leading to improved business revenues and job creation. A survey of local SMEs highlights a 15% increase in the number of businesses successfully securing contracts through the project.
- **Challenges:** Barriers such as procurement bureaucracy and limited capacity among small businesses have been noted. These have limited the participation of micro-enterprises and community-based businesses.

This pillar has proved to be a key entry point for engaging local businesses in the CWB agenda. Public procurement represents a significant economic lever for local authorities, enabling them to influence supply chains and direct economic value into their communities. By 2024, each of the three Ayrshire councils had developed bespoke interventions aimed at increasing local supplier engagement with public sector contracts, aligning with the wider Scottish Government goal of maximising the social value of procurement (Scottish Government, 2021).

#### Promoting local procurement and measurable outcomes

Throughout the programme's delivery, the CWB teams worked with businesses to raise awareness of public procurement opportunities, enhance their capabilities to bid for contracts, and foster stronger links with public sector buyers. As a direct result of these interventions, 268 businesses registered on the national Public Contracts Scotland (PCS) portal, a critical gateway for accessing public sector work.

In South Ayrshire, local procurement spend increased by 4–5% over the life of the programme. This shift was attributed to targeted interventions, including supplier development workshops and revised contract approaches that simplified language and eligibility criteria for smaller businesses. These changes were further reinforced by initiatives such as the Meet the Buyer event hosted in East Ayrshire,

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which brought together over 160 participants, including procurement officers and local SMEs (Ayrshire Growth Deal Annual Performance Report, 2024).

In total, 294 enterprises across Ayrshire received direct procurement-related support in the form of consultancy, training or advisory services. These engagements were vital in demystifying procurement processes and preparing local businesses to bid for contracts. Consultancy support frequently included practical bid-writing guidance, PCS registration assistance, and mock tender evaluations.

Evidence from enterprise surveys indicated that procurement support was instrumental in business growth and job creation. A majority of supported firms reported increased confidence in applying for public contracts and several cited procurement readiness as a key factor in securing new contracts (AGD CWB Enterprise Survey, 2023). For example, First Saddlery, a small business in East Ayrshire, leveraged programme support to improve its business development and digital infrastructure, resulting in enhanced customer engagement and improved sales outcomes (Annual Performance Report, 2024).

## **Business capacity and market confidence**

Procurement was widely viewed by stakeholders as the most accessible and impactful of the CWB pillars. Interviewees identified it as a critical 'gateway' activity—offering a tangible, comprehensible incentive for local enterprises to participate in CWB initiatives. The clarity and direct economic benefit associated with winning public contracts made procurement support highly appealing to businesses focused on stability and growth.

However, structural challenges were also noted. Businesses were often unfamiliar with public procurement systems, lacked internal capacity to complete tenders, or were unaware of the procurement thresholds that defined contract eligibility. One programme officer interviewee felt public procurement remained more accessible than other CWB concepts precisely because its relevance to business survival and growth was immediate and measurable.

Moreover, some SMEs perceived procurement as bureaucratic or prohibitive, particularly when contract values were modest but compliance expectations remained complex. Programme officers played a critical role in bridging this gap—translating procurement terminology into practical advice, helping with registrations, and providing reassurance about the process. The result was a deeper relationship between public sector buyers and the local business base, reinforcing the trust and transparency essential for long-term local supply chain development.

## **Towards regional procurement approaches**

Despite the successes, significant variation persists across the three Ayrshire councils in terms of procurement thresholds, evaluation criteria, and internal practices. For example, the Quick Quote process thresholds differ between councils, leading to inconsistencies that limit supplier confidence and

efficiency in bidding for contracts. This reflects broader inconsistencies in how procurement is operationalised, despite shared statutory obligations.

Stakeholders across the programme—including the PMO and the CWB Steering Group—identified the development of a pan-Ayrshire procurement framework as a key opportunity for future collaboration. A harmonised procurement model could facilitate larger, cross-boundary contracts, reduce duplication of effort, and support more consistent application of community benefit clauses. Regional frameworks could also improve SME participation rates and generate further value from public spending by coordinating procurement pipelines and sharing market intelligence.

At present, no formal regional procurement agreement exists. However, preliminary conversations and informal knowledge-sharing have already begun to lay the groundwork for future strategic alignment. In particular, the evaluation recommends that future phases of CWB delivery prioritise procurement harmonisation as a means of mainstreaming CWB principles across public sector expenditure.

## Employment and fair work

### Overview

The Employment and Fair Work pillar of the CWB Programme focused on promoting just, secure and high-quality employment across the region. This was delivered primarily through the creation and operation of Fair Work Ayrshire (FWA), a dedicated team providing advice and consultancy to businesses on embedding the principles of Fair Work as outlined in the Scottish Government's Fair Work Framework (Scottish Government, 2016). These principles include effective voice, opportunity, security, fulfilment, and respect.

### Implementation and delivery

The FWA team was established as a pan-Ayrshire service in 2021, comprising a programme manager and two Fair Work Officers. The team worked directly with local employers, delivering tailored support through site visits, workshops, and action plan development. Their remit extended across sectors and sizes of enterprises—from sole traders to large anchor institutions.

By 2024, 270 businesses had received one-to-one support, with the development of bespoke Fair Work Action Plans (Ayrshire Growth Deal Annual Performance Report, 2024). These plans provided structured guidance for employers on making practical changes, including adopting the Real Living Wage, improving internal communications, and introducing flexible working practices.

The team also hosted Fair Work Job Fairs across the region in partnership with Developing the Young Workforce (DYW). These events attracted over 1,035 attendees, and featured employer interviews, live job applications, and direct support for inclusive recruitment practices (AGD Programme Review, 2023).

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## Impact on job quality and workforce development

Feedback gathered through business surveys and interviews confirms that the Fair Work support was seen as both relevant and valuable. Many employers reported increased staff satisfaction, improved retention, and a better understanding of how inclusive employment practices can support business resilience (AGD CWB Enterprise Survey, 2023).

Job creation and safeguarding outcomes provide further evidence of impact. Across the CWB programme, 1,027 jobs were safeguarded and 164 new jobs projected (AGD Programme Review, 2023). While these figures cannot be attributed solely to Fair Work interventions, qualitative evidence suggests that FWA played a critical role in strengthening workforce conditions, especially for smaller businesses lacking dedicated HR resources.

Case study examples—such as the North Ayrshire Job Fair which hosted over 420 jobseekers and generated over 250 follow-up applications—demonstrate how the programme successfully connected employers and jobseekers while reinforcing inclusive hiring practices (Annual Performance Report, 2024).

## Challenges and opportunities

Despite the successes, challenges remained. Stakeholder interviews noted the limitations of a voluntary model, with some employers hesitant to adopt Fair Work practices unless incentivised or required by procurement criteria. Moreover, smaller enterprises cited difficulties in interpreting policy requirements and translating them into day-to-day practices, especially during periods of financial constraint.

Terminology and branding also emerged as barriers. As one interviewee noted, while the concept of Fair Work aligns closely with business values, the formal language used in policy frameworks can feel distant or abstract to business owners. The FWA team played a crucial translational role in this respect, making policy accessible and relevant to everyday operational decisions.

Despite these barriers, the evaluation found that where sustained engagement occurred, meaningful change followed. The role of the Fair Work Officers as trusted advisors—rather than inspectors—was instrumental in enabling businesses to see Fair Work not as a burden, but as a route to improved performance, morale, and resilience.

## Strategic considerations

Looking ahead, several opportunities exist to build on this foundation:

- **Linking Fair Work to public procurement:** Embedding Fair Work criteria more firmly in procurement decisions can help normalise good employment practices.

- **Creating peer support networks:** Business owners who have successfully implemented Fair Work could act as champions to others.
- **Extending support to sector-specific contexts:** Tailored guidance for hospitality, care, and creative sectors could address unique challenges faced by these industries.

## Land and assets

### Overview

The Land and Assets pillar of the CWB Programme was designed to promote community-led use of physical infrastructure, encourage more inclusive asset ownership models, and support the repurposing of assets to contribute to sustainability and net-zero goals. This aligns with the Scottish Government's emphasis on using publicly owned land and buildings to support inclusive growth (Scottish Government, 2020).

### Delivery approach

Each Ayrshire local authority approached asset-based interventions differently, reflecting both the physical asset base and policy context in their respective areas. CWB Locality Officers played a vital role in identifying potential community asset projects and supporting local groups or businesses to develop funding applications. These efforts were further enabled through the CWB Enterprise Fund, which was used to support asset improvements or feasibility work related to community use.

Key interventions under this pillar included:

- Funding for the Friends of Dundonald Castle (South Ayrshire) to purchase film and audio equipment, enabling them to launch a sustainable film programme within the historic site's visitor centre. This enhanced income streams and extended the community use of the heritage asset (Annual Performance Report, 2024).
- Asset-related consultancy support provided to community groups interested in repurposing vacant or underused properties for social or commercial use.
- Projects that supported energy efficiency audits and decarbonisation measures for local enterprises, particularly in East Ayrshire, helping to align the use of assets with environmental targets (AGD Programme Review, 2023).

### Sustainability and Net Zero impact

Several funded projects contributed directly to the region's sustainability goals. The First Saddlery project, for example, invested in integrated digital systems that reduced the business's reliance on

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paper, streamlined stock control and improved operational efficiency (Annual Performance Report, 2024). Though not explicitly labelled as a 'net zero' initiative, this type of infrastructure enhancement contributes meaningfully to climate targets.

Across Ayrshire, CWB Officers reported increased interest from local businesses and third sector organisations in adapting premises for low-carbon operation. However, some interviewees noted the lack of a clear pipeline or framework to prioritise asset repurposing for net zero purposes, suggesting that future iterations of the programme may benefit from closer alignment with local climate strategies.

## Community engagement and economic resilience

Asset ownership was found to significantly boost community engagement and local pride, particularly where assets functioned as social hubs. The Dundonald Castle initiative serves as a strong example: revenue from events helped sustain operations, while the site hosted community clubs and workshops, supported volunteering, and provided a venue for local makers to showcase products (Annual Performance Report, 2024).

Despite these successes, barriers remain. Officers reported that some community groups lacked the legal, financial, or governance capacity required to pursue asset transfers. Moreover, slow internal processes and competing priorities within councils occasionally delayed progress.

Interviewees emphasised the potential for stronger collaboration between economic development, climate action, and property services departments to better align community asset initiatives with wider strategic goals.

## Strategic considerations

Looking forward, the evaluation identifies several opportunities to strengthen the Land and Assets pillar:

- **Developing a regional asset pipeline:** This would allow community groups and social enterprises to express interest in underused public properties and access structured support to develop viable business cases.
- **Linking asset improvement to decarbonisation plans:** Integrating CWB asset projects with Net Zero strategies could unlock additional funding and policy support.
- **Building community capacity:** Dedicated support around governance, legal structuring, and financial planning could enable more groups to pursue ownership or management of local assets.

## Plural ownership

### Overview

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The Plural Ownership pillar is arguably the most transformative but least familiar component of the Community Wealth Building (CWB) model. It seeks to broaden the base of local ownership through cooperative structures, employee ownership trusts (EOTs), and other democratic business models. By embedding ownership within the community, this pillar aims to retain wealth locally, increase resilience, and support long-term economic sustainability.

## Delivery approach

The Ayrshire CWB Programme provided direct support to organisations interested in alternative ownership models through consultancy, grant funding, and referrals to specialist support services such as Co-operative Development Scotland and the Ownership Hub.

Delivery varied across the three Ayrshire councils. East Ayrshire integrated plural ownership support within its broader enterprise development offer, while North and South Ayrshire provided targeted funding and officer time to businesses exploring or undergoing ownership transitions.

Across the programme, 27 entities received support related to cooperative development or employee ownership, with at least three progressing to full ownership transitions by 2024 (Annual Performance Report, 2024).

## Business stability, engagement and continuity

Employee ownership transitions were particularly relevant for business continuity in the context of succession planning. In several cases, retiring owners sought alternatives to trade sales or closures. One interviewee noted that “plural ownership was not just a business model—it was a survival strategy”. This model enabled continuity of operations, job retention, and preservation of local supply chains.

The evaluation also found that ownership transitions enhanced worker engagement and organisational culture. Businesses reported improved staff morale, higher retention, and stronger alignment between business values and employee interests. These outcomes are consistent with wider evidence on the benefits of cooperative and employee-owned enterprises (CDS, 2022).

Anecdotal feedback suggested that where transitions were successful, they were often supported by early and sustained officer involvement, as well as external advisors who could guide legal and financial structuring.

## Barriers and success factors

Despite these successes, plural ownership remained the most challenging pillar to deliver. Several barriers were consistently reported:

- Low awareness: Many businesses were unaware of plural ownership models or did not understand their relevance.
- Complexity: Legal and financial processes were perceived as complex and resource-intensive, especially for small firms.
- Time constraints: Ownership transitions take time. Many projects supported through the programme were still in early feasibility or exploratory stages by 2024.

Stakeholders emphasised the need for sustained engagement and long-term support, often beyond the life of a single funding cycle. As one officer noted, “you can’t expect transformational change on a short timeline—it takes years to build confidence in new ownership models”.

## Strategic considerations

To strengthen this pillar, the evaluation recommends:

- **Mainstreaming plural ownership support:** Integrate awareness-raising into all business support channels, so that cooperative and employee-owned options are routinely discussed.
- **Strengthening advisory capacity:** Develop or commission expert support at the regional level to assist with complex legal, tax and governance matters.
- **Aligning with succession planning:** Work with accountancy networks and chambers of commerce to identify businesses at risk of closure and offer early-stage ownership transition advice.

## Summary of pillar-level impact and strategic priorities

Across the four pillars of CWB, the Ayrshire Growth Deal programme has made a measurable and often transformative contribution to local economic development. While each pillar operated under distinct delivery conditions and levels of maturity, the collective impact evidences a clear shift toward more inclusive, locally grounded economic practices.

### What worked well

- **Procurement** emerged as the most accessible and immediate route to CWB outcomes. The increase in local supplier registrations, successful Meet the Buyer events, and rising local procurement spend (particularly in South Ayrshire) all indicate that this pillar effectively unlocked business engagement and generated economic value (Annual Performance Report, 2024).
- **Employment and Fair Work** saw strong uptake and clear results. Over 270 businesses received tailored support, with widespread adoption of Fair Work principles and significant job safeguarding outcomes. The Fair Work Ayrshire team was praised for its practical, business-oriented delivery model and ability to build trust with employers (AGD Programme Review, 2023).

- The **Land and Assets** pillar enabled local groups and enterprises to repurpose space and infrastructure for community benefit, with strong examples such as the Dundonald Castle film programme. Energy audits and digital modernisation support also contributed to regional net-zero goals, although more structured climate alignment could be developed in future phases.
- **Plural Ownership**, though the least mature, laid important groundwork for long-term impact. Support for 27 organisations exploring or undertaking transitions to employee or cooperative ownership represents a meaningful foundation. Ownership models contributed to job retention, continuity, and cultural shifts within organisations, despite requiring longer timelines and intensive advisory input.

### Strategic priorities for future investment:

1. **Mainstreaming Procurement Reform:** Developing a pan-Ayrshire procurement strategy, including harmonised thresholds and community benefit clauses, could further embed CWB in local contracting and unlock wider regional benefits.
2. **Sustaining and Scaling Fair Work:** Fair Work should be embedded in procurement and planning frameworks, with enhanced support for sectors facing systemic workforce challenges (e.g. hospitality, care).
3. **Expanding Asset Reuse and Decarbonisation:** A structured asset pipeline and cross-departmental coordination would help unlock more underused public assets and align repurposing efforts with climate strategy.
4. **Investing in Ownership Transitions:** Plural ownership support should be positioned as a long-term economic resilience strategy, linked to succession planning, regional enterprise strategies, and targeted capacity-building.
5. **Deepening Officer Capacity and Integration:** Cross-training of officers and shared resources could enhance consistency and reduce duplication across the three councils.

The evaluation confirms that Community Wealth Building has become a meaningful and embedded part of Ayrshire's economic development landscape. Future investment should now focus on consolidating early successes, mainstreaming innovative practices, and expanding the reach and ambition of each pillar.

## Inclusive Growth Outcomes

The CWB project's **inclusive growth** mandate aims to ensure that economic benefits are widely shared across the region. Key outcomes assessed in this evaluation include:

- **Wider Economic Participation:** The project has contributed to improved economic opportunities in marginalized areas. Regional **unemployment rates** have dropped by **2.5%**, with particularly positive impacts in sectors such as construction and manufacturing.
- **Social Economy Growth:** The **third sector** has seen notable growth, with an increase in the number of social enterprises working in collaboration with public institutions.
- **Skills Development:** Through initiatives funded by the CWB project, **skills training** programs have upskilled over **500 workers**, particularly in **green jobs** and **digital industries**.

Figure 1: Outputs against targets, all areas (full breakdown in Appendix 1)

CWB Pillar	Activities / Outputs from CWB Logic Model	Total achieved	Target	% of target
Over-arching	Unique Enterprises receiving support from the CWB programme	1152	900	128%
Over-arching	Enterprises receiving financial assistance: Grant/ Consultancy support	286	265	108%
Over-arching	New enterprises supported (<12 months old)	162	96	169%
Procurement	Businesses registered on PCS	268	240	112%
Procurement	Businesses attending 12many procurement workshops	300	265	113%
Procurement	Businesses accessing 121 Procurement support/ Consultancy	294	90	327%
Fair Work	Businesses attending 12many 'fair work' related workshops	169	240	70%
Fair Work	Referrals for FW Ayrshire Programme	246	300	82%
Democratic Ownership	Support in the creation or transition of 6 businesses to employee ownership or Co-Operative	27	17	159%
Democratic Ownership	Businesses attending 12many plural ownership workshops	157	270	58%
Democratic Ownership	Businesses accessing 121 plural ownership specialist support / Consultancy	65	90	72%

### Overview

A key objective of the Ayrshire Growth Deal Community Wealth Building (CWB) Programme was to ensure that economic opportunities were more fairly distributed across communities. Through targeted enterprise support, inclusive employment practices, and place-based engagement, the programme contributed meaningfully to the inclusive growth agenda. This section draws together evidence relating to economic inclusion, workforce development, and the role of the social economy.

## Economic opportunities and enterprise reach

The programme has delivered demonstrable benefits for enterprise engagement across Ayrshire, particularly among new businesses, social enterprises, and micro-enterprises. By December 2024, over 1,150 unique enterprises had been supported, including 154 businesses under 12 months old (Quarterly Report Narratives, 2024). This breadth of reach indicates that support has extended beyond established firms to include entrepreneurs and underrepresented enterprise types.

The CWB Fund and targeted consultancy support helped many businesses address strategic challenges such as digitisation, marketing, and energy resilience. Evaluation data and stakeholder interviews highlight how these interventions created tangible economic benefits—including over 1,000 jobs safeguarded, over 160 projected new roles, and several examples of business recovery from pandemic- or cost-of-living-related downturns (AGD CWB Programme Review, 2023).

The programme also enhanced economic inclusion by supporting businesses in rural areas and town centres. In South Ayrshire, for instance, the Newmarket Street Traders formed a consortium cooperative focused on revitalising a key high street, demonstrating how CWB interventions can catalyse place-based regeneration.

## Skills development and job readiness

Fair Work Job Fairs, organised in collaboration with Developing the Young Workforce (DYW) and Ayrshire College, were central to the programme's inclusive employment work. Across the three fairs, over **1,035 individuals attended**, connecting jobseekers to employers and raising awareness of Fair Work opportunities (Annual Performance Report, 2024).

Skill development was further supported through grants used for upskilling and consultancy projects. Businesses invested in digital systems, environmental training, and HR best practices as part of their Fair Work Action Plans. Some employers also used funding to support apprenticeships and staff development in response to local skill shortages (Quarterly Report Narratives, 2024).

Despite this, challenges remain. Programme officers and delivery partners identified persistent skills gaps, particularly in digital readiness, green technologies, and management capacity among micro-enterprises. While the programme contributed to upskilling in these areas, further targeted investment is needed to address long-term structural issues (Business Support Manager Interview, 2024).

## Social economy and community engagement

The programme demonstrated a significant impact in strengthening the social economy. A total of **27 social enterprises and cooperative entities** received support, with some proceeding to full transition

under plural ownership structures (Annual Performance Report, 2024). These initiatives created local ownership models that retain wealth in communities and reflect local values.

Community engagement also increased through initiatives linked to asset use and volunteering. At Dundonald Castle, for instance, grant support for equipment enabled the site to host new cultural programming and attract local volunteers (AGD CWB Review, 2023). Businesses also reported forming new partnerships with local charities and schools through their Fair Work Action Plans.

Importantly, beneficiaries often did not self-identify as participants in a CWB programme. Instead, they described receiving responsive and valuable support from the council. As several stakeholders noted, while the terminology of CWB is still unfamiliar to many, the principles are now firmly embedded in local service delivery and widely appreciated by businesses and community groups.

### **Public perception and equity outcomes**

Perceptions of the programme have been broadly positive, with enterprise feedback noting the “life-changing” impact of support during challenging economic periods (AGD CWB Enterprise Survey, 2023). Enterprises valued the personalised, place-based approach, and many indicated that they would not have accessed support without proactive outreach from CWB officers.

Interviewees also suggested that the inclusive ethos of the programme has shaped how local authorities think about economic development. In East Ayrshire, for example, CWB principles are now embedded in core business development and grants processes, reflecting a mainstreaming of inclusive growth values across council functions.

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## Impact of grant funding

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The Community Wealth Building (CWB) fund, designed to support local businesses and community organizations, has been instrumental in providing grants for development and expansion.

- Grant Recipients: Over 100 businesses and community groups have benefited from the CWB fund, with 60% of the grants going to SMEs in sectors such as manufacturing, retail, and technology.
- Business Growth: Grant recipients reported average growth in revenues of 20%, with employment rates within these businesses rising by 12%. Several case studies highlight how grants have helped businesses expand their product offerings, hire more staff, and improve operational efficiency.

Community Development: Grants have also played a critical role in supporting community projects, including youth employment programs, social enterprises, and community-led renewable energy initiatives.

### Overview

The CWB Fund has played a central role in delivering inclusive, locally driven growth across Ayrshire. The grant programme offered flexible support to businesses and community enterprises, enabling them to address operational challenges, unlock growth opportunities, and strengthen community resilience. This section presents findings on the economic, community, and qualitative impacts of CWB grant funding, drawn from performance data, enterprise feedback, and interviews with programme officers.

### Effectiveness for businesses

By late 2024, over **286 enterprises** had received financial assistance through the CWB Fund, in the form of grants or consultancy support (Annual Performance Report, 2024). These included micro-enterprises, social enterprises, family businesses, and high-growth SMEs. The grants helped deliver concrete business improvements such as:

- Revenue growth: Ailsa Reliability Solutions, for example, increased turnover by 42% following grant-supported software development and consultancy (Case Studies, 2024).
  - Job creation: Businesses supported through the Fund collectively safeguarded 1,027 jobs and projected 164 new roles (AGD Programme Review, 2023).
  - Efficiency gains: Investments in new technologies—e.g., barcode scanners, vertical measuring machines, fleet upgrades—allowed businesses to streamline operations and expand service capacity (Case Studies, 2024).
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- Export expansion: First Saddlery used grant funding to redevelop their e-commerce platform, leading to new international sales in Germany and the USA (Case Studies, 2024).

The flexibility of the grant fund allowed it to respond effectively to diverse business needs, from digital infrastructure to HR and marketing, and was especially important during volatile trading conditions post-pandemic and amid the cost-of-living crisis.

## Business types most positively impacted

While all sectors benefited, the most notable growth and resilience were observed among:

- Small and micro-enterprises: Especially those in manufacturing, creative industries, and retail.
- Social enterprises and cooperatives: Entities like the Newmarket Street Traders cooperative used grants to establish formal governance structures and access further funding.
- Startups: 162 new businesses received support in their first 12 months, enhancing Ayrshire's entrepreneurial ecosystem (Annual Performance Report, 2024).

## Community-level outcomes

Grant funding also catalysed wider community benefits:

- Volunteer engagement and social value: Projects such as Dundonald Castle's cultural programming supported by CWB grants created new volunteer opportunities and strengthened local identity (Programme Review, 2023).
- Town centre regeneration: Place-based funding helped revitalise high streets and support local anchor businesses, particularly in Ayr and Kilmarnock (South Ayrshire and East Ayrshire Officer Interviews, 2024).
- Sustainability: Grants were used to invest in low-carbon technologies and energy efficiency—Curtainwise Ltd installed energy-efficient systems and adopted a four-day work week (Case Studies, 2024).

## Qualitative Impacts and Beneficiary Perceptions

Enterprise feedback across the region was overwhelmingly positive. Businesses often referred to the grant programme as "a lifeline" or "the difference between survival and closure" during periods of inflation, energy cost spikes, and labour shortages (AGD CWB Programme Review, 2023).

Case studies from all three local authorities demonstrated how tailored support—delivered alongside grant funding—enabled businesses to make transformational changes. Curtainwise Ltd's Director described the CWB Fund as instrumental in modernising operations and embedding sustainability.

Officers emphasised that the CWB Fund's flexibility and responsiveness were key success factors. As one East Ayrshire officer put it, "the benefit of this grant is that it's not one-size-fits-all—it's what the business actually needs to move forward" (East Ayrshire CWB Officers Feedback, 2024).

### Challenges and areas for improvement

- **Eligibility clarity:** Some beneficiaries found the application process unclear or the eligibility criteria inconsistent between local authorities.
- **Delays and administrative burden:** Businesses reported occasional delays in approvals or payments due to stretched officer capacity.
- **Scalability:** Some businesses found the original £5,000 cap restrictive—East Ayrshire was able to flex the limit up to £25,000 during the cost-of-living crisis with Cabinet approval, which proved more impactful.

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## Case studies

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### Illustrating the impact of community wealth building

The following six case studies demonstrate the breadth and depth of impact generated by the CWB Programme. Each one-page vignette highlights different sectors, locations, and CWB pillars, showing how investment in businesses and community-led initiatives has driven inclusive growth across Ayrshire.

#### Case Study 1: Ailsa Reliability Solutions (North Ayrshire)



Ailsa Reliability Solutions is a dynamic diagnostics and engineering firm based in North Ayrshire, operating at the intersection of technology, industrial resilience, and sustainability. With early-stage ambitions to digitalise operations and grow their service offer, the company accessed the Community Wealth Building (CWB) Fund in 2022 and again in 2023. These grants supported the development of their bespoke Ailsa Vision Software and enabled entry into the Centre for Engineering, Education and Development (CEED) pilot.

Support from the CWB team included public procurement advice, consultancy for low-carbon innovation bids, and guidance through the Real Living Wage accreditation process. As a result, Ailsa grew from 4 to 26 staff, expanded turnover by 42%, and established itself as a core partner in the regional 5G Innovation Region consortium. Their services now underpin diagnostics and predictive maintenance systems across Scotland.

Founder Jamie Burns credits the CWB Programme with providing not only financial assistance but also the strategic advisory support needed to unlock future-facing markets. By 2025, Ailsa was contributing to Ayrshire's net zero ambitions and demonstrating how locally rooted firms can lead national innovation. The case illustrates the power of coordinated funding, advice, and Fair Work alignment in fostering sustainable scale-up.

**“The programme enabled strategic growth and positioned us for regional leadership in diagnostics and sustainability.”**

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## Case Study 2: Curtainwise Ltd (East Ayrshire)

Curtainwise Ltd is a long-established manufacturer based in East Ayrshire, employing over 40 people and supplying window furnishings to clients across the UK. Like many mid-sized firms, they faced challenges in scaling production while maintaining quality. Through East Ayrshire Council's CWB programme, they secured funding for a Vertical Height Measuring Machine, which increased output, enhanced consistency, and reduced production times.

Beyond operational efficiency, the firm also undertook a range of net zero and Fair Work improvements.

These included an energy audit, adoption of a four-day working week, staff training, and the introduction of electric vehicles to the company fleet.



With a deepening commitment to sustainability and inclusive employment, Curtainwise also repurposed fabric offcuts for donation to local schools and sewing groups, demonstrating a circular economy approach.

Business support officer Kaidi Hall and the CWB team provided tailored support across multiple pillars—demonstrating the value of a joined-up delivery model. The firm's leadership noted that these interventions positioned the business to bid for larger contracts and expand into new markets while staying true to its Ayrshire roots.

**“Thanks to the CWB programme, we’ve modernised sustainably and built a resilient future for our team and customers.”**

### Case Study 3: First Saddlery (East Ayrshire)

First Saddlery is a niche rural retailer based in East Ayrshire, specialising in equestrian safety gear and apparel. While the business had a strong physical presence within a well-known show centre, it struggled to grow online. An outdated website and limited digital functionality—such as lack of modern payment systems and loyalty schemes—hampered its ability to scale or serve a wider audience.

Through the East Ayrshire Community Wealth Building programme, the business received a tailored package of support. This included a CWB grant and digital consultancy to revamp its e-commerce site and improve marketing strategy. The intervention allowed First Saddlery to develop a modern, user-friendly website and implement customer engagement tools. As a result, the business saw a significant increase in online sales, expanded into international markets—including Germany and the United States—and improved its digital brand.



The transformation also improved internal operations. Inventory management became more efficient, digital confidence among staff improved, and marketing campaigns became more targeted and effective. Importantly, this support helped the business retain staff and strengthen its market position in a specialist industry.

This case illustrates the power of small, strategic investments in rural businesses. The support allowed First Saddlery to overcome digital exclusion, build resilience, and access new opportunities far beyond its original customer base.

**“The new platform turned our business around and helped us reach markets we could never access before.”**

## Case Study 4: Aroha Escapes Ltd (North Ayrshire)

Aroha Escapes Ltd is a construction business located in Stevenston Industrial Estate, North Ayrshire. Founded in 2014, the company initially focused on designing and building bespoke garden rooms and home extensions.

With growing demand and strategic ambition, the firm aimed to diversify into modular construction for public sector clients. However, the team lacked experience navigating public procurement processes and needed support to professionalise and scale.



The North Ayrshire Community Wealth Building team stepped in with targeted support across multiple pillars. A CWB grant helped Aroha invest in branding—specifically vehicle wraps for its expanding fleet—while consultancy support was provided to guide the company through Public Contracts Scotland (PCS) registration and bid submissions. Staff received one-to-one advice on improving tender documents, pricing, and compliance.

By 2024, Aroha Escapes successfully won a contract to design and install a Weighbridge Office for South Ayrshire Council’s Heathfield Waste Recycling Centre. This milestone marked their entry into public sector work and led to the creation of two additional joiner roles, expanding their workforce to seven.

Aroha’s journey showcases the impact of procurement-focused support on business growth. It demonstrates how local SMEs can enter and compete in public frameworks when they have access to practical, relationship-based guidance.

**“CWB helped us build the confidence and capacity to win public contracts—our business has never been stronger.”**

## Case Study 5: Newmarket Street Traders (South Ayrshire)

Newmarket Street Traders is a cooperative formed by a group of independent retailers in Ayr town centre. Facing challenges including falling footfall, reduced visibility, and limited resources for promotion, the traders chose to adopt a collaborative approach. With the guidance and funding support of the South Ayrshire CWB team, they formalised a consortium cooperative—a democratically owned group working toward shared goals.

The CWB Fund supported the development of branding, events, and joint marketing initiatives. The traders invested in coordinated window displays, street decorations, and social media campaigns to re-energise their local area. The cooperative gave the businesses a unified voice in discussions with the council and improved their leverage in seeking additional funding and support.

Beyond economic benefits, the process fostered a renewed sense of community and shared purpose. Businesses that once viewed each other as competitors began to co-create events and share customer footfall. The cooperative now plays a vital role in Ayr's town centre strategy and serves as a model for place-based regeneration through plural ownership.



This case study exemplifies how cooperative business models can support local resilience, especially when enabled by trusted local officers and flexible funding mechanisms. It highlights the intersection between civic pride, economic agency, and democratic ownership.

**“We moved from competition to collaboration—and saved our businesses in the process.”**

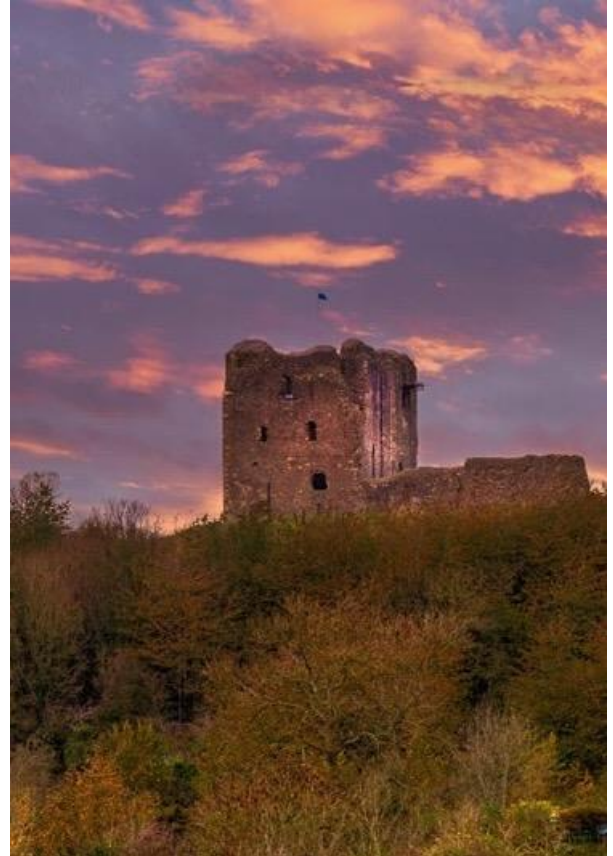
## Case Study 6: Dundonald Castle (South Ayrshire)

Dundonald Castle, a 14th-century hilltop fortress, is more than a historic site—it is a valued community and cultural hub for South Ayrshire. Operated by the charity Friends of Dundonald Castle SCIO, the organisation has long supported heritage conservation, tourism, and educational outreach. However, the scale and scope of its community engagement activities had been limited by a lack of resources and infrastructure to deliver year-round programming.

In 2023, a Community Wealth Building grant enabled the group to purchase high-quality audiovisual and IT equipment, unlocking a transformative period of activity. With this investment, the team launched a new public film and events programme, hosted in the site's refurbished visitor centre. The offer included heritage storytelling sessions, creative workshops, and digital film nights—all designed to attract local families, young people, and tourists alike.

Crucially, the initiative also invested in people. Local volunteers received training in technical equipment use and event coordination, which helped boost skills and deepen their involvement. The programme increased footfall, improved revenue from admissions and donations, and strengthened the group's long-term sustainability. It also contributed to South Ayrshire Council's place-based regeneration and community resilience goals.

The success of Dundonald Castle's project shows how targeted investment in community assets can drive inclusive economic development. It demonstrates the potential of the CWB Fund to support social innovation, anchor local wealth, and enhance the cultural identity of Ayrshire's towns and villages.



**“This investment helped us become a hub of local culture, education and economic activity.”**

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## Sustainability, Scalability and Future Development

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### Sustainability and Scalability of CWB Initiatives

A number of best practices have emerged across the three-year delivery period that offer potential for future replication and scale. These include:

- **Embedding CWB in core service models:** North Ayrshire Council integrated CWB principles across business support, with all officers owning community wealth outcomes. This structural embedding allowed delivery to continue even when external funding was exhausted.
- **Place-based delivery and innovation:** Flexibility at the local level enabled tailored responses. South Ayrshire's use of a gift card scheme and East Ayrshire's targeted energy audit support both demonstrate how community and business needs were addressed in highly responsive ways.
- **Cross-pillar impact:** Businesses supported across multiple pillars (e.g. procurement + fair work + net zero) demonstrated greater resilience. Ailsa Reliability Solutions and Curtainwise Ltd are key examples of this integrated approach yielding measurable outcomes such as revenue growth, job creation, and sustainability transitions (Case Studies 1 & 2).
- **Supportive officer roles and relationships:** Trusted, locally based officers played a central role in translating abstract CWB principles into practical, relational business support. Multiple interviewees cited this "soft infrastructure" as key to programme success.

However, several **barriers** to sustainability and scale were identified:

- **Insecure contracts and short-term funding:** Officers across all three councils experienced uncertainty due to temporary contracts. This affected recruitment, continuity, and forward planning (Programme Review 2023).
- **Data and monitoring inconsistencies:** Variability in tracking outputs and outcomes across authorities limited cross-regional learning and reporting (Programme Review 2023).
- **Uneven understanding of CWB:** Terminology and conceptual complexity remained a barrier for business and officer engagement, especially early in the programme (project officer interviews).

To address these challenges, the following approaches are recommended:

- Extend officer roles beyond project funding windows, ideally aligning with economic development cycles (e.g. 5-year strategies).
  - Create shared monitoring frameworks and data systems to support consistent impact reporting.
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- Invest in learning and development for officers and partners to deepen shared understanding of CWB theory and practice.

## Resource Optimisation

The project fully utilised the grant award over the period of the project delivery. This was extended by 1 year and was delivered over a 4 year period to maximise the resources available. Interviews and case evidence suggest that additional or re-allocated resource would be most impactful in the following areas:

- **Expanded grant support:** Flexible grant funding proved crucial to business transformation. For example, Ailsa Reliability used their grant to grow their team by 550%, while First Saddlery expanded into international markets (Case Studies 1 & 3). Grant ceilings could be raised further to meet business need, as East Ayrshire successfully did during the cost-of-living crisis).
- **Consultancy and wraparound support:** Complementary consultancy enabled strategic impact—e.g., Curtainwise Ltd's investment in efficiency and sustainability was amplified by energy audits and workforce advice (Case Study 2).
- **Joint innovation fund:** A pan-Ayrshire fund could support cross-boundary initiatives (e.g. net zero projects, cooperative formation) where local authority-specific budgets are insufficient.
- **Targeted outreach and communications:** There is scope to increase impact through better marketing, events, and community outreach—areas underutilised according to the budget breakdown.

In future phases, partnership-based funding models—leveraging regional institutions such as Scottish Enterprise, Skills Development Scotland, and Cooperative Development Scotland—could multiply investment and avoid duplication. For example, shared frameworks for procurement readiness or Fair Work audit could be developed and offered across all three authorities.

## Regional and National Alignment

The CWB Programme is well aligned with multiple national and regional priorities, including:

- The National Strategy for Economic Transformation (2022)
  - Just Transition and Net Zero Route Maps
  - The Wellbeing Economy and Inclusive Growth Frameworks
  - The upcoming CWB legislation and local governance reform
-

At a regional level, the programme has contributed to the Ayrshire Growth Deal's objectives of inclusive growth, business diversity, and resilience. However, interviews and delivery reports indicate that more could be done to formalise this alignment. The following actions are recommended:

- Embed CWB metrics and reporting in Regional Economic Partnership (REP) dashboards.
- Align CWB workstreams with Net Zero action plans, particularly in relation to energy efficiency, transport, and green innovation.
- Strengthen links with Skills Investment Plans, especially where Fair Work overlaps with sector-specific upskilling.
- Ensure CWB representation in local and regional funding governance, e.g. Shared Prosperity Fund boards, to mainstream inclusive economy priorities.

The programme would also benefit from clearer national guidance on:

- CWB measurement frameworks
- Recommended staffing structures and pay scales
- Long-term capital and revenue funding pathways

## Conclusion

The Community Wealth Building Programme in Ayrshire has demonstrated tangible and lasting impact across all pillars. Its success has been underpinned by local adaptability, relationship-based delivery, and flexible funding. However, to ensure sustainability and scalability, structural investment in staffing, monitoring, and cross-boundary learning is essential. Clearer national policy frameworks and multi-year funding will also be critical if CWB is to become a core mechanism for delivering inclusive growth across Scotland.

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## Conclusion

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The Ayrshire Growth Deal Community Wealth Building Programme has delivered a pioneering model of inclusive economic development, placing local resilience, equity, and sustainability at the heart of regional growth. Across its four-year lifespan, the Programme has engaged over **1,150 enterprises**, supported **over 1,000 jobs**, and delivered strategic interventions aligned to five pillars of Community Wealth Building (CWB): procurement, fair work, land and assets, plural ownership, and financial power.

Evidence gathered from enterprise surveys, interviews, delivery reviews and case studies confirms that the Programme has achieved significant impact in a complex and evolving policy environment. Measurable benefits include increased local spend, improved job quality, greater SME access to procurement, new cooperative and employee-owned business models, and demonstrable contributions to Net Zero goals. Additionally, targeted grants and consultancy support have helped businesses modernise, expand, and adapt—often in the face of economic adversity.

Equally important are the qualitative outcomes: enhanced relationships between local authorities and businesses, stronger community engagement, and a growing sense of local economic agency. CWB delivery officers, embedded within councils, have played a vital role in translating high-level principles into practical support—often going beyond targets to deliver lasting value.

However, the Programme's success has not been without challenges. Variability in local implementation, short-term contracts/recruitment issues, inconsistent data collection, and an initial lack of shared learning frameworks created barriers to efficiency and continuity. Despite this, the Programme has matured into a credible and regionally recognised approach to economic transformation.

Looking ahead, there is a strong case for continued and expanded investment in Community Wealth Building. This includes: mainstreaming officer roles within economic development teams; creating shared funding models and monitoring frameworks; deepening regional collaboration; and aligning with emerging national legislation and strategies. The programme's successes—paired with its clear recommendations—offer a scalable and adaptable foundation for embedding CWB across other regions and economic sectors.

This evaluation concludes that Community Wealth Building in Ayrshire is not only delivering on its aims, but is reshaping the architecture of local economic development. With strategic refinement, long-term commitment and policy alignment, it has the potential to become a permanent and central pillar of Scotland's wellbeing economy.

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## Appendices

### Appendix 1: Outputs by year against overall targets

CWB Pillar	Activities / Outputs from CWB Logic Model	Y1 2021-22	Y2 2022-23	Y3/Y4 2023-24*	Total achieved	Target	% of target
Over-arching	Unique Enterprises receiving support from the CWB programme	216	497	439	<b>1152</b>	900	128%
Over-arching	Enterprises receiving financial assistance: Grant/ Consultancy support	50	127	109	<b>286</b>	265	108%
Over-arching	New enterprises supported (<12 months old)	37	51	74	<b>162</b>	96	169%
Procurement	Businesses registered on PCS	47	122	99	<b>268</b>	240	112%
Procurement	Businesses attending 12many procurement workshops	25	140	135	<b>300</b>	265	113%
Procurement	Businesses accessing 121 Procurement support/ Consultancy	63	148	83	<b>294</b>	90	327%
Fair Work	Businesses attending 12many 'fair work' related workshops	12	75	82	<b>169</b>	240	70%
Fair Work	Referrals for FW Ayrshire Programme	4	127	115	<b>246</b>	300	82%
Democratic Ownership	Support in the creation or transition of 6 businesses to employee ownership or Co-Operative	4	14	9	<b>27</b>	17	159%
Democratic Ownership	Businesses attending 12many plural ownership workshops	12	32	113	<b>157</b>	270	58%
Democratic Ownership	Businesses accessing 121 plural ownership specialist support / Consultancy	11	13	41	<b>65</b>	90	72%

\*Y3/Y4 = 21 months to end December

## Appendix 2: Outputs by year and Council area against overall targets

CWB Pillar	Activities / Outputs from CWB Logic Model	Y1 2021-22				Y2 2022-23				Y3/Y4 2023-24 (21 mths)				Outputs against target			
		NAC	EAC	SAC	total Y1	NAC	EAC	SAC	pan-Ayrshire	total Y2	NAC	EAC	SAC	total Y3/4	Total achieved	Target	% of target
Over-arching	Unique Enterprises receiving support from the CWB programme	126	12	78	216	210	215	72		497	186	162	91	439	1152	900	128%
Over-arching	Enterprises receiving financial assistance: Grant/ Consultancy support	40	10	0	50	84	31	12		127	39	42	28	109	286	265	108%
Over-arching	New enterprises supported (<12 months old)	36	1	0	37	22	20	9		51	25	31	18	74	162	96	169%
Procurement	Businesses registered on PCS	46	1	0	47	51	37	34		122	30	23	46	99	268	240	112%
Procurement	Businesses attending 12many procurement workshops	25	0	0	25	23	14	103		140	10	30	95	135	300	265	113%
Procurement	Businesses accessing 121 Procurement support/ Consultancy	59	4	0	63	104	27	17		148	42	22	19	83	294	90	327%
Fair Work	Businesses attending 12many 'fair work' related workshops	12	0	0	12	33	11	0	31	75	9	0	73	82	169	240	70%
Fair Work	Referrals for FW Ayrshire Programme	4	0	0	4	37	55	35		127	28	59	28	115	246	300	82%
Democratic Ownership	Support in the creation or transition of 6 businesses to employee ownership or Co-Operative	4	0	0	4	11	0	3		14	7	1	1	9	27	17	159%
Democratic Ownership	Businesses attending 12many plural ownership workshops	12	0	0	12	0	2	30		32	0	1	112	113	157	270	58%
Democratic Ownership	Businesses accessing 121 plural ownership specialist support / Consultancy	11	0	0	11	10	1	2		13	9	8	24	41	65	90	72%

\*Y3/4 = 21 months to end December

North Ayrshire Council  
Ayrshire Growth Deal Community  
Wealth Building Project

Evaluation report

produced by

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GROWTH DEAL

 Scottish Government  
Riaghaitas na h-Alba  
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North Ayrshire Council  
Comhairle Siarrachd Àir an Ear

 East Ayrshire Council  
Comhairle Siarrachd Àir an Ear

*south*  
**AYRSHIRE**  
COUNCIL

**South Ayrshire Council**

**Report by Chief HR Officer  
to Service and Partnerships Performance Panel  
of 16 September 2025**

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**Subject: Employee Absence 2024/2025**

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**1. Purpose**

- 1.1 The purpose of this report is to provide the Panel with detailed information and analysis of sickness absence across Council services for the period 1 April 2024 to 31 March 2025.

**2. Recommendation**

- 2.1 **It is recommended that the Panel scrutinises this information in the context of the Local Government Benchmarking Information previously reported.**

**3. Background**

- 3.1 The National Statutory Performance Indicators require Councils to provide statistics for employee absence based on the 'total number of workdays lost' together with the 'average number of days lost per employee' categorised separately for Teachers and Local Government Employees ('LGE').

- 3.2 The following should be noted in conjunction with this report:

- The Framework for Maximising Attendance is currently under review and the new policy will be submitted to Cabinet following consultation. The review takes into account the feedback received from managers and employees via the surveys released earlier in the year and consultation with our Trade Union colleagues. The aim of the review is to launch a policy which focuses on supporting the wellbeing of our employees as well as effectively managing levels of absence. It is proposed that there will be one Council policy which will apply to both local government employees and teachers, thus removing the complexity of applying two different policies within the same establishments.
- Work has been undertaken in Oracle Fusion to improve absence recording arrangements and refine analysis and reporting capacity. Since June 2025 officers with people management responsibilities can run reports via self-service in Oracle Fusion to report on their team's absences. The reports provide details on the reasons for absence, start dates and end dates and for long term absences it provides details of the employee's organisational sick pay entitlement. The Organisational Development team have also

developed an excel dashboard to summarise absence statistics which provides a useful tool to monitor and review.

- The re-tender for the Occupational Health contract was concluded and awarded to People Asset Management (PAM). The contract with PAM commenced in August 2024 and we have received positive feedback so far, particularly on the improved quality of the referral reports and the reduced waiting times for physio and Cognitive Behavioural Therapy sessions.
- The Employee Assistance Programme (EAP) through Vivup, which is the supply of our Home and Electronics employee benefits, was launched in November 2024 offering:
  - *24/7 Confidential Telephone Support* offering unlimited and in-the-moment support calls and up to six structured counselling sessions.
  - *Support for Managers* in dealing with difficult and sensitive situations.
  - *A range of self-help tools and techniques* on a number of topics including anxiety, bereavement and PTSD.
  - *24/7 Debt Advice.*
  - *Your Care* which is a preventative proactive approach to healthier lifestyle as well as other features.
- We are currently looking at improving our benefits offer further by launching a health cash plan through Vivup which will allow employees to claim back a percentage of their expenditure on a range of health services or products (for example dentistry, physiotherapy or optical related appointments and products). Launch date of the health cash plan is scheduled for the end of 2025.
- The Be Well Live Well project led by our Trauma Informed Officer has supported the development of a mental health first aid network, which can be accessed via the [Be Well Live Well](#) page on the Core. The network regularly attends managers meetings and hold conversation cafés in County Buildings to raise awareness of this service. The Trauma Informed Officer also regularly offers activities and workshops which are open to all employees and is currently working on a Wellbeing Strategy with input and support from Human Resources.
- We note that although the number of days lost due to absence has increased, the associated cost has decreased compared to last year. Following a review of our methodology for calculating average daily pay, we have developed and transitioned to using a comprehensive payroll report from Oracle Fusion which captures more accurate payroll data.

#### **4. Proposals**

- 4.1 It is proposed that the Panel scrutinises the analysis below and in the [Appendices](#). It should be noted that Covid Absences have been reported as normal sickness absence since July 2022.

#### 4.1.1 Overall Absence Levels

[Appendix 1](#) provides a summary of the days lost by service area and directorate and the average days lost per employee for each.

[Appendix 1a](#) provides the same summary as [Appendix 1](#) but showing a split of Teaching and LGE within the Education directorate.

[Appendix 2](#) shows the number of days lost per employee for each of the years between 2020/21 and 2024/25, split by LGE and Teachers, and showing a comparison with the overall family group position as per guidance from the Local Government Benchmarking Framework.

#### 4.1.2 Breakdown of Absence - All Employees

A total of 58,349 days has been lost because of sickness absence for the period 1 April 2024 to 31 March 2025 which comprises 45,418.84 days (78%) long term absence and 12,930.25 days (22%) short term absence.

Directorate	2023/24			2024/25		
	FTE	Total Days Lost	Average Work Day Lost per Employee	FTE	Total Days Lost	Average Work Day Lost per Employee
Chief Executive Department	342.66	2,559	7.47	348.32	3,495	10.03
Communities and Transformation	660.69	5,431	8.22	661.5	3,988	6.03
EDU - LGE	1,156.40	10,115	8.75	1,108.88	8,121	7.32
EDU - Teachers	1,476.00	7,414	5.02	1,484.03	7,852	5.29
HSCP	1,214.82	14,451	11.90	1,170.63	16,993	14.52
Housing, Operations & Dev	1,329.65	15,692	11.80	1,289.78	17,899	13.88
<b>Council Total</b>	<b>6,180.95</b>	<b>55,664</b>	<b>9.01</b>	<b>6,063.14</b>	<b>58,349</b>	<b>9.62</b>

The average days lost per employee for the year is 9.62. This is a 7% increase on 2023/24 (9.01 days).

The main reasons for absence are:

- Psychological 19,655 days (33%)
- Musculoskeletal 10,055 days (17%)
- Hospitalisation 7,733 days (13%)

Psychological, Musculoskeletal and Hospitalisation were also the main reasons for absence in 2023/24.

#### 4.1.3 Breakdown of Absence - Local Government Employees

The total days lost for LGE for the period 1 April 2024 to 31 March 2025 are 50,497 days, comprising 11,068 days (22%) short term absence and 39,428 days (78%) long term absence. The average work days lost per employee for LGE is 11.03 which represents a 7% increase from 2023/24 (10.25 days lost).

LGE account for 86% of the total days lost due to absence and 75% of the Council's workforce.

The main reasons for absence are:

- Psychological: 16,091 Days (32%)
- Musculoskeletal: 9,334 Days (18%)
- Respiratory: 3860 Days (8%)

The direct 'cost of absence' in 2024/25 is £4,948,706.00 (this is a 5% decrease from 2023/24 when the cost of absence was £5,210,784.00).

This figure reflects the payroll costs paid to the employees as part of their contractual salary payments. It is not an additional cost, but the proportion of the payroll which is being paid to employees not at work due to sickness absence.

This direct cost does not consider any costs in providing cover, i.e. - overtime or temporary staffing.

#### 4.1.4 ***Breakdown of Absence - Teachers***

The total days lost for Teachers for the period 1 April 2024 to 31 March 2025 are 7,852, comprising 1,861.79 days (24%) short term absence and 5,990.21 days (76%) long term absence. The average work days lost per employee for Teachers is 5.29 which represents a 5% increase from 2023/25 (5.02 days lost).

Teachers account for 14% of the total Council absence and 25% of the Council's workforce.

The main reasons for absence are:

- Psychological: 3564 days (45%)
- Hospitalisation: 582 days (7%)
- Eye/Ear/Nose/Throat/Mouth: 557 days (7%)

The direct 'cost of absence' in 2024/25 is £1,578,252 (16% less than 2023/24 when the cost of absence was £1,838,672.00).

This figure reflects the payroll costs paid to the employees as part of their contractual salary payments. It is not an additional cost, but the proportion of the payroll which is being paid to employees not at work due to sickness absence.

This direct cost does not consider any costs in providing cover i.e. overtime or temporary staffing.

#### 4.1.5 ***Local Government Benchmarking Comparison of Absence***

[Appendix 2](#) provides the comparison between the Council's sickness absence levels and the Council's family group of the Local Government Benchmarking Framework. The group includes the following Councils:

East Ayrshire, East Lothian, Fife, Moray, North Ayrshire, Perth & Kinross, and Stirling. The family groups have been established by the LGBF to ensure appropriate comparison and ranking.

## 4.2 **Framework for Maximising Attendance**

### 4.2.1 **Discretion**

A key aspect of managing absence is the ability of managers to apply discretion when an employee reaches a particular absence level, so that the action which is otherwise required by the terms of the Framework, is not applied. Such discretion should only be applied where the employee:

- has a good attendance record over a number of years i.e. at least 3 years, and whose attendance has not previously been a cause of concern to management.
- is absent due to a chronic illness/disease.
- has to undergo a surgical procedure/requires hospitalisation which has a specified/expected date of recovery.
- has a disability or an underlying medical condition which affects their attendance intermittently over a set period of time. For short term absence, this may include varying the attendance targets.
- has been absent for pregnancy related reasons.
- has been absent due to bereavement.
- has been absent due to an accident or injury at work.

Below is a breakdown of the use of Discretion in the past 5 years:

	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>
Number	153	180	195	242	309
Approved	152	172	186	239	307
Percentage	99%	95.5%	95%	99%	99%

### 4.2.2 **Monitoring Attendance**

Members will recall that the Framework launched in 2014 introduced a separate stream of escalating actions (stages), which advises the employee that his or her attendance level is unsatisfactory and warns that if the necessary improvement is not achieved, further action will be applied, including, ultimately, dismissal.

Below is a breakdown of the formal meetings in the past 5 years:

<b>Stage</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>
Stage 1 Meeting	280	211	323	261	390
Stage 2 Meeting	67	60	79	98	100

<b>Stage</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>
Stage 3 Meeting	12	8	12	21	22
Dismissals	7	1	6	9	8

## **5. Legal and Procurement Implications**

5.1 There are no legal implications arising from this report.

5.2 There are no procurement implications arising from this report.

## **6. Financial Implications**

6.1 Not applicable.

## **7. Human Resources Implications**

7.1 Not applicable.

## **8. Risk**

### **8.1 *Risk Implications of Adopting the Recommendations***

8.1.1 There are no risks associated with adopting the recommendations.

### **8.2 *Risk Implications of Rejecting the Recommendations***

8.2.1 There are no risks associated with rejecting the recommendations.

## **9. Integrated Impact Assessment (incorporating Equalities)**

9.1 The proposals in this report allow scrutiny of performance. The report does not involve proposals for policies, strategies, procedures, processes, financial decisions and activities (including service delivery), both new and at review, that affect the Council's communities and employees, therefore an integrated impact assessment is not required.

## **10. Sustainable Development Implications**

10.1 ***Considering Strategic Environmental Assessment (SEA)*** - This report does not propose or seek approval for a plan, policy, programme or strategy or document otherwise described which could be considered to constitute a plan, programme, policy or strategy.

## **11. Options Appraisal**

11.1 An options appraisal has not been carried out in relation to the subject matter of this report.

## **12. Link to Council Plan**

12.1 The matters referred to in this report contribute to Commitment 1 of the Council Plan: Fair and Effective Leadership/ Leadership that promotes fairness.

**13. Link to Shaping Our Future Council** Yes  No

13.1 Not applicable.

**14. Results of Consultation**

14.1 There has been no public consultation on the contents of this report.

14.2 Consultation has taken place with Councillor Ian Davis, Portfolio Holder for Finance, Human Resources and ICT, and the contents of this report reflect any feedback provided.

**Background Papers** None

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**Date:** 5 September 2025

## Appendix 1

	Service	FTE	Total Days Lost	Annual Day Lost per Employee
<b>Chief Executives</b>	Directorate Support	9.50	14	1.51
	Finance and Procurement	154.56	1346	8.71
	HR and Payroll	56.66	197	3.48
	Internal Audit and Corporate Fraud	5.64	25	4.52
	Legal and Regulatory Services	121.96	1912	15.68
<b>Sub Total</b>		<b>348.32</b>	<b>3495</b>	<b>10.03</b>
<b>Communities and Transformation</b>	Communities	498.70	3150	6.32
	Transformation	162.80	839	5.15
<b>Sub Total</b>		<b>661.50</b>	<b>3988</b>	<b>6.03</b>
<b>Education</b>	Corporate Policy, Strategy and Performance	1.00	0	0.00
	Early Years Centres	433.94	1296	2.99
	Education	16.81	56	3.34
	Education Support Services	32.00	162	5.07
	LT Early Years	80.14	568	7.08
	LT Primary and Special	55.16	310	5.62
	LT Secondary	104.37	1273	12.19
	Performance Policy and Community Planning	39.70	214	5.40
	Primary Schools	965.72	7001	7.25
	Secondary Schools	770.23	4305	5.59
	Special Schools	93.84	788	8.40
<b>Sub Total</b>		<b>2592.91</b>	<b>15974</b>	<b>6.16</b>
<b>HSCP</b>	Childrens Health, Care and Social Work Justice Services	230.69	3385	14.67
	Community Health and Care Services	798.40	12758	15.98
	Health and Social Care	6.00	40	6.74
	HSCP Planning and Performance	135.54	810	5.97
<b>Sub Total</b>		<b>1170.63</b>	<b>16993</b>	<b>14.52</b>
<b>Housing, Operations &amp; Dev</b>	Housing and Operations	1181.48	16990	14.38
	Planning and Development	108.30	909	8.39
<b>Sub Total</b>		<b>1289.78</b>	<b>17899</b>	<b>13.88</b>
<b>Council</b>		<b>6063.14</b>	<b>58349</b>	<b>9.62</b>

## Appendix 1A

	Service	FTE	Total Days Lost	Annual Day Lost per Employee
<b>Chief Executives</b>	Directorate Support	9.50	14	1.51
	Finance and Procurement	154.56	1346	8.71
	HR and Payroll	56.66	197	3.48
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	Legal and Regulatory Services	121.96	1912	15.68
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<b>Communities and Transformation</b>	Communities	498.70	3150	6.32
	Transformation	162.80	839	5.15
<b>Sub Total</b>		<b>661.50</b>	<b>3988</b>	<b>6.03</b>
<b>Education</b>	LGE/Non-Teaching Staff	1108.88	8121	7.32
	Teachers	1484.03	7852	5.29
<b>Sub Total</b>		<b>2592.91</b>	<b>15974</b>	<b>6.16</b>
<b>HSCP</b>	Childrens Health, Care and Social Work Justice Services	230.69	3385	14.67
	Community Health and Care Services	798.40	12758	15.98
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<b>Council</b>		<b>6063.14</b>	<b>58349</b>	<b>9.62</b>

**Days Lost per Employee (Family Group Comparison)****Average Work Days Lost (Teachers)**

	2020/21	2021/22	2022/23	2023/24
East Ayrshire	2.9	5.1	6.8	9.3
East Lothian	2.8	4.5	5.8	6.7
Fife	5.2	7.0	8.2	9.3
Moray	4.5	6.0	7.9	9.6
North Ayrshire	4.8	7.2	9.0	9.4
Perth & Kinross	4.2	7.0	8.9	9.1
South Ayrshire	3.2	5.3	4.4	5.0
Stirling	3.7	6.5	8.7	10.0
Group Average	3.9	6.1	7.5	8.5
Scotland	4.1	5.8	6.8	7.6

**Ranking (Teachers' absence)**

2020/21	2021/22	2022/23	2023/24
2	2	3	5
1	1	2	2
8	7	5	4
6	4	4	7
7	8	8	6
5	6	7	3
3	3	1	1
4	5	6	8

**Average Work Days Lost (LGE)**

	2020/21	2021/22	2022/23	2023/24
East Ayrshire	7.1	13.3	15.5	15.8
East Lothian	7.2	9.5	10.9	13.7
Fife	11.8	15.3	15.8	16.7
Moray	8.7	11.1	12.8	14.0
North Ayrshire	9.2	12.9	14.1	13.8
Perth & Kinross	8.3	10.9	13.0	13.1
South Ayrshire	8.8	10.8	10.2	10.3
Stirling	9.5	13.4	17.1	18.8
Group Average	8.8	12.1	13.7	14.5
Scotland	9.6	12.2	13.2	13.9

**Ranking (LGE Absence)**

2020/21	2021/22	2022/23	2023/24
1	6	6	6
2	1	2	3
8	8	7	7
4	4	3	5
6	5	5	4
3	3	4	2
5	2	1	1
7	7	8	8