Oak Tree Housing Association Ltd

Engagement plan

from 1 April 2026 to 31 March 2027

Regulatory status

Compliant
The RSL meets regulatory requirements, including the Standards of Governance and Financial Management.

We don't require any further assurance from Oak Tree Housing Association Ltd (Oak Tree) other than the annual regulatory returns required from all RSLs.

Regulatory returns

Oak Tree must provide us with the following annual regulatory returns and alert us to notifiable events as appropriate:

- Annual Assurance Statement;
- audited financial statements and external auditor's management letter;
- loan portfolio return;
- five year financial projections; and
- Annual Return on the Charter.

It should also notify us of any material changes to its Annual Assurance Statement, and any tenant and resident safety matter which has been reported to or is being investigated by the Health and Safety Executive or reports from regulatory or statutory authorities or insurance providers, relating to safety concerns.

Our lead officer for Oak Tree Housing Association Ltd is:

Dean Reynolds
Regulation Manager

Tel: 07769 287 740
Email: dean.reynolds@shr.gov.scot