

## **Item: 5**

### **The Orkney Fund Board – 25 February 2026**

#### **Year 1 Application Approval Process**

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## **1. Overview**

- 1.1. On 23 January 2026, a Board workshop was held to align the programme timeline for Year 1 (2026/27 financial year), review the refined application process, and discuss initial proposals for roundtable discussions.
- 1.2. The purpose of this report is to seek formal approval of the Year 1 funding application process, including:
  - The revised application form and guidance;
  - The revised scoring sheet;
  - The proposed assessment and approval approach.
- 1.3. The report also provides an overview of the Expressions of Interest (Eols) received for the 2026/27 funding round and outlines the estimated level of funding requested.

## **2. Recommendations**

- 2.1. It is recommended that the Board approves the Year 1 funding application process as set out in this report, including:
  - The revised application form;
  - The revised guidance;
  - The revised scoring sheet;
- 2.2. The officer-led assessment approach, whereby officers assess applications against agreed criteria and submit recommendations to the Board for final approval.

## **3. Eol Overview**

- 3.1. The Expression of Interest (Eol) phase closed in December 2025. A total of 53 Eols were received, with estimated requests of:
  - £722,162 capital
  - £232,847 revenue

3.2. The Board's allocation for 2026/27 is:

- £360,000 capital
- £232,000 revenue
- An additional £150,000 capacity funding available to support Board activity and engagement.

3.3. Discussions have taken place with applicants to discern whether an application is eligible for an application or not. Applications were not progressed where the funding request fell below the proposed minimum threshold or where there was no clear alignment with the Orkney Fund's priorities.

## **4. Refined Application Process**

4.1. Year 1 funding will focus on community-based projects aligned with the Orkney Fund's core themes and the Pride in Place programme objectives. Applications will be assessed against strategic fit, value for money, community need, deliverability, and legacy and sustainability.

4.2. At the Board workshop, it was agreed that the existing application form and guidance should be reviewed and refined ahead of the Year 1 funding round, reflecting feedback from the previous round.

4.3. Officers presented the revised application form and guidance for approval at the workshop. Amendments included improved accessibility, clearer guidance for applicants, and refinements to align with Board and programme requirements.

4.4. It was also proposed to introduce a minimum request threshold of £10,000 for capital applications and £5,000 for revenue applications to reduce the volume of small-scale requests and ensure funding is focused on projects of strategic significance, while retaining flexibility where appropriate.

4.5. The application assessment criteria were also revised and refined. This included clarifying the wording of each criterion to improve consistency, and expanding the scoring range from 0-3 to 0-5. The revised scale is intended to allow greater differentiation between applications and provide a more robust basis for ranking applications.

4.6. Given the anticipated volume of applications, the assessment process was reviewed at the workshop.

4.7. Two options were considered:

- A sub-group of Board members scoring applications; or
- An officer-led assessment, with recommendations presented to the Board for formal approval.

4.8. Given anticipated application volumes and Board capacity constraints, an officer-led assessment model is recommended for Year 1 to ensure consistency and efficient processing, while retaining Board oversight and final decision-making.

4.9. Eligible applicants have been invited to submit full applications by 12:00 on Friday, 20 March 2026. Applicants are welcome to submit a draft application for informal comments in advance of the deadline as part of a two-stage process.

4.10. Following the deadline, officers will assess applications against the agreed criteria and prepare a report setting out scores and funding recommendations for consideration at the next formal Board meeting (anticipated late April).

## **5. Next Steps**

5.1. Pending approval of the proposed process, officers will:

- i. Provide support to applicants ahead of the submission deadline.
- ii. Undertake officer-led assessment of applications against the approved criteria following the 20 March deadline.
- iii. Prepare a scoring summary and recommendations report for consideration at the next Board meeting (anticipated late April 2026).

5.2. Officers will review the effectiveness of the Year 1 assessment approach and report back to the Board with any recommended refinements for future rounds.

### **For Further Information please contact:**

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