

# UHI | INVERNESS

Meeting	Finance and General Purposes Committee
Date and time	Thursday 12 June 2025 at 9.00 a.m.
Location	Virtually – via Microsoft Teams

Governance Officer

06 May 2025

## AGENDA

### Welcome and Apologies

### Declaration of Interests and/or any Statement of Connections or Transparency Statements.

## ITEMS FOR DECISION

1. **MINUTES**
  - a. Minutes of the Meeting held on 06 March 2025
  - b. Confidential Note of Meeting CN-01-032025 held on 06 March 2025
  - c. Confidential Note of Meeting CN-02-032025 held on 06 March 2025
  - d. Confidential Note of Meeting CN-03-032025 held on 06 March 2025
2. **OUTSTANDING ACTIONS**
3. **POLICIES FOR APPROVAL**
  - a) **FOI Policy**  
Report by Data Controller and Governance Officer
  - b) **UHI Student Support Funds Policy**  
Report by Admissions, Enrolment & Funding Manager
  - c) **UHI FE Fee Waiver Policy**  
Report by Director of Finance and Estates
4. **REVENUE BUDGET FOR AY 25-26**  
Report by Director of Finance and Estates
5. **CAPITAL BUDGET FOR AY 25-26**  
Report by Director of Finance and Estates
6. **MID-YEAR FORECAST RETURN**  
Report by Director of Finance and Estates

**ITEMS FOR DISCUSSION**

- 7. REVENUE AND CAPITAL BUDGET MONITORING**  
Report by Director of Finance and Estates
  - 8. ESTATE CAMPUS REPORT**  
Report by Estates and Campus Services Manager  
a.) Longman Sale Monitoring
  - 9. KPI MATRIX**  
Report by Operations and Commercial Manager
  - 10. STUDENT RECRUITMENT**  
Report by MIS Manager
  - 11. OPERATIONS AND EXTERNAL RELATIONS REPORT (CONFIDENTIAL)**  
Report by Vice Principal – Curriculum, Operations and External Relations
  - 12. COMMITTEE EVALUATION**  
Report by Governance Officer
- 

**ITEMS FOR NOTING**

- 13. AOCB**
- 14. DATE OF NEXT MEETING – 06 November 2025 at 9.00 a.m.**

If any member wishes to add an item of business to the Agenda, please inform the Chair and the Governance Officer as soon as possible. Additional items of business will only be considered for inclusion in the agenda in advance of the start of the meeting.

**UHI | INVERNESS****Outstanding Actions from Finance and General Purposes Committee**

<b>Item</b>	<b>Action</b>	<b>Responsibility</b>	<b>Timeline</b>	<b>Actioned</b>
<b>07 March 2024</b>				
<b>UHI Research funding</b>	Regional funded research and its redistribution to be looked at across UHI.	Principal	May '24	<b>ONGOING</b>
<b>03 February 2025</b>				
<b>Final Report 2023/24 Audit by Deloitte Recommendation 1</b>	It is recommended that a fixed asset register is created and maintained going forward.	Director of Finance and Estates	June '25	<b>ONGOING</b>
<b>Final Report 2023/24 Audit by Deloitte Recommendation 2</b>	It is recommended that floor plans are maintained annually and provided to the College's external valuer ahead of each valuation per the rolling valuation cycle.	Director of Finance and Estates	June '25	<b>ONGOING</b>
<b>Final Report 2023/24 Audit by Deloitte Recommendation 3</b>	It is recommended that the College seek to source a copy of the original NPD service concession agreement and retain this going forwards.	Director of Finance and Estates	June '25	<b>ONGOING</b>
<b>Final Report 2023/24 Audit by Deloitte Recommendation 4</b>	It is recommended that the College looks to source original grant income documentation from the relevant party and moving forward, we would suggest that they retain any relevant documentation.	Director of Finance and Estates	June '25	<b>ONGOING</b>

<b>Subject/Title:</b>	Policy Approvals
<b>Author:</b> [Name and Job title]	Quality
<b>Meeting:</b>	F&GP Committee
<b>Meeting Date:</b>	12 <sup>th</sup> June 25
<b>Date Paper prepared:</b>	29/05/2025
<b>Brief Summary of the paper:</b>	The F&GP Committee is asked to approve the reviewed <ul style="list-style-type: none"> <li>- FOI Policy</li> <li>- UHI Student Support Funds Policy.</li> <li>- UHI FE Fee Waiver Policy</li> </ul>
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	Approval
<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with:: <ul style="list-style-type: none"> <li>• compliance</li> <li>• partnership services</li> <li>• risk management</li> <li>• strategic plan</li> <li>• new opportunity/change</li> </ul>	Compliance
<b>Resource implications:</b>	No <b>If yes, please specify:</b>
<b>Risk implications:</b>	Yes <b>If yes, please specify:</b> Operational: Organisational: Policy review and development required to ensure compliance with legislation and regulations.
<b>Equality and Diversity implications:</b>	Yes <b>If yes, please specify:</b> Completed Equalities Impact Assessment included.
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	
<b>Status –</b> [Confidential/Non confidential]	Non-confidential
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	Yes
*If a paper should <b>not</b> be included within “open” business, please highlight below the reason.	

**ITEM**

Its disclosure would substantially prejudice a programme of research (S27)		Its disclosure would substantially prejudice the effective conduct of public affairs (S30)	
Its disclosure would substantially prejudice the commercial interests of any person or organisation (S33)		Its disclosure would constitute a breach of confidence actionable in court (S36)	
Its disclosure would constitute a breach of the Data Protection Act (S38)		Other (please give further details)	
For how long must the paper be withheld? (express either as the time which needs to pass or a condition which needs to be met.)			

Further guidance on application of the exclusions from Freedom of Information legislation is available via

<http://www.itspublicknowledge.info/ScottishPublicAuthorities/ScottishPublicAuthorities.asp> and

[http://www.itspublicknowledge.info/web/FILES/Public\\_Interest\\_Test.pdf](http://www.itspublicknowledge.info/web/FILES/Public_Interest_Test.pdf)

# UHI | INVERNESS

## FREEDOM OF INFORMATION POLICY

**REFERENCE: PL/GO/2021/001**

Lead Officer	Governance Officer
Review Officer	Information Development Manager
Date first approved by BoM	9 June 2008
First Review Date	24 November 2009
Date review approved by BoM	29 June 2021
Next Review Date	June 2027
Equality impact assessment	May 2021
Further information (where relevant)	

Reviewer	Date	Review Action/Impact
College Secretary	24.11.09	Audit Committee
College Secretary	04.09.12	Audit Committee
College Secretary	24.11.15	Audit Committee
Secretary to the Board of Management	May 21	Change to Policy Review and Lead Officer, Legislation and related policies updated, Inclusion of 'social media' in information requests, EIR acronym has been expanded – Environmental information regulation, Section 3.5 Exemptions and 4.1 Compliance has been updated.
Governance Officer	26.11.24	Change of job title of Lead Officer, Legislation and related policies updated, Inverness College references amended to "UHI Inverness", Text adjusted to bring the policy up to date.

## Contents

<b>1. Policy Statement:</b> .....	<b>3</b>
<b>2. Legislative framework/related policies</b> .....	<b>3</b>
<b>4 Compliance</b> .....	<b>4</b>
<b>5 Monitoring</b> .....	Error! Bookmark not defined.
<b>6 Review</b> .....	Error! Bookmark not defined.

## 1. Policy Statement:

UHI Inverness will comply with the requirements of the *Freedom of Information (Scotland) Act 2002* (the “Act”) and the *Environmental Information (Scotland) Regulations 2004* (the “EIRs”) which place obligations upon UHI Inverness as a designated Scottish Public Authority, to provide information to the public.

The Act aims to increase openness and accountability in government and across the public sector by ensuring people (anywhere in the world), have the right to access information held by Scottish public authorities.

This policy applies to all information held by the college, including information stored on the college’s behalf by another organisation or authority. Information can be held in a variety of media, including paper, analogue or digital formats.

Subject to certain conditions and exemptions, any person who makes a request for information in writing (or some other permanent form) to UHI Inverness will be entitled to receive it.

## 2. Legislative framework/related policies

- Freedom of Information (Scotland) Act 2002 (the “Act”)
- Environmental Information (Scotland) Regulations 2004 (the “EIRs”)
- General Data Protection Regulation (UK GDPR)
- UK Data Protection Act 2018

This policy should also be read in conjunction with the college’s:

- Data Protection Policy
- Section 61 Code of Practice on Records Management
- FOISA/EIR: Section 60 code of practice
- Complaints Policy
- Publication Scheme
- Email Retention and Usage Policy
- UHI Records Retention and Disposal Policy

## 3. Scope General

- 3.1 This policy applies to all information held by the college, including that contained within the Publication Scheme and information stored on the college’s behalf by another organisation or authority (including sub-contractors who may process information on behalf of the college).

Information can be held in a variety of media, including paper, analogue or digital formats.

- 3.2 It is the responsibility of Managers to ensure their staff are made aware of the existence and content of this policy.

#### 4. Information Requests

- 4.1 All FOISA requests, received by the college must be made in a permanent form (e.g. letter, e-mail, audio/video recording, or message received through official college social media channels). Environmental Information Regulation (EIR) requests do not need to be received in a permanent form.
- 4.2 Requests do not need to explain why the information is required or quote their rights under the Act or regulations to make a request for information.
- 4.3 Should an individual require help to make a request under FOISA, they may contact an Freedom of Information Officer via the [foi.ic@uhi.ac.uk](mailto:foi.ic@uhi.ac.uk) mailbox and leave a phone number for an Officer to call them or they may call the college switchboard on Tel: 01463 273000 and ask to be put through to the Governance Officer.

#### 5. Exemptions

- 5.1 UHI Inverness may refuse to provide information that it deems to be exempt under the Act or EIR regulation. In cases where the college considers a request could be subject to an exemption, due consideration will be given to the request, to determine if some or any of the requested information can be disclosed. This decision will be based upon the public interest test along with the FOISA exemptions, information rights of all data subjects, legal and contractual obligations and issues which may affect data security. Where information is found to be exempt, the college will issue a refusal notice to the requester, explaining why the information sought, is exempt from disclosure, in terms of the Act.

#### 6. Compliance

- 6.1 The college will appoint two Freedom of Information Officers to ensure all requests are processed within the legal deadlines. The college's Governance Officer is the Lead FOI Officer. All FOI activity undertaken by the Officers will be overseen by the Information Development Manager who will provide support as and when necessary.
- 6.2 The college will ensure the Officers receive appropriate training to develop competence and ongoing training as part of their continual professional development.

#### 7 Monitoring

- 7.1 Compliance with this policy will be monitored by the EMT who will receive a 6 monthly report from the Governance Officer. An annual FOI report will be submitted to the Board of Management (via the Finance and General Purposes Committee) summarising information requests received and the timescale for response in relation to the 20 day legal requirement.
- 7.2 The Freedom of Information policy and procedures shall be reviewed every three years.

Policy/Procedure: Freedom of Information  
 Review Due: December 2024  
 Date of Assessment: 26/11/24

Author/Owner: Governance Officer  
 Department/Section: Board of Management

Signature: *J. O'Neil*

Date: 27/11/2024

### Step 1

Aim of proposed activity/decision/new or revised policy or procedure:

The policy and procedure have been brought up to date with language and current processes in operation. Language has been simplified and legislative and policy references have been updated.

- New
- Revised
- Existing

Who will be affected?	Who will be consulted?	Evidence available:
Anyone who is requesting information under FOISA including staff, students and external requesters	Data Protection Officer and current FOI Officers	Qualitative Evidence- FOI Annual Report including statistical data. Quarterly reports to the SIC.

### Step 2

Potential Positive/Negative/Neutral Impact Identified. <b>P, N, N/I</b>	Age	Disability	Gender Reassignment	Marriage/Civil Partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation
Eliminating Discrimination	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I
Advancing Equality of Opportunity	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I
Promoting Good Relations.	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I

## Step 3

## No Action to be taken

We will continue to work with all requesters to provide appropriate guidance and assistance to ensure requests for information are valid and that any request for a review is valid. We will work with all requesters to ensure we can identify and locate the information they seek and ensure that we seek clarification where appropriate. We will work with all Review Officers to ensure all reviews are fully completed and are done so in line with the process in place.

## Summary of EIA Outcome – please tick

- No further action to be carried out
- Amendments or changes to be made
- Proceed with awareness of adverse impact
- Abandon process – Stop and Rethink

Please forward completed EIA forms to the Quality Unit

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UHI Inverness College, University of the Highlands and Islands

## Student Support Funds Policy

PL/CS/2021/004

Lead Officer (Post):	<del>Assistant Principal – Finance &amp; Audit</del> <u>Director of Finance &amp; Estates</u>
Responsible Office/ Department:	Admissions, <del>Enrolment &amp; Student</del> & Funding
Responsible Committee:	Board of Management F&GP Committee
Review Officer (Post):	Admissions, <del>Enrolment &amp; Student</del> & Funding <u>Manager</u> <del>Team Leader</del>
Date policy approved:	30/06/2020
Date policy last reviewed and updated:	<del>29/06/2021</del> <u>12/12/2024</u>
Date policy due for review:	<del>28/02/2024</del> <u>01/12/2027</u>
Date of Equality Impact Assessment:	<del>28/02/2024</del> <u>01/12/2024</u>
Date of Privacy Impact Assessment:	n/a

This policy covers the period academic year ~~2024/25~~ to academic year ~~2025/26~~.**Commented [EB3]:** IS this a yearly reviewed policy or will this cover 3 year period?For all our up-to-date policies, please visit the Policy homepage on our [website](#).

Accessible versions of this policy are available upon request.

Policy Summary

Overview	This policy is required to set out a regional approach to distribution of student support funds for Inverness College UHI and all academic partners in the University of the Highlands and Islands.
Purpose	The policy will provide a framework for a consistent and coherent methodology for the awarding of student support funds.
Scope	This policy applies to all academic partners.
Consultation	This policy was formulated by a Policy Ownership Group, made up of practitioners from across the University of the Highlands and Islands network. Endorsement was received from Partnership Council, before the policy went through local consultation and approval by College Boards of Management and Finance and General Purpose Committee.
Implementation and Monitoring	Academic partners will be responsible for implementing and monitoring the policy. Analysis will be carried out of the policy's impact by staff from the Vice-Principal for Further Education's office.
Risk Implications	The policy reduces risk for the University and academic partners by creating a streamlined process and reinforcing the existing staff community of practice.  Students will also benefit from a consistent approach across all partners.
Link with Strategy	This policy is linked to the Regional Outcome Agreement.
Impact Assessment	Equality Impact Assessment: <del>February 2021 – No further action required.</del> <u>December 2024</u>
	Privacy Impact Assessment: n/a

## 1. Policy Statement

- 1.1 The purpose of this policy is to outline the principles underpinning the College's process of assessing and distributing Student Support Funds. The overarching aim of this policy is to ensure that as many eligible students as possible have access to funds within allocated budgets.
- 1.2 Funds are distributed in compliance with the funding regulations as determined by the Scottish Funding Council and Student Awards Agency Scotland. Where discretion is given to the College to determine eligibility, this policy and the separate ~~Inverness College~~ UHI [Inverness](#) Student Support Funds Procedure specifies the rationale applied.

## 2. Definitions

- 2.1 Scottish Funding Council ("SFC") - SFC is the national, strategic body that is responsible for funding teaching and learning provision, research and other activities in Scotland's Colleges and universities. SFC gives funding to Colleges and universities with guidance on how the funds should be distributed to students.
- 2.2 Student Awards Agency Scotland ("SAAS") – SAAS is an agency of the Scottish Government giving financial support to eligible students doing a course of higher education in the UK. SAAS provides the University of the Highlands and Islands with funds and guidance for distribution of the Higher Education Discretionary Fund.
- 2.3 For the purposes of this policy, the following terms will be used:
- 2.3.1 The Further Education Bursary will be referred to as the "Bursary Fund".
- 2.3.2 The Educational Maintenance Allowance will be referred to as the "EMA".
- 2.3.3 The College and University Childcare Funds will be referred to the "Childcare Funds".
- 2.3.4 The Further Education Discretionary Fund will be referred to as the "FE Discretionary Fund".
- 2.3.5 The Higher Education Discretionary Fund will be referred to the "HE Discretionary Fund".
- 2.4 Further Education courses are normally up to and including Level 6 on the [SCQF Framework](#). Higher Education courses are normally Level 7 and above.

Field Code Changed

## 3. Purpose

- 3.1 The College will utilise the current guidance to ensure fair distribution of the Student Support Funds.
- 3.2 The College aims to distribute Student Support Funds within the conditions of the respective national policies in a fair and consistent manner to assist students who demonstrate financial need. The College undertakes to maximise the use of available funds to ensure as many students as possible benefit through the qualifying criteria.
- 3.3 **Bursary Fund**
- 3.3.1 As defined in the current SFC guidelines, available [here](#), the Bursary Fund may be offered where the student and their course meets eligibility criteria. There is no automatic entitlement to the Bursary Fund, even where eligibility is established.
- 3.3.2 The Bursary Fund constitutes the following:
- Maintenance Allowance
  - Dependant Allowance
  - Study Expense Allowance

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- Travel Expense Allowance
- Additional Support Needs for Learning Allowance

3.3.3 Maintenance Allowance: the College follows the SFC guidance for this element.

3.3.4 Dependant Allowance: the College follows the SFC guidance for this element.

3.3.5 Study Expense Allowance: the College follows the SFC guidance for this element.

3.3.6 Travel Expense Allowance

- The College will determine the most appropriate and cost-effective route or mode of transport for Travel Expense Allowance.
- Travel expenses will only be paid for students residing 3 miles or more from the College.

3.3.7 Additional Support Needs for Learning Allowance: the College follows the SFC guidance for this element.

3.3.8 The attendance criteria for the Bursary Fund is based on the current SFC guidance. Where the guidance calls for institutional discretion to be applied, the process to be followed is agreed regionally and is available in the Attendance and Engagement Appendix.

#### 3.4 EMA

As defined in the current SFC guidelines, available [here](#), the EMA provides a weekly term time allowance for students normally aged 16-19 years old inclusive from low income households who are studying non-advanced courses.

3.4.1 The College follows the current SFC guidance.

3.4.2 The attendance criteria for EMA is based on the current SFC guidance. Where the guidance calls for institutional discretion to be applied, the process to be followed is agreed regionally and is available in the Attendance and Engagement Appendix.

#### 3.5 Childcare Funds (Further and Higher Education)

As defined in the current national policy and guidelines, available [here](#), Childcare Funds consist of two elements to help pay for formal or registered childcare expenses: the Lone Parents Childcare Grant and the Discretionary Childcare Funds.

3.5.1 The College follows the current national policy and guidelines for Childcare Funds.

3.5.2 The College may identify certain groups as priority for allocation of the Discretionary Childcare Funds element, based on assessment of need.

#### 3.6 FE Discretionary Fund

As defined in the current [SFC guidelines](#), the FE Discretionary Fund is "primarily for emergency use and instances of financial hardship".

3.6.1 The College follows the current guidance, available above.

3.6.2 The College distributes FE Discretionary Funds within allocated budgets in response to student need and circumstances.

3.6.3 The FE Discretionary Fund has priority areas including, but not limited to:

- Housing and accommodation costs
- Emergency aid for unforeseen and unmanageable circumstances

Field Code Changed

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- Students at risk of financial hardship due to substantially higher-than-average utility costs

### 3.7 HE Discretionary Fund

As defined in the current [SAAS guidelines](#), the HE Discretionary Fund is intended to “provide non-repayable assistance for students in financial difficulties in order for them to access and/or continue in Higher Education”.

Field Code Changed

- 3.7.1 The College follows the current guidance, available above.
- 3.7.2 The College distributes HE Discretionary Funds within allocated budgets in response to student need and circumstances.
- 3.7.3 The HE Discretionary Fund has priority areas including, but not limited to:
- Housing and accommodation costs
  - Students experiencing excessive travel costs, e.g. where the journey is greater than a reasonable commute
  - Childcare costs for part-time HE courses
  - Emergency aid for unforeseen and unmanageable circumstances
  - Students at risk of financial hardship due to substantially higher-than-average utility costs

### 3.8 Supporting Evidence

- 3.8.1 Students applying for financial support are required to produce documentary evidence in support of their application before an award can be considered.
- 3.8.2 Exception may be made for care experienced students and young estranged students who may encounter difficulty in providing documentation in support of their application, which could create or exacerbate financial hardship. In this case, confirmation of the student’s circumstances from a third party agency such as the local authority Social Work department will be accepted in place of the normal supporting documentation.

### 3.9 Eligibility

- 3.9.1 Eligibility criteria are in line with the relevant guidance/policy for each fund.
- 3.9.2 In addition, all applicants for student financial support will be checked for any outstanding debt to the College. Students with outstanding debt will be required to enter into a repayment agreement before additional funds will be released.
- 3.9.3 Where a student’s experiences an unforeseeable or unavoidable change to their circumstances during an academic year, the College may re-assess the student as appropriate.

### 3.10 Appeals (Informal and Formal)

- 3.10.1 Students are entitled to raise concerns related to the application of this policy and awarding of student support funds.
- 3.10.2 In the first instance, students should raise their concerns with College staff responsible for student support funds administration.
- 3.10.3 Should this not resolve the concerns; the student will be able to escalate the issue by means of an impartial review.
- 3.10.4 Further information is available in the accompanying Student Support Funds Procedures.

## 4. Scope

- 4.1 Financial support may only be offered if both the student and their course are eligible for support.

## 5. Exceptions

- 5.1 The policy identifies areas of discretion for Colleges and sets out priority areas for support. Ultimate authority for awarding of discretionary funds rests with the College, and decisions will be made in line with the policy and/or guidelines issued by SFC or SAAS.
- 5.2 As per the Education (Access Funds) (Scotland) Determination there are different arrangements for students living in the local authority areas of Orkney Islands and Shetland Islands. These students should contact the College at which they intend to study for further information.

## 6. Notification

- 6.1 Staff members engaging with Student Support Funds should be familiar with this policy and all relevant SFC/SAAS policies.
- 6.2 Annual changes to SFC/SAAS policies will be cascaded to staff by line managers and hyperlinks in the policy updated to reflect the most recent guidance.
- 6.3 Any changes in SFC/SAAS policy or national legislation will be reflected in this policy.
- 6.4 The policy will be publicly available on the College's website, along with other current policies.

## 7. Roles and Responsibilities

- 7.1 The ~~Assistant Principal – Finance & Audit~~ [Director of Finance & Estates](#) has overall responsibility for the implementation of this policy and the management of Student Support Funds.
- 7.2 The ~~Assistant Principal – Finance & Audit~~ [Director of Finance & Estates](#) is responsible for the approval of FE Discretionary Funds and HE Discretionary Funds.
- 7.3 The staff administering Student Support Funds are responsible for ensuring up-to-date local policies and SFC/SAAS guidance is followed.
- 7.4 The Admissions, [Enrolment](#) and ~~Student Funding~~ [Manager/Team Leader](#) is responsible for ensuring that all enrolled students receiving EMA support have a signed Learning Agreement.
- 7.5 The Admissions, [Enrolment](#) and ~~Student Funding~~ [Manager/Team Leader](#) is responsible for ensuring that student attendance information is passed to the [Funding Officers/SITS office](#) for recording on the College SITS system to satisfy the conditions of the relevant Student Support Fund award.
- 7.6 Students are responsible for informing the College of changes to their circumstances, including voluntary withdrawal from a course.

## 8. Related Policies, Procedures, Guidelines and Other Resources

- 8.1 This policy should be read in conjunction with SFC and SAAS policies and guidance. Links are provided above in Section 3.
- 8.2 Student Support Funds Procedures.
- 8.3 Student Support Funds Attendance and Engagement Appendix
- 8.4 Further Education Fee Waiver Policy.
- 8.5 [University of the Highlands and Islands Hardship Group Guidance](#)

Field Code Changed

Inverness College is known as UHI Inverness  
University of the Highlands and Islands

Student Support Funds Policy

- 8.6 [University of the Highlands and Islands Funding webpage](#)  
8.7 [Scottish Funding Council \(SFC\) website](#)  
8.7 [Student Awards Agency Scotland \(SAAS\) website](#)

## 9. Version Control and Change History

Version	Date	Endorsed by	Amendment(s)	Author
0	Nov 2018	Partnership Council	New single policy.	Student Support Funds Policy Ownership Group
1	Feb 2021	Partnership Council	Formatting changes and grammar corrections; 3.8.2: 'young estranged students' added; 3.10: Clarity added around informal steps before formal process initiated; 7.5: made more generic for local contextualisation.	Student Support Funds Policy Ownership Group
2	October 2023	TBC	Updated Links	Sheree Grant (Admissions and Funding Manager UHI Inverness)
3	<a href="#">Nov 2024</a>	<a href="#">PPRP</a>	<a href="#">Updated Links</a>	<a href="#">Sheree Grant Admissions, Enrolment and Funding Manager</a>
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## University of the Highlands and Islands

### Student Support Funds Policy: Attendance Appendix

#### 1. Overview

1.1 This appendix sets out the regional approach for Further Education funding attendance requirements. The guidance will be used by all colleges in the UHI partnership to ensure parity of experience for students and to limit risk for colleges.

1.2 The guidance below is based on Scottish Funding Council (SFC) [guidance](#), and adds further information for the areas where there is discretion available. The appendix fulfils the SFC [Fund Management and Audit Information](#) requirement that colleges should:

- Implement their own rules for measuring satisfactory attendance, participation and engagement
- Produce their own guidance for authorised absence
- Operate these rules and guidance consistently across the college

1.3 Attendance can be a critical part of being a student and courses are designed on the principle of students attending all classes. Attendance, punctuality and personal timekeeping are valuable transferable skills for progression in academic studies or for employment.

#### 2. Guidance

2.1 The expectation set out by the SFC is for students to attend all their classes; this will be assessed through attendance monitoring. Student attendance will be expressed as a percentage of the overall classes attended.

2.2 Examples of authorised absences identified by SFC include, but are not limited to:

- Self-certificated absence because of illness. Medical certificates should normally be submitted for illnesses lasting for more than five working days.
- Religious holidays (but not other holidays).
- Work experience placements.
- Tutor agreed exam preparation.
- Attendance at children's hearing, court, meeting related to caring responsibilities or care needs, etc.
- Unexpected caring responsibilities, either for the student's child(ren) or an adult dependant, such as the illness of a child or dependant.
- Severe weather and transport breakdown.
- Attendance at a family funeral.
- Medical or dental appointments for either the student, or a child or adult who is dependent on the student. This can include non-emergency appointments if these cannot be arranged outside college hours, although every effort should be made to avoid clashes with classes.
- Fulfilment of an official position e.g. HISA representation
- Jury duty

As soon as a student becomes aware of an absence from the criteria above they should inform relevant staff via the College's official absence reporting processes.

Levels and patterns of authorised absences will be monitored to ensure the system is not abused.

2.3 Any absence that is not considered a valid authorised absence will be recorded as an unauthorised absence.

## 2.4 Attendance Thresholds

- 2.4.1 Students should aim to attend 100% of their scheduled activity. Both authorised and unauthorised absences will affect a student's attendance percentage.
- 2.4.2 The reporting period is the duration over which attendance is calculated. The payment schedules are the frequency that payments are made for different types of support fund.
- 2.4.3 If attendance falls below 100% of scheduled activity for the reporting period local informal interventions may be used to engage with students in order to reinforce the benefits of attendance and help improve it.
- 2.4.4 If attendance falls below 85% of scheduled activity for the reporting period formal interventions will commence.

2.5 Where students have failed to maintain the required attendance threshold set out above, staff will consider whether the student has taken reasonable steps to engage with their studies.

Examples of appropriate student engagement include, but are not limited to:

- Maintaining contact with relevant college staff, explaining the reasons for absence and the steps they are taking to engage with their studies.
- Keeping up to date with learning by obtaining lecture notes, online resources or other learning materials from college staff.
- Demonstrating that they have engaged in independent study to keep up to date with their learning.
- Handing in assignments or classwork in a timely fashion, unless there are mitigating factors.
- Continuing to meet their learning objectives.
- Engaging with the college in any other way which demonstrates that they are continuing to participate in their studies.

## 3. Attendance and Engagement Support Procedures

### Stage 1

3.1 Students falling below the attendance threshold set out in 2.4 and not maintaining appropriate engagement will be contacted by staff in order to discuss strategies for improving attendance. Local systems can be used to inform this engagement. Students will be able to confidentially disclose any barriers to attendance or engagement they may be experiencing.

3.2 Students will be informed that should their attendance not improve and they are not meeting engagement requirements they are at risk of having student support funds they are eligible for reduced or withdrawn, and any overpayments reclaimed. An agreed timeframe for improvement and the student's understanding will be recorded on local systems, along with any evidence from Learner Support and Academic staff regarding attendance and engagement.

3.3 Students who do not participate in the Stage 1 process will have their funding withdrawn, and any overpayments reclaimed, if they are not achieving appropriate engagement and will be required to arrange a meeting with the appropriate members of staff in order to discuss having their funding reinstated.

### Stage 2

3.4 If attendance does not improve, or improves and then declines within the same academic year, the student will be required to attend a formal meeting and agree an Attendance and Engagement Support Plan with staff.

3.5 Students who do not participate in the Stage 2 process will have their funding withdrawn, and any overpayments reclaimed, where they are not achieving appropriate engagement and will be

required to arrange a meeting with the appropriate members of staff in order to discuss having their funding reinstated.

### Stage 3

3.5 Students who have been through Stages 1 and 2 will not be invited to attend another meeting within the same academic year if issues continue or reoccur. **Instead, withdrawal or reduction of student support funds may initiate immediately if they are not achieving appropriate engagement.** The onus will then be on the student to engage with staff in order to agree a plan for improving attendance and engagement.

### Personal Learning Support Plans (PLSPs)

3.6 Where a student has complex circumstances or health issues (including mental health issues) which may impact on their attendance, the College may exercise particular flexibility with regards to attendance. The College will agree attendance and participation plans directly with the student in these circumstances and this will be reflected in the student's PLSP.

PLSPs are created in partnership with a student in response to a disclosed need. Attendance may form part of the PLSP, but issues around attendance alone would not justify the creation of a PLSP. There is local support available for students to access if they have concerns around how their personal circumstances may be affecting attendance and engagement. For further information, the local Student Support team should be contacted and the Learner Support Policy consulted.

### Legislative Responsibilities

3.7 All colleges in the UHI partnership have due regard to equalities legislation and the Children and Young People (Scotland) Act 2014 when considering the position of students with protected characteristics and care experienced students. Colleges may exercise increased flexibility when considering attendance issues for groups of students impacted by this legislation (for example Care Experienced students, Disabled students, Student Parents and those on Maternity/Paternity/Adoption leave). In addition, colleges will be mindful of their corporate parenting responsibilities under the Children and Young People (Scotland) Act 2014.

## 4. Monitoring and Changes to SFC Guidance

4.1 Colleges will utilise local means of monitoring and reporting on attendance. This information will be used as appropriate for regional level reporting and analysis.

4.2 Annual changes to SFC policy will be considered by the Student Support Funds Policy Ownership Group and any necessary amendments made to the Attendance and Engagement Appendix.

Policy/Procedure/Strategy: UHI Student Support Funds

Author/Owner: Admissions, Enrolment & Funding Manager

Signature: Sheree Grant

Review Due: December 2027

Department/Section: Admissions and Funding

Date of Assessment: December 2024

Date: 12<sup>th</sup> December 2024

### Step 1

Aim of proposed activity/decision/new or revised policy or procedure:

Standardised University of the Highlands and Islands tertiary Student Support Funds Policy. The aim of the policy is to provide a consistent entitlement to Student Support Funds across all UHI partners.

- New
- Revised
- Existing

Who will be affected?	Who will be consulted?	Evidence available:
All students in receipt of Student Support Funds	- Academic Partner Local Staff Consultation including relevant staff and student groups - HISA Local Student Representatives	Email evidence available from Single Policy Environment Project Manager on practitioner engagement process. Partners will lead on the local engagement and consultation processes.

### Step 2

Potential Positive/Negative/Neutral Impact Identified. <b>P, N, N/I</b>	Age	Disability	Gender Reassignment	Marriage/Civil Partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation
Eliminating Discrimination	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I
Advancing Equality of Opportunity	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I
Promoting Good Relations.	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I	N/I

## Step 3

Sustainability	N/I
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## Step 4

No Action to be taken

**Ongoing monitoring of the student support fund use. Feedback to be collected from student surveys and complaints to allow for ongoing monitoring of the policy impact.**

Summary of EIA Outcome – please tick

- No further action to be carried out
- Amendments or changes to be made
- Proceed with awareness of adverse impact
- Abandon process – Stop and Rethink

Please forward completed EIA forms to the Quality Unit

# UHI | INVERNESS

~~Inverness College UHI~~

## Further Education Fee Waiver Policy

PL/CS/2023/005

Lead Officer (Post):	Director of Finance <del>&amp; Estates</del>
Responsible Office/ Department:	Finance
Responsible Committee:	Finance & General Purposes Committee
Review Officer (Post):	<del>Finance Manager</del> Accountant
Date policy last reviewed and updated:	03/10/2023
Date policy due for review:	01/10/2024
Date policy last reviewed and updated:	16/08/2023
Date policy approved:	03/10/2023
Date of Equality Impact Assessment:	August 2023

This policy covers the 202~~53~~-2~~64~~ academic year.

For all our up-to-date policies, please visit our website [UHI Inverness](https://www.uhi.ac.uk).

Accessible versions of this policy are available upon request.

Policy Summary

Overview	This policy is required to set out a regional approach to Further Education Fee Waivers for <del>Inverness College</del> UHI <u>Inverness</u> and all academic partners in UHI.
Purpose	The policy will provide a framework for a consistent and coherent methodology for the awarding of Scottish Funding Council and discretionary fee waivers for further education courses.
Scope	This policy applies to all academic partners who run further education courses.
Consultation	This policy was developed by a Policy Ownership Group, made up of practitioners from across UHI. Endorsement was received from Partnership Council, before the policy went through local consultation and approval by college Boards of Management.
Implementation and Monitoring	Academic partners will be responsible for implementing and monitoring the policy.
Risk Implications	The policy reduces risk for the university and partners by creating a streamlined process and a community of practice for staff. Students will also benefit from a consistent approach across all partners.
Link with Strategy	Links with our obligations under the Regional Outcome Agreement.
Impact Assessment	Equality Impact Assessment: Assessed – No further action to be taken.
	Privacy Impact Assessment: n/a

## 1. Policy Statement

- 1.1 This document sets out the policy for the awarding of further education fee waivers in ~~Inverness College~~ UHI Inverness. This policy refers to Scottish Funding Council policy and guidelines on fee waivers, which is reviewed annually. A position is also set out for the awarding of discretionary fee waivers from a college's individual budget.

## 2. Definitions

- 2.1 Scottish Funding Council ("SFC"): SFC is the national, strategic body that is responsible for funding teaching and learning provision, research and other activities in Scotland's colleges and universities. SFC provides funding that colleges can claim for fee waivers.
- 2.2 Fee waiver: Some students will be able to access a fee waiver, which means they will not have to pay their own course fees. Eligibility for a fee waiver will be assessed at the start of the course, and the student may be required to produce evidence to support their application.

## 3. Purpose

- 3.1 This policy sets out a robust and transparent framework for the awarding further education course fee waivers ~~at~~ in ~~Inverness College~~ UHI Inverness.
- 3.2 The policy will create an equality of experience for students across the partnership, whilst allowing individual colleges the flexibility to respond to local needs.

### 3.3 SFC Funded Fee Waivers

The core of this policy is based on the SFC Fee Waiver Policy, associated annexes and appendices. The current SFC Fee Waiver Policy can be accessed [on the UHI Inverness website here](#). The majority of fee waivers will be approved by the college and funded by SFC.

### 3.4 Discretionary Fee Waivers

Students attending UHI will have a parity of experience through the use of SFC fee waivers. Under exceptional circumstances and subject to individual budgets, colleges have the power to award discretionary fee waivers and for the college to pay the course fees.

3.4.1 Categories of Discretionary Fee Waivers include but are not limited to:

- Staff development, where a course is an essential part of an approved staff development plan;
- Where the college stipulates compulsory completion of an additional qualification as part of the main course;
- Exceptional requirements, where college senior management identify a local benefit to use of Discretionary Fee Waivers (being cognisant of 3.4.3).

3.4.2 Colleges should endeavour to create parity of experiences for students across the region through their use of discretionary fee waivers.

3.4.3 Due consideration should be given to the impact of discretionary fee waiver usage on other colleges in UHI.

### 3.5 SVQs

3.5.1 Students undertaking a part-time SVQ as a condition of their employment will not be awarded a fee waiver. In these circumstances, the employer is normally expected to meet the cost of the fees.

3.5.2 Students undertaking a SVQ where it is not a condition of their employment may be eligible for a fee waiver dependent on the course and their personal circumstances.

3.5.3 For students undertaking a part-time SVQ regardless of whether it is a condition of employment, their eligibility for fee waivers on additional courses will be assessed according to the current SFC Fee Waiver Policy, associated annexes and appendices.

## 4. Scope

4.1 This Policy applies to all applicants for further education courses (full-time and part-time), except for the courses set out in Section 5 below.

4.2 Applicants for higher education courses should refer to the [Higher Education Fees Policy](#). Higher education courses are normally Level 7 and above on the [SCQF Framework](#).

## 5. Exceptions

5.1 Courses outwith the scope of this policy are:

- Any non-credit bearing leisure courses, designed for hobby or personal interest
- All commercial courses, designed and delivered for a particular business/industry

5.2 Please refer to the accompanying Fee Waiver Procedures and eligibility flowchart for further information.

## 6. Notification

6.1 Staff engaging with fee waivers should be familiar with this policy and all relevant SFC policies.

6.2 Annual changes to SFC policies will be cascaded to staff by line managers and hyperlinks in the policy updated to reflect the most recent guidance.

6.3 Any changes in SFC policy or national legislation will be reflected in this policy.

6.4 The policy will be publicly available on the ~~in Inverness College~~ UHI ~~Inverness's~~ website, along with other current policies.

## 7. Roles and Responsibilities

7.1 The College's most senior financial officer has overall responsibility for the implementation of this policy and the management of fee waivers, including the approval of discretionary fee waivers.

7.2 Staff administering fee waivers are responsible for ensuring up-to-date SFC guidance is followed.

## 8. Legislative Framework

[Further and Higher Education \(Scotland\) Act 2005](#)

[Equality Act 2010](#)

[Scottish Government: Costs of Learning Student Funding Guide](#)

## 9. Related Policies, Procedures, Guidelines and Other Resources

- 9.1 This policy should be read in conjunction with SFC Fee Waiver policies and guidance. The up-to-date information can be accessed [on the UHI Inverness website. here-](#)
- 9.2 UHI Further Education Fee Waiver Procedures
- 9.3 UHI Further Education Student Funding Support Policy
- 9.4 [UHI Higher Education Fees Policy](#)
- 9.5 UHI Further Education Fees Policy (Forthcoming)

## 10. Other Conditions

10.1 The burden of proof is on the student to satisfy the college with evidence of the eligibility of their status. If the circumstances of the student change during the course so that the student becomes eligible for a part-time fee waiver when they were not previously, the college can (at their discretion) claim back the full fee from SFC and reimburse the student. The change must occur and be reported to the college by the student before the 'required date', which for AY 202~~53~~-264 is:

- For courses of 20 weeks or less: the date where 25% of the length of course has elapsed; and
- For courses of more than 20 weeks: 5 weeks after the course start date.

10.2 Please refer to SFC's [Credit Guidance](#) ~~Credit Guidance~~-AY 202~~53~~-264 for more information.

10.3 Changes to student circumstances occurring after this date cannot be claimed back from SFC. However, colleges are free to use their own discretion with college funds.

10.4 There is no upper or lower age limit on a student's eligibility for a fee waiver.

10.5 The college will be able to apply a fee waiver in respect of students who satisfy the eligibility rules for the course (as defined in the Credit Guidance), where the college is claiming credits for their activity in the current AY.

10.6 With the exception of any fee waivers for state school pupils who are undertaking college activities that form part of their school-based curriculum, additional part-time activity over and above full-time study will not be eligible for a fee waiver, although it may be eligible for credits (to determine if additional part-time activity is eligible, please refer to the Credit Guidance).

10.7 Students taking two or more part-time courses will be eligible for a maximum of one full-time fee waiver. The maximum amounts claimable for each student will be:

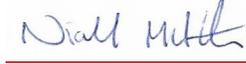
- The FE fee (£1,008 in AY 2023-24) for students taking FE courses.
- The FE fee (£1,008 in AY 2023-24) for students taking a mix of FE and part-time HE courses.
- The HE fee (£1,285 in AY 2023-24) for students taking part-time HE courses - fee waivers should not be claimed for full-time HE courses, as these are funded through [Student Awards Agency Scotland \(SAAS\)](#).

## 11. Version Control and Change History

Version	Date	Endorsed by	Amendment(s)	Author
0	May 2018	Partnership Council	New single policy	Fee Waiver Policy Ownership Group
1	March 2021	Partnership Council	Various formatting and grammatical changes through policy; 2.1: Clarity added around source of funding; 2.2: New definition added; 3.3: 'approved by college added'; 3.4: ' for the college to pay the course fees' added; 3.4.1: changes to three bullet points for clarity, including removal of 'significant' and addition of '(being cognisant of 3.4.3)' in third bullet point; 3.5: New section added bringing SVQs into scope of policy; 5.1: SVQs removed from exceptions, and additional information added to other exceptions; 7.3: section removed. 9.4 and 9.5: Removed Access and Inclusion Strategy and added HE Fees Policy and FE Fees Policy.	Fee Waiver Policy Ownership Group
2	June 2022	UHI Inverness	SFC link updated for academic year 2022-23.	Review Officer
3	August 2023	UHI Inverness	SFC link updated for academic year 2023-24. Section 10 Other conditions added – from 10.1 to 10.7.	Finance team

Policy/Procedure/Strategy: UHI FE Fee Waiver Policy

Author/Owner: Director of Finance & Estates

Signature: 

Review Due:

Department/Section: Finance

Date of Assessment: 19 May 2025

Date: 19 May 2025

## Step 1

Aim of proposed activity/decision/new or revised policy or procedure:

To provide a consistent entitlement to FE fee waivers across all UHI Partners.

Who will be affected?

All students in receipt of FE course fee waivers.

Who will be consulted?

EMT

Evidence available:

In line with current best practice across similar organisations and UHI partners.

## Step 2

Potential Positive/Negative/Neutral Impact Identified. <b>P, N, N/I</b>	Age	Disability	Gender Reassignment	Marriage/Civil Partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation
Eliminating Discrimination	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>
Advancing Equality of Opportunity	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>
Promoting Good Relations.	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>	<u>N/I</u>

### Step 3

Sustainability	<a href="#">N/I</a>
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### Step 4

No Action to be taken

Summary of EIA Outcome – please tick

- No further action to be carried out
- Amendments or changes to be made
- Proceed with awareness of adverse impact
- Abandon process – Stop and Rethink

Please forward completed EIA forms to the Quality Unit

**UHI | INVERNESS**

<b>Subject/Title:</b>	Revenue Budget 2025/26
<b>Author:</b>	Niall McArthur – Director of Finance & Estates
<b>Meeting:</b>	Finance and General Purposes Committee
<b>Meeting Date:</b>	12 June 2025
<b>Date Paper prepared:</b>	27 May 2025
<b>Brief Summary of the paper:</b>	To present to the committee the revenue budget for 2025/26.
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	Recommend to Board for Approval

<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with: <input type="checkbox"/> compliance <input type="checkbox"/> partnership services <input type="checkbox"/> risk management <input type="checkbox"/> strategic plan <input type="checkbox"/> new opportunity/change	Complying with Funding parameters Financial sustainability
<b>Resource implications:</b>	Yes – monitoring of Financial Resources <b>If yes, please specify:</b>

<b>Risk implications:</b>	Yes <b>If yes, please specify:</b> Financial Operational		
<b>Equality and Diversity implications:</b>	N/A		
<b>Student Experience Impact:</b>	None		
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	None		
<b>Status –</b> [Confidential/Non confidential]	Non-Confidential		
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	Yes		
*If a paper should <b>not</b> be included within “open” business, please highlight below the reason.			
Its disclosure would substantially prejudice a programme of research (S27)		Its disclosure would substantially prejudice the effective conduct of public affairs (S30)	
Its disclosure would substantially prejudice the commercial interests of any person or organisation (s33)		Its disclosure would constitute a breach of confident actionable in court (s36)	
Its disclosure would constitute a breach of the Data Protection Act (s38)		Other (Please give further details)	

Further guidance on application of the exclusions from Freedom of Information legislation is available via

<http://www.itspublicknowledge.info/ScottishPublicAuthorities/ScottishPublicAuthorities.asp> and

[http://www.itspublicknowledge.info/web/FILES/Public\\_Interest\\_Test.pdf](http://www.itspublicknowledge.info/web/FILES/Public_Interest_Test.pdf)

## Recommendation

That members of the Finance and General Purposes Committee recommend to the Board that the College’s 2025/26 draft revenue income and expenditure budget be approved.

**Purpose of report:**

To present to the Finance and General Purposes Committee the revenue income and expenditure budget for the year to 31 July 2026 and ask that it recommends that the College Board approves it.

The annual revenue income and expenditure budget is prepared each year, which is presented to the committee and then, if recommended for approval, is presented to the Board for approval by the 31 July of each year and prior to the commencement of the new financial year.

**Background**

The draft revenue budget for 2025/26 is being prepared at a time when there are significant and unprecedented financial pressures on all colleges and universities within Scotland, as well as financial sustainability issues for all UHI colleges within the UHI partnership.

Scottish Government announced in its indicative FE funding allocation in April 2025, a £13.2 million increase in the total allocation to the sector, to £656.2 million, an increase of 2.1%. However, this included pensions funding of £8.3 million and lecturers additional 1.14% funding of £4.5 million, so for UHI overall it was a reduction of £278,000 if these are excluded, as these funding allocations had already been built into core funding.

At a time where both FE and HE funding levels continue to fall below current inflation levels and consequently, year after year, lead colleges having real term cuts in their funding, rising staff and non-staff costs are making things even more difficult when trying to move to a more financially sustainable position.

There is a number of both sectoral and UHI specific additional costs/loss of income which are impacting on the budget for 2025/26 and these are shown below in tables 1 and 2 below, along with a brief explanation of each one.

**Table 1 – Sectoral Issues**

<b>SECTORAL ISSUES</b>	<b>AMOUNT</b>
	<b>£</b>
Unfunded pay increase	730,000
Increase in employers NIC's	500,000
Increase in employers pension contributions	160,000
Lost HE tuition fee income	700,000
<b>Total</b>	<b>2,090,000</b>

**Sectoral Costs/ Loss of Income**

- Unfunded pay increases for 2025/26 - £730,000 – for a number years, the college sector has not received funding for the cost of living increases awarded to both academic and professional staff, even although they are set at a national level and

colleges have no direct input into the setting of the increases. For 2025/26, they were set at 4.14%.

- Increase in employers national insurance contributions for 2025/26 - £500,000 – from April 2025, employers NIC's have increased due to changes in both the rates and levels at which NIC is paid.
- Increase in employers pension contributions (SPPA/ LGPS) for 2025/26 - £160,000 – increases due to higher staff costs, for both LGPS and SPPA pension schemes.
- Lost HE tuition fee income - £700,000 – since 2010/11, the HE fee for both HNC/HND (£1,285) and degree level (£1,820) have remained the same, with no inflationary increases. Assuming an increase of 2% each subsequent year from 2010/11, the college should be receiving an additional £700,000 in HE tuition fees, based on our current HE numbers.

**Table 2 – UHI Issues**

<b>UHI ISSUES</b>	<b>AMOUNT</b>
	<b>£</b>
UHI EO HE topslice	4,000,000
UHI EO FE topslice	600,000
UHI EO REG topslice	33,000
Lost FE credit funding	3,000,000
Lost Module leadership (ML) funding – direct costs	298,000
Lost ML funding – opportunity cost	880,000
Lost Programme Leadership funding	29,000
<b>Total</b>	<b>8,840,000</b>

#### UHI Costs/ Loss of Income

- HE topslice - £4million – each year, prior to allocating the HE teaching grant to UHI partners, UHI EO topslice the total student income by 35% to cover UHI EO costs. The total EO HE topslice for 2025/26 across all partners is £13 million, with the estimated reduction in UHI Inverness HE grant being £4 million. These fund the services which are delivered by UHI EO, although UHI partners have no say in how or what services are delivered compared to the procurement of external contracts, where service specifications can be produced and where VFM is not being delivered, other service providers can be procured.
- FE topslice - £600,000 – each year, prior to allocating the FE teaching grant to UHI partners, UHI EO topslice the FE teaching grant, by taking 15% of the total topslice and using that to topslice the college FE grant.
- UHI EO Research Excellence Grant topslice - £33,000 – each year, prior to allocating the REG grant to UHI partners, UHI EO topslice total REG funding by 16%, which is used by UHI to offset costs of the research department in UHI.
- Lost FE credit income - £3,000,000 – in 2024/25, UHI Inverness had unmet demand of 8,200 credits split across the whole curriculum, with the 4 largest areas being engineering, languages & ESOL, special programmes and care. If all of these unmet credits were funded, that would equate to £3 million of additional FE teaching grant being allocated to the college. The additional impact of this is not meeting the needs

of our communities and also not fulfilling our role as a college. The risk to the college is not meeting our future growth plans – we are currently meeting our FE credit target but not maximising the opportunities to grow our HE pipeline.

- Module leadership – direct cost £298,000 and opportunity cost - £880,000. The module leadership activities are delivered on behalf of UHI EO and partners are expected to carry out these activities without any funding being allocated to the college. The direct cost for these in terms of remitted hours is £298,000, with the opportunity costs/ lost income being significantly higher at £880,000, which relates to these hours being used to deliver FE & HE courses and therefore attract FE & HE teaching grant.
- Programme leadership – direct cost £29,000. The programme leadership activities are delivered on behalf of UHI EO and due to a reduction in the amount of overall grant, UHI Inverness is now receiving £29,000 less in funding for this activity.

**In total, for 2025/26, UHI Inverness is budgeting to lose income/incur additional costs of £10.930 million, on a turnover of £30.5 million, which equates to 36% of turnover.**

At the present time, there is very little UHI Inverness can do to change the sectoral funding issues noted above, which amount to £2.090 million. However, a change to the UHI topslice would make a significant difference to the deficit forecast in 2025/26.

As noted above, the UHI topslice on the college HE total student income is approximately £4 million. The table below shows the impact of a step change reduction of 5% in the top slice to the additional HE grant income the college would receive. (Figures below are estimates).

**Table 3 – Potential Reduction in UHI HE topslice**

UHI Topslice	Amount	Amount of additional HE Grant
	£	£
UHI EO HE topslice - 35%	4,000,000	0
UHI EO HE topslice – 30%	3,290,000	710,000
UHI EO HE topslice – 25%	2,770,000	1,230,000
UHI EO HE topslice – 20%	2,250,000	1,750,000
UHI EO HE topslice – 15%	1,730,000	2,270,000

As you can see from table 3 above, even a modest 5% reduction in the UHI HE topslice would result in an increase in HE grant of £710,000 for UHI Inverness, which would more or less bring the college back to a break-even position. If there was a further decrease of another 5%, the college would be budgeting for a surplus in 2025/26 and be able to invest further in all areas of the college, including staff development, curriculum development, estates developments, employer engagement, etc.

## UHI Partnership Financial Forecasts

Table 4 – UHI AP Financial Forecasts – 2024/25

<u>Academic Partner</u>	<u>SFC FFR</u> <u>(Jun 24)</u> <u>£m</u>	<u>Forecast</u> <u>Nov 24</u>	<u>Variance</u>	<u>SFC MYR</u> <u>Mar 25</u>	<u>Variance</u> <u>to FFR</u>
Inverness	(0.9)	(1.0)	(0.1)	(1.2)	(0.3)
Moray	(2.2)	(1.4)	0.8	(0.7)	1.5
NWH	(1.4)	(1.7)	(0.3)	(2.3)	(0.9)
Perth	(0.5)	(0.9)	(0.4)	(2.1)	(1.6)
Shetland	(1.2)	(0.7)	0.5	(0.8)	0.4
Orkney	(0.4)	(0.5)	(0.1)	(0.5)	(0.1)
Argyll	(0.5)	(0.1)	0.4	0.0	0.5
<b>Total Assigned/ Incorp Coll</b>	<b>(7.1)</b>	<b>(6.3)</b>	<b>0.8</b>	<b>(7.6)</b>	<b>(0.5)</b>
HTC	(0.1)	(0.2)	(0.1)	(0.2)	(0.1)
SAMS	(0.1)	(0.6)	(0.5)	(0.6)	(0.5)
SMO	0.1	0.1	0.0	0.0	(0.1)
<b>Total AP</b>	<b>(7.2)</b>	<b>(7.0)</b>	<b>0.2</b>	<b>(8.4)</b>	<b>(1.2)</b>
EO	(2.5)	(1.0)	1.5	(2.5)	0.0
<b>Total UHI partnership</b>	<b>(9.7)</b>	<b>(8.0)</b>	<b>1.7</b>	<b>(10.9)</b>	<b>(1.2)</b>

Table 4 above shows the current financial forecast for all partners and UHI EO for 2024/25. The original forecasts included in the forecast in the FFR in June 2024 was a total forecast deficit of £9.7 million. In the November forecast, this decreased to a deficit of £8 million, but increased in the forecast mid-year returns to a total of £10.9 million, with two partners and UHI EO forecasting deficits of over £2 million.

The total in-year cash advances to date are £5.2 million for the partnership and are expected to rise by a further £1.4 million by the end of the year, with further cash support required by UHI Perth, UHI Shetland and UHI HTC.

At the end of April 2025, partners have received a total of £13.6 million of funding support over the last 3 years, details are noted below:

- £2.5 million from UHI to Shetland and NWH, in the form of loans from unrestricted cash reserves, to support both colleges post-merger.
- £4.1 million from the SFC to provide initial liquidity support to the new merged college NWH, in 2023/24. This funding was sourced from waived HE clawback in 2021/22.
- £5.2 million from SFC to 4 partners in financial distress, in the form of advances in core grant, to be repaid when the college is in a more stable financial position.
- £1.5 million from SFC in the form of loans to support both liquidity cover (at UHI Shetland) and VSS costs (UHI Moray). Both are to be repaid as and when the college is in a more sustainable financial position.

With the addition of a further £1.4 million between now and July 2025, as noted above, this will take the overall total financial support and increased debt for the UHI partnership to £15 million.

**It is clear that major changes are required in terms of the UHI funding model and the wider sectoral funding model as well. However, the above noted UHI EO**

**topslice, which continues to be taken from partners for HE, FE and research activity, should be revised now. This alone, would go a long way to reduce the operating deficits of all partners, and begin to move all partners to a position of financial sustainability.**

### **Draft Revenue Budget 2025/26**

The draft revenue budget operating deficit for 2025/26 is £792,000, compared with a budget deficit of £750,000 in 2024/25. The main variations in the 2025/26 budget compared to the 2024/25 budget are noted below:

- FE Grant – budget income of £10.310 million compared to £10.148 million in 2024/25, an increase of £162,000. The increase includes assumed additional SFC grant in relation to the additional employers NIC costs, to be announced in the SFC final allocations for 2025/26. Assumed amount is £190,000, which is 48% of additional costs.
- HE grant - budget income of £7.438 million compared to £6.324 million in 2024/25, an increase of £1.114 million. The increase is due to the forecast increase in our HE teaching grant due to the forecast increase in our HE numbers, mainly down to increases in our GA's.
- Tuition fees – budget income of £3.131 million, compared to £3.038 million in 2024/25, an increase of £93,000. The increase relates to the increase in our overall HE numbers.
- Research grants – budget income is £1.246 million compared to £1.332 million in 2024/25, a reduction of £86,000. Overall, research is forecasting a deficit of £72k for 2025/26.
- Refectory income - budget income of £0.634 million, compared to £0.591 million in 2024/25, an increase of £43,000.
- SDS income – budget income of £2.142 million, compared to £2.099 million in 2024/25, an increase of £43,000. The increase relates to new starts for 2025/26 which at this point are only estimates in terms of the amount of funding the college will drawdown from SDS.
- Commercial income – budget income of £0, compared to £147,500 in 2024/25, a decrease of £147,500. Although there is a decrease within commercial income, there is commercial activity/ income within miscellaneous income, include several projects under a number of curriculum areas.
- Miscellaneous income - budget income of £0.877 million, compared to £0.593 million in 2024/25, an increase of £284,000. The increase is due to increased project income and it should be noted that the current forecast income for 2024/25 is over £800,000.
- Staff costs budget of £21.079 million, compared to £19.554 million in 2024/25, an increase of £1.525 million compared to the 2024/25 budget, due to a number of factors noted below:
  - Cost of living increases for staff, at 4.14% - £730,000
  - Increase in employers NIC - £500,000
  - Increase in employers pension contributions – £160,000
- Premises costs – budget costs of £1.933 million, compared to £1.935 million in 2024/25, a decrease of £2,000.
- Other operating costs - budget costs of £7.763 million, compared to £7.742 million in 2024/25, an increase of £21,000.

Committee members should be aware that incorporated colleges should seek to set a balanced budget each year. However, the current financial landscape with significant unfunded increases in staff and other costs, along with real term reductions in funding, are making it almost impossible for colleges to move to a more financially sustainable position.

The longer-term outlook for the college financial forecasts is shown in summary form in appendix 2 of the paper. The key points are noted below:

- Operational deficit to reduce over the next 5 years, 2029/30 deficit of £376,000. Any reduction in the EO topslice would help to offset the forecast deficits and return the college to budget break-even/ surplus position.
- Decreasing cash balances over the coming 5 years. Forecast balance at end of 2025/26 is £3.3million, with the cash balance forecast at 2029/30 being £1.3 million.
- Assumed increase of 3% COL in staff costs from 2026/27 to 2029/30.
- Forecast increase in HE numbers over the next 5 years.
- No increase in forecast FE numbers over the next 5 years.

Given the above forecast budget deficit for 2025/26, further work is being undertaken to draft a revised financial strategy for the college. The key element within the strategy will be a plan to move the college from its current forecast budget deficit to a financially sustainable position of at least break-even from a cashflow point of view. This will be achieved through a variety of measures, some of which are set out below:

- The college is currently forecasting to be above its FE target, both in 2024/25 and for 2025/26, in terms of the curriculum plan. Ongoing discussions with UHI/ SFC have been taking place regarding additional FE credit funding being reallocated from the FE sector to the college. No increase has been included in the financial forecasts going forward at this time.
- The college is currently forecasting to be above its APC target for 2024/25 and is forecasting an increase in its HE numbers for 2025/26, mainly due to an increase in graduate apprenticeship numbers, which are forecast to be 332 fte in 2025/26, with the UHI total being 370 fte. Overall, UHI Inverness is now budgeting for the highest amount of HE fte's in the UHI partnership, the figure being 1,582 fte, from a total APC target of 5,069 fte.
- There continues to be discussions around the UHI EO top slice within the UHI Transformation project and the view that it continues to be too high and is diverting FE and HE teaching grant funding which would directly benefit the student experience. Currently, the FE top slice is £0.6 million and the HE top slice is £4.0 million.
- Within staff costs, there has been considerable work undertaken to review and adjust curriculum staffing to ensure it is in line with the curriculum plan for 2025/26. The college will also continue to review fixed term contracts, as well as any current vacancies and retirements, which could lead to additional savings in staff costs during the coming year and in future years.

- There continues to be work across all areas of the non-staff costs budgets to make savings, with work being carried out by procurement to increase the use of APUC frameworks.
- Within the UHI Transformation project, there is ongoing work related to partnership wide shared services across all the professional services and this has the potential to reduce professional services staff costs in the coming years.
- In terms of the research activity, there is a reduction in research grants of £92,000 compared to 2023/24, however expenditure has also decreased, and overall, research are currently budgeting for a small surplus. This will be closely monitored during the year to ensure any variances are dealt with as early possible.

## Appendix 1

1. Draft figures for the main FE teaching grant funding have been received. They are as follows:

2025/26	£9,999,959	Credit Target	26,442	Average	£378
2024/25	£9,776,277	Credit Target	26,442	Average	£370

It should be noted that the above budget FE grant includes funding for both SSPA additional pension costs and the additional 1.14% of academic staff pay costs.

The FE Credit target is the same as 2024/25 at 26,442 credits. The total SFC FE grant is £10.310million, which includes the assumed SFC grant for additional NIC's of £190,000 and the lifecycle grant of £109,802.

The annual estates maintenance funding from the SFC for FE has increased compared to 2024/25, from £104,279 to £109,802.

2. The SFC HE RAM grant for 2025/26 is noted below:

2025/26	APC 1,582 HE FTE, Budget target 1,666	Budgeted £6,911,000
2024/25	APC 1,319 HE FTE, Budget target 1,390	Budgeted £5,740,000

The College had a target of 1,319 FTE (Full Time Equivalent Student Numbers) in 2024/25 and is projected to deliver 1,666 in 2024/25. The APC target for 2025/26 has been set at 1,582 FTE.

PGDE funding and other UHI funding is still to be finalised at the time of writing the report. Research Funding covers both Research Excellence Grant (REG) and University Innovation Funding (UIF). The final funding figure for REG for 2024/25 is £130,030, a decrease of £3,405 from the 2023/24 figure of £133,435. At present, we do not have the UIF allocation for the college.

3. Tuition fees -

The HE fees budget is based on delivering 1,582 UGT FTE.

Overseas fees are based on the outturn for 2023/24. Overall, the fees budget is £3,131,450, £93,000 above the 2024/25 budget figure.

4. Other Grant Funding – these are mainly research related and based on project income and PHDs in post. Overall, there is a decrease of £92,164 to £1,246,000, due to a reduction in forecast research grants and commercial research income.
5. Refectory and training restaurant Income – the budgeted income for the refectories assumes some events income, with the total income budget being £634,000, compared to £591,000 in 2024/25.
6. SDS Income – overall, this is forecast to be £43,000 above the 2024/25 budget.
7. Commercial Income – forecast to be £0 in 2025/26, although some commercial activity is included in miscellaneous income for 2025/26.
8. Miscellaneous Income – overall, an increase in the forecast miscellaneous income for 2025/26, increased from £592,000 to £877,000, an increase of £285,000. The increase is due to additional project income and some commercial activities across a number of curriculum areas.
9. Unitary Charge funding is based on amounts being paid in respect of this.
10. Staff costs – total budget of £21.078 million, compared to £19.554 million in 2024/25, an increase of £1.524 million or 7.8%
  - Unfunded cost of living (COL) increase of £730,000
  - Employers NIC's increase
  - Employers pension contributions increase - £160,000
11. Premises costs – overall they have reduced by £2,000.
12. Other operating costs – overall, other operating costs have increased by £21,000.

**Risks Downside**

- Continued rise in staff cost of living increases, which continue to be unfunded.
- UHI EO top slice continues to remain at the same level as in previous years.
- The HE target may be challenging, although current forecast admission data at present show an increased rate compared to previous years.
- The recent public sector final budget for the college sector for 2025/26 and flat funding for the Scottish Funding Council for the next five years.
- Research income continues to be uncertain, with increasing competition for grants within the UK.
- If the costs of Job Evaluation are greater than funding received from SFC, then the College will have a further pressure.

**Student Support Budget**

Student Support funding is not part of the main college accounts. The College receives funding from the Scottish Funding Council (SFC) which is specifically for this purpose of Student Support. If there is an underspend on funding received, this is reimbursed to the SFC. Any such underspend cannot be used to support a deficit position in the College's main accounts. HE Hardship funding parameters are estimated. Overall, the FE student support funding has remained the same at £2,197,086 compared to the 2024/25 allocation.

**Other Comments**

The SFC have recently sent out the request for the College Financial Forecast return for 2025, which is due to be completed by and returned to the SFC by 30 June 25. This will be based on the 2024/25 forecast figures and the budget for 2025/26.

## INVERNESS COLLEGE

PERIOD ENDED 31 JULY 2026

## BUDGET 25-26 INCOME AND EXPENDITURE ACCOUNT

	<b>Draft Budget 31-Jul-26</b>	<b>Budget 31/07/2025</b>	<b>variance</b>
<b>Income</b>			
Scottish Funding Council FE Grants	10,309,761	10,148,000	161,761
UHI	7,438,500	6,324,280	1,114,220
Tuition Fees	3,131,189	3,038,940	92,249
Other Grants - Research	1,246,037	1,332,090	(86,053)
Refectory and Training Restaurant	634,217	591,000	43,217
SDS	2,142,725	2,099,400	43,325
Commercial	0	147,500	(147,500)
Miscellaneous	876,887	592,740	284,147
Unitary Charge	4,903,884	4,903,884	0
	<b><u>30,683,200</u></b>	<b><u>29,177,834</u></b>	
<b>Staff Costs</b>			
Teaching	11,173,600	10,631,934	(541,666)
Teaching Support	1,570,274	1,454,561	(115,713)
Premises	349,644	338,907	(10,737)
Administration and Support	5,921,582	5,282,842	(638,740)
Hospitality	456,315	388,536	(67,779)
Research	1,109,450	979,115	(130,335)
Business Development	498,107	475,380	(22,727)
Provision			0
	<u>21,078,972</u>	<u>19,551,275</u>	
Other Staff Costs ( included above for 24-25)			
	<b><u>21,078,972</u></b>	<b><u>19,551,275</u></b>	
<b>Other Costs</b>			
Premises	1,932,909	1,935,590	2,681
Other Costs	7,763,142	7,741,822	(21,320)
	<b><u>30,775,023</u></b>	<b><u>29,228,687</u></b>	
Cash Position	(91,823)	-50,853	
NPD Capital	(897,592)	(897,592)	
<b>Cash Position after repaying loan capital</b>	<b><u>(989,415)</u></b>	<b><u>(948,445)</u></b>	
<b>Non RDEL</b>			
Deferred Grant Release	300,000	300,000	
Depreciation	-1,000,000	-1,000,000	
	(700,000)	(700,000)	
	<b><u>(791,823)</u></b>	<b><u>(750,853)</u></b>	

FORECAST INCOME AND EXPENDITURE - 2025/26 TO 2029/30

	Note	Budget 31-Jul-24	Budget 31-Jul-25	Budget 31-Jul-26	Financial Forecast 31-Jul-27	Financial Forecast 31-Jul-28	Financial Forecast 31-Jul-29	Financial Forecast 31-Jul-30
		£	£	£	£	£	£	£
<b>Income</b>								
Scottish Funding Council FE Grants	1	9,885,000	10,148,000	10,310,000	10,310,000	10,310,000	10,310,000	10,310,000
UHI	2	6,010,788	6,324,580	7,438,580	7,853,580	8,268,580	8,579,830	8,891,080
Tuition Fees	3	2,877,127	3,038,450	3,131,450	3,206,450	3,281,450	3,356,450	3,431,450
Other Grants - Research	4	1,424,254	1,332,090	1,246,090	1,246,090	1,264,090	1,289,090	1,314,090
Refectory and Training Restaurant	5	653,700	591,000	634,000	634,000	643,000	643,000	643,000
SDS	6	1,731,307	2,099,400	2,142,400	2,142,400	2,193,400	2,218,400	2,243,400
Commercial	7	442,500	147,500	-	-	12,500	12,500	12,500
Miscellaneous	8	515,480	592,740	876,740	726,740	754,740	764,240	773,740
Unitary Charge	9	4,903,884	4,903,884	4,903,884	4,903,884	4,903,884	4,903,884	4,903,884
		<b>28,444,040</b>	<b>29,177,644</b>	<b>30,683,144</b>	<b>31,023,144</b>	<b>31,631,644</b>	<b>32,077,394</b>	<b>32,523,144</b>
<b>Staff Costs</b>	10	18,225,593	19,553,731	21,078,731	21,348,731	21,739,193	22,141,369	22,545,610
Premises	11	1,963,771	1,935,590	1,932,590	1,935,590	1,940,590	1,940,590	1,940,590
Other Operating Costs	12	7,972,950	7,741,822	7,762,922	7,712,922	7,712,922	7,712,922	7,712,922
		<b>28,162,314</b>	<b>29,231,143</b>	<b>30,774,243</b>	<b>30,997,243</b>	<b>31,392,705</b>	<b>31,794,881</b>	<b>32,199,122</b>
Non RDEL								
Deferred Grant Release		300,000	300,000	300,000	300,000	300,000	300,000	300,000
Depreciation		(1,000,000)	(1,000,000)	(1,000,000)	(1,000,000)	(1,000,000)	(1,000,000)	(1,000,000)
		<b>(700,000)</b>	<b>(700,000)</b>	<b>(700,000)</b>	<b>(700,000)</b>	<b>(700,000)</b>	<b>(700,000)</b>	<b>(700,000)</b>
<b>Operational Deficit</b>		<b>(418,274)</b>	<b>(753,499)</b>	<b>(791,099)</b>	<b>(674,099)</b>	<b>(461,061)</b>	<b>(417,487)</b>	<b>(375,978)</b>
<b>Year-end Cash Balance</b>		<b>8,619,000</b>	<b>4,100,000</b>	<b>3,300,000</b>	<b>2,600,000</b>	<b>2,100,000</b>	<b>1,700,000</b>	<b>1,300,000</b>

**Notes on Income & Expenditure lines**

25/26 Op deficit - £0.791 million - if exclude increase in staff costs due to 4% COL & ER's NIC net increase & pension costs, op surplus is £200k.

FE grants - assumes SFC funding for ER's NIC increase - 48%, £190k

UHI HE grant - assumes HE fte target in 2025/26 - 1,666 ftes & increases in following years of 26/27-100, 27/28 - 100, 28/29 - 75 & 29/30 - 75

Tuition fees - assume extra fees in 25/26 from increase in HE fte's - £100,000 & 26/27-£75k, 27/28 - £75k, 28/29 - £75k, 29/30 - £75k

Research grants income - reduced by £100,000 and results in a deficit budget position of £72,000.

Refectory, SDS, Commercial & Misc stay same in 25/26 & 26/27

Staff costs - 3% COL, assumed 1% additional COL for 25/26, plus incr ER's NIC = £500,000. Further staff savings/ vacancy management - £100,000 +£100k sick cover.

Non-staff cost savings - assumed stays same in 25/26

Cash balance - reducing cash balance over forecast period due to forecast deficits. By 2029/30, £1,300,000 cash balance.

**UHI | INVERNESS**

<b>Subject/Title:</b>	Capital Budget – 2025/2026
<b>Author:</b>	Niall McArthur – Director of Finance & Estates
<b>Meeting:</b>	Finance and General Purposes Committee
<b>Meeting Date:</b>	12 June 2025
<b>Date Paper prepared:</b>	27 May 2025
<b>Brief Summary of the paper:</b>	To present the capital funding budget for 2025/26 for both FE and HE capital grants.
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	Recommend to Board for Approval

<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with: <input type="checkbox"/> compliance <input type="checkbox"/> partnership services <input type="checkbox"/> risk management <input type="checkbox"/> strategic plan <input type="checkbox"/> new opportunity/change	Complying with Funding parameters Financial sustainability
<b>Resource implications:</b>	Yes – monitoring of Financial Resources <b>If yes, please specify:</b>

<b>Risk implications:</b>	Yes <b>If yes, please specify:</b> Financial Operational		
<b>Equality and Diversity implications:</b>	N/A		
<b>Student Experience Impact:</b>	None		
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	None		
<b>Status – [Confidential/Non confidential]</b>	Non-Confidential		
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	Yes		
*If a paper should <b>not</b> be included within “open” business, please highlight below the reason.			
Its disclosure would substantially prejudice a programme of research (S27)		Its disclosure would substantially prejudice the effective conduct of public affairs (S30)	
Its disclosure would substantially prejudice the commercial interests of any person or organisation (s33)		Its disclosure would constitute a breach of confident actionable in court (s36)	
Its disclosure would constitute a breach of the Data Protection Act (s38)		Other (Please give further details)	

Further guidance on application of the exclusions from Freedom of Information legislation is available via

<http://www.itspublicknowledge.info/ScottishPublicAuthorities/ScottishPublicAuthorities.asp> and

[http://www.itspublicknowledge.info/web/FILES/Public\\_Interest\\_Test.pdf](http://www.itspublicknowledge.info/web/FILES/Public_Interest_Test.pdf)

## Recommendation

That members of the Finance and General Purposes Committee recommend to the Board that the College’s 2025/26 capital budget is approved.

## Purpose of report

To present to the Finance and General Purposes Committee the capital budget for 2025/26 and ask that it recommends that the College Board approves it.

## Background

There is an annual capital budget prepared each year and this is then presented for approval by the Board by 31 July of each year and prior to the commencement of the new financial year.

## Executive Summary

The capital budget parameters are slightly different from the revenue budget. The revenue budget has a year-end of 31 July, whereas the capital budget has a year-end of 31 March and therefore must commit to spend the full grant by 31 March and pay the subsequent invoices by 31 July each year.

Information on the allocations is given in appendix 1 of this report. These cover FE Lifecycle Maintenance, FE Backlog Maintenance; HE Capital; and SFC BIS (Research monies).

1. FE Lifecycle Maintenance - £109,102. This is increased from the 2024/25 allocation of £104,279. This has in previous years been used to fund repairs to buildings and IT hardware costs. At present this has been included in the Revenue Budget to support Estate Maintenance and IT Hardware spend, however, SFC have now indicated that this should only be used for capital expenditure in 2025/26.
2. FE Backlog Maintenance £8,018. This is the same as the 2024/25 allocation. This should be spent on issues raised from a SFC exercise and review of college estate for the whole college sector over five years ago.
3. HE Capital funding £37,360. This grant has increased by £4,277 or 13% from £33,083 in 2024/25. The SFC guidance states that this grant should only be spent on estates capital items.
4. BIS funding £28,551 – this funding is research orientated for buildings or equipment. The College still awaits final confirmation of this from the Scottish Funding Council via UHI Executive Office.

Work will now be undertaken to plan and prioritise the capital spend for 2025/26.

## INVERNESS COLLEGE

## Appendix 1

## CAPITAL BUDGET TO 31 JULY 26

	<b>FE Lifecycle Maintenance £</b>	<b>Total £</b>	<b>HE Capital £</b>	<b>FE Backlog £</b>	<b>Sub Total £</b>		<b>BIS Research £</b>	<b>BIS Total £</b>	
<b>2025-26</b>	109,102	<b>109,102</b>	37,360	8,018	<b>45,378</b>	*	28,551	<b>28,551</b>	45,378
<b>2024-25</b>	104,279	<b>104,279</b>	33,083	8,018	<b>41,101</b>		28,551	<b>28,551</b>	41,101
<b>2023-24</b>	106,857	<b>106,857</b>	37,234	8,018	<b>45,252</b>		22,419	<b>22,419</b>	45,252

**Note** SFC BIS research grant not yet confirmed by UHI EO, estimate only.

<b>Subject/Title:</b>	SFC Mid-Year Return MYR 2025
<b>Author:</b>	Niall McArthur, Director of Finance & Estates
<b>Meeting:</b>	Finance & General Purposes Committee
<b>Meeting Date:</b>	12 June 2025
<b>Date Paper prepared:</b>	27 May 2025
<b>Brief Summary of the paper:</b>	To present the SFC MYR for 2025.
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	Approval

<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with: <input type="checkbox"/> compliance <input type="checkbox"/> partnership services <input type="checkbox"/> risk management <input type="checkbox"/> strategic plan <input type="checkbox"/> new opportunity/change	Financial Sustainability
<b>Resource implications:</b>	Yes – monitoring of Financial Resources <b>If yes, please specify:</b>

<b>Risk implications:</b>	Yes <b>If yes, please specify:</b> Financial Operational		
<b>Equality and Diversity implications:</b>	N/A		
<b>Student Experience Impact:</b>	None		
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	None		
<b>Status</b> – [Confidential/Non confidential]	Non-Confidential		
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	Yes		
*If a paper should <b>not</b> be included within “open” business, please highlight below the reason.			
Its disclosure would substantially prejudice a programme of research (S27)		Its disclosure would substantially prejudice the effective conduct of public affairs (S30)	
Its disclosure would substantially prejudice the commercial interests of any person or organisation (s33)		Its disclosure would constitute a breach of confident actionable in court (s36)	
Its disclosure would constitute a breach of the Data Protection Act (s38)		Other (Please give further details)	

Further guidance on application of the exclusions from Freedom of Information legislation is available via

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[http://www.itspublicknowledge.info/web/FILES/Public\\_Interest\\_Test.pdf](http://www.itspublicknowledge.info/web/FILES/Public_Interest_Test.pdf)

## Recommendation

Finance & General Purposes committee members are asked to approve the SFC MYR for 2025.

### **Purpose of report**

To provide to committee the SFC Mid-Year return for 2025 and to highlight the key aspects of the return, both in terms of the income & expenditure statement and the balance sheet.

### **SFC MYR March 2025**

Overall, the SOCIE is currently forecasting a draft operational deficit of £1.477 million, compared to the original budget deficit of £750,000.

The operational deficit of £1.477 million includes the following adjustments:

- Adjustment for the 2024/25 accrued cost of the Job Evaluation for support staff, estimated at £377,000.
- Adjustment for the forecast employers NIC costs for the period April to July 2025 – estimated cost of £130,000.

If these costs are stripped out, the underlying deficit is £970,000, which is in line with the January 2025 budget monitoring figures.

The college is forecasting that it will exceed its FE Credit target for 2024/25, with the actual number of credits at February 2025 currently being 26,760, compared to the target of 26,442. This is expected to increase further, however any over-performance will not increase our teaching costs. In terms of the HE UGT fte number for 2024/25, the current actual at February 2025 is 1,352 fte, compared to the target of 1,319 fte. The forecast for the year is 1,354 fte, which is 35 fte above the APC target and 40 fte below the budget target of 1,394 fte.

The main issues that are affecting the financial performance for the College in 2024/25 are noted below.

### **Income**

- Research grant funding – the research grant funding is forecast to be below target at present by approximately £282,000, although efforts are being made to close the gap in terms of the income target for the year. At present further work is being carried out on both income and expenditure forecasts to ascertain the forecast for the year.
  - Mitigating Actions: ongoing work to bring in additional grant income, including UKRI application, further KTP grants, and potential funding through the Green Freeport, as well as minimising expenditure for the rest of the academic year.

- UHI HE grant funding - the UHI HE grant is forecast to be lower than the budget of £6.324 million, although the HE fte is ahead of the APC target of 1,319, but below the budget target of 1,394 HE fte. The forecast HE grant figure is £6.199 million, £125,000 below the budget figure. At this stage we do not have any information relating to the microram position for 2024/25.
  - Mitigating Actions: to maximise the January 2025 student intake for HE students.
- Tuition fees – with the HE fte being below the budget target set for the year as noted above, there is a knock-on impact on tuition fees, which is being forecast to be below target by £83,000.
  - Mitigating Actions: to maximise the January 2025 student intake for HE students.
- Refectory & restaurant income – based on current income levels, forecast to be £59,000 above the income target of £591,000.
- Commercial income – based on current activity levels, forecast to be the same as the income target of £147,000, although the actual figure for the 6 months to January 2025 is low.
- Miscellaneous income – based on current income levels, forecast to be £130,000 above the income target of £560,740, mainly due to additional other income not budgeted for.

## Expenditure

- Staff costs - are forecast to be £494,000 over budget, with the agreed cost of living increases now been paid for both academic and professional staff for 2024/25 and the 2 previous years. The forecast includes additional SPPA employer costs, which increased from 23% to 26% in April 2024 and the additional income from SFC has been received from SFC. It also includes the JE support staff adjustment of £377,000 for 2024/25.

The recently announced increase in employer NIC's has been included in the forecasts, with uncertainty over what level of funding the SFC will provide for these additional costs. The forecast amount for the college for April to July 2025 is £130,000.

Other staff costs and travel costs are forecast to be the same as the budget for the year to 31 July 2025.

- Mitigating Actions: to continue to review all vacancies and ascertain whether they should be replaced or not, as part of the Staff Review Panel (SRP) process. Also, continue to review any retirements and ascertain

whether they should be replaced or can be replaced through further efficiency measures.

- Premises costs - are forecast to be £44,000 above the budget of £1.935million. This is mainly due to the forecast overspend in energy costs of £100,000, offset by underspends in other budget lines.
  - Mitigating Actions: to continue to review all lines of expenditure and for the remainder of the year, reduce expenditure if possible.
- Other Operating costs - are forecast to be £78,000 below the budget of £7.741million. This is due to the forecast underspend in a number of different areas.
  - Mitigating Actions: to continue to review all lines of expenditure and for the remainder of the year, further reduce expenditure if possible. Budget holder refresher training will also be undertaken for all budget holders, with the key focuses being on budget monitoring and on procurement. The budget review exercise has also started for 2024/25, with the second round of reviews progressing through the rest of February 2025. Further reviews will take place during the rest of the year, in May 2025.

As part of the ongoing improvements to the budget setting process, budget profiling will be put in place as part of the 2025/26 budgets setting process and budget holders will be given training in how to profile their budgets for next year, to improve the budget monitoring and review process.

## **Student Support Funding**

The Student Support funding (SSF) is forecast to be overspent in 2024/25 by approximately £50,000, compared to an underspend of £579,000 in 2023/24. This is due to a significant decrease in the college allocation from SFC. As part of the SFC In-Year redistribution exercise carried out in November 2024, UHI Inverness requested additional funds of £100,000 for 2024/25 and this has been approved by SFC and will be used to fund additional learning assistants to support students. Further updates will be provided over the rest of the AY.

## **Liquidity**

The bank balance at the end of January 2025 was £7.266 million, compared to the bank balance at July 2024 of £8.619 million. The forecast bank balance at 31 July 2025 is £4.2 million, a reduction of £4.419 million compared to the previous years balance. The reduction is due to the forecast deficit position in 2024/25, as well as the back-dated pay award for 2022/23 and 2023/24, which has now been paid to staff, ALF funding of £900,000 being held at July 2024, repayment of SSF underspend of £600,000 in March 2025 and the Longman site sale proceeds of £773,000 included in the 2024 year-end balance.

## **Risk Assessment**

### Downside Risks

- The continued unfunded cost of living increases for academic and professional staff.
- The five-year public sector finance forecast which was issued by the Scottish Government, which showed flat funding for revenue grants and reduced capital for five years. Also, current SFC funding model changes for FE funding could adversely impact college funding in future years.
- Although HE FTE numbers are increasing for UHI Inverness, across the UHI partnership they are still significantly below the SFC funded target, which increases the risk of further cuts to the UHI SFC funded number and potentially reduces the funded growth which is required across UHI.
- The UHI microRam continues to add uncertainty in projections at the year-end.
- Job Evaluation was due to complete by 31 March 2023. If monies from the SG are not sufficient to cover the costs, then colleges will have to fund the additional cost themselves.

## UHI Inverness

	FFR 2024-25	MYR 2024-25	Variance	Variance	Explanation for variance
	£000	£000	%	£	
<b>Statement of Comprehensive income and expenditure (Consolidated)</b>					
<b>INCOME</b>					
Tuition fees and education contracts	5,137	5,054	-1.6%	-83	
Funding council/RSB grants	21,675	21,550	-0.6%	-125	
Research grants and contracts	1,332	1,082	-18.8%	-250	
Other income	1,301	1,388	6.7%	87	
Investment income	30	100	233.3%	70	
<b>Total income before donations and endowments</b>	<b>29,475</b>	<b>29,174</b>	<b>-1.0%</b>	<b>-301</b>	
Donations and endowments	0	0		0	
<b>Total income</b>	<b>29,475</b>	<b>29,174</b>	<b>-1.0%</b>	<b>-301</b>	
<b>EXPENDITURE</b>					
Staff costs	19,553	20,047	2.5%	494	
Staff costs - exceptional restructuring costs	0	0		0	
Exceptional costs - non-staff	0	0		0	
Other operating expenses	6,859	6,790	-1.0%	-69	
Donation to Arms Length Foundation	0	0		0	
Depreciation	1,000	1,000	0.0%	0	
Interest and other finance costs	2,814	2,814	0.0%	0	
<b>Total expenditure</b>	<b>30,226</b>	<b>30,651</b>	<b>1.4%</b>	<b>425</b>	
<b>Surplus/(deficit) before other gains and losses and share of operating surplus/deficit of joint ventures and associates</b>	<b>(751)</b>	<b>(1,477)</b>	<b>96.7%</b>	<b>-726</b>	
Gain/(loss) on disposal of fixed assets	0	0		0	
Gain/(loss) on investments	0	0		0	
Share of operating surplus/(deficit) in joint venture(s)	0	0		0	
Share of operating surplus/(deficit) in associate(s)	0	0		0	
<b>Surplus/(deficit) before tax</b>	<b>(751)</b>	<b>(1,477)</b>	<b>96.7%</b>	<b>-726</b>	
Other taxation	0	0		0	
<b>Surplus/(deficit) for the year</b>	<b>(751)</b>	<b>(1,477)</b>	<b>96.7%</b>	<b>-726</b>	
Unrealised surplus on revaluation of land and buildings	0	0		0	
Actuarial (loss)/gain in respect of pension schemes	0	0		0	
Other comprehensive income	0	0		0	
<b>Total comprehensive income for the year</b>	<b>(751)</b>	<b>(1,477)</b>	<b>96.7%</b>	<b>-726</b>	

## UHI Inverness

INCOME	FFR	MYR	Variance	Variance	Explanation for variance
	2024-25	2024-25			
	£000	£000	%	£	
<b>1 Tuition fees and education contracts</b>					
a) FE - UK	120	120	0.0%	0	
b) FE - EU	0	0		0	
c) HE	2,718	2,635	-3.1%	-83	
d) Non-EU	200	200	0.0%	0	
e) SDS contracts	2,099	2,099	0.0%	0	
f) Education contracts	0	0		0	
g) Other	0	0		0	
<b>Total tuition fees and education contracts</b>	<b>5,137</b>	<b>5,054</b>	<b>-1.6%</b>	<b>-83</b>	
<b>2 SFC / RSB Grants</b>					
a) SFC / RSB FE recurrent grant (including fee waiver)	10,044	10,044	0.0%	0	
b) UHI recurrent grant - HE provision	6,324	6,199	-2.0%	-125	
c) FE Childcare funds	0	0		0	
d) Release of SFC / RSB deferred capital grants	300	300	0.0%	0	
e) SFC capital grant	104	104	0.0%	0	
f) SFC grant for NPD	4,903	4,903	0.0%	0	
g) Other SFC / RSB grants - FE provision	0	0		0	
h) Other UHI grants - HE provision	0	0		0	
<b>Total SFC / RSB Grants</b>	<b>21,675</b>	<b>21,550</b>	<b>-0.6%</b>	<b>-125</b>	
<b>3 Research grants and contracts</b>					
a) European Commission	1,332	1,082	-18.8%	-250	
b) Other grants and contracts	0	0		0	
<b>Total research grants and contracts</b>	<b>1,332</b>	<b>1,082</b>	<b>-18.8%</b>	<b>-250</b>	
<b>4 Other Income</b>					
a) Catering and residences	591	650	10.0%	59	
b) Other European Income	0	0		0	
c) Other income generating activities	147	147	0.0%	0	
d) Grants from ALF	0	0		0	
i) Revenue	0	0		0	
ii) Capital	0	0		0	
e) Non-government capital grant	0	0		0	
f) Other grant income	0	0		0	
g) Release of non-SFC government deferred capital grant	0	0		0	
h) Other income	563	591	5.0%	28	
<b>Total other income</b>	<b>1,301</b>	<b>1,388</b>	<b>6.7%</b>	<b>87</b>	
<b>5 Investment income</b>					
a) Investment income on endowments	0	0		0	
b) Investment income on restricted reserves	0	0		0	
c) Other investment income	0	0		0	
d) Other interest receivable	30	100	233.3%	70	
e) Net return on pension scheme	0	0		0	
<b>Total investment income</b>	<b>30</b>	<b>100</b>	<b>233.3%</b>	<b>70</b>	
<b>6 Donations and endowment income</b>					
a) New endowments	0	0		0	
b) Donations with restrictions	0	0		0	
c) Unrestricted donations	0	0		0	
<b>Total donation and endowment income</b>	<b>0</b>	<b>0</b>		<b>0</b>	

**UHI Inverness**  
**EXPENDITURE**

	FFR 2024-25	MYR 2024-25	Variance	Variance	Explanation for variance
	£000	£000	%	£	
<b>STAFF COSTS</b>					
1 Teaching departments	11,323	11,380	0.5%	57	
2 Teaching support services	1,620	1,620	0.0%	0	
3 Other support services	870	880	1.1%	10	
4 Administration and central services	4,700	4,730	0.6%	30	
5 Premises	340	345	1.5%	5	
6 Catering and residences	410	415	1.2%	5	
7 Other income generating activities	0	0		0	
8 Other staff costs	290	677	133.4%	387	
9 Impact of FRS 102 pensions reported costs (less contributions paid included above)				0	
<b>Normal staff costs</b>	<b>19,553</b>	<b>20,047</b>	<b>2.5%</b>	<b>494</b>	
10 Exceptional restructuring costs	0	0		0	
<b>Total staff costs</b>	<b>19,553</b>	<b>20,047</b>	<b>2.5%</b>	<b>494</b>	
<b>Additional breakdown of staff costs</b>					
Salaries	15,300	15,650	2.3%	350	
Social security costs	1,320	1,370	3.8%	50	
Pension contributions	2,870	3,027	5.5%	157	
Non-cash pension adjustments - net service cost				0	
Non-cash pension adjustments - early retirement provision				0	
Severance payments	0	0		0	
<b>Total staff costs</b>	<b>19,490</b>	<b>20,047</b>	<b>2.9%</b>	<b>557</b>	
<b>NON-STAFF COSTS</b>					
1 Exceptional costs - non-staff	0	0		0	
2 Other operating expenses					
a) Teaching departments	2,180	2,140	-1.8%	-40	
b) Teaching support services	0	0		0	
c) Other support services	90	85	-5.6%	-5	
d) Administration and central services	1,555	1,515	-2.6%	-40	
e) General education	0	0		0	
f) Premises	1,940	1,980	2.1%	40	
(i) Maintenance	710	690	-2.8%	-20	
(ii) Utilities	720	820	13.9%	100	
(iii) Other	510	470	-7.8%	-40	
g) Catering and residences	430	440	2.3%	10	
h) Other income generating activities	550	530	-3.6%	-20	
i) Overspend on student support funds *	0	0		0	
j) Planned maintenance	0	0		0	
k) Movement on early retirement pension provision	0	0		0	
l) NPD	0	0		0	
m) Other	114	100	-12.3%	-14	
<b>Total other operating expenses</b>	<b>6,859</b>	<b>6,790</b>	<b>-1.0%</b>	<b>-69</b>	
3 Depreciation					
a) Government funded assets	0	0		0	
b) Non-government funded assets	0	0		0	
c) NPD funded assets	1,000	1,000	0.0%	0	
<b>Total depreciation</b>	<b>1,000</b>	<b>1,000</b>	<b>0.0%</b>	<b>0</b>	
4 Interest					
a) On bank loans, overdrafts and other loans	0	0		0	
b) Finance lease interest	0	0		0	
b) Other	0	0		0	
c) Net charge on pension scheme				0	
d) NPD interest	2,814	2,814	0.0%	0	
<b>Total interest</b>	<b>2,814</b>	<b>2,814</b>	<b>0.0%</b>	<b>0</b>	

\* Includes any overspend on bursaries, discretionary funds, and student funds received from SAAS, but excludes childcare funds.

## UHI Inverness

ADJUSTED OPERATING RESULT	FFR 2024-25 £000	MYR 2024-25 £000	Variance %	Variance £	Explanation for variance
<b>Surplus/(deficit) before other gains and losses and share of operating surplus/deficit of joint ventures and associates</b>	<b>(751)</b>	<b>(1,477)</b>	96.7%	-726	
<b>Add:</b>					
Total depreciation (Government-funded, privately funded and NPD-funded assets) net of deferred capital grant release ( <i>incorporated colleges only</i> )	700	700	0.0%	0	
Exceptional non-restructuring items (e.g. impairment costs)	0	0		0	
Donation to Arms-Length Foundation (incorporated colleges only)	0	0		0	
Non-cash pension adjustment - net service cost	0	0		0	
Non-cash pension adjustment - ERP	0	0		0	
Non-cash pension adjustment -net interest costs	0	0		0	
Costs of support staff and middle management job evaluation exercise not matched by revenue	0	377		377	
<b>Deduct:</b>					
Non-Government capital grants (e.g. ALF capital grant)	0	0		0	
Exceptional income (if disclosed as exceptional in accounts)	0	0		0	
Revenue budget allocated to loan repayments and other capital items ( <i>incorporated colleges only</i> )	817	817	0.0%	0	
NPD payments to reduce NPD balance sheet debt	0	0		0	
<b>Adjusted operating result</b>	<b>(868)</b>	<b>(1,217)</b>	40.2%	-349	
<b>Revenue budget allocated to non-revenue expenditure (<i>incorporated colleges</i>) :</b>					
Loan repayments	0	0		0	
NPD / PFI repayments	817	817		0	
Estates costs	0	0		0	
Provisions pre 1 April 2014	0	0		0	
	<b>817</b>	<b>817</b>			

Balance Sheet		FFR	MYR	Variance	Variance	Explanation for variance
		2024-25	2024-25			
		£000	£000	%	£	
1 Non-current assets	a) Intangible assets	0	0			0
	b) Fixed assets	55,024	57,744	4.9%		2,720
	c) Investments	0	0			0
	<b>Total non-current assets</b>	<b>55,024</b>	<b>57,744</b>	<b>4.9%</b>		<b>2,720</b>
2 Current assets	a) Stock	48	48	0.0%		0
	b) Debtors	2,802	2,802	0.0%		0
	c) Investments	0	0			0
	d) Cash and cash equivalents	4,750	4,313	-9.2%		-437
	e) Other (e.g. assets for resale)	1,240	0	-100.0%		-1,240
<b>Total current assets</b>	<b>8,840</b>	<b>7,163</b>	<b>-19.0%</b>		<b>-1,677</b>	
3 Creditors: amounts falling due within one year	a) Bank loans and external borrowing	0	0			0
	b) Bank overdrafts	0	0			0
	c) Lennartz creditor	0	0			0
	d) Obligations under finance leases and service concessions	0	0			0
	e) Payments received in advance	541	541	0.0%		0
	f) Amounts owed to Funding Council	0	0			0
	g) Obligations under PFI/NPD	1,032	1,032	0.0%		0
	h) Deferred capital grant	300	300	0.0%		0
	i) Other creditors and accruals	5,200	5,000	-3.8%		-200
<b>Total creditors &lt; 1 year</b>	<b>7,073</b>	<b>6,873</b>	<b>-2.8%</b>		<b>-200</b>	
Share of net assets/(liabilities) in associate		0	0			0
<b>NET CURRENT ASSETS/LIABILITIES</b>		<b>1,767</b>	<b>290</b>	<b>-83.6%</b>		<b>-1,477</b>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<b>56,791</b>	<b>58,034</b>	<b>2.2%</b>		<b>1,243</b>
4 Creditors: amounts falling due after more than one year	a) Local authority loans	0	0			0
	b) Bank loans and external borrowing	0	0			0
	c) Lennartz creditor	0	0			0
	d) Finance leases and service concessions	0	0			0
	e) Obligations under PFI/NPD	31,857	31,857	0.0%		0
	f) Deferred capital grant	8,830	8,830			0
	g) Amounts repayable to Funding Council	0	0			0
	h) Other creditors	0	0			0
<b>Total creditors &gt;1 year</b>	<b>40,687</b>	<b>40,687</b>	<b>0.0%</b>		<b>0</b>	
5 Provisions	a) Pension provisions	1,770	-2,921	-265.0%		-4,691
	c) Other	0	0			0
<b>Total provisions</b>	<b>1,770</b>	<b>(2,921)</b>	<b>-265.0%</b>		<b>-4,691</b>	
<b>TOTAL NET ASSETS</b>		<b>14,334</b>	<b>20,268</b>	<b>41.4%</b>		<b>5,934</b>
9 Restricted Reserves	a) Endowment Reserve	0	0			0
	b) Restricted Reserve	0	0			0
10 Unrestricted reserves	a) Income and Expenditure Reserve	1,827	5,041	175.9%		3,214
	b) Revaluation reserve	12,507	15,227	21.7%		2,720
11 Non-controlling interest		0	0			0
<b>TOTAL RESERVES</b>		<b>14,334</b>	<b>20,268</b>	<b>41.4%</b>		<b>5,934</b>

<b>Subject/Title:</b>	Revenue & Capital Budget Monitoring to 31 March 2025
<b>Author:</b>	Niall McArthur, Director of Finance & Estates
<b>Meeting:</b>	Finance & General Purposes Committee
<b>Meeting Date:</b>	12 June 2025
<b>Date Paper prepared:</b>	27 May 2025
<b>Brief Summary of the paper:</b>	To present the revenue and capital budget monitoring for the 8 months to 31 March 2025 and forecast for the year ended 31 July 2025.
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	Discussion

<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with: <input type="checkbox"/> compliance <input type="checkbox"/> partnership services <input type="checkbox"/> risk management <input type="checkbox"/> strategic plan <input type="checkbox"/> new opportunity/change	Financial Sustainability
<b>Resource implications:</b>	Yes – monitoring of Financial Resources <b>If yes, please specify:</b>

<b>Risk implications:</b>	Yes <b>If yes, please specify:</b> Financial Operational		
<b>Equality and Diversity implications:</b>	N/A		
<b>Student Experience Impact:</b>	None		
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	None		
<b>Status – [Confidential/Non confidential]</b>	Non-Confidential		
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	Yes		
*If a paper should <b>not</b> be included within “open” business, please highlight below the reason.			
Its disclosure would substantially prejudice a programme of research (S27)		Its disclosure would substantially prejudice the effective conduct of public affairs (S30)	
Its disclosure would substantially prejudice the commercial interests of any person or organisation (s33)		Its disclosure would constitute a breach of confident actionable in court (s36)	
Its disclosure would constitute a breach of the Data Protection Act (s38)		Other (Please give further details)	

Further guidance on application of the exclusions from Freedom of Information legislation is available via

<http://www.itspublicknowledge.info/ScottishPublicAuthorities/ScottishPublicAuthorities.asp> and

[http://www.itspublicknowledge.info/web/FILES/Public\\_Interest\\_Test.pdf](http://www.itspublicknowledge.info/web/FILES/Public_Interest_Test.pdf)

## Recommendation

Finance & General Purposes committee members are asked to discuss the report.

## Purpose of report

To provide an update on the current forecast position at March 2025, in terms of the revenue and capital budget monitoring for the 12 months ended 31 July 2025.

## Revenue Monitoring – to 31 July 2025

This report provides an update to the committee on the forecast position of the college at the 8 month stage to March 2025, for the year to 31 July 2025.

Overall, the management accounts position is currently forecasting an operational deficit of £0.934 million, compared to the original budget deficit of £0.750 million and the previous February 2025 forecast deficit of £0.970 million. The breakdown of each income and expenditure line is provided in appendix 1 of the report. The financial forecast at March 2025 includes the estimated employers national insurance cost increase, which is to be paid from April 2025 onwards.

The college is forecasting that it will exceed its FE Credit target for 2024/25, with the actual number of credits at March 2025 currently being 26,891, compared to the target of 26,442. This is expected to increase further, however any over-performance has not increased our teaching costs. In terms of the HE UGT fte number for 2024/25, the current estimated actual at March 2025 is 1,359 fte, compared to the target of 1,319 fte. The forecast for the year is 1,359 fte, which is 40 fte above the APC target and 35 fte below the budget target of 1,394 fte.

The main issues that are affecting the financial performance for the College in 2024/25 are noted below.

## Income

- **Research grant funding (Red risk)** – the research grant funding is forecast to be below target at present by approximately £282,000, although efforts are being made to close the gap in terms of the income target for the year. At present further work is being carried out on both income and expenditure forecasts to ascertain the forecast for the year.
  - Mitigating Actions: ongoing work to bring in additional grant income, including UKRI application, further KTP grants, and potential funding through the Green Freeport, as well as minimising expenditure for the rest of the academic year.
- **UHI HE grant funding (Red risk)** - the UHI HE grant is forecast to be lower than the budget of £6.324 million, although the HE fte is ahead of the APC target of 1,319, but below the budget target of 1,394 HE fte. The forecast HE grant figure is £6.071 million, £253,000 below the budget figure. The decrease in forecast UHI HE grant funding is due to the estimated microram charge, which for 2024/25 is estimated at approximately £350,000.

- Mitigating Actions: to maximise the January 2025 student intake for HE students and claim all other UHI grants by July 2025.
- **Tuition fees (Red risk)** – with the HE fte being below the budget target set for the year as noted above, there is a knock-on effect on tuition fees, which is being forecast to be below target by £51,000.
  - Mitigating Actions: to maximise the January 2025 student intake for HE students.
- **Refectory & restaurant income (Green risk)** – based on current income levels, forecast to be £99,000 above the income target of £591,000.
- **Commercial income (Amber risk)** – based on current activity levels, forecast to be the same as the income target of £147,000, although the actual figure for the 8 months to March 2025 is low.
- **Miscellaneous income (Green risk)** – based on current income levels, forecast to be £241,000 above the income target of £560,740, mainly due to additional other income not budgeted for.

## Expenditure

- **Staff costs (Red risk)** - are forecast to be £32,000 over budget, with the agreed cost of living increases now been paid for both academic and professional staff for 2024/25 and the 2 previous years. It also includes additional SPPA employer costs, which increased from 23% to 26% in April 2024 and this additional income has now been received from SFC (£220,000).

The recently announced increase in employer NIC's from April 2025 has been included in the forecasts, with uncertainty over whether the SFC will fund these additional costs for 2024/25. The forecast amount for the college for April to July 2025 is £130,000. For 2025/26, the SFC has indicated that colleges will receive part funding for the increase, at a contribution rate of 48%.

Other staff costs and travel costs are forecast to be the same as the budget for the year to 31 July 2025.

- Mitigating Actions: to continue to review all vacancies and ascertain whether they should be replaced or not, as part of the Staff Review Panel (SRP) process. Also, continue to review any retrials and ascertain whether they should be replaced or can be replaced through further efficiency measures.
- **Premises costs (Red risk)** - are forecast to be £44,000 above the budget of £1.935million. This is mainly due to the forecast overspend in energy costs of £100,000.

- Mitigating Actions: to continue to review all lines of expenditure and for the remainder of the year, reduce expenditure if possible.
- **Other Operating costs (Green risk)** - are forecast to be £158,000 below the budget of £7.741million. This is due to the forecast underspend in a number of different areas.
  - Mitigating Actions: to continue to review all lines of expenditure and for the remainder of the year, reduce expenditure if possible. Budget holder refresher training will also be undertaken for all budget holders, with the key focuses being on budget monitoring and on procurement. The budget review exercise has also started for 2024/25, with the second round of reviews progressing through the rest of February 2025. Further reviews will take place during the rest of the year, in May 2025.

As part of the ongoing improvements to the budget setting process, budget profiling will be put in place as part of the 2025/26 budgets setting process and budget holders will be given training in how to profile their budgets for next year, to improve the budget monitoring and review process.

### **Student Support Funding**

The Student Support funding (SSF) is forecast to be overspent in 2024/25 by approximately £50,000, compared to an underspend of £579,000 in 2023/24. This is due to a decrease in the college allocation from SFC. As part of the SFC In-Year redistribution exercise carried out in November 2024, UHI Inverness requested additional funds of £100,000 for 2024/25 and this has been approved by SFC and this will be used to fund additional learning assistants to support students. Further updates will be provided over the rest of the AY.

### **Liquidity**

The bank balance at the end of March 2025 was £5.522 million, compared to the bank balance at July 2024 of £8.619 million. The forecast bank balance at 31 July 2025 is £4.1 million, a reduction of £4.519 million compared to the previous years balance. The reduction is due to the forecast deficit position in 2024/25, as well as the back-dated pay award for 2022/23 and 2023/24, which has now been paid to staff, ALF funding of £900,000 being held at July 2024, repayment of SSF underspend of £600,000 in March 2025 and the Longman site sale proceeds of £773,000 included in the 2024 year-end balance.

### **Risk Assessment**

#### Downside Risks

- The continued unfunded cost of living increases for academic and professional staff.
- Increases in employers pension contributions, and the increases in employers NIC from April 2025.
- The five-year public sector finance forecast which was issued by the Scottish Government, which showed flat funding for revenue grants and reduced capital for five years.
- Although HE FTE numbers are increasing for UHI Inverness, across the UHI partnership they are still significantly below the SFC funded target, which increases the risk of further cuts to the UHI SFC funded number and potentially reduces the funded growth which is required across UHI.
- The UHI microRam continues to add uncertainty in projections at the year-end.
- Job Evaluation was due to complete by 31 March 2023. If monies from the SG are not sufficient to cover the costs, then colleges will have to fund the additional cost themselves.

### **Capital Monitoring – to 31 July 2025**

The college receives capital funding from both FE and HE grants, the details of which are noted below:

- FE Lifecycle Maintenance - £104,279
- FE Backlog Maintenance £8,018.
- HE Capital funding - £33,083.
- BIS HE Research funding - £28,551

We can confirm that for 2024/25, the allocations noted above have been fully committed and will complete a return to UHI to confirm this is the case by the end of the AY.

## **Appendix 1**

### **1. SFC FE Funding**

The forecast figure is £10.145 million, which is in line with the budget figure. Current forecasts are that the college will exceed its credit target of 26,442 credits for 2024/25, with actual credits at March 2025 being 26,869 credits.

## **2. UHI HE Funding**

The UHI HE grant is forecast to lower than the budget of £6.324 million, although the HE fte is ahead of the APC target of 1,319, but below the budget target of 1,394 HE fte. The forecast HE grant figure is £6.071 million, £253,000 below the budget figure. The decrease in forecast UHI HE grant funding is due to the estimated microram charge, which for 2024/25 is estimated at approximately £350,000.

## **3. Tuition Fees**

Overall, tuition fees income is forecast to be below the budget figure of £3.040 million by £51,000, due to HE numbers being below the budget target figure for the year.

## **4. Other Grant Funding - Research**

Forecast to be £282,000 below budgeted income, mainly due to lower-than-expected research income. To be closely monitored for the remainder of the year.

## **5. Refectories**

The current forecast for refectory income is ahead of the budget target of £591,000 for the year by £99,000.

## **6. SDS**

At present, the forecast for the year is the same as the original budget figure of £2.099 million, and this will be closely monitored for the remainder of the year.

## **7. Commercial**

Short Course and commercial income for 2024/25 is forecast to be the same as the original budget of £147,000 and this will be closely monitored for the rest of the year, as the current actual figure to March 2025 is low.

## **8. Miscellaneous Income**

The miscellaneous income is currently forecast to be above the original budget of £560,740 by £241,000. This is due to additional other income being received which was not budgeted for.

## **9. NPD/ Unitary Charge Income**

As previously reported, this is an area the College is reviewing. However, increasingly we are looking at income reimbursement from the SFC. The SFC also has been reviewing this in terms of Scottish Government funding and support for colleges who have NPD contracts.

## 10. Staff costs

Forecast to be £32,000 over budget, with the agreed cost of living increases now been paid for both academic and professional staff for 2024/25 and the 2 previous years. It also includes additional SPPA employer costs, which increased from 23% to 26% in April 2024 and this additional income has now been received from SFC (£220,000).

The recently announced increase in employer NIC's from April 2025 has been included in the forecasts, with uncertainty over whether the SFC will fund these additional costs for 2024/25. The forecast amount for the college for April to July 2025 is £130,000. For 2025/26, the SFC has indicated that colleges will receive part funding for the increase, at a contribution rate of 48%.

Other staff costs and travel costs are forecast to be the same as the budget for the year to 31 July 2025.

- a. Mitigating Actions: to continue to review all vacancies and ascertain whether they should be replaced or not, as part of the Staff Review Panel (SRP) process. Also, continue to review any retrials and ascertain whether they should be replaced or can be replaced through further efficiency measures.

## 11. Premises Costs

Forecast to be £44,000 above the budget of £1.935million. This is mainly due to the forecast overspend in energy costs of £100,000.

- a. Mitigating Actions: to continue to review all lines of expenditure and for the remainder of the year, reduce expenditure if possible.

## 12. Other Operating Costs

Forecast to be £158,000 below the budget of £7.741million. This is due to the forecast underspend in a number of different areas.

- o Mitigating Actions: to continue to review all lines of expenditure and for the remainder of the year, reduce expenditure if possible. Budget holder refresher training will also be undertaken for all budget holders, with the key focuses being on budget monitoring and on procurement. The budget review exercise has also started for 2024/25, with the second round of reviews progressing through the rest of February 2025. Further reviews will take place during the rest of the year, in May 2025.

## INVERNESS COLLEGE

PERIOD ENDED 31-Mar-25

## INCOME AND EXPENDITURE ACCOUNT

	Note	Actual 31-Mar-25 £	Budget 31-Jul-25 £	Estimated Outturn 31-Mar-25 £	Variance from Budget £	Risk
<b>Income</b>						
Scottish Funding Council FE Grants	1	6,693,111	10,148,000	<b>10,145,277</b>	(2,723)	G
UHI	2	4,164,192	6,324,280	<b>6,070,666</b>	(253,614)	R
Tuition Fees	3	2,901,119	3,040,440	<b>2,989,093</b>	(51,347)	R
Other Grants - Research	4	762,378	1,364,090	<b>1,082,090</b>	(282,000)	R
Refectory and Training Restaurant	5	526,604	591,000	<b>690,000</b>	99,000	G
SDS	6	1,155,649	2,099,400	<b>2,099,400</b>	0	A
Commercial	7	36,733	147,500	<b>147,500</b>	0	A
Miscellaneous	8	686,387	560,740	<b>802,057</b>	241,317	G
Unitary Charge	9	3,416,152	4,903,884	<b>4,903,884</b>	0	
		20,342,325	29,179,334	<b>28,929,966</b>	(249,368)	
<b>Staff Costs</b>						
		12,823,448	19,568,775	<b>19,600,426</b>	(31,651)	R
<b>Other Costs</b>						
Premises	11	4,010,169	1,935,590	<b>1,979,590</b>	(44,000)	R
Other Costs	12	3,077,853	7,742,422	<b>7,584,422</b>	158,000	G
		7,088,021	9,678,012	<b>9,564,012</b>	114,000	
		19,911,470	29,246,787	<b>29,164,438</b>	82,349	
Cash Position		430,855	(67,453)	<b>(234,472)</b>	(167,019)	
NPD Capital		(631,694)	(897,592)	<b>(897,592)</b>	0	
<b>Cash Position after repaying loan capital</b>		<b>(200,838)</b>	<b>(965,045)</b>	<b>(1,132,064)</b>	<b>(167,019)</b>	
<b>Non RDEL</b>						
Deferred Grant Release		0	300,000	<b>300,000</b>	0	
Depreciation		0	1,000,000	<b>1,000,000</b>	0	
		0	(700,000)	<b>(700,000)</b>	0	
<b>Operational Deficit</b>		<b>430,855</b>	<b>(767,453)</b>	<b>(934,472)</b>	<b>(167,019)</b>	

## INVERNESS COLLEGE

31-Mar-25

## BALANCE SHEET

AS AT:	31-Mar-25	31-Mar-25 £	Final FS 31-Jul-24 £
<b>FIXED ASSETS</b>			
Tangible Assets		58,412,252	57,814,608
Leased Assets		54,000	54,000
		<u>58,466,252</u>	<u>57,868,608</u>
<b>CURRENT ASSETS</b>			
Stock		50,581	50,581
Debtors		709,610	1,199,440
Assets Held for Sale		0	0
Cash at Bank and in Hand		5,522,687	8,619,233
		<u>6,282,878</u>	<u>9,869,254</u>
<b>CREDITORS</b>			
Amounts falling due within One Year		(3,479,254)	(7,551,936)
<b>NET CURRENT ASSETS</b>		<u>2,803,625</u>	<u>2,317,318</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<u>61,269,877</u>	<u>60,185,926</u>
<b>CREDITORS</b>			
Amounts falling due after more than One Year		(39,722,368)	(39,093,480)
<b>PROVISION FOR LIABILITIES AND CHARGES</b>			
Defined Benefit Obligations		6,672,000	6,672,000
Enhanced Pensions		(1,656,457)	(1,750,525)
Other provisions		(2,019,652)	(2,019,652)
		<u>24,543,400</u>	<u>23,994,269</u>
<b>NET ASSETS INCLUDING PENSION LIABILITY</b>		<u>24,543,400</u>	<u>23,994,269</u>
<b>RESERVES</b>			
Revaluation Reserve		15,226,666	15,226,666
Income and Expenditure Account including Pension Liability		9,316,735	8,767,601
		<u>24,543,400</u>	<u>23,994,267</u>
<b>Total Reserves</b>		<u>24,543,400</u>	<u>23,994,267</u>

0

(2)

INVERNESS COLLEGE  
 PERIOD ENDED 31-Mar-25  
 INCOME AND EXPENDITURE ACCOUNT

ITEM 07.c

	Note	Actual 31-Mar-25 £	Budget 31-Jul-25 £	Estimated Outturn 31-Mar-25 £	Variance from Budget £	Within College Control £	Outwith College Control £	Note
<b>Income</b>								
Scottish Funding Council FE Grants	1	6,693,111	10,148,000	10,145,277	(2,723)	(2,723)	(2,723)	1
UHI	2	4,164,192	6,324,280	6,070,666	(253,614)	(253,614)	(253,614)	2
Tuition Fees	3	2,901,119	3,038,940	2,989,093	(49,847)	(49,847)	(49,847)	3
Other Grants - Research	4	762,378	1,364,090	1,082,090	(282,000)	(282,000)	(282,000)	4
Refectory and Training Restaurant	5	526,604	591,000	690,000	99,000	99,000	99,000	5
SDS	6	1,155,649	2,099,400	2,099,400	0	0	0	6
Commercial	7	36,733	147,500	147,500	0	0	0	7
Miscellaneous	8	686,387	560,740	802,057	241,317	241,317	241,317	8
Unitary Charge	9	3,416,152	4,903,884	4,903,884	0	0	0	9
		20,342,325	29,177,834	28,929,967	(247,867)			
<b>Staff Costs</b>	10	12,823,448	19,551,275	19,600,426	(49,151)	(49,151)	(49,151)	10
<b>Other Costs</b>					0			
Premises	11	4,010,169	1,935,590	1,979,590	(44,000)	(44,000)	(44,000)	11
Other Costs	12	3,077,853	7,740,922	7,584,422	156,500	156,500	156,500	12
		7,088,022	9,676,512	9,564,012	112,500			
<b>Total Expenditure</b>		19,911,470	29,227,787	29,164,438	63,349			
Cash Position		430,855	(49,953)	(234,471)	(184,518)			
NPD Capital		(631,694)	(897,592)	(897,592)	0			
<b>Cash Position after repaying loan capital</b>		(200,839)	(947,545)	(1,132,063)	(184,518)			
<b>Non RDEL</b>								
Deferred Grant Release		0	300,000	300,000	0			
Depreciation		0	1,000,000	1,000,000	0			
		0	(700,000)	(700,000)	0			
<b>Operational Deficit</b>		430,855	(749,953)	(934,471)	(184,518)			

Notes

- 1 Scottish Funding Council FE Grants - level of FE student activity within our control, value of grant outwith our control.
- 2 UHI HE grants - level of HE student activity within our control, value of grant outwith our control
- 3 Tuition Fees - level of student activity within our control, amount of FE & HE full-time fees outwith our control, set by SFC
- 4 Other Grants - Research - within our control
- 5 Refectory and Training Restaurant - within our control
- 6 SDS - number of places on contracts outwith our control, but recruiting to the contracts awarded within our control.
- 7 Commercial - within our control
- 8 Miscellaneous income - within our control
- 9 Unitary Charge - outwith our control, set by SFC
- 10 Staff costs - number of staff in the college within our control, NB cost of ling increases and employer pension contributions outwith our control.
- 11 Premises - energy prises outwith our control, although working to reduce energy use at all college sites
- 12 Other operating costs - mix of costs both within and outwith our control.

**Finance & General Purposes**

<b>Subject/Title:</b>	09. Estates and Campus Services Report
<b>Author:</b> [Name and Job title]	Martin Kerr, Estates & Campus Manager
<b>Meeting:</b>	Finance and General Purposes Committee
<b>Meeting Date:</b>	12/06/2025
<b>Date Paper prepared:</b>	26/05/ 2025
<b>Brief Summary of the paper:</b>	This paper provides updates on our carbon management plan, waste management and capital projects, together with reporting on aspects of soft FM and hard FM performance
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	Noting
<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with:: <ul style="list-style-type: none"> <li>• compliance</li> <li>• partnership services</li> <li>• risk management</li> <li>• strategic plan</li> <li>• new opportunity/change</li> </ul>	
<b>Resource implications:</b>	Yes / No <b>If yes, please specify:</b>
<b>Risk implications:</b>	Yes / No <b>If yes, please specify:</b> Operational: Organisational:
<b>Equality and Diversity implications:</b>	Yes/No <b>If yes, please specify:</b>
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	

<b>Status –</b> [Confidential/Non confidential]	Non confidential
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	Yes

\*If a paper should **not** be included within “open” business, please highlight below the reason.

Its disclosure would substantially prejudice a programme of research (S27)		Its disclosure would substantially prejudice the effective conduct of public affairs (S30)	
Its disclosure would substantially prejudice the commercial interests of any person or organisation (S33)		Its disclosure would constitute a breach of confidence actionable in court (S36)	
Its disclosure would constitute a breach of the Data Protection Act (S38)		Other (please give further details)	
For how long must the paper be withheld? (express either as the time which needs to pass or a condition which needs to be met.)			

Further guidance on application of the exclusions from Freedom of Information legislation is available via

<http://www.itspublicknowledge.info/ScottishPublicAuthorities/ScottishPublicAuthorities.asp> and

[http://www.itspublicknowledge.info/web/FILES/Public\\_Interest\\_Test.pdf](http://www.itspublicknowledge.info/web/FILES/Public_Interest_Test.pdf)

### **Campus Services Report**

#### **Soft FM and Contracts**

Pristine settling into new contract with several clarifications now being addressed. Audit scores have been in mid-90%. However scoring system being reviewed to make it more accurate to observations.

#### **Pool vehicle**

All minibuses fully operational. Request for 25/26 schedule has been issued to Academic teams. Research and SSF vehicles have now been added into vehicle booking system. To maximise use of these college assets and reduce costs. Potential saving £8k per year.

#### **Leasing Agreements**

WASPS Lease has been terminated, with all activities been transferred to 201 from August 2025. An-lochan lease agreement being reviewed due to substantial cost increase. Discussions are ongoing to reduce lease area. Review meeting planned for 29<sup>th</sup> May. Burnett road lease is secured until May 2026. Looking at alternative usage and potential early exit. Sustainable construction Centre, now operational. 20<sup>th</sup> May.

#### **Water Risk Assessment**

Guidance document presented to H&SC. Discussions on going with GTFM. L8 training being scheduled for 5<sup>th</sup> March. Now complete.

#### **Hard FM, GTFM**

The working relationship between GTFM and the college team has been under strain due to several long-term issues. These issues have been raised to the GTFM board on 24<sup>th</sup> Oct 2024, this has been escalated with a formal letter issued to GTFM on a number of areas, looking for an improvement plan.

##### **Key Areas**

1. Speed of response. etc fire management system enquires.
2. Handover procedures relating to life cycle activities. No clear handover and quality review.
3. Project management.

**4. Contract management.**

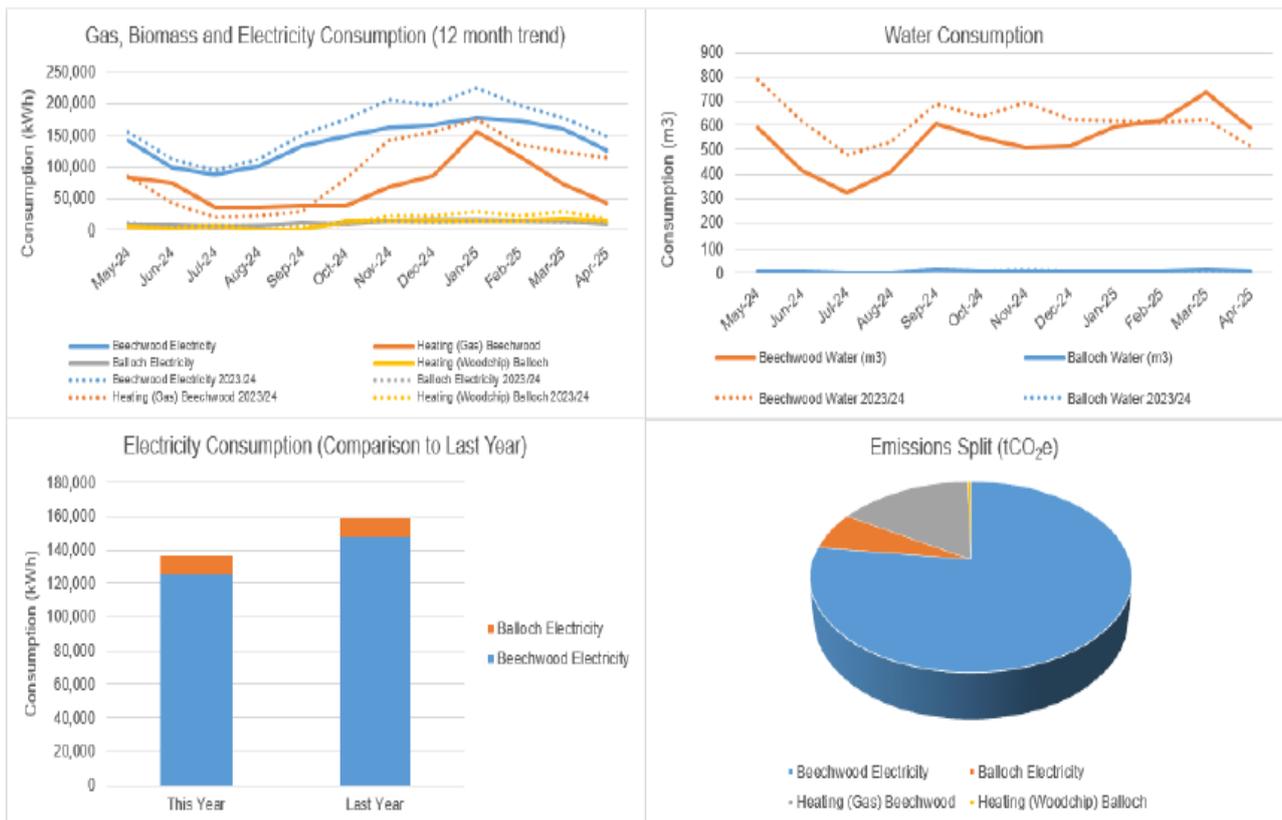
A number of meetings between EMT and GTFM senior management team have been undertaken. With GTFM proposing several positive actions to improve partnership. New management structure to commence August 2025 and sustainable LED lighting project install to be completed by end 2026.

**Carbon Management Plan**

The Inverness College Carbon Management plan has been developed by the Estates team and GTFM our FM contractor.

Good progress has been made on low-cost adjustment to operating systems. GTFM have been working through there action plan on improved monitoring tools. This will allow us to undertake analysis of our facilities.

GTFM produces a monthly utility report for scrutiny at the IC GTFM Monthly Operations Meeting chaired by the Estates Manager.



Energy consumptions are reducing due to time of year, adjustments made to BMS schedules and LED install. However electrical costs are above expected budget. Heating energy balance under review.

**Waste Management**

Northern recycling performing well. With 80% of our waste being recycled. The other 20% of general waste is sent for Waste to energy. Therefore, zero waste to land fill. We have had slow

progress with new waste management to see if further waste streams can be improved to reduce general waste volume.

### **Capital Project and Campus Management Capital Projects Update**

#### **ABC Garden/ Healthy Campus**

Working group has been put on hold. Funds reallocation being reviewed for new LRC social area.

#### **Sector Development Plan Room change project update**

G1 being developed into new Engineering Technology Centre. – All structural modifications are complete with rooms now being utilised. HC have now confirmed planning is not required for AC unit install. Working being progressed in June.

201 being developed into new Creative Centre – now Complete. WASPS has been given notice.



G38/ 39 are being converted to dirty workshops. – now Complete. Final decoration snagging will be complete by end of May.

HISA have moved up to 214 per summer. New window – now complete.

Project Wrap up meeting to be undertaken Mid-June.

**Harbour Rd Sustainable Construction Centre Lease.**

New project team has been established to deliver this option. Teaching condensed 20<sup>th</sup> May.  
Funding for modifications has been secured just awaiting to be released to allow project to move forward.

Subject/Title:	KPI Report
Meeting and date:	FGP Committee, 12 June 25; EMT Committee 5 June 25
Author:	Martin Whyte
Decision, Discussion or Noting:	Noting / Discussion
Link to Strategic Plan:	<b>Links to all strategic objectives</b>
Cost implications:	<del>Yes</del> / No ( <i>delete as applicable</i> ) <b>If yes, please specify:</b>
Risk assessment:	<del>Yes</del> / No ( <i>delete as applicable</i> ) <b>If yes, please specify:</b> Financial: Operational: Organisational:

### Recommendation(s)

Note the performance measures year to date – period 9, April 2025.

### Main body of information

The KPI matrix for period 9, April 2025 accompanies the paper and presents performance for each active measure in the period and YTD against respective targets.

### Period Update

Twenty-three measures were active in the period.

Thirteen of the twenty-three measures active in the period are satisfactory / met (Green).  
Six of the measures are unsatisfactory / not yet met (Red),  
Four measures are marginal / not yet met (Amber).

### YTD Update

Thirty-four measures are in scope year to date. Two HR measures are also reported but have no target.

Sixteen of the thirty-four measures are satisfactory / met (Green).  
Twelve of the measures are unsatisfactory / not yet met (Red).  
Six measures are marginal / not yet met (Amber).

A column has been added detailing the sector benchmark for each measure, where applicable. Some measures have sector benchmarks defined as TBC as further

investigation is needed to establish if easily accessible sector data is held. Respective managers aim to identify if sector benchmark data is available for 25/26 reporting. N/A indicates that the measure and data is specific to UHI Inverness and lacks meaningful sector comparison.

### **Comment on In Scope Measures – April 25.**

#### **HE Active Applications (next AY).** Serial 1. 94.8%. RED.

The number of active applications fell in April primarily due to the adjustment for BSc Oral Health Science applications. The course has a capacity of 12 and received well over 100 applications. After offers were accepted, the remaining applications have been removed. Offer acceptance rates remain higher than last year. Data in MIS Manager report.

#### **FE Active Applications (next AY).** Serial 2. 102.5%. GREEN.

32 applications more than profile expectation at the end of period 9. Many courses have established waiting lists. Unmet/suppressed demand data is being captured and shared with the RSB.

MIS Manager report contains up to date data.

#### **FE Credits.** Serial 3. 102.7%. GREEN.

SFC FE funded threshold has been exceeded. We have delivered 708 FE Credits beyond the threshold.

Note - this is the equivalent of 41 additional full-time FE students for which we receive no funding.

#### **Apprenticeship Starts.** Serial 4. 80.4%. RED.

New apprentice starts have reached 291 for the year. While below the target number it has exceeded 2023/24 starts by 15, which means that our average number of apprentices in learning will remain high.

#### **Apprentices in Learning.** Serial 5. 104.8%. GREEN.

Average apprentices in learning are 33 over expectation. The high number of apprentices is reflected in SDS Apprenticeship income.

#### **Apprenticeship Income.** Serial 6. 116.8%. GREEN.

Income YTD is 86% of annual expectation as at the end of period 9. Strong performance in apprenticeship income.

#### **Commercial Short Course Income.** Serial 8. 88.3%. RED.

YTD actual income has increased to £66,200 from circa. £33,600 in the previous period. Several commercial courses were undertaken in the period. Staff capacity enabled courses to be undertaken. In addition, £40k of Other Grant funding relating to net zero training has been carried out in year.

#### **HE Enrolments.** Serial 9. 105.8%. GREEN.

Enrolment numbers increased by 1 in the period. Overall, HE headcount is very good and reflects efforts made across college to attract applications and convert them.

**HE FTE (APC figure).** Serial 11. 99.6%. AMBER.

5.8 FTE below the FTE target provided to APC. MIS Manager is working with student records colleagues (Inverness and EO) to ensure that all student course loadings are complete to ensure that FTE data is accurate. Some student records require completion/review.

**Student Satisfaction & Engagement Survey (SSES).** Serial 20. 100.7%. GREEN.

Actual SSES result for AY 24/25 is 94.7% satisfaction. National benchmark 89.7%. Excellent satisfaction and engagement results.

**SSES % Response Rate.** Serial 24. 96.7%. AMBER.

Actual survey response rate was 53.2% of students. Internal target 55%. National benchmark is 50%. Exceeded the benchmark but did not achieve our internal target and is lower than the response rate in 23/24. Increased 'campaign' activity planned in 25/26 and extend duration the survey is open to support completion by work-based students.

**MA Successful Outcomes.** Serial 32. 76.1%. RED.

MA outcomes are below the sector benchmark (57.1% / 72%). Outcome % reduced in April, holidays will have impacted unit achievement data. As the AY nears a close, unit completions increase as many elements are undertaken and assessed holistically. Data for frameworks/subjects are closely monitored by curriculum and Business Solutions.

**Mental Health Support Appt.** Serial 35. 103.2%. GREEN.

All enquiries received an appointment within 3-10 working days in April. Objective 95%. YTD overall is 98%. The counselling team continue to deliver a tremendous service to our students.

**Learning Support Appt.** Serial 36. 105.3%. GREEN.

YTD performance is 100% of ASN appointments receive an appointment within 6-20 working days. Tremendous. Very high number and proportion of ASN referrals so the workload is not insignificant. This also impacts the team and resources at exam time (now).

**Sickness Levels.** Serial 40.

Absence rates for Q3 are to be reported. HR will include the most recent data in their paper to HR Committee and this will be captured in the next iteration of the KPI report. No change to data presented in the previous report to audit committee.

**% Staff Turnover.** Serial 43.

% staff turnover data for Q3 to be reported. HR will include the most recent data in their paper to HR Committee and this will be captured in the next iteration of the KPI report. No change to data presented in the previous report to audit committee.

**PRD Completion.** Serial 44.

PRD data for Q3 to be reported. HR will include the most recent data in their paper to HR Committee, and this will be captured in the next iteration of the KPI report. No change to data presented in the previous report to audit committee.

**Number of Workplace Injuries.** Serial 47. GREEN.

This measure remains well below the previous year which is pleasing. 6 injuries in the period. 4 minor cuts in Hairdressing, 1 staff member tripped in the car park and one student injured playing football during break on campus. HS&S Manager monitors closely.

**% of Staff Completed Mandatory iHASCO Training.** Serial 49. 101.2%. GREEN.

Performance remains over the target of 80% completion. There are mandatory modules (not H&S related) that are to be completed by all staff by the end of June. Managers are asked to keep a close eye on completions and utilise staff development days in June to ensure all are complete.

**Room Occupancy – Frequency %.** Serial 59. 119.1%. GREEN.

Occupancy for the period was at 54% increasing average occupancy to 45.1% across the year. School programmes have largely ended at Easter which will lower occupancy on Fridays from this point. Occupancy will reduce each month as teaching ends for different qualification levels.

**CO2 Emissions on Utilities (gross Tonnes).** Serial 60. 84.1%. GREEN.

87 tonnes below expectation YTD which is pleasing. Estates and HS&S Manager continue to monitor energy use and energy mix data with GTFM.

**Estates Reactive Task Completion Rate %.** Serial 62. 98.8%. AMBER.

The team achieved 95% completion in the period, marginally below the expectation of 96%. Estates supervisor monitors estates requests and completion rates. YTD average is 94.9% completion.

**GTFM % Reactive Task Completion Rate.** Serial 63. 99.4% AMBER.

GTFM met their objective in April delivering 96%. YTD average completion rate now stands at 94.4%. Completion rates are a key part of the contract management discussions that take place each month.

The information is accessible to all department managers and board members via SharePoint at: IN Management Information > Documents > KPI Matrix

## Performance Measures

AY: 2024-2025

Performance Measures- EMT &amp; Board of Management

Measures - Linked to Profile and Actual sheets

AY Start	01 Aug 2024
Today	27 May 2025
Period Month	April
No.Periods YTD	9

Key:

B = Not yet in scope
R = Not Achieved
A = Partially Achieved
G = Achieved

Measure	Measurement Frequency	2023/24 Actual	2024/25 Target	YTD Profile	YTD ACTUAL	YTD ACTUAL v PROFILE RAG	Sector Benchmark
<b>Measure 1: CORE FE/HE OUTPUTS</b>							
1	HE Active applications (next AY - Measure from Dec - Jul)	Monthly	1333	1,400.0	1,350	1,280	94.8% N/A
2	FE Active applications (next AY - Measure from Dec - Jul)	Monthly	2281	2,300.0	2100	2,132	101.5% N/A
3	FE Credits	Monthly	26543	26,442	26,200	26,908	102.7% N/A
4	Apprenticeship starts	Monthly	276	374	362	291	80.4% N/A
5	Apprentices in Learning (average in year)	Monthly	664	675	675	708	104.8% N/A
6	Apprenticeship Income (excluding T&A)	Monthly	£1,222,884	£1,259,400	£927,076	£1,082,679	116.8% N/A
8	Commercial Short Course Income	Monthly	£121,486	£100,000	£75,001	£66,200	88.3% N/A
9	HE enrolments (head count)	Monthly	1,904	1,990	1,990	2,106	105.8% N/A
10	HE enrolments (year one starts)	Annual	697	700	700	637	91.0% N/A
11	HE FTE (APC figures) (from Oct)	Monthly	1,259.6	1,319.0	1,319.0	1,313.2	99.6% N/A
12	Research - Income less expenditure	Biannual	£140,043	£150,000	£150,000	£299,930	-200.0% N/A
13	GA Programmes - New Enrolments	Monthly	92	122	122	191.0	156.6% N/A
14	Senior Phase Enrolments	Annual	667	677	677	574.0	84.8% N/A
<b>MEASURE 2: SATISFACTION MEASURES</b>							
18	Early Satisfaction & Engagement Survey (ESES)	Annual	96.0%	96%	96.0%	95.7%	99.7% N/A
20	Student Satisfaction & Engagement Survey (SSES)	Annual	92.0%	94%	94.0%	94.7%	100.7% 89.70%
23	ESES % Response Rate	Annual	63.3%	60%	60.0%	61.0%	101.7% N/A
24	SSES % Response Rate	Annual	57.0%	55%	55.0%	53.2%	96.7% 50%
<b>Measure 3: RETENTION, SUCCESS &amp; PROGRESSION</b>							
32	Modern Apprenticeship successful outcomes (contract year)	Monthly	63.0%	75%	75.0%	57.1%	76.1% 72%
33	FE progression to further FE study	Annual	37.0%	40%	40.0%	39.6%	99.0% TBC
34	FE progression to HE - actual	Annual	30.0%	35%	35.0%	29.7%	84.9% TBC
35	Mental Health Support appt (non-emergency) offered for within 3 - 10 working days	Monthly	99.0%	95.0%	95.0%	98%	103.2% TBC
36	Learning Support appt offered for within 6 - 20 working days	Monthly	96.0%	95.0%	95.0%	100%	105.3% TBC
<b>Measure 4: HR</b>							
40	Sickness levels	Quarterly	2.98%	2.58%	2.67%	3.40%	127.5% TBC
43	% Staff turnover	Quarterly	2.38%	3.01%	3.07%	2.30%	75.0% TBC
44	PRD completion - full or review	Quarterly	57%	75%	50%	6%	11.8% N/A
47	Number of workplace injuries	Monthly	138	138	134	105	78.36% N/A
48	Number of RIDDOR reportable accidents and illness	Monthly	3			5	TBC
49	% of staff completed mandatory IHASCO (H&S) Trg	Quarterly	79%	80%	80.0%	80.9%	101.2% N/A
<b>Measure 5: FINANCE</b>							
53	Forecast Outturn Operational Surplus/(Deficit)	Quarterly	-£309,938	-£750,000	-£750,000	-£967,000	128.9% N/A
<b>Measure 6: ESTATES &amp; CAMPUS</b>							
59	Room Occupancy - Frequency %	Monthly	36.0%	36.0%	37.9%	45.1%	119.1% TBC
60	CO2 Emissions on Utilities (gross) Tonnes	Monthly	638	667	546	459	84.1% TBC
61	CO2 Emissions on Waste - Tonnes	Quarterly	11.0%	0.930	0.257	0.197	76.5% TBC
62	Estates reactive task completion rate %	Monthly	95%	96%	96%	94.9%	98.8% N/A
63	GTFM % reactive task completion rate	Monthly	95%	95%	95%	94.4%	99.4% N/A

## Performance Measures

AY: 2024-2025

Performance Measures- EMT &amp; Board of Management

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20 Student Satisfaction & Engagement Survey (SSES)	Annual	92.0%	94%	94.0%	94.7%	100.7%	89.70%
24 SSES % Response Rate	Annual	57.0%	55%	55.0%	53.2%	96.7%	50%
32 Modern Apprenticeship successful outcomes (contract year)	Monthly	63.0%	75%	75.0%	57.1%	76.1%	72%
35 Mental Health Support appt (non-emergency) offered for within 3 - 10 working days	Monthly	99.0%	95.0%	95.0%	98%	103.2%	TBC
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62 Estates reactive task completion rate %	Monthly	95%	96%	96%	94.9%	98.8%	N/A
63 GTFM % reactive task completion rate	Monthly	95%	95%	95%	94.4%	99.4%	N/A

<b>Subject/Title:</b>	Student Activity 2024/25 and Recruitment 2025/26
<b>Author:</b> [Name and Job title]	Jane MacLennan, Information Systems Manager
<b>Meeting:</b>	Finance and General Purposes
<b>Meeting Date:</b>	12 <sup>th</sup> June 2025
<b>Date Paper prepared:</b>	2 <sup>nd</sup> June 2025
<b>Brief Summary of the paper:</b>	To provide the committee with an update on student enrolments and withdrawals for 2024/25, and the status of current recruitment for 2025/26.
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	Discussion
<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with:: a) compliance • partnership services • risk management • strategic plan • new opportunity/change	This paper links to the strategic plan, particularly in relation to the student experience and the curriculum.
<b>Resource implications:</b>	Yes
<b>Risk implications:</b>	Yes – quality of the student experience
<b>Equality and Diversity implications:</b>	Yes – equity of the student experience
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	n/a

<b>Status</b> – [Confidential/Non confidential]	<b>Non-confidential</b>		
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	<b>Yes</b>		
*If a paper should <b>not</b> be included within “open” business, please highlight below the reason.			
Its disclosure would substantially prejudice a programme of research (S27)		Its disclosure would substantially prejudice the effective conduct of public affairs (S30)	
Its disclosure would substantially prejudice the commercial interests of any person or organisation (S33)		Its disclosure would constitute a breach of confidence actionable in court (S36)	
Its disclosure would constitute a breach of the Data Protection Act (S38)		Other (please give further details)	
For how long must the paper be withheld? (express either as the time which needs to pass or a condition which needs to be met.)			

Further guidance on application of the exclusions from Freedom of Information legislation is available via

<http://www.itspublicknowledge.info/ScottishPublicAuthorities/ScottishPublicAuthorities.asp> and

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## Student Activity 2022/23 and Recruitment 2023/24

### Executive summary

The report provides an update on student enrolments and withdrawals for 2024/25, and the status of current recruitment for 2025/26. Please note the data for this report was drawn on 2<sup>nd</sup> June 2025.

The 2024/25 FE Credits target for UHI Inverness is 26,442 we have exceeded our target with actual credits as at 2<sup>nd</sup> June 2025 at 27,130

The 2024/25 UHI Academic Partnership target for funded Scottish or EU HE undergraduate students is 1,319 and the budgeted target is 1,394. To date we have exceeded the APC target and have achieved 96.3% of the budgeted target.

Early withdrawals have decreased for FE full time and HE students but increased for part time FE students in 2024/25. Overall, the FE full time withdrawal rate is currently 17.3% which is above the target set of 17%, however HE full time overall withdrawals are significantly lower this year at 8.8% compared to 11.8%.

Recruitment for 2025/26 is ongoing, currently acceptances for FE courses are marginally lower than the previous 2 years. However, for HE study acceptances remain higher than previous years, and of those who have received an offer 80% have accepted.

### Main body of information

#### Student enrolments against targets 2024/25

##### FE

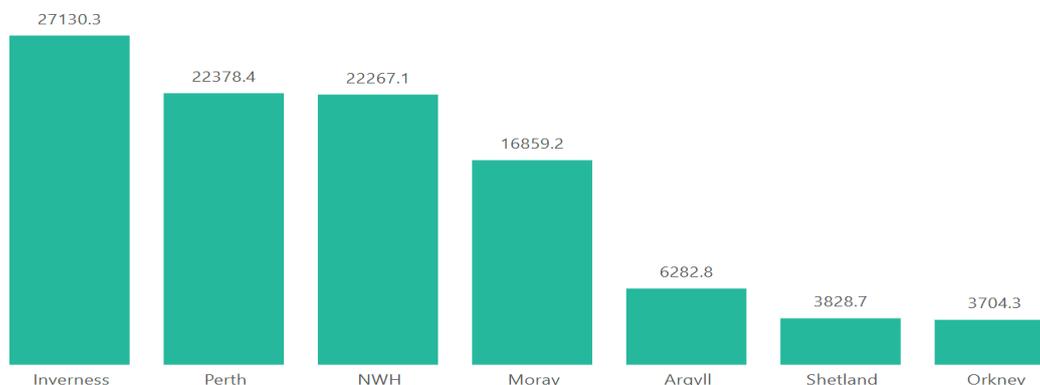
The core credit target for 2024/25 is 26,442, we have exceeded our target with actual credits as at 2<sup>nd</sup> June 2025 at 27,130.

Credit Target			Actual Credits		% of Target	
	Original	Rebased			Original	Rebased
2021/22	30,677	32,009	01/06/2022	28,443	92.7%	88.9%
2022/23	29,882	29,620	01/06/2023	30,495	102.1%	103.0%
2023/24	26,657	26,442	30/05/2024	26,555	99.6%	100.0%
2024/25	26,442		02/06/2025	27,130	102.6%	

The chart below shows the current distribution of credits across UHI. For reference, there is currently a shortfall of 1,253.2 credits to Q4 forecast and 1,318.2 to the overall RSB target, which is 103,796.

# UHI Student Numbers (FE Only)

## FE Credits at All Academic Partners: 2024/25



2024-25	Q4	Q4	Current	Difference to Q4 Forecast
	Planned Total	Forecast		
UHI Argyll	6,666	6,396	6,282.8	-113.20
UHI Inverness	26,442	26,948	27,130.3	182.30
UHI Moray	18,098	17,577	16,859.2	-717.80
UHI NWH	22,305	22,357	22,267.1	-89.90
UHI Orkney	3,555	3,886	3,704.3	-181.70
UHI Perth	22,310	22,360	22,378.4	18.40
UHI Shetland	4,393	4,180	3,828.7	-351.30
RSB Total	103,769	103,704	102,450.8	-1,253.20

(Extract from RSB quarterly tracker and AP data from Metis 02/06/2025)

## HE

The 2024/25 APC target for Undergraduate students who are fundable is 1,319 fte, and a budgeted target of 1,394.

The table below shows the estimated HE FTE based on current enrolments, and against targets set by APC. The estimates are made using information from the student record system and FTE based on mode of attendance.

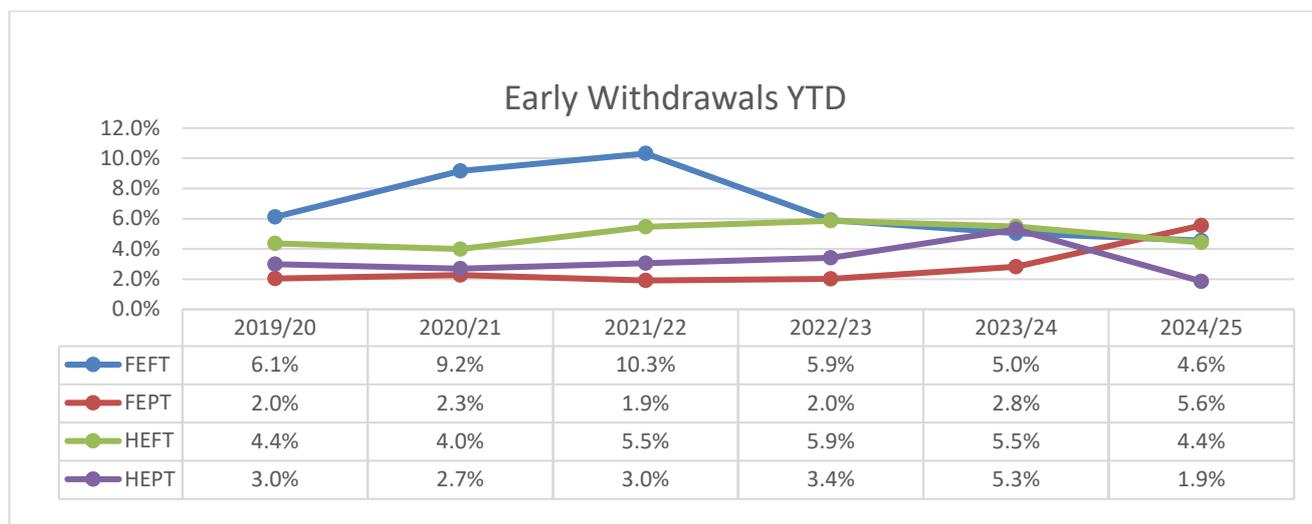
APC FTE target		Estimated FTE as at this point of year		% of Target
2021/22	1,530	01/06/2022	1,373	89.7%
2022/23	1,441	01/06/2023	1,303	90.4%
2023/24	1,418	30/05/2024	1,248	88%
2024/25 APC	1,319	02/06/2025	1,343	101.8%
2024/25 Budgeted	1,394	02/06/2025	1,343	96.3%

### Withdrawals

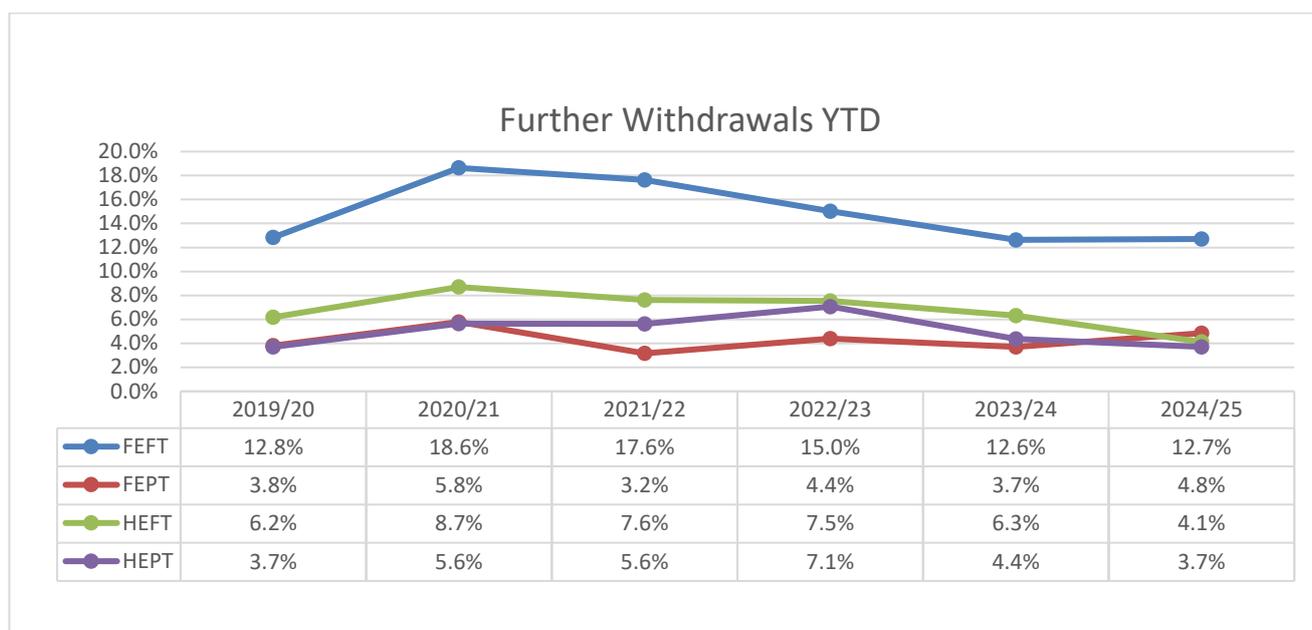
The table below shows the early withdrawal rates as at 2<sup>nd</sup> June 2025.

In comparison, the early withdrawals were higher at 5.1% for FEFT, but lower for FEPT at 2.6% as at 31<sup>st</sup> May 2024. For HE the comparator figures were both higher at 5.2% for HEFT and 5.4% HEPT at 31<sup>st</sup> May 2024.

It is not expected that there will be further change to the early withdrawal rates.



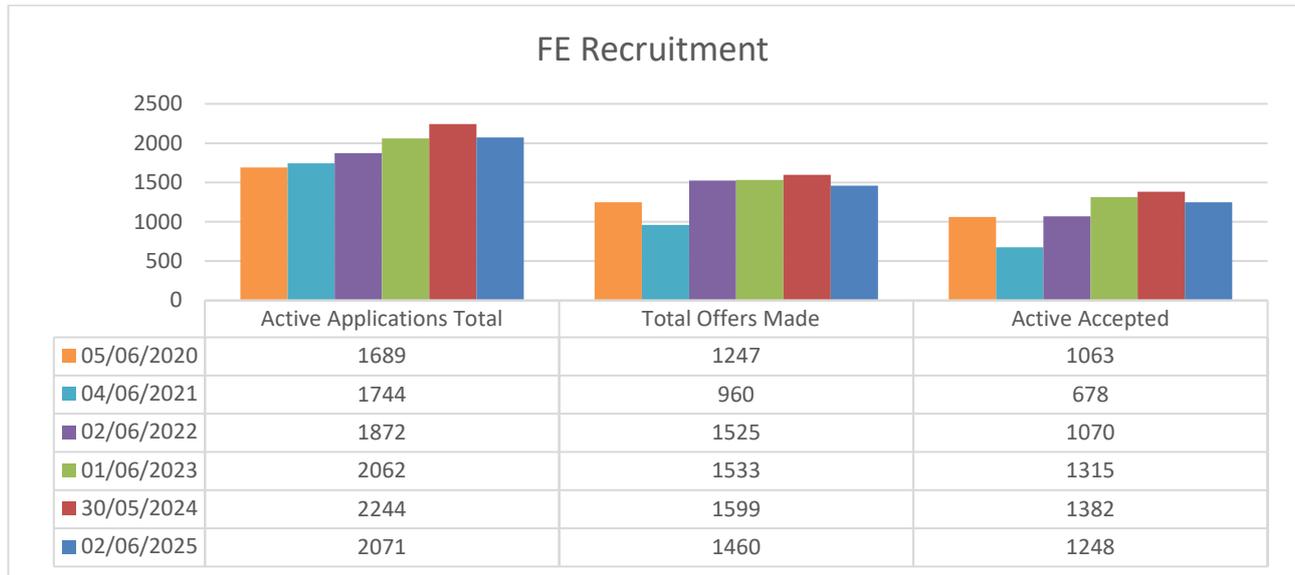
The chart below shows the Further Withdrawal end of year figures for previous years and the year to date for 2024/25. In comparison, the further withdrawals at 31<sup>st</sup> May 2024 were lower at 11.6% for FEFT and 3.1% for FEPT. For HEFT the comparator figures were higher at 5.6% and for HEPT 4% at 31<sup>st</sup> May 2024.



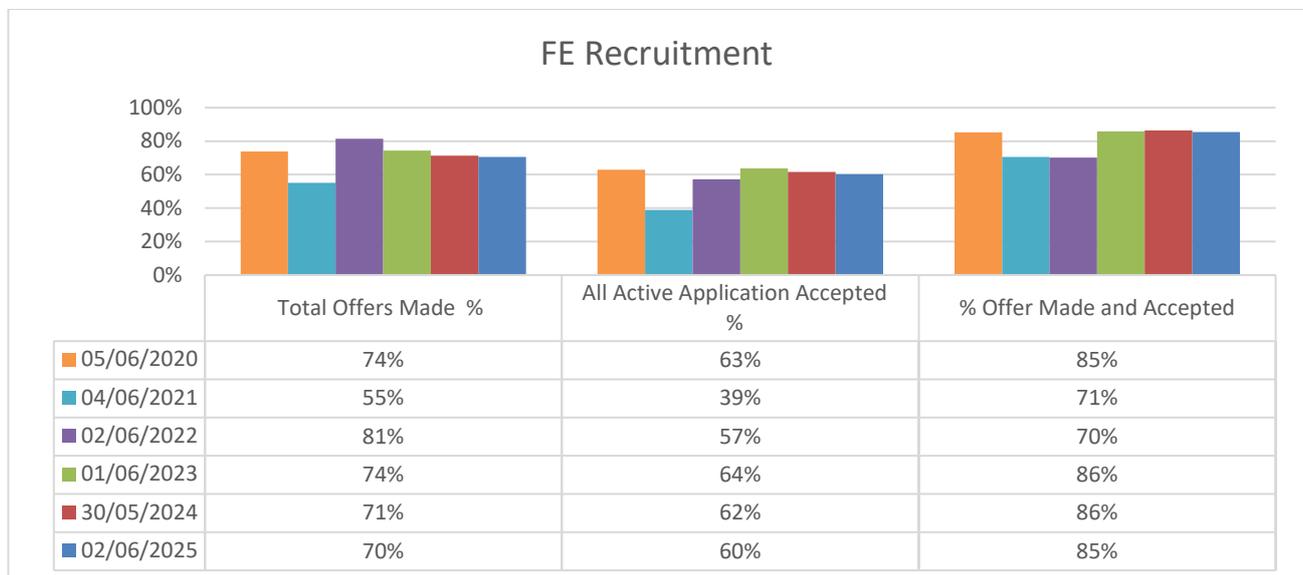
At the time of writing further withdrawals are, as expected, below previous year end totals, except for FE Full time students. Overall, the FE full time withdrawal rate is currently 17.3% which is above the target set of 17%, however HE full time overall withdrawals are significantly lower this year at 8.5% compared to the 2023/24 year end position of 11.8% .

**Recruitment 2025/26**

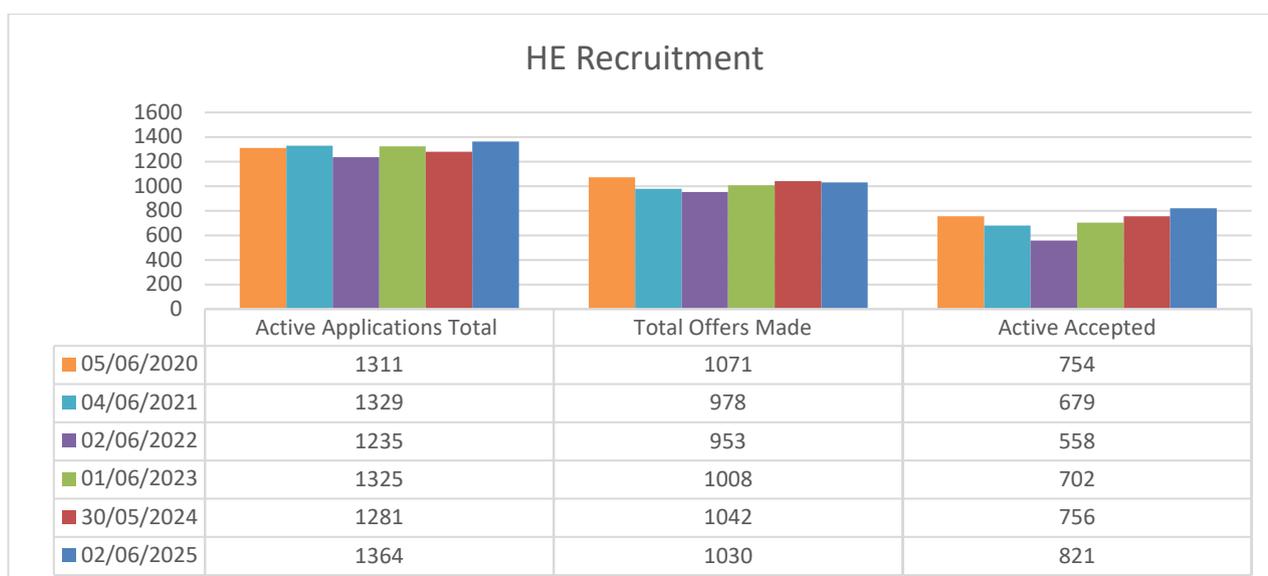
The charts below show the active applications received to date for FE Courses.



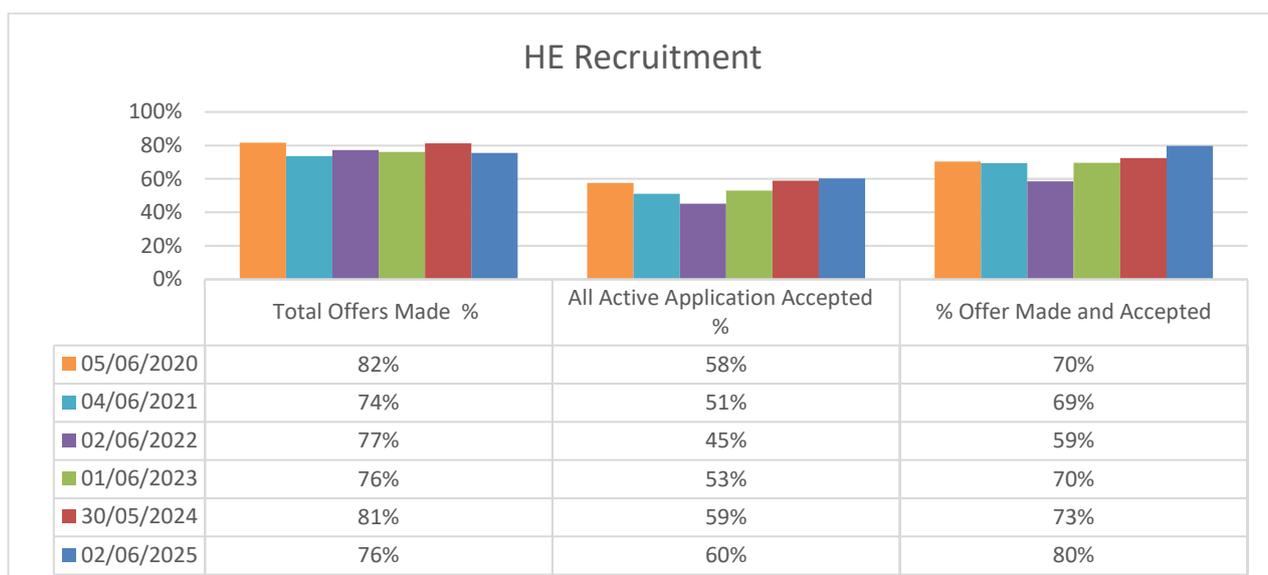
Currently acceptances for FE courses are marginally lower than the previous 2 years.



The charts below show the active applications received to date for HE Courses.



Acceptances remain higher than previous years, and of those who have received an offer 80% have accepted as shown in the chart below.



The tables below highlight the first-year full-time HE Applicants. Of the first year full-time applications received, 76% are for HNC courses, compared to 21% for degree level study.

78% of HNC applicants have accepted their offer, compared to 51% of Degree applicants.

Applications	01/06/2023	30/05/2024	02/06/2025
HNC F1	530	593	642
HND F1	44	19	24
Degree Yr 1	200	213	179
Total F1	774	825	845
All Applicants	1325	1281	1350

**ITEM 10.**

<b>% F1 Applications</b>	01/06/2023	30/05/2024	02/06/2025
HNC F1	68%	72%	76%
HND F1	6%	2%	3%
Degree Yr 1	26%	26%	21%

<b>Offers Accepted</b>	01/06/2023	30/05/2024	02/06/2025
HNC F1	324	377	419
HND F1	16	5	8
Degree Yr 1	80	102	91
Total F1	420	484	518
All Applicants	702	756	809

<b>% Applications/Offers Accepted</b>	01/06/2023	30/05/2024	02/06/2025
HNC F1	HNC F1	77%	78%
HND F1	HND F1	50%	56%
Degree Yr 1	Degree Yr 1	44%	51%
Total F1	Total F1	66%	70%
All Applicants	All Applicants	70%	73%

## UHI | INVERNESS

<b>Subject/Title:</b>	Committee & Chair Evaluation
<b>Author:</b> [Name and Job title]	Ludka Orłowska-Kowal Governance Officer
<b>Meeting:</b>	FGP Committee
<b>Meeting Date:</b>	12 June 2025
<b>Date Paper prepared:</b>	03 June 2025
<b>Brief Summary of the paper:</b>	Annual FGP Committee and Chair Evaluation Exercise
<b>Action requested:</b> [Approval, recommendation, discussion, noting]	
<b>Link to Strategy:</b> Please highlight how the paper links to, or assists with:: <ul style="list-style-type: none"> <li>• compliance</li> <li>• partnership services</li> <li>• risk management</li> <li>• strategic plan</li> <li>• new opportunity/change</li> </ul>	<p>The Code of Good Governance for Scotland's Colleges establishes standards of good governance practice for all boards and provides the essential foundations for compliance within the legislative framework. One of the five principles around which the code has been developed is effectiveness.</p> <p>Paragraph D24 states that "The board must agree a process for evaluating the effectiveness of the board chair and the committee chairs"</p>
<b>Resource implications:</b>	
<b>Risk implications:</b>	Yes/No Operational: required for the proper Governance of the College
<b>Equality and Diversity implications:</b>	N/A
<b>Consultation:</b> [staff, students, UHI & Partners, External] and provide detail	

<b>Status</b> – [Confidential/Non confidential]	Non-Confidential		
<b>Freedom of Information</b> Can this paper be included in “open” business* [Yes/No]	Yes		
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In October/November 2025 UHI Inverness Board of Management will be undergoing an Externally Facilitated Effectiveness Review conducted by CDN. The review takes place every 3-5 years and the latest took place in autumn 2020. The CDN confirmed that the Board does not need to conduct its annual Internal Evaluation Process in the year the external review takes place.

The Governance Officer will contact other Governance Professionals within the partnership and wider network to ask for examples of best practice being used by other institutions when it comes to internal reviews in order to plan for 2025/26 process.