

Report

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Report to:	Finance and Information Technology Resources
Date of Meeting:	3 March 2008
Report by:	Executive Director (Finance and Information Technology Resources)

Subject:	Review of Trust Funds
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1. Purpose of Report

1.1. The purpose of the report is to:-

- ◆ Inform Committee of the processes that will be followed when reviewing active and inactive trusts to ensure intended recipients benefit fully

2. Recommendation(s)

2.1. The Committee is asked to approve the following recommendation(s):-

- (1) note the content of this report.

3. Background

- 3.1. A report was submitted to Finance and Information Technology Resources on 30 September 2008 to inform Committee of expenditure incurred by various trust funds during 2007/08 and to advise Committee of inactive funds as at 31 March 2008.
- 3.2. Committee was asked to approve work to commence on reviewing active and inactive trusts to ensure intended recipients benefit fully.
- 3.3. This paper is intended to outline the processes that will be followed during this review.

4. Process of Reviewing Trust Funds

- 4.1. The first stage in reviewing the Trust Funds will be to attempt to determine the original purpose or intent of the Trust Funds. In order to do so the original trust deeds or notes from the former district councils will be examined. It is anticipated that in some cases documented evidence of the original purpose or intent of the Trust Funds will not be available. A list of the Trusts that will be reviewed is attached to this paper at Appendix 1.
- 4.2. Where the original purpose or intent of the Trust Fund cannot be determined advice will be sought from the Council's Legal services and with the Office of the Scottish Charity Regulator (OSCR) to identify what options we have for managing these Trusts.

- 4.3. There are currently a number of different methods used to determine how Trust beneficiaries are selected, and how the funds are distributed. There are also some trusts which are inactive. Options for actively managing and reporting on the Trusts will be investigated. The aim is to ensure that we get the most out of the Trust Funds that we hold.
- 4.4. OSCR had previously notified us of an option which may allow the consolidation of existing trusts in order to achieve maximum benefit for the recipients. This option will be investigated and findings reported back to this Committee. Advice from OSCR and Legal Services will be sought throughout this investigation.
- 4.5. The expected outcome for the review will be an agreed strategy for the continued management of Trust Funds within the council, documenting how each Trust is to be used.
- 4.6. A further report on the progress of this review will be made to Finance and IT Resources Committee in July 2009.

5. Employee Implications

- 5.1. None

6. Financial Implications

- 6.1. Any costs arising from this review can be met from within existing budgets.

7. Other Implications

- 7.1. None

8. Equality Impact Assessment and Consultation Arrangements

- 8.1. There is no requirement to carry out an impact assessment in terms of the proposals contained within this report.
- 8.2. There is no requirement to undertake any consultation in terms of the proposals contained within this report.

Linda Hardie

Executive Director (Finance and Information Technology Resources)

4 February 2009

Link(s) to Council Values and Objectives

- ♦ Value: Accountable, effective and efficient

Previous References

- ♦ Finance and IT Resources Committee, 30 September 2008 : Trust Fund Expenditure 2007/08

List of Background Papers

None

Contact for Further Information

If you would like to inspect the background papers or want further information, please contact:-

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List of SLC Held Trusts

Name of Trust Fund	Origin and Purpose
<i>Clydesdale</i>	
Hospitlands	For the Deserving Poor of Lanark
Vary Bequest	For the deserving poor to be divided equally between parishes of Carmichael 4, Pettinain 2, Lanark 6.
JE Black	For the aid and benefit, individually or as a whole, of the residents of the town of Biggar, who are, or would be but for the lack of entitlement, in receipt of a Government retirement pension.
James Alexander Coal Bequest	To provide coal for the poor of the village of Leadhills
Robert Gillespie	For deserving poor in the Parish of Douglas
John Gillespie	For poor persons in Parish of Douglas
James Grierson	For the benefit of such poor and deserving persons residing in and natives of the Parish of Leadhills.
Alexander Hyslop	For poor of village of New Lanark.
James and Janet Alexander Nursing Bequest	To provide suitable nurses and medical attendance, medicine, medical and surgical appliances and necessaries for invalids and convalescents among inhabitants of Leadhills.
Robert Waugh Bequest	Bequest by late rev R Waugh for poor in Parish of Lesmahagow
Gibson Bequest	Poor of Lanark
Mitchell Bequest	Poor of Lanark
Jeannie Fraser Bequest	Poor of Lanark
Cowan Fund	Poor of Lanark
Archibald Cameron	For the poor of Leadhills, except immigrants living there less than ten years.
Mungo Henshaw	Legacy by late Mungo Henshaw in 1857 for poor of Wiston and Roberton
John M Waugh	For the benefit of the poor persons in the parish of Lesmahagow
Mauldslie	Bequest by forefathers of late Sir Wyndham Anstruther for the poor of Parish of Carluke
Lockhart Nemphlar	From Trustees of late Mr. Wm. Lockhart for deserving persons resident in Nemphlar.
Walston Parish	Bequest for poor of Parish of Walston
Miss F.E.M. Bennett Bequest	Unknown
Murray Memorial	To meet the running cost of maintaining the Mortuary Chapel in Lanark Cemetery

Chapel	
Agnes Taylor Hastie	For the purpose of maintaining the Burial Ground of Testatrix and her husband in Leadhills Churchyard in a neat and tidy condition.
Alexander Kay	Fund created in 1926 by the trustees of the late Mr Alexander Kay of Cornhill for the upkeep of Testator's monument in Coulter Churchyard.
Chancellor	Bequest by the late Archibald Cameron for upkeep of Chancellor Burial Ground in Quothquan Churchyard
JS Waugh	Sum paid by Miss Jessie S Waugh for purpose of maintaining family burial place in St.John's Churchyard Symington
Symington Memorial	Upkeep of the William Symington Memorial in Leadhills
Leadhills War Memorial	Unknown
James Alexander Books	To provide books for Leadhills Miners' library, and maintain and improve the library
Hamilton	
John Nivison Bequest	Gifted by Mr.John Nivison - revenue to be applied in Dalserf Parish - 4/6ths coal for poor, 1/6th Dykehead Colliery Committee for infirm workmen and widows, 1/6th school prizes for schools in Larkhall./ (with power to change allocation, if necessary)
Old Mortifications & Charities	Poor of Hamilton
John McNaughton Bequest	Unknown but Historically been Distributed to Boys Brigade and St Andrews Ambulance
Daniel Smith Bequest	Poor of Hamilton
David Nimmo Bequest	Poor of Hamilton
Robert Downie Bequest	Poor of Hamilton
Pollock Bequest	Poor of Hamilton
Dr J Dixon Bequest	Poor of Hamilton
Robert Nimmo Bequest	Unknown
Robert Smillie Memorial	Unknown
Alex Hamilton Bequest	Unknown
John Adams Memorial Fund	St John's Grammar School
East Kilbride	
W Crawford Bequest	Gift for the poor of Parish - fund of East Kilbride
E Giffen Bequest	Bequest for poor persons in Parish of Avondale
R Nimmo Bequest	Chapelton
A Gebbie Bequest	Bequest for poor persons in Parish of Avondale

H Gebbie Bequest	Bequest for poor persons, as defined, in Parish of Avondale - 5 poor persons annually
J Gebbie Bequest	Bequest for deserving aged and delicate persons in Parish of Avondale
Provost Fund Gen A/c	Unknown
J Reid Bequest	Bequest for keeping father's lair and gravestone in Chapelton Churchyard in order.
Rutherglen	
Rutherglen Mortified Money	For poor of Rutherglen
McFarlane's Property	Unclaimed balance as per 1975 accounts
Social Work	
The Loudon Bequest	To fund holiday projects for elderly residents in former Strathclyde Regional Council area
Carmunock Parish Trust	Fund for poor of Parish of Carmunnock
Education	
Alexander Campbell Prize Fund	To provide a Dux prize at Cathkin PS
The Alexander Robert Prize	To provide a prize for Maths in Carluke HS
Andrew Macallan Mem. Medal	To provide a Dux Medal at Rutherglen Academy
Annie E.Adams Memorial Prize	To provide a French prize at Hamilton Grammar
Annie Harley Mem. Prize	To provide sewing prizes at Low Waters PS Hamilton
Archibald Stevenson Mem.Medal	To provide a medal for Art at Hamilton Grammar
A.M.Watt Low Mem. Prize	To provide a prize for Bankhead PS
Biggar Women Temp.Assoc.Prize	To provide prizes for essays etc on Temperance and Bible Knowledge at Biggar HS
Carstairs Dist.Nursing Assoc.Bequest	To provide prizes in Carstairs Junction PS (2/3) and Carstairs PS (1/3)
The Clow Ross Prize	To provide a prize for the Dux girl at Uddingston Grammar
David B. Hair Medal	To endow a Medal for Maths at Hamilton Grammar
David L. Struthers Prize Fund	To provide four prizes at Gilmourton Primary School

Dr.Donald C.Buchanan Mem.Prize	To provide a prize for Latin in Rutherglen Academy
Dr.John Shaw Mem. Prize	To provide a prize for the runner up to the Dux at Quarter Primary School
Dr.Robert .Yuill Prize Fund	To provide a prize for the best collection of wild flowers and plants in Carluke Primary School
Elizabeth. B. Mitchell Mem Trust	To commemorate the interest in East Kilbride New Town of the late Elizabeth B Mitchell.
Elizabeth Strachan Mem.Prize	To provide a prize for the Primary 3 class of Strathaven Academy
Ewart Prize Fund	To provide a Special Merit Prize at Hamilton Grammar
Fleming Downie Prize for English	To provide an English Prize at Strathaven Academy
Flora B. Aiton Medal	To endow a Medal for Latin at Hamilton Grammar
Francis Martin Senior Boys Dux	To provide a Dux Prize at Holy Cross High School
George B.R.Marshall Prize	To provide prizes for Art and English at Braidwood Primary School
George F. Pollock Trust	To provide University Bursaries for pupils at Hamilton Grammar
George M.Crawford Mem Prize	To provide a prize for the Dux boy at Uddingston Grammar
George Stewart Memorial Prize	Deed of Trust from Daniel McMichael Andrew to provide Geography and History Prizes at Strathaven Academy
Holy Cross H.S.Prize Fund	To provide prizes for Holy Cross High School
The Hutton Prize	To provide prizes for French and German at Lanark Grammar
Isabella Leggate Memorial Prize	To provide a prize at Hamilton Grammar
Isobel M.Walker Mem. Prize	To provide a prize at Hamilton Grammar
James Logan Mem.Prize Fund	To provide prizes for Uddingston Grammar School – 2/3 Dux 1/3 Special English Prize
James W.Allan Bursary	To provide a bursary for the study of Natural History to students in Lanark County
James W.Allan Prize	To provide prizes for Natural History at Biggar High School

Fund	
Jane Andrew Mem.Prize Fund	To provide prizid for scholastic ability at Strathaven Academy
J.Eunice Copeland M.A.,K.I.H.(India)Prize	To provide the first year Dux prize at Lanark Grammar
J.W.Torrance Bursary	To provide a bursary for the best pupil in Quarter Primary School
Kathleen Power Mem.Prize	To provide a prize for the Dux girl at Holy Cross High School
Marion N.Blackley Mem. Bequest	To provide shoes to deserving cases in Robert Smellie Memorial Primary School, Larkhall
Marion Sharpe Paterson Prize Fund	To provide prizes in Glenlee Primary School, Burnbank
Mary A.B.B.Scott(Lamington Bequest)	To provide a bursary for a resident of the Parish of Lamington to attend a Scottish University
Mary W.McLaughlin Prize	To provide a Primary 7 prize at Netherburn Primary School
Miss Christina Clarkson Ross Prize	To provide a prize to the Junior Division of Rutherglen Academy for a pupil who has worked hard but who will never gain a prize in the usual way
Miss E.M. Hamilton Fund	To provide a prize in Music at Hamilton Grammar
Mitchell Dux Medal	To provide a Dux medal at Larkhall Academy
The Peter Shand Prize	To provide prizes for chemistry and physics at Lanark Grammar School
Rev.James French Trust	To provide a gold medal for the best scholar or assistance to scholars at New Lanark
Rev.John McKechnie Prize Fund	To provide a Dux prize at Halfmerke Primary School
Robert Britton Memorial Prize	To provide a History Prize at Hamilton Grammar School
Robert Wood Prize Fund	To provide a medal for Dux of third year at Lanark Grammar
Robertson Reid Mem. Prize	To provide a prize for the Dux boy and girl in Gallowflat Junior Secondary School
Sir John Mann Mem.	To provide prizes for the Dux boy and Girl at Carnwath Primary School

Prize Fund	
Sir Nathaniel Dunlop Bursaries	To provide four bursaries in Glasgow University for pupils of Biggar High School
Strathaven Male Voice Choir Music Prize	To provide a music prize for Strathaven Academy
Symington P.S.Dux Prize Fund	To provide a Dux medal at Symington Primary School
S.S.E.B.Prize For Physics (Earnock High)	To provide a prize for physics at Earnock High School
Thos.Anderson Gold Medal Fund	To provide a gold medal for the best pupil in arithmetic at Hamilton Grammar
The William Marr Prize	To provide a prize for Technical Drawing at Carluke High School
The William Vint Foster Memorial Prize Fund	Unknown

