

Gairloch & Plockton High Schools Educational Trust Scheme 2024

Highland Council Charitable Trusts

Scottish Charity Number SCO25079

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Preamble

Pursuant to The Charities and Trustee Investment Act 2005, Section 43, where educational trusts (that are also charities) now come under the provisions of the act, superseding previous legislation, The Highland Council, as the local education authority, have prepared the following scheme for the reorganisation of the HCT Gairloch High School Fund and Howard Doris Fund.

The Howard Doris Fund was established in 1997, following the closure of the Howard Doris Trust and the remaining funds transferred to the local authority to be used for the benefit of the pupils of Gairloch and Plockton High Schools. This Gairloch High School portion of the fund was incorporated into The Highland Charities Trust, administered by The Highland Council, in 2014. The Plockton High School portion of the fund remained as a non charity fund.

It is noted that The Highland Charities Trust is an amalgamation of small trust funds from various sources covering a wide variety of intentions of the original bequestors. A separate charity “The Highland Council Charitable Trusts” holds the funds for educational purposes. Whilst the reasons for placing Gairloch High School Fund into the Highland Charities Trust is unclear, it is considered appropriate that the funds be transferred to the education trusts, The Highland Council Charitable Trusts (SC025079), along with the Howard Doris Fund.

It shall continue to be governed by this and any subsequent updated trust scheme, which is approved by the elected members of The Highland Council, in their capacity as trustees.

This trust scheme covers Plockton High School and Gairloch High School.

In the financial year 2024-2025, the funds available across the two schools amounted to approximately £54,000. The annual combined income is in the region of £2,300.

1. Administrative Arrangements

Business Arrangements

1. The Highland Council shall be the governing body of the trust. It delegates its powers, in relation to the trust, to an appropriate committee.
2. The committee, under The Scheme of Delegation and Administration to Committees and Sub-Committees and to Officers (2023), has the authority to allocate and monitor expenditure from any agreed and delegated localised funds (2.9)
3. The day-to-day business of the trust may be undertaken by an officer of The Highland Council, who shall provide a report twice a year to the appropriate committee of The Highland Council.

4. As trustees, it shall be in the power of The Highland Council to make such rules and standing orders as they think fit under this scheme, provided that the said rules and standing orders shall not be inconsistent with the provisions of the scheme.

2. Conditions of Awards

1. When awarding scholarships, grants or other assistance under the scheme, The Highland Council:
 - a. may consider by such means as they think fit, the attainment, merit and promise of each candidate making an application,
 - b. may have regard to the financial and other circumstances of each candidate and to the expenses likely to be incurred by the candidate and may take account of any other bursaries or grants awarded to the candidate,
 - c. may consider by such means as they think fit, the merit and standing of any club, institution or organisation making an application.
2. Each scholarship or grant shall be tenable for one year.

3. Powers of Investment and Administration

1. The Highland Council shall have all the relevant powers competent under the laws of Scotland to financially manage the fund and any property or assets of the trust. This includes financial investments, purchase, lease, sale, or inheritance of property.

4. Additional Donations

1. The Highland Council may receive donations, legacies, annuities, subscriptions, and other gifts for this scheme. These shall be used according to the donors' instructions. If no instructions are given, The Highland Council will allocate the donations to the trust's capital, income, or both as they see fit.

5. Capital Expenditure

1. The Highland Council may draw from the capital such sums as they see fit for the benefit of the pupils of the two schools. Should the capital be exhausted, the scheme will then close.

6. Variation of Preferences

1. If the amount between the trust's income and the sums in the approved plan changes significantly, The Highland Council may adjust the sums in the plan to reflect the available balance of free income.

7. Application of Income

1. The Highland Council after paying the expenses of the scheme and the necessary expenses of management, burdens and taxes affecting the trust shall in each financial year:
 - i. Apply as nearly as possible the whole of the free income of the trust, including any balance carried forward from the previous financial year, in conformity with the plans to be approved from time to time in accordance with Section 8 of the scheme, provided that no expenditure shall be incurred under an approved plan in relief of expenditure which would in the absence of the endowment ordinarily be incurred from any other fund.
 - ii. Apply the balance of any free income in conformity with the approved plan as per Section 8.
 - iii. Where a listed category in the approved plan receives no application, up to the maximum sum for that category may be transferred in that financial year to another category.
 - iv. Draw upon the capital, if required, to support an application from either school.
 - v. If at the end of any financial year, there is an unexpended balance of income, The Highland Council may carry up to £10,000 to the following financial year or to add the balance (full or part) to the capital of the trust.

8. Purposes of the Trust

Submission and Approval of Plan

1. A plan shall be drawn up in the format of the Second Schedule.
2. The Highland Council may, at any time, require a revision or amendment to the plan.
3. The Highland Council may approve, with or without changes, any plan or amendment submitted under this section and must then implement it as approved.

Award Categories

1. Where provision is made, The Highland Council may annually award grants, in part 1 of the plan for prizes, bursaries, maintenance allowances or travel grants for pupils.
2. Where provision is made, The Highland Council may annually award grants, in part 1 of the plan, to assist with the cost of musical, sporting or other equipment and facilities for the benefit of pupils.
3. Support for any pupil may continue for up to one year after the child has ceased to attend either school.
4. Where an application is received from the headteacher for grant aid in respect of paragraphs 4-6 above, which exceeds the availability of free income, The Highland Council may draw from the capital fund.

5. In the event of either school ceasing to exist, then the charitable purposes shall be read to refer to pupils attending any secondary school whose catchment includes any of the former local government areas of Lochcarron and South West Ross.

9. Miscellaneous

Limitation of Value of Awards

6. The value of any award made under this scheme shall not adversely affect the value of any statutory award made by the local education authority to a person.

Withdrawal of Awards

7. The Highland Council shall require the holder of any award under this scheme to make satisfactory progress in the course of study. If, in the opinion of the council, any such holder be guilty of serious misconduct or fail to make reasonable progress, the council may withdraw the award. The Highland Council's determination shall be final.

Names of Founders

8. The Highland Council shall, as far as possible, associate the names of the founders of the fund to which this scheme relates with the awards and grants made under the scheme.

Availability of Scheme

9. The Highland Council shall ensure that the scheme is published on its website and is available to the public.

First Schedule

Particulars of Bequest

Serial No	Name of Endowment(s)	Designation of Founders	Governing Instruments	Area or School of Benefit
1	Howard Doris Fund	Howard Doris Ltd	Letter of 26 th September 1997 from Brodies Solicitors, Edinburgh	Plockton High School Gairloch High School

Second Schedule

The Approved Plan Part 1

Section 8	Rubric	Maximum Expenditure in each Year (Plockton)	Maximum Expenditure in each Year (Gairloch)	Remarks
Prizes	Howard Doris Prize			
Bursaries	Howard Doris Bursary			
Maintenance Allowance	Howard Doris Allowance			For one pupil in each school, at the discretion of the headteachers.
Travel Grant	Howard Doris Travel			Special payment annually to each school, subject to sufficient income.
Musical Equipment	Howard Doris Music			
Sport Equipment	Howard Doris Sport			
Other Equipment or Facilities	Howard Doris Resources			
Total				
Combined Total				

The Approved Plan- Part 2 Capital Grants

Section 8	Rubric	Particular Purpose of Grant	Amount of Grant	Financial Year(s) in which the Grant will be Paid	Remarks
Travel Grant	Howard Doris Travel				Give a brief description of the grant.
Musical Equipment	Howard Doris Music				No purpose may be included unless it is a purpose to which the capital may be properly devoted. If the grant is to be given in more than one financial year, state the years.
Sport Equipment	Howard Doris Sport				
Other Equipment or Facilities	Howard Doris Resources				