

Report

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Report to:	Finance and Information Technology Resources Committee
Date of Meeting:	19 January 2010
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:-

- ◆ Propose arrangements to manage South Lanarkshire Council's Trusts from 2010/11 in order to ensure the intended recipients of the Trusts benefit fully.

2. Recommendation(s)

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

- (1) that the suggested consolidation and ongoing management of non Education trusts be approved
- (2) that the gifting of the James Alexander Books Trust to the Leadhills Miners Library, and passing the Carmunnock Parish Trust to Glasgow City Council to manage, be approved
- (3) that the holding of the Trusts to maintain lairs is approved
- (4) that the combined Hamilton Grammar trust, and continuation of individual education trusts with the option to offer schools the full capital value of low value trusts be approved
- (5) that the recommended minimum level of funds distributed to £10 for schools, £20 for individuals and £50 for groups be approved
- (6) that the ongoing governance of the Trusts within the Council be approved.

3. Background

3.1. South Lanarkshire Council administers a total of 110 Trust Funds. The value of these Trust Funds as at 31 March 2009 was £0.873m. These Trusts can be categorised as Area Based Trusts (Clydesdale, Hamilton, East Kilbride and Rutherglen), Education Trusts and Social Work's Trusts.

3.2. These Trusts are primarily the result of bequests which have gifted varying sums of money to the Council for specific purposes such as assisting the poor, or to provide prizes in schools. Many of these Trusts were bequeathed many years ago, some hundreds of years ago.

- 3.3. Every year monies are distributed from most of the Trust funds. Normal practice has been to distribute the interest gained on the Trust, and maintain the capital value of the Trust to allow benefit to be gained in future years. The selection of recipients of funds distributed from the Trusts has been made by various methods. Some recipients remain unchanged year to year.
- 3.4. There are a number of Trusts which are currently inactive. This means that no monies are being distributed from these Trusts which effectively mean that no benefit is being gained from the Trusts' existence. In addition, many of the Trusts (especially Trusts relating to schools) are only distributing very small amounts of cash each year as the low capital value of the Trust results in very little interest being earned.
- 3.5. A list of all SLC held Trusts and amounts distributed in 2008/09 is shown at Appendix 1.
- 3.6. On 3 March 2009, the Finance and Information Technology Resources Committee approved work to commence on reviewing active and inactive Trusts to ensure intended recipients benefit fully. The process of the review would be to identify, if possible, the original purpose of the Trust, identify options for actively managing and reporting on Trusts and identify an agreed strategy for the continued management of Trust Funds within the Council, documenting how each Trust is to be used.

4. Identifying purpose of Funds

- 4.1. The first stage of the review was to establish the original purpose of the Trusts. There are pieces of documentation relating to some of the Trusts detailing how the Trust was to be used. In addition there are Lanark County Council documents dating back to 1939 which noted the source and purpose for many of the Clydesdale Trusts. There are some Trusts where no source documentation can be located.
- 4.2. For the Trusts where records are held, the narrative shown in the table at Appendix 1 reflects the purpose of the Trust. Where purpose is shown as unknown, no documentation has been found. On the whole the Trusts aim to provide benefit to residents of an area who are in need of financial assistance; however there is no direct guidance on how this should be done.
- 4.3. Legal Services were approached to provide advice on the implications of a change to the way that Trusts are managed within the Council. If it is found that the Council has not acted in the way that the Trust was intended, the Council may have to re-establish the funds to allow the original purpose to be met. Through this review the Council intends to meet the intention of the Trust as far as possible. For the currently inactive funds, this review will allow these Funds to meet their purpose where previously no benefit was being gained.

5. Current Distribution methods

- 5.1. As detailed in Section 3 Trust Funds have been managed in such a way as to maintain the capital value of the fund and the majority of Area Based Trust Funds are distributed to the same individuals or groups each year.
- 5.2. Education Trust Funds are mainly distributed by making payment to the relevant school fund. Once again this method of distribution has been long established. Of the 57 payments made this year, 42 payments were under £10.

- 5.3. There are 28 Trusts which are currently inactive, with no payments being made from them in recent years. These inactive funds currently total £36,305
- 5.4. The review has found that the current distribution methods are not allowing the full potential benefit of the Trusts to be realised. There is no formal arrangement for new recipients to be considered for assistance from the Area Based Trusts. Also, many of the payments made from the Area Based Trusts and in the Education Trusts are small with many payment made of only £1. In addition, inactive trusts currently serve no benefit as funds are not distributed.

6. Proposed Management of Trusts – Area Based Funds

- 6.1. On reviewing the intended purpose of the Trusts, it is apparent that many of them have the same general purpose. For many of the Trusts the general intention lies in line with others within the same geographic area.
- 6.2. For the Area Based Trusts benefit would be achieved in combining the Trusts to form a greater capital base, generate more interest to distribute, and therefore to become more effective. Pooling of the Trusts will generate greater and therefore more beneficial payments. Appendix 2 suggests the new combined trusts and the ward that those trusts will cover. Changes to beneficiaries, and the introduction of new beneficiaries will be advised to the Chair and relevant local members, by the Executive Director (Finance and IT Resources).
- 6.3. There are some Trusts which have been working well in benefiting the community. It is proposed that these continue as they are. These are marked in Appendix 2, and include the Social Work trust, The Loudon Bequest, and the Rutherglen Mortification Moneys.
- 6.4. There are also a few specific Trusts whose purpose can be better met out with the management proposed above. One currently inactive Trust (the Carmunnock Parish Trust) has the purpose of providing assistance for the poor in Carmunnock. As Carmunnock is now part of Glasgow City Council, it is proposed that the Trust is transferred to Glasgow City Council.
- 6.5. There is also an inactive Trust (the James Alexander books trust) whose purpose was to provide books for the Leadhills Miner's Library, which was founded in 1741. A museum now displays books from the Miners Library and material relating to the use of the library and the lives of its users. It is proposed that the Trust is gifted in its entirety to the library museum to contribute towards its upkeep.
- 6.6. Some Trusts were bequeathed to provide for the upkeep of burial places in various locations within the South Lanarkshire Area. It is proposed that these funds are held in Trust, and the relevant members covering the areas where the lairs are kept are informed of the Trust.
- 6.7. There is a capital project ongoing to restore the Murray Memorial Chapel in Lanark cemetery. It is proposed that the currently inactive Trust, held to meet the running costs of the chapel, is donated to the project.
- 6.8. This proposed management of Trusts will result in 11 non education trusts being managed by SLC.

Education Trusts

7. Background

- 7.1. Within the Education Trusts there are currently some Trusts with large capital values over £4,000 with reasonable levels of payments being made annually. It is proposed that these payments continue.
- 7.2. The remaining Trusts' capital values are small, or the purpose of the Trust is unknown. Payments made from these Trusts can be extremely small and insufficient to allow the purpose of the Trust to be met. There are also a number of trusts which relate to Hamilton Grammar school
- 7.3. Research has shown that many of the schools that receive a payment from a trust use the money as a contribution towards a prize, some in the name of the Trust, and some as a contribution towards general prizes.
- 7.4. Discussions have taken place with Education Resources and the schools who currently are beneficiaries of the Education Trusts. Prizes are seen as a positive incentive for pupils, and it is proposed that the individual schools continue to benefit from the Trusts going forward.
- 7.5. The capital value of many of the trusts is less than £200. As schools are being paid the interest earned on the Trusts' Capital value many of the payments to schools are very small amounts with 42 payments of less than £10 being made. This means that schools that are awarding prizes may be subsidising the prize with money from their own budgets and school funds.

Recommendations

- 7.6. Moving forward it is proposed that all the Hamilton Grammar Trusts are combined into one trust for administration purposes. The School should continue to apply the income to meet the purpose that the Trust intended.
- 7.7. It is also proposed that all relevant schools can be offered a minimum payment from an Education Trust Fund of £10. This will ensure that the funds can be used to provide a prize without the need for subsidy until the Trust Fund is empty.
- 7.8. It is also proposed that any fund with less than £200 capital value is offered to the school as a lump sum. The school would be required to use the funds to provide benefit to the school. This would of course mean that in future years an annual payment would not be made and the trust would be closed down.
- 7.9. Appendix 3 shows the proposal for Education Trusts moving forward,

8. Distribution of Funds

- 8.1. To ensure distributed funds are of sufficient value to make a beneficial impact to recipients, members are asked to approve the recommendation that the minimum amounts distributed will be either interest gained or 2% of fund (which ever is greater). This may result in some erosion of capital.
- 8.2. Members are also asked to approve the recommendation that no payment of less than £20 will be made to an individual, or £50 to a group. Therefore the minimum payout from a Trust would be £20 per annum.

- 8.3. These recommendations do not apply to Education Trusts, as the distribution of funds from these trusts is detailed in sections 7.2.1 to 7.2.3 above.
- 8.4. The Council will be required to show how the funds have been applied. Therefore evidence will be required of expenditure.

9. Ongoing Governance of Trusts

- 9.1. The Finance and Information Technology Resources Committee will continue to act as the governing body of the Trusts. Annual reports will be presented to Committee advising of monies distributed and remaining balances within Trusts. The Executive Director (Finance and Information Technology Resources) will continue to act on behalf of the Committee in administering the Trusts and any changes to the beneficiaries will be notified to the Chair and relevant local members
- 9.2. The recipients of the Education Trust Funds are deemed to be the schools. The selection of individual prize winners will be administered by the schools.
- 9.3. The Council is also required to submit each year to the Office of the Scottish Charity Regulator (OSCR) a report including both the accounts for the trust, and also an Annual Report including information on the performance, governance and outcomes of the Trust.

10. Employee Implications

- 10.1. None

11. Financial Implications

- 11.1. All financial implications arising from the Trust review can be met by the Trust Funds.

12. Other Implications

- 12.1. None

13. Equality Impact Assessment and Consultation Arrangements

- 13.1. There is no requirement to carry out an impact assessment in terms of the proposals within this report.
- 13.2. Education Resources have researched the current use of trust income within schools and gauged opinion on the best way to continue to gain benefit from the Trusts.

Linda Hardie

Executive Director (Finance and Information Technology Resources)

4 December 2009

Link(s) to Council Values and Objectives

- ◆ Value: Accountable, effective and efficient

Previous References

- ◆ Finance and IT Resources Committee, 7 July 2009

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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Active Funds

Name of Trust Fund	Origin and Purpose	2008/09 Expenditure	Details of Payments	Balance within Fund
Clydesdale				
Hospitlands	For the Deserving Poor of Lanark	£150.00	£15 each to 10 Lanark residents	£4,049.68
Vary Bequest	For the deserving poor to be divided equally between parishes of Carmichael 4, Pettinain 2, Lanark 6.	£210.00	£15 each to 12 Lanark residents £30 to the Scottish Redundant Churches Trust	£6,448.94
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.	£50.00	£10 each to 5 Biggar residents	£1,395.78
James Alexander Coal Bequest	To provide coal for the poor of the village of Leadhills	£120.00	£40 each to 3 Leadhills residents	£1,189.01
Robert Gillespie	For deserving poor in the Parish of Douglas	£8.00	Payment made to St Brides Parish Church	£494.37
John Gillespie	For poor persons in Parish of Douglas	£4.00	Payment made to St Brides Parish Church	£221.29
James Grierson	For the benefit of such poor and deserving persons residing in and natives of the Parish of Leadhills.	£660	£60 each to 11 Leadhills residents	£10,462.87

Alexander Hyslop	For poor of village of New Lanark.	£30.00	£10 each to 3 New Lanark residents	£442.55
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James and Janet Alexander Nursing Bequest	To provide suitable nurses and medical attendance, medicine, medical and surgical appliances and necessities for invalids and convalescents among inhabitants of Leadhills.	£140	£20 each to 7 Leadhills residents	£28,781.64
Hamilton				
John Nivison Bequest	Gifted by Mr. John Nivison - revenue to be applied in Dalsersf 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)	£120.00	£10 each to 5 Larkhall residents £10 each to the following Larkhall Academy Craigbank Primary School Glengowan Primary School Hareleeshill Primary School Machanhill Primary School Robert Smillie Memorial School St Mary's Primary School	£6,656.85
Old Mortifications & Charities	Poor of Hamilton	£130.00	£10 each to 13 Hamilton residents	£5,130.28
John McNaughton Bequest	Unknown but Historically been Distributed to Boys Brigade and St Andrews Ambulance	£330.00	£130 to St Andrews Ambulance Corps (Hamilton West Company) £25 each to the following: 1 st Hamilton Boys Brigade 2 nd Hamilton Boys Brigade 5 th Hamilton Boys Brigade 9 th Hamilton Boys Brigade 10 th Hamilton Boys Brigade 11 th Hamilton Boys Brigade	£9,893.24

			12 th Hamilton Boys Brigade 13 th Hamilton Boys Brigade	
Daniel Smith Bequest	Poor of Hamilton	£10.00	£10 each to 1 Hamilton residents	£2,161.91
David Nimmo Bequest	Poor of Hamilton	£70.00	£10 each to 7 Hamilton residents	£498.18
Robert Downie Bequest	Poor of Hamilton	£60.00	£10 each to 6 Hamilton residents	£2,547.48
Pollock Bequest	Poor of Hamilton	£110.00	£10 each to 11 Hamilton residents	£4,835.88
Dr J Dixon Bequest	Poor of Hamilton	£20.00	£10 each to 2 Hamilton residents	£4,193.36
East Kilbride				
W Crawford Bequest	Gift for the poor of Parish - fund of East Kilbride	£40.00	Payment to East Kilbride Old Parish Church	£2,246.93
E Giffen Bequest	Bequest for poor persons in Parish of Avondale	£3.99	Payment to Strathaven Council of Churches	£109.59
R Nimmo Bequest	Chapelton	£65.59	Payment to Strathaven Council of Churches	£1,923.08
A Gebbie Bequest	Bequest for poor persons in Parish of Avondale	£3.33	Payment to Strathaven Council of Churches	£91.09
H Gebbie Bequest	Bequest for poor persons, as defined, in Parish of Avondale - 5 poor persons annually	£2.22	Payment to Strathaven Council of Churches	£60.55
J Gebbie Bequest	Bequest for deserving aged and delicate persons in Parish of Avondale	£6.53	Payment to Strathaven Council of Churches	£192.04
Rutherglen				
Rutherglen Mortified Money	For poor of Rutherglen	£1,154.05	Money used to provide a meal and small cash gift to elderly residents of	£28,824.84

			Rutherglen	
Social Work				
The Loudon Bequest	To fund holiday projects for elderly residents in former Strathclyde Regional Council area	£30,348.07	Payment made to following Councils: Argyll & Bute £1,320.00 East Dunbartonshire £855.00 East Ayrshire £1,560.00 East Renfrewshire £762.00 Glasgow City £10,722.00 Inverclyde £1,305.00 North Ayrshire £1,644.00 North Lanarkshire £3,636.00 Renfrewshire £2,037.00 South Ayrshire £1,566.00 South Lanarkshire £3,258.00 West Dunbartonshire £1,335.00 Payment made in respect of Portfolio Management Fee to Barclays Wealth £348.07	£572,149.18
Education				
Alexander Campbell Prize Fund	To provide a Dux prize at Cathkin PS	£1.00	Payment to Cathkin Primary School Fund	£23.10
The Alexander Robert Prize	To provide a prize for Maths in Carluke HS	£2.00	Payment to Carluke High School Fund	£93.80
Andrew Macallan Mem. Medal	To provide a Dux Medal at Rutherglen Academy	£10.00	Payment to Stonelaw High School	£403.64
Annie E.Adams Memorial Prize	To provide a French prize at Hamilton Grammar	£3.00	Payment to Hamilton Grammar School Fund	£128.55
Annie Harley Mem. Prize	To provide sewing prizes at Low Waters PS Hamilton	£6.00	Payment to Woodside Primary School	£305.92
Archibald Stevenson Mem.Medal	To provide a medal for Art at Hamilton	£3.00	Payment to Hamilton Grammar School Fund	£124.47

	Grammar			
A.M.Watt Low Mem. Prize	To provide a prize for Bankhead PS	£1.00	Payment to Bankhead Primary School Fund	£59.18
Biggar Women Temp.Assoc.Prize	To provide prizes for essays etc on Temperance and Bible Knowledge at Biggar HS	£1.00	Payment to Biggar High School Fund	£60.96
Carstairs Dist.Nursing Assoc.Bequest	To provide prizes in Carstairs Junction PS (2/3) and Carstairs PS (1/3)	£8.00	Payment of £5.00 made to Carstairs Primary School Fund and £3.00 made to Carstairs Junction Primary School Fund	£355.88
The Clow Ross Prize	To provide a prize for the Dux girl at Uddingston Grammar	£3.00	Payment to Uddingston Grammar School Fund	£136.08
David B. Hair Medal	To endow a Medal for Maths at Hamilton Grammar	£5.00	Payment to Hamilton Grammar School Fund	£151.56
David L. Struthers Prize Fund	To provide four prizes at Gilmourton Primary School	£5.00	Payment to Gilmourton Primary School Fund	£296.70
Dr.Donald C.Buchanan Mem.Prize	To provide a prize for Latin in Rutherglen Academy	£24.00	Payment to Stonelaw High School	£1,336.61
Dr.John Shaw Mem. Prize	To provide a prize for the runner up to the Dux at Quarter Primary School	£10.00	Payment to Quarter Primary School Fund	£4,963.50
Dr.Robert .Yuill Prize Fund	To provide a prize for the best collection of wild flowers and plants in Carluke Primary	£3.00	Payment to Carluke Primary School Fund	£133.66

	School			
Elizabeth. B. Mitchell Mem Trust	To commemorate the interest in East Kilbride New Town of the late Elizabeth B Mitchell.	£4,000	Payment made to school clusters on a rotational basis every two years to fund specific projects. Contribution towards projects will be made in 2008/09 and then 2010/11.	£18,298.14
Elizabeth Strachan Mem.Prize	To provide a prize for the Primary 3 class of Strathaven Academy	£3.00	Payment to Strathaven Academy School Fund	£118.32
Ewart Prize Fund	To provide a Special Merit Prize at Hamilton Grammar	£2.00	Payment to Hamilton Grammar School Fund	£75.62
Fleming Downie Prize for English	To provide an English Prize at Strathaven Academy	£3.00	Payment to Strathaven Academy School Fund	£151.56
Flora B. Aiton Medal	To endow a Medal for Latin at Hamilton Grammar	£5.00	Payment to Hamilton Grammar School Fund	£164.47
Francis Martin Senior Boys Dux	To provide a Dux Prize at Holy Cross High School	£3.00	Payment to Holy Cross High School Fund	£126.51
George B.R.Marshall Prize	To provide prizes for Art and English at Braidwood Primary School	£3.00	Payment to Braidwood Primary School Fund	£115.26
George F. Pollock Trust	To provide University Bursaries for pupils at Hamilton Grammar	£150.00	Payment to Hamilton Grammar School Fund	£6,167.72
George M.Crawford Mem Prize	To provide a prize for the Dux boy at	£6.00	Payment to Uddingston Grammar School Fund	£307.48

	Uddingston Grammar			
George Stewart Memorial Prize	Deed of Trust from Daniel McMichael Andrew to provide Geography and History Prizes at Strathaven Academy	£10.00	Payment to Strathaven Academy School Fund	£386.90
Holy Cross H.S.Prize Fund	To provide prizes for Holy Cross High School	£5.00	Payment to Holy Cross High School Fund	£239.77
The Hutton Prize	To provide prizes for French and German at Lanark Grammar	£484.00	Payment to Lanark Grammar School Fund	£28,972.48
Isabella Leggate Memorial Prize	To provide a prize at Hamilton Grammar	£3.00	Payment to Hamilton Grammar School Fund	£114.58
Isobel M.Walker Mem. Prize	To provide a prize at Hamilton Grammar	£3.00	Payment to Hamilton Grammar School	£109.16
James Logan Mem.Prize Fund	To provide prizes for Uddingston Grammar School – 2/3 Dux 1/3 Special English Prize	£2.00	Payment to Uddingston Grammar School Fund	£117.88
James W.Allan Bursary	To provide a bursary for the study of Natural History to students in Lanark County	£400.00	Payment of £200 each to: Lesmahagow High School Fund Carluke High School Fund	£24,918.20
James W.Allan Prize Fund	To provide prizes for Natural History at Biggar High School	£3.00	Payment to Biggar High School Fund	£145.91
Jane Andrew Mem.Prize Fund	To provide prizes for scholastic ability at Strathaven Academy	£5.00	Payment to Strathaven Academy School Fund	£195.39
J.Eunice Copeland M.A.,K.I.H.(India)Prize	To provide the first year Dux prize at Lanark	£2.00	Payment to Lanark Grammar School Fund	£60.85

	Grammar			
J.W.Torrance Bursary	To provide a bursary for the best pupil in Quarter Primary School	£70.00	Payment to Quarter Primary School Fund	£4,536.81
Kathleen Power Mem.Prize	To provide a prize for the Dux girl at Holy Cross High School	£3.00	Payment to Holy Cross High School Fund	£131.26
Marion N.Blackley Mem. Bequest	To provide shoes to deserving cases in Robert Smellie Memorial Primary School, Larkhall	£18.00	Payment to Robert Smellie Memorial Primary School Fund	£1,079.09
Marion Sharpe Paterson Prize Fund	To provide prizes in Glenlee Primary School, Burnbank	£3.00	Payment to Glenlee Primary School Fund	£138.73
Mary A.B.B.Scott(Lamington Bequest)	To provide a bursary for a resident of the Parish of Lamington to attend a Scottish University	£300.00	Payment of £150 each to: Biggar High School Fund Lamington Primary School Fund	£18,530.04
Mary W.McLaughlin Prize	To provide a Primary 7 prize at Netherburn Primary School	£1.00	Payment to Netherburn Primary School Fund	£69.00
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	£2.00	Payment to Stonelaw High School Fund	£137.04
Miss E.M. Hamilton Fund	To provide a prize in Music at Hamilton Grammar	£1.00	Payment to Hamilton Grammar School Fund	£70.18

Mitchell Dux Medal	To provide a Dux medal at Larkhall Academy	£3.00	Payment to Larkhall Academy School Fund	£125.86
The Peter Shand Prize	To provide prizes for chemistry and physics at Lanark Grammar School	£10.00	Payment to Lanark Grammar School Fund	£291.15
Rev.James French Trust	To provide a gold medal for the best scholar or assistance to scholars at New Lanark	£32.00	Payment to New Lanark Primary School Fund	£1,093.38
Rev.John McKechnie Prize Fund	To provide a Dux prize at Halfmerke Primary School	£1.00	Payment to Halfmerke Primary School Fund	£45.62
Robert Britton Memorial Prize	To provide a History Prize at Hamilton Grammar School	£1.00	Payment to Hamilton Grammar School Fund	£133.81
Robert Wood Prize Fund	To provide a medal for Dux of third year at Lanark Grammar	£6.00	Payment to Lanark Grammar School Fund	£181.56
Robertson Reid Mem. Prize	To provide a prize for the Dux boy and girl in Gallowflat Junior Secondary School	£3.00	Payment to Stonelaw High School Fund	£177.35
Sir John Mann Mem. Prize Fund	To provide prizes for the Dux boy and Girl at Carnwath Primary School	£9.00	Payment to Carnwath Primary School Fund	£359.16
Sir Nathaniel Dunlop Bursaries	To provide four bursaries in Glasgow University for pupils of Biggar High School	£400.00	Payment to Biggar High School Fund	£19,592.42
Strathaven Male Voice Choir Music Prize	To provide a music prize for Strathaven Academy	£9.00	Payment to Strathaven Academy School Fund	£301.07

Symington P.S.Dux Prize Fund	To provide a Dux medal at Symington Primary School	£4.00	Payment to Tinto Primary School Fund	£148.85
S.S.E.B.Prize For Physics (Earnock High)	To provide a prize for physics at Earnock High School	£4.00	Payment to Earnock High School Fund	£185
Thos.Anderson Gold Medal Fund	To provide a gold medal for the best pupil in arithmetic at Hamilton Grammar	£9.00	Payment to Hamilton Grammar School Fund	£327.12
The William Marr Prize	To provide a prize for Technical Drawing at Carluke High School	£9.00	Payment to Carluke High School Fund	£283.13
The William Vint Foster Memorial Prize Fund	Unknown	£20.00	Payment to Douglas Primary School	£3,954.99
TOTAL		£39,940.78		£836,253.04

Inactive Funds

Name of Trust Fund	Origin and Purpose	2008/09 Income	Balance within fund
Clydesdale			
Robert Waugh Bequest	Bequest by late rev R Waugh for poor in Parish of Lesmahagow	£47.52	£1167.47
Gibson Bequest	Poor of Lanark	£21.27	£520.90
Mitchell Bequest	Poor of Lanark	£10.96	£268.05
Jeannie Fraser Bequest	Poor of Lanark	£27.32	£664.12
Cowan Fund	Poor of Lanark	£10.65	£254.07
Archibald Cameron	For the poor of Leadhills, except immigrants living there less than ten years.	£12.06	£301.08
Mungo Henshaw	Legacy by late Mungo Henshaw in 1857 for poor of Wiston and Roberton	£9.91	£242.45
John M Waugh	For the benefit of the poor persons in the parish of Lesmahagow	£57.04	£1283.22
Mauldslie	Bequest by forefathers of late Sir Wyndham Anstruther for the poor of Parish of Carluke	£5.14	£183.68
Lockhart Nemphlar	From Trustees of late Mr. Wm. Lockhart for deserving persons resident in Nemphlar.	£3.01	£79.49
Walston Parish	Bequest for poor of Parish of Walston	£7.73	£203.62
Miss F.E.M. Bennett Bequest	Unknown	£5.35	£135.35
Murray Memorial Chapel	To meet the running cost of maintaining the Mortuary Chapel in Lanark Cemetery	£211.14	£5309.63
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.	£11.19	£274.48
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.	£52.92	£1319.75
Chancellor	Bequest by the late Archibald Cameron for upkeep of Chancellor Burial Ground in Quothquan Churchyard	£55.58	£1389.88
JS Waugh	Sum paid by Miss Jessie S Waugh for purpose of maintaining family burial place in St.John's Churchyard Symington	£84.33	£2084.48
Symington Memorial	Upkeep of the William Symington Memorial in Leadhills	£5.68	£161.07

Leadhills War Memorial	Unknown	£10.44	£253.29
James Alexander Books	To provide books for Leadhills Miners' library, and maintain and improve the library	£24.99	£635.14
Hamilton			
Robert Nimmo Bequest	Unknown	£12.84	£303.82
Robert Smillie Memorial	Unknown	£139.98	£3558.20
Alex Hamilton Bequest	Unknown	£190.88	£6179.57
John Adams Memorial Fund	St John's Grammar School	£75.88	£1859.09
East Kilbride			
Provost Fund Gen A/c	Unknown	£13.52	£329.59
J Reid Bequest	Bequest for keeping father's lair and gravestone in Chapelton Churchyard in order.	£7.31	£184.02
Rutherglen			
McFarlane's Property	Unclaimed balance as per 1975 accounts	£167.11	£4205.81
Social Work			
Carmunock Parish Trust	Fund for poor of Parish of Carmunnock	£117.44	£2954.55
TOTAL		£1,399.19	£36,305.87

Proposed Combined Trusts 2010/11 onwards

Trust Number 1 : Larkhall Trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
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.	£6,656.85	Larkhall
Total Fund Balance		£6,656.85	

Trust Number 2 : Clydesdale East Trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
JE Black	For the aid and benefit, individually or as a whole, of the residents of the town of Biggar, who are in receipt of a Government retirement pension.	£1,395.78	Clydesdale East
Mungo Henshaw	Legacy by late Mungo Henshaw in 1857 for poor of Wiston and Roberton	£242.45	Clydesdale East
Walston Parish	Bequest for poor of Parish of Walston	£203.62	Clydesdale East
Vary Bequest	For the deserving poor to be divided equally between parishes of Carmichael 4, Pettinain 2, Lanark 6. 0.5 to Clydesdale North, 0.5 to Clydesdale east	£3,224.47	Clydesdale North & Clydesdale East
James and Janet Alexander Nursing Bequest	To provide suitable nurses and medical attendance, medicine, medical and surgical appliances and necessities for invalids and convalescents among inhabitants of Leadhills.	£28,781.64	Clydesdale East
James Alexander Coal Bequest	To provide coal for the poor of the village of Leadhills	£1,189.01	Clydesdale East
James Grierson	For the benefit of such poor and deserving persons residing in and natives of the Parish of Leadhills.	£10,462.87	Clydesdale East

Archibald Cameron	For the poor of Leadhills, except immigrants living there less than ten years.	£301.08	Clydesdale East
Symington Memorial	Upkeep of the William Symington Memorial in Leadhills	£161.07	Clydesdale East
Leadhills War Memorial	Unknown	£253.29	Clydesdale East
Total Fund Balance		£46,215.28	

Trust Number 3 : Clydesdale West Trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
Mauldslie	Bequest by forefathers of late Sir Wyndham Anstruther for the poor of Parish of Carluke	£183.68	Clydesdale West
Total Fund Balance		£183.68	

Trust Number 4 : Rutherglen Trust – Managed by Corporate Resources

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
Rutherglen Mortified Money	For poor of Rutherglen	£28,824.84	Rutherglen
McFarlane's Property	Unknown	£4,205.81	Rutherglen
Total Fund Balance		£33,030.65	

Trust Number 5 : East Kilbride Trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
Provost Fund Gen A/c	Unknown	£329.59	East Kilbride
W Crawford Bequest	Gift for the poor of Parish - fund of East Kilbride	£2,246.93	East Kilbride
Total Fund Balance		£2,576.52	

Trust Number 6 : Hamilton Trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
Robert Nimmo Bequest	Unknown	£303.82	Hamilton Wards
Robert Smillie Memorial	Unknown	£3,558.20	Hamilton Wards
Alex Hamilton Bequest	Unknown	£6,179.57	Hamilton Wards
Old Mortifications & Charities	Poor of Hamilton	£5,130.28	Hamilton Wards
Daniel Smith Bequest	Poor of Hamilton	£2,161.91	Hamilton Wards
David Nimmo Bequest	Poor of Hamilton	£498.18	Hamilton Wards
Robert Downie Bequest	Poor of Hamilton	£2,547.48	Hamilton Wards
Pollock Bequest	Poor of Hamilton	£4,835.88	Hamilton Wards
Dr J Dixon Bequest	Poor of Hamilton	£4,193.36	Hamilton Wards
John McNaughton Bequest	Unknown but Historically been Distributed to Boys Brigade and St Andrews Ambulance	£9,893.24	Hamilton
Total Fund Balance		£39,301.92	

Trust Number 7 : Clydesdale North Trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
Gibson Bequest	Poor of Lanark	£520.90	Clydesdale North
Mitchell Bequest	Poor of Lanark	£268.05	Clydesdale North
Jeannie Fraser Bequest	Poor of Lanark	£664.12	Clydesdale North
Cowan Fund	Poor of Lanark	£254.07	Clydesdale North

Miss F.E.M. Bennett Bequest	Unknown	£135.35	Clydesdale North
Hospitlands	For the Deserving Poor of Lanark	£4,049.68	Clydesdale North
Vary Bequest	For the deserving poor to be divided equally between parishes of Carmichael 4, Pettinain 2, Lanark 6. <i>0.5 to Clydesdale North, 0.5 to Clydesdale east</i>	£3,224.47	Clydesdale North & Clydesdale East
Alexander Hyslop	For poor of village of New Lanark.	£442.55	Clydesdale North
Lockhart Nemphlar	From Trustees of late Mr. Wm. Lockhart for deserving persons resident in Nemphlar.	£79.49	Clydesdale North
Total Fund Balance		£9,638.68	

Trust Number 8 : Clydesdale South Trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
Robert Waugh Bequest	Bequest by late rev R Waugh for poor in Parish of Lesmahagow	£1,167.47	Clydesdale South
John M Waugh	For the benefit of the poor persons in the parish of Lesmahagow	£1,283.22	Clydesdale South
Robert Gillespie	For deserving poor in the Parish of Douglas	£494.37	Clydesdale South
John Gillespie	For poor persons in Parish of Douglas	£221.29	Clydesdale South
Total Fund Balance		£3,166.35	

Trust Number 9 : Avondale and Stonehouse trust

Name of Trust Fund	Origin and Purpose	Fund Balance	Ward Name
E Giffen Bequest	Bequest for poor persons in Parish of Avondale	£109.59	Avondale and Stonehouse
R Nimmo Bequest	Chapelton	£1,923.08	Avondale and

			Stonehouse
A Gebbie Bequest	Bequest for poor persons in Parish of Avondale	£91.09	Avondale and Stonehouse
H Gebbie Bequest	Bequest for poor persons, as defined, in Parish of Avondale - 5 poor persons annually	£60.55	Avondale and Stonehouse
J Gebbie Bequest	Bequest for deserving aged and delicate persons in Parish of Avondale	£192.04	Avondale and Stonehouse
Total Fund Balance		£2,376.35	

Trust Number 10 : Loudon Bequest - Distributor - SLC

Name of Trust Fund	Origin and Purpose	Balance within Fund	
The Loudon Bequest	To fund holiday projects for elderly residents in former Strathclyde Regional Council area	£572,149.18	
Total Fund Balance		£572,149.18	

Trust Number 11 : Burial / Lairs - Keep in Trust (except Murray Chapel)

Name of Trust Fund	Origin and Purpose	Balance within Fund	
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.	£274.48	Clydesdale East
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.	£1,319.75	Clydesdale East
Chancellor	Bequest by the late Archibald Cameron for upkeep of Chancellor Burial Ground in Quothquan Churchyard	£1,389.88	Clydesdale East
JS Waugh	Sum paid by Miss Jessie S Waugh for purpose of maintaining family burial place in St.John's Churchyard Symington	£2,084.48	Clydesdale East

Murray Memorial Chapel	To meet the running cost of maintaining the Mortuary Chapel in Lanark Cemetery	£5,309.63	Clydesdale North
J Reid Bequest	Bequest for keeping father's lair and gravestone in Chapelton Churchyard in order.	£184.02	Avondale and Stonehouse
Total Fund Balance		£10,562.24	
Total Non Education Trusts		£725,857.70	

Other Trusts

Name of Trust Fund	Origin and Purpose	Balance within Fund	2010/11 onwards - Action
James Alexander Books	To provide books for Leadhills Miners' library, and maintain and improve the library	£635.14	Gift to Leadhills Miners Library.
Carmunock Parish Trust	Fund for poor of Parish of Carmunock	£2,954.55	Pass to Glasgow City Council
Total		£3,589.69	

Education Trusts

Ongoing Individual Education trusts

Name of Trust Fund	Origin and Purpose	Balance within Fund	2010/11 onwards - Distributor
Dr.John Shaw Mem. Prize	To provide a prize for the runner up to the Dux at Quarter Primary School	£4,963.50	Continue payment to school
J.W.Torrance Bursary	To provide a bursary for the best pupil in Quarter Primary School	£4,536.81	Continue payment to school
Mary A.B.B.Scott(Lamington Bequest)	To provide a bursary for a resident of the Parish of Lamington to attend a Scottish University	£18,530.04	Continue payment to school
Sir Nathaniel Dunlop Bursaries	To provide four bursaries in Glasgow University for pupils of Biggar High School	£19,592.42	Continue payment to school
James W.Allan Bursary	To provide a bursary for the study of Natural History to students in Lanark County	£24,918.20	Continue payment to school
The Hutton Prize	To provide prizes for French and German at Lanark Grammar	£28,972.48	Continue payment to school
Elizabeth. B. Mitchell Mem Trust	To commemorate the interest in East Kilbride New Town of the late Elizabeth B Mitchell.	£18,298.14	Continue payment to school
Total in Individual Education Trusts (7)		£119,811.59	

Hamilton Grammar Trust			
Name of Trust Fund	Origin and Purpose	Balance within Fund	2010/11 onwards - Distributor
Miss E.M. Hamilton Fund	To provide a prize in Music at Hamilton Grammar	£70.18	Hamilton Grammar
Robert Britton Memorial Prize	To provide a History Prize at Hamilton Grammar School	£133.81	Hamilton Grammar
Ewart Prize Fund	To provide a Special Merit Prize at Hamilton Grammar	£75.62	Hamilton Grammar
Isobel M.Walker Mem. Prize	To provide a prize at Hamilton Grammar	£109.16	Hamilton Grammar
Isabella Leggate Memorial Prize	To provide a prize at Hamilton Grammar	£114.58	Hamilton Grammar
Archibald Stevenson Mem.Medal	To provide a medal for Art at Hamilton Grammar	£124.47	Hamilton Grammar
Annie E.Adams Memorial Prize	To provide a French prize at Hamilton Grammar	£128.55	Hamilton Grammar
David B. Hair Medal	To endow a Medal for Maths at Hamilton Grammar	£151.56	Hamilton Grammar
Flora B. Aiton Medal	To endow a Medal for Latin at Hamilton Grammar	£164.47	Hamilton Grammar
Thos.Anderson Gold Medal Fund	To provide a gold medal for the best pupil in arithmetic at Hamilton Grammar	£327.12	Hamilton Grammar
John Adams Memorial Fund		£1,859.09	Hamilton Grammar
George F. Pollock Trust	To provide University Bursaries for pupils at Hamilton Grammar	£6,167.72	Hamilton Grammar
Total Hamilton Grammar Trust		£9,426.33	

Individual Education Trusts

Name of Trust Fund	Origin and Purpose	Balance within Fund	2010/11 onwards - Distributor
Alexander Campbell Prize Fund	To provide a Dux prize at Cathkin PS	£23.10	SLC
Rev.John McKechnie Prize Fund	To provide a Dux prize at Halfmerke Primary School	£45.62	SLC
A.M.Watt Low Mem. Prize	To provide a prize for Bankhead PS	£59.18	SLC
Mary W.McLaughlin Prize	To provide a Primary 7 prize at Netherburn Primary School	£69.00	SLC
George B.R.Marshall Prize	To provide prizes for Art and English at Braidwood Primary School	£115.26	SLC
Dr.Robert .Yuill Prize Fund	To provide a prize for the best collection of wild flowers and plants in Carluke Primary School	£133.66	SLC
Marion Sharpe Paterson Prize Fund	To provide prizes in Glenlee Primary School, Burnbank	£138.73	SLC
Symington P.S.Dux Prize Fund	To provide a Dux medal at Symington Primary School	£148.85	SLC
David L. Struthers Prize Fund	To provide four prizes at Gilmourton Primary School	£296.70	SLC
Annie Harley Mem. Prize	To provide sewing prizes at Low Waters PS Hamilton	£305.92	SLC
Carstairs Dist.Nursing Assoc.Bequest	To provide prizes in Carstairs Junction PS (2/3) and Carstairs PS (1/3)	£355.88	SLC
Sir John Mann Mem. Prize Fund	To provide prizes for the Dux boy and Girl at Carnwath Primary School	£359.16	SLC

Marion N.Blackley Mem. Bequest	To provide shoes to deserving cases in Robert Smellie Memorial Primary School, Larkhall	£1,079.09	SLC
The William Vint Foster Memorial Prize Fund	Unknown	£3,954.99	SLC
Rev.James French Trust	To provide a gold medal for the best scholar or assistance to scholars at New Lanark	£1,093.38	SLC
Biggar Women Temp.Assoc.Prize	To provide prizes for essays on Temperance and Bible Knowledge at Biggar HS	£60.96	SLC
J.Eunice Copeland M.A.,K.I.H.(India)Prize	To provide the first year Dux prize at Lanark Grammar	£60.85	SLC
The Alexander Robert Prize	To provide a prize for Maths in Carluke HS	£93.80	SLC
James Logan Mem.Prize Fund	To provide prizes for Uddingston Grammar School – 2/3 Dux 1/3 Special English Prize	£117.88	SLC
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	£137.04	SLC
Elizabeth Strachan Mem.Prize	To provide a prize for the Primary 3 class of Strathaven Academy	£118.32	SLC
Mitchell Dux Medal	To provide a Dux medal at Larkhall Academy	£125.86	SLC
Francis Martin Senior Boys Dux	To provide a Dux Prize at Holy Cross High School	£126.51	SLC
Kathleen Power Mem.Prize	To provide a prize for the Dux girl at Holy Cross High School	£131.26	SLC
The Clow Ross Prize	To provide a prize for the Dux girl at Uddingston Grammar	£136.08	SLC

James W.Allan Prize Fund	To provide prizes for Natural History at Biggar High School	£145.91	SLC
Fleming Downie Prize for English	To provide an English Prize at Strathaven Academy	£151.56	SLC
Robertson Reid Mem. Prize	To provide a prize for the Dux boy and girl in Gallowflat Junior Secondary School	£177.35	SLC
S.S.E.B.Prize For Physics (Earnock High)	To provide a prize for physics at Earnock High School	£185	SLC
Jane Andrew Mem.Prize Fund	To provide prized for scholastic ability at Strathaven Academy	£195.39	SLC
Holy Cross H.S.Prize Fund	To provide prizes for Holy Cross High School	£239.77	SLC
Robert Wood Prize Fund	To provide a medal for Dux of third year at Lanark Grammar	£181.56	SLC
George M.Crawford Mem Prize	To provide a prize for the Dux boy at Uddingston Grammar	£307.48	SLC
The William Marr Prize	To provide a prize for Technical Drawing at Carluke High School	£283.13	SLC
Strathaven Male Voice Choir Music Prize	To provide a music prize for Strathaven Academy	£301.07	SLC
The Peter Shand Prize	To provide prizes for chemistry and physics at Lanark Grammar School	£291.15	SLC
George Stewart Memorial Prize	Deed of Trust from Daniel McMichael Andrew to provide Geography and History Prizes at Strathaven Academy	£386.90	SLC
Andrew Macallan Mem. Medal	To provide a Dux Medal at Rutherglen Academy	£403.64	SLC
Dr.Donald C.Buchanan Mem.Prize	To provide a prize for Latin in Rutherglen Academy	£1,336.61	SLC
Total Individual Education trusts		£13,873.60	

