

## OAK TREE HOUSING ASSOCIATION LTD GUIDE TO INFORMATION

LAST REVIEWED: DECEMBER 2022

### At a glance – terms used in this document

Term Used	Explanation
FOISA	Freedom of Information (Scotland) Act 2002  <i>Places a duty on those organisations covered to proactively publish certain types of information; and to respond to requests for information; and to provide advice and assistance to those making requests for information.</i>
EIRs	Environmental Information Regulations (Scotland) 2004  <i>Those organisations covered by EIRs have a duty to respond to requests for environmental information</i>
SIC	The Scottish Information Commissioner  <i>Who is responsible for ensuring that those bodies covered by FOISA and EIRs comply with the terms of the legislation.</i>
MPS	Model Publication Scheme  <i>Produced by the SIC – this details all of the information that those subject to FOISA should publish (if they hold it)</i>
Guide to Information	<i>A guide that all organisations subject to FOISA and adopting the MPS must produce to help people access the information it makes available</i>
Classes of Information	<i>Nine broad categories describing the types of information authorities should publish (if they hold it).</i>

## **Background**

The Freedom of Information (Scotland) Act 2002 (FOISA) requires that all housing associations/co-operatives in Scotland must produce and maintain a publication scheme. This must detail all of the key information that we publish and how you can access it. This Guide to Information is our publication scheme, and contains links to where you can find all of the information listed online.

Oak Tree Housing Association Ltd has adopted the Scottish Information Commissioner's (SIC) [Model Publication Scheme \(MPS\)](#), and this Guide has been approved by the SIC.

## **Formats other than online**

All of the information listed is available on our website (unless stated), and completely free to access online. However, we understand that not everyone will have online access and where this is the case you can contact us to view this in our office (where this would be convenient).

If you would like a printed copy of any of the information listed, unfortunately we may have to charge a small fee to provide this. This fee will never exceed the cost of photocopying and postage – and we will let you know any total cost before we forward this to you.

Our charges for providing any information detailed in this guide are summarised below:

<b>Format</b>	<b>Charge</b>
Online	Free
View at our office	Free
Print in black and white	10p per A4 sheet
Print in colour	20p per A4 sheet
CD Rom	£0.50per disc
Posted document/CD Rom	Cost of postage incurred

If you would like to request information that we publish in a format other than online, or arrange a visit to our office to view information, please contact:

Kirsty Davis - Office Manager – [info@oaktreeha.org.uk](mailto:info@oaktreeha.org.uk) Tel 01475 807000

## **Information that we cannot publish**

Whilst we will try to make all of the information we have detailed available, in rare cases there may be some information that we cannot make available. For example, sometimes if we were to publish certain Committee minutes, it could reveal personal details about an individual. This would be a breach of Data Protection legislation if we were to do so. When this is the case, we will remove any personal details before publication and highlight where and why we have done so.

### **For how long will information be published?**

We aim, where possible, to publish information for at least the current and previous two financial years. When we review any document – e.g. our policies – to avoid confusion we will only publish the current version once it has been updated.

### **Copyright and re-use**

Where we hold the copyright on our published information, the information may be copied or reproduced without formal permission, provided that:

- It is copied accurately
- It is not used in a misleading context
- The source of the material is identified

### **Contact us**

If you have any queries about anything contained within this Guide to Information, or if there is some information that you cannot find that you would like to access, please contact:

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Chief Executive Officer  
Oak Tree Housing Association Ltd  
40 West Stewart Street  
Greenock  
PA15 1SH

Email: [Info@oaktreeha.org.uk](mailto:Info@oaktreeha.org.uk)  
Tel: 01475 807000

## The Information that we make available to you

Under the MPS, the information we provide must be listed under certain “classes” of information. These are the categories of information that are detailed below. As FOI applies to other bodies and sectors across Scotland – such as Scottish Government and Councils for example –this means that not all of the categories in the MPS apply to housing associations/co-operatives.<sup>1</sup>

The details of all the information we hold under each of the classes that apply to our organisation, and hyperlinks to access this information when available online, are outlined below.

Information	Where to access
<b>Class 1 - About Oak Tree Housing Association Ltd</b>	
<i>Information about who we are, where to find us, how to contact us, how we are managed and our external relations.</i>	
<b>Descriptions of who we are</b>	
Vision and Values	<a href="https://www.oaktreeha.org.uk/vision-values/">https://www.oaktreeha.org.uk/vision-values/</a>
Aims and Objectives	<a href="https://www.oaktreeha.org.uk/aims-objectives/">https://www.oaktreeha.org.uk/aims-objectives/</a>
Area(s) of operation	<a href="https://www.oaktreeha.org.uk/about-us/">https://www.oaktreeha.org.uk/about-us/</a>
Business Plan	<a href="https://www.oaktreeha.org.uk/business-plan/">https://www.oaktreeha.org.uk/business-plan/</a>
Customer Care Charter	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
<b>Location and opening arrangements</b>	
Address	<a href="https://www.oaktreeha.org.uk/contact-us/">https://www.oaktreeha.org.uk/contact-us/</a>
Telephone number and e-mail address for general enquiries	<a href="https://www.oaktreeha.org.uk/contact-us/">https://www.oaktreeha.org.uk/contact-us/</a>
opening times	<a href="https://www.oaktreeha.org.uk/contact-us/">https://www.oaktreeha.org.uk/contact-us/</a>
General contact arrangements	<a href="https://www.oaktreeha.org.uk/contact-us/">https://www.oaktreeha.org.uk/contact-us/</a>
Contact details for making a complaint	<a href="https://www.oaktreeha.org.uk/make-a-complaint/">https://www.oaktreeha.org.uk/make-a-complaint/</a>
<b>Information relating to Freedom of Information</b>	
Publication Scheme and Guide to Information	<a href="https://www.oaktreeha.org.uk/freedom-of-information/">https://www.oaktreeha.org.uk/freedom-of-information/</a>
Charging Schedule for Published Information	<a href="https://www.oaktreeha.org.uk/freedom-of-information-environmental-info-charging-statement/">https://www.oaktreeha.org.uk/freedom-of-information-environmental-info-charging-statement/</a>
Contact details and advice on making an FOI request	<a href="https://www.oaktreeha.org.uk/freedom-of-information/">https://www.oaktreeha.org.uk/freedom-of-information/</a>
Freedom of Information policies and procedures	<a href="https://www.oaktreeha.org.uk/foi-policy/">https://www.oaktreeha.org.uk/foi-policy/</a>
Charging Schedule for environmental information provided in response to requests made under EIRs	<a href="https://www.oaktreeha.org.uk/freedom-of-information-environmental-info-charging-statement/">https://www.oaktreeha.org.uk/freedom-of-information-environmental-info-charging-statement/</a>
<b>About our Governing Body</b>	

<sup>1</sup> In the MPS Class 8: Commercial Publications and Class 9: Our Open Data do not apply to RSLs.

Information	Where to access
List of Governing Body Members <ul style="list-style-type: none"> <li>• Names</li> <li>• when they became a governing body member</li> <li>• Professional biographical details</li> <li>• office-bearing responsibilities</li> <li>• when they became an office-bearer</li> </ul>	<a href="https://www.oaktreeha.org.uk/committee-and-staff/">https://www.oaktreeha.org.uk/committee-and-staff/</a>  Available on request
Description of the role of the Governing Body <ul style="list-style-type: none"> <li>• governance structure chart (including sub-committees and working groups);</li> <li>• remits for governing body and any sub-committees</li> </ul>	<a href="https://www.oaktreeha.org.uk/committee-and-staff/">https://www.oaktreeha.org.uk/committee-and-staff/</a>
How to become part of the governing body	<a href="https://www.oaktreeha.org.uk/committee-and-staff/">https://www.oaktreeha.org.uk/committee-and-staff/</a>
<b>About our staff</b>	
Organisational structure	<a href="https://www.oaktreeha.org.uk/committee-and-staff/#staffstructure">https://www.oaktreeha.org.uk/committee-and-staff/#staffstructure</a>
List of senior management team, including professional biography and contact details	<a href="https://www.oaktreeha.org.uk/committee-and-staff/#SeniorManagementTeam">https://www.oaktreeha.org.uk/committee-and-staff/#SeniorManagementTeam</a>  Biographical details are available on request
<b>Governance Documents and Corporate Policies</b>	
Rules/Articles	<a href="https://www.oaktreeha.org.uk/our-rules/">https://www.oaktreeha.org.uk/our-rules/</a>
Standing Orders	<a href="https://www.oaktreeha.org.uk/committee-and-staff/#structure">https://www.oaktreeha.org.uk/committee-and-staff/#structure</a>
Membership Policy	<a href="https://www.oaktreeha.org.uk/share-membership/">https://www.oaktreeha.org.uk/share-membership/</a>
Code of Conduct for Staff	<a href="https://www.oaktreeha.org.uk/committee-and-staff/">https://www.oaktreeha.org.uk/committee-and-staff/</a>
Code of Conduct for Governing Body Members	<a href="https://www.oaktreeha.org.uk/committee-and-staff/#GovernancePolicyDocuments">https://www.oaktreeha.org.uk/committee-and-staff/#GovernancePolicyDocuments</a>
Entitlements Payments and Benefits Policy (or equivalent, including arrangements for payments for expenses and subsistence)	<a href="https://www.oaktreeha.org.uk/committee-and-staff/#GovernancePolicyDocuments">https://www.oaktreeha.org.uk/committee-and-staff/#GovernancePolicyDocuments</a>
Register of Interests	Available on request
Equal Opportunity and Diversity Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>

<b>Information</b>	<b>Where to access</b>
Health and Safety Policy Statement	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Sustainability Policy Statement	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
<b>Relationship with Regulators</b>	
Engagement plan with Scottish Housing Regulator	<a href="https://www.housingregulator.gov.scot/landlord-performance/landlords/oak-tree-housing-association-ltd/engagement-plan-from-31-march-2022-to-31-march-2023">https://www.housingregulator.gov.scot/landlord-performance/landlords/oak-tree-housing-association-ltd/engagement-plan-from-31-march-2022-to-31-march-2023</a>
Assurance Statement	<a href="https://www.oaktreeha.org.uk/documents/#scottishhousingregulator">https://www.oaktreeha.org.uk/documents/#scottishhousingregulator</a>
Annual Return on Charter Submission to SHR	<a href="https://www.oaktreeha.org.uk/documents/#performance">https://www.oaktreeha.org.uk/documents/#performance</a>
Financial Returns to SHR	<a href="http://www.oaktreeha.org.uk/documents/#performance">www.oaktreeha.org.uk/documents/#performance</a>
Charter report to tenants	<a href="http://www.oaktreeha.org.uk/documents/#performance">www.oaktreeha.org.uk/documents/#performance</a>
Internal and External Audit arrangements	<a href="http://www.oaktreeha.org.uk/documents/#performance">www.oaktreeha.org.uk/documents/#performance</a>
<b>Group Details</b>	
Details of our subsidiaries Oak Tree Housing Initiatives (development projects and other business activities)	<a href="https://www.oaktreeha.org.uk/othi/">https://www.oaktreeha.org.uk/othi/</a>
<b>Key Partnerships</b>	
Strategic agreements with other organisations	Available on request
<b>Class 2 – How we deliver our functions and services</b> <i>Information about our work, our strategy and policies for delivering services and information for our service users.</i>	
<b>How to use our services</b>	
List of services provided	<a href="https://www.oaktreeha.org.uk/">https://www.oaktreeha.org.uk/</a>
How to report a repair	<a href="https://www.oaktreeha.org.uk/reportarepair/">https://www.oaktreeha.org.uk/reportarepair/</a>
Right to Repair information	<a href="https://www.oaktreeha.org.uk/right-to-repair/">https://www.oaktreeha.org.uk/right-to-repair/</a>
How to apply for a house	<a href="https://www.oaktreeha.org.uk/apply-for-a-house/">https://www.oaktreeha.org.uk/apply-for-a-house/</a>
How to get information about tenancy support	<a href="https://www.oaktreeha.org.uk/support-for-your-tenancy/">https://www.oaktreeha.org.uk/support-for-your-tenancy/</a>
How to make a complaint	<a href="https://www.oaktreeha.org.uk/make-a-complaint/">https://www.oaktreeha.org.uk/make-a-complaint/</a>
How to speak to a housing officer	<a href="https://www.oaktreeha.org.uk/help-advice/">https://www.oaktreeha.org.uk/help-advice/</a>
How we consult with tenants and other customers to inform and	<a href="https://www.oaktreeha.org.uk/get-involved/">https://www.oaktreeha.org.uk/get-involved/</a>

<b>Information</b>	<b>Where to access</b>
improve service delivery and develop new services	
<b>Policies and Procedures</b>	
Allocations Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Adaptations Policy	Available on Request
Anti-Social Behaviour Policy (Estate Management Policy)	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Asbestos Management Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Arrears Management Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Asset Management Policy (including stock condition information)	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Customer Care Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Data Protection Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Equality and Diversity Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Estate Management Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Health and Safety Policy and procedures	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Legionella Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Procurement Policy	<a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>
Risk Management Policy	Available on Request
Rent Setting Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Repairs Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Sustainability Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Tenant Engagement Policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Tenancy Sustainment Policy	Included in Rent Arrears Policy
Internal procedures relating to above (where available)	Available on request

Information	Where to access
<b>Class 3 – How we take decisions and what we have decided</b> <i>Information about the decisions we take, how we make decisions and how we involve others.</i>	
<b>Governing Body Meetings</b>	
Governing body meeting minutes	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Governing body meeting reports/papers	Available on request
Governing body agendas	Available on request
<b>Consultation and Participation</b>	
Tenant Participation Strategy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Consultation reports noting the outcome of any recent consultations with tenants/others	Available on request
<b>Class 4 – What we spend and how we spend it</b> <i>Information about our strategy for, and management of, financial resources (in sufficient detail to explain how we plan to spend public money and what has actually been spent).</i>	
<b>Information about our accounts and budgets</b>	
Description of funding sources	<a href="https://www.oaktreeha.org.uk/finance/">https://www.oaktreeha.org.uk/finance/</a>
Audited accounts	<a href="http://www.oaktreeha.org.uk/documents/#finance">www.oaktreeha.org.uk/documents/#finance</a>
Budget policies and procedures	<a href="https://www.oaktreeha.org.uk/finance/">https://www.oaktreeha.org.uk/finance/</a>
Budget allocation to key service areas	<a href="https://www.oaktreeha.org.uk/finance/">https://www.oaktreeha.org.uk/finance/</a>
<b>Our programme of work and projects</b>	
<b>Brief details of any project funding</b> and how it's being spent	<a href="https://www.oaktreeha.org.uk/finance/">https://www.oaktreeha.org.uk/finance/</a>
<b>Capital works programme/plans</b> information (annual programme figure)	<a href="https://www.oaktreeha.org.uk/finance/">https://www.oaktreeha.org.uk/finance/</a>
<b>Spending relating to Staff and Governing Body</b>	
Expenses policies and procedures	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Senior staff/governing body member expenses at category level e.g. travel, subsistence and accommodation	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Board member remuneration other than expenses	We do not offer remuneration to the Board



Information	Where to access
Pay and grading structure (levels of pay rather than individual salaries)	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
General information about staff pension scheme	<a href="https://www.oaktreeha.org.uk/finance/">https://www.oaktreeha.org.uk/finance/</a>
<b>Class 5 – How we manage our resources</b>	
Information about how we manage our human, physical and information resources	
<b>Human resources</b>	
Strategy and management of human resources	Available on request
Staffing structure	<a href="https://www.oaktreeha.org.uk/committee-and-staff/#staffstructure">https://www.oaktreeha.org.uk/committee-and-staff/#staffstructure</a>
Human resources policies, covering: <ul style="list-style-type: none"> <li>• recruitment</li> <li>• performance management</li> <li>• salary and grading</li> <li>• promotion</li> <li>• pensions</li> <li>• discipline</li> <li>• grievance</li> <li>• staff development</li> <li>• maintenance and retention of staff records</li> </ul>	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a> or available on request.
Internal procedures relating to the above (where available)	Available on request
Trade Union information	Oak Tree is part of an umbrella organisation, EVH and they negotiate on Terms & Condition's and Salary with the <a href="#">Unite the Union</a>
Summary of professional organisations/trade bodies of which we are a member	<a href="#">CIH Scotland</a> <a href="#">Scottish Federation of Housing Associations</a> <a href="#">Employers in Voluntary Housing</a> <a href="#">Tenant Participation Advisory Scheme</a> Quality and Efficiency Forum <a href="#">Glasgow &amp; West of Scotland Forum of HA's</a> <a href="#">Housemark</a> <a href="#">Institute of Clerk of Works</a> <a href="#">Institute of Chartered Accountants of Scotland</a> <a href="#">Royal Institute of Chartered Surveyors</a>

Information	Where to access
<b>Physical Resources</b>	
Management of our land and property assets, including environmental/sustainability reports	Available on request
General description of our land and property holdings	<a href="https://oaktreeha.org.uk/about-us/">https://oaktreeha.org.uk/about-us/</a>
Estate development plans	Available on request
<b>Information Resources</b>	
Records management policy and records management plan, including records retention schedule	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Data protection policy	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
<b>Class 6 - How we procure goods and services from external providers</b> Information about how we procure works, goods and services, and our contracts with external providers.	
<b>Our Contractors and suppliers</b>	
Information about our key service delivery contractors who carry out: <ul style="list-style-type: none"> <li>responsive repairs</li> <li>landscape maintenance</li> <li>planned/cyclical maintenance</li> </ul>	Responsive Repairs are carried out by Consilium Contracting Services <a href="https://www.consiliumcs.co.uk/">https://www.consiliumcs.co.uk/</a> Landscape Maintenance is carried out by <a href="#">John O'Conner</a> Planned/Cyclical Maintenance is serviced through the IFLAIR Framework <a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>
List of suppliers and contractors used by organisation (provided to staff under our Entitlements Payments and Benefits Policy)	<a href="http://www.oaktreeha.org.uk/documents/#governanceandhr">www.oaktreeha.org.uk/documents/#governanceandhr</a>
Information about regulated procurement contracts awarded (value, scope, duration)	<a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>
<b>Our Procurement</b>	
Procurement Policy and procedures	<a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>

Information	Where to access
Information on how to tender for work and invitations to tender	<a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>
Register of contracts awarded which have gone through formal tendering, including name of supplier, period of contract and value	<a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>
Links to procurement information we publish on Public Contracts Scotland website	<a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>
Framework Agreements	<a href="https://www.oaktreeha.org.uk/procurement/">https://www.oaktreeha.org.uk/procurement/</a>
<b>Class 7 – How we are performing</b> Information about how we perform as an organisation, and how well we deliver our functions and services	
Annual Report	<a href="http://www.oaktreeha.org.uk/documents/#performance">www.oaktreeha.org.uk/documents/#performance</a>
ARC report to tenants	<a href="http://www.oaktreeha.org.uk/documents/#performance">www.oaktreeha.org.uk/documents/#performance</a>
Performance Standards/indicators	Available on request
Benchmarking information	Available on request
Complaints policy, guidance and forms	<a href="http://www.oaktreeha.org.uk/documents/#performance">www.oaktreeha.org.uk/documents/#performance</a>
Complaints reports or equivalent to show how complaints are handled and influence service delivery (aggregate reports rather than individual outcomes).	<a href="http://www.oaktreeha.org.uk/documents/#performance">www.oaktreeha.org.uk/documents/#performance</a>
Newsletter	<a href="http://www.oaktreeha.org.uk/documents/#publications">www.oaktreeha.org.uk/documents/#publications</a>
<b>Class 8 – Our commercial publications</b> <i>Information packaged and made available for sale on a commercial basis and sold at market value through a retail outlet e.g. bookshop, museum or research journal</i>	
This class does not apply as we do not produce any publications for sale.	Not applicable
<b>Class 9 – Our open data</b> Open data made available by us under the Scottish Government's <a href="#">Open Data Resource Pack</a> and available under open licence.	
This class does not apply	Not applicable