

**NORTH LANARKSHIRE COUNCIL
REPORT**

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| To: Educational Trust Committee | Subject: Lanarkshire Educational Trust Scheme |
| From: Director of Education | Date: 09 September 2002 |
| Ref: JOK/PMG | |

Purpose of the Report

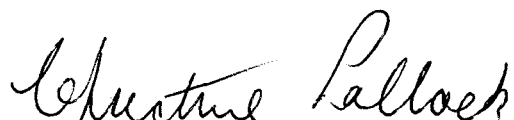
This report provides the Trust Committee with information on the Lanarkshire Educational Trust Scheme during the financial year 2002-03, and makes proposals for the distribution of the Trust income for the period April 2002-September 2002.

Recommendation

The Educational Trust Committee is asked to:

1. note the contents of the report
2. homologate the action taken to date
3. determine the applications for the period April 2002-September2002.

For further information please contact Michael O'Neill or John O'Keane



North Lanarkshire Council : Education Department

Lanarkshire Educational Trust Scheme

Report by Head of Quality and Support Services

1 Progress report

- 1.1 Following the approval of the Educational Trust Committee on the 15th March 2002 all of the approved awards (for phase 2 of the financial year), totalling £27,350 were made to the successful applicants. This brought the total amount allocated for the financial year 2001-2002 to £44,297.
- 1.2 On the recommendation of the Educational Trust Committee that the full Committee should convene twice per annum to determine the applications, the date of the next meeting was fixed for 20th September 2002.

2 Applications for 2002-03

- 2.1 The procedure for inviting and dealing with the requests for financial assistance under the Lanarkshire Educational Trust Scheme was agreed by the Educational Trust Committee at its meeting on 29th August 1997. The key features of this procedure include:
- requests for financial assistance would be invited in response to an annual public advertisement in the autumn of each year.
 - the respective Heads of Service for North and South Lanarkshire would meet to consider the applications against the Trust criteria
 - a set of recommendations would be drawn up for approval by the Trust Committee before the end of the financial year.
 - exceptionally, consideration would be given by the Heads of Service to urgent requests for financial assistance received outwith the above timetable. Decisions made by the Heads of Service would be submitted for homologation to the next meeting of the Education Trust Committee.
- 2.2 Applications from individuals and groups residing within the area formerly known as the County of Lanark were invited, with an imposed deadline, for the financial period, of December 2002. A copy of the relevant guidelines (Appendix i) was provided with every application form to assist applicants in determining the category best suiting their needs.

2.3 As in previous years, the applications were considered under the categories which can be broadly banded together as;

| | |
|------------------|---|
| 21, 22, 23 | Application from individuals |
| 24, 26, or 28 | Applications from groups or clubs |
| 25, 26, 27 or 29 | Applications from EA or educational establishment |

2.4 A number of applications seeking financial assistance were received between April 2002 and June 2002 and considered by the respective Heads of Service. Subsequently, several were given an interim award (6 totalling £1,800). Details of these processed applications are included (Appendix ii) to be homologated by the Trust Committee .

2.5 A summary of the applications received and recommendations has been drawn up for determination by the Educational Trust Committee (Appendix iii).

3 Recommendations

The Educational Trust Committee is asked to:

1. note the contents of the report
2. homologate the action taken to date
3. determine the applications for the period April 2002 - September 2002.

Guidelines

- Application from Educational establishments / groups / societies or talented individuals - maximum award £500
- Only one bid permitted per establishment Advisers within North and South Lanarkshire, responsible for the Visual Arts, Music or Drama, are entitled to apply for financial support of specific projects within these categories.
- Individual applicants must demonstrate exceptional talent in visual arts, music or drama (and have **evidence** to support claim e.g. recognition by a national body).

Making an Application

It should be appreciated that the nature of the Trust, by virtue of providing the income generated within any one financial year, demands that applications adhere to strict deadlines. Subsequently all applications, complete with any relevant evidence, must be submitted by the deadline shown on the front of the application form.

Completing the application form

The application form is subdivided into three parts to deal with the three broad band of applicants - individual, group and educational establishment. Every part of the section relevant to your situation must be completed, especially where evidence is required to determine financial status, acceptance to a course, intended costs etc. It is essential that additional information such as a request for or receipt of funding from another source is included.

While receipt of your application can be acknowledged it should be understood that no judgment as to the suitability or likelihood of an award can be made on an individual basis. Instead, all applications will be collated and presented to the Educational Trust Committee (which comprises of six councillors, three each from North and South Lanarkshire) which will convene in February and September of each financial year. Applicants, successful or otherwise, will be informed of the Committee's decisions shortly after each meeting.

Only in the most exceptional of circumstances will applications be considered outwith these two planned meetings.

While the Trust and its terms are applicable to inhabitants of the former County of Lanark it is administered by North Lanarkshire Council . Completed application forms should be returned, by the deadline indicated on the application form, to :

Mrs Marjory Mulholland, Administrative Officer, Lanarkshire Educational Trust Scheme, Education Department (QDS), Municipal Buildings, Kildonan St., Coatbridge, ML5 3BT.

Lanarkshire Educational Trust Scheme

The Lanarkshire Educational Trust and the Marshall Trust were established in the 1930s, with the purpose of providing some assistance for people, residing within the geographical boundaries of the **County of Lanark** as then was and facing financial hardship in pursuit of their education. Initially this was in the form of educational bursaries and scholarships.

These Trusts have now been reactivated under the collective heading of the *Lanarkshire Educational Trust Scheme*. The terms of the trust allow grants to be awarded for a number of educational purposes including; travel scholarships, travel grants, research scholarships, support of clubs/organisations for young people, special educational equipment for schools, provision and maintenance of sports facilities, educational experimentation, promoting education in visual arts, in music and in drama and limited aspects of adult education.

The sums available under each of the above headings are limited and experience has shown that the demands for grant support in certain categories will exceed the funds available.

Details of the Trust Scheme

These notes should prove useful in completing the application form, which must clearly specify the category under which you seek a grant.

Essentially the Trust offers financial assistance to individuals or groups who reside within the area formerly known as the County of Lanark, within 9 categories (numbered from 21-29 in the Trust Scheme). These categories are extremely specific in terms of the eligibility, purpose and financial limitation of any grant awarded. A summary of these categories is included in order to assist you to decide if you are eligible to apply for a grant and to ascertain under which category you wish your application to be considered.

Categories as specified by the Trust Scheme

21.Travel Scholarships

- Financial aid to persons belonging to the County who travel beyond Scotland to University, College or Educational Institution while undergoing a course of study or to contribute towards any fees which may be charged

Guidelines

- Individual applicant - maximum award £500
- Scholarship only available to matriculated students (**evidence** required)
- Grant to cover cost of fees, books or instruments.

22. Travel grants

- A grant to anyone belonging to the County, enabling them to travel either in Great Britain or abroad for any purpose of an educational nature, the Council having regard to the financial situation of the applicant.

Guidelines

- **Individual applicant** - maximum award £500
- Details of the educational purpose of application
- Evidence of **the journey** undertaken
- Not considered suitable:
 - (i) Group applications (e.g. school trip) on the basis that needy individuals and their particular circumstances would not be identified and
 - (ii) multiple journeys (basically a claim for travelling expenses)

23. Research scholarships

- Award scholarships for research work or special study to inhabitants of the County who graduated at a Scottish University, and who require financial aid in order to undertake such research.

Guidelines

- **Individual applicant** - maximum award £500
- Scholarship only available to post-graduate students (evidence required)
- Details and evidence of research work or special study to be undertaken.

24. Support of Clubs etc.

- Grants to assist in the establishment and maintenance of clubs, societies and organisations which promote the educational benefit, mental or physical, moral or social, of children / young people.

Guidelines

- **Group application** - maximum award £1000
- Details of financial assistance requested along with information regarding similar applications for and success in gaining other grants .
- Club accounts, details of fund raising and history of the club required to substantiate claim.

25. Special Equipment

- Grants available to the education authority for the purposes of improving the efficiency of education in schools by providing special equipment.

Guidelines

- Applications from **Educational establishments** - maximum award £500
- Only one bid permitted per establishment

26. Sports Facilities

- Assistance in the provision of school facilities and sports competitions as

well as financial aid for the development of talented amateur sports persons. (e.g. National recognition, with **evidence** to support claim)

Guidelines

- Application from **Educational establishments, Associations or talented individuals** - maximum award £500
- Only one bid permitted per establishment
- Lanarkshire Schools Sports Associations (e.g. Football, badminton etc.) would apply for expenses and costs under category 26b/c.
- Individual applicants would apply under 26d. but would be treated similar to those applying under 21, 22, 23, and be restricted to a maximum of £500

27. Educational Experiments

- Grant to the Authority to assist in the cost of any experiment of an educational nature conducted by the Council.

Guidelines

- Application from **Educational establishments / Authorities** - maximum award £5000
- Only one bid permitted per establishment
- Projects not considered would include those initiatives already funded by the education authority e.g. Supported Study, Easter Schools etc.

28. Adult Education.

- Financial assistance for lecturers or instructors to defray the expenses incurred with the promotion or encouragement of adult education.

Guidelines

- **Group application** maximum award £1000
- Award strictly to cover costs of lecturer / instructor. Subsequently details of these specific costs are essential.

29. Promoting Education in the Visual Arts

29A Promoting Education in Music

29B Promoting Education in Drama

- Financial assistance to groups or individuals showing exceptional promise in the above areas, enabling them to obtain special tuition.
- Establish and maintain works of art. Organising, defraying the costs of art exhibitions.
- Establish and maintain and equip choirs, bands and orchestras. Organising, defraying the costs of concerts / musical performances.
- Establish and maintain and equip dramatic groups. Organising, defraying the costs of dramatic performances.

Guidelines (over)

Total Interim June 2002

| June | Christian | Surname | Address 1 | Address 2 | | Cat | Nature/Application | Costs | Previous | Rec | Amount |
|------|-----------|-----------|----------------------|-------------|--|-----|---|-------|----------|--------------|-------------------|
| In 1 | Caroline | McCluskey | 11 Orchard Street | Motherwell | | 29A | The National Youth Orchestra of Scotland | £500 | 2000 | | £ 375.00 |
| In 2 | Rachel | Baxter | 3 Broompark Drive | Lesmahagow | | 29A | The National Brass Band of Scotland 02/ Summer Course | £420 | 2001 | | £ 300.00 |
| In 3 | Rhonda | Cairns | 73 North Dryburgh Rd | Wishaw | | 22? | NYOS Summer Jazz Courses 2002 | £250 | No | | £ 210.00 |
| In 5 | Laura | Kelly | 33 Gienburn Ave | Moodiesburn | | 29A | N.Y.C.O.S. W.S.O. & Solo Singers Summer School | £960 | Yes | | £ 385.00 |
| In 7 | Shona | Brown | 16 McIntosh Way | Motherwell | | 29A | NYOS Summer Courses 2002 | £500 | 2001 | | £ 375.00 |
| In 9 | Stuart | Clark | 1 Halfmerk South | Calderwood | | 29B | Scottish Youth Theatre (Summer Festival) | £500 | No | | £ 155.00 |
| | | | | | | | | | | Total | £ 1,800.00 |

Appendix (ii)

Interim October 2002

| Oct | Christian | Surname | Address 1 | Address 2 | Cat | Nature/Application | Costs | Prev | Req | Rec |
|-------|----------------|-------------|-----------------------------|-------------|----------|--|-------------|------|---------|--------|
| G 1 | Hugh | Ainsley | The Sheiling | Airdrie | 24 | Lanarkshire Area Schools Badminton Association (Running Costs) | £5,420 | No | £500 | £500 |
| G 2 | Dorothy | Lucas | 2 Glassford Road | Strathaven | 24 | Avonside Strathaven Section of E/K Gymnastics Club (Trip Portugal) | £7,800 | No | £1,000 | £1,000 |
| G 3 | Loraine | Swan | Kildare Farm | Lanarkshire | 29 | Kilninie Lanimers Club (Transportation of Float to Edinburgh) | £750 | No | £750 | £750 |
| G 4 | Clare | Fisher | 44 Sandy Road | Carluke | 24 | 5 Carluke Brownie Pack (Project Citizenship House of Commons) | £3,334 | No | £1,000 | £1,000 |
| Ed 1 | Lydia | Hook | Orbiston Nursery School | Bellshill | 29A | Promoting Education In The Visual Arts (Raido Microphone) | £578 | Yes | £500 | £300 |
| Ed 2 | Liz | Oliver | Westburn Nursery School | Cambuslang | 29 | Scottish Youth Theatre, Costumes Props etc | £970 | No | £500 | £500 |
| Ed 3 | Patricia | Hughes | Earlston Nursery School | Carnbroe | 25,26,27 | Physical Development (Special Equipment) | £6,009 | No | £1,500 | £500 |
| Ed 4 | David | Chalmers | Biggar High School | Biggar | 29B | Art, Music, Physical and Social Education (School Show) | £2,000 | No | £1,000 | £500 |
| In 1 | Francis | Derrington | Westraw House | Lanark | 29A | Junior Academy (RSAMD) | £1,482 | Yes | £500 | £500 |
| In 2 | Freya | Beamish | Westraw House | Lanark | 29A | Junior Academy (RSAMD) | £1,482 | Yes | £500 | £500 |
| In 3 | Monica | McGhee | 42 Alexander Gibson Way | Motherwell | 29A | Junior Academy (RSAMD) | £1,482 | No | £500 | £500 |
| In 4 | Siobhan | Donnelly | 27 Moss Road | Wishaw | 29A | Junior Academy (RSAMD) | £1,482 | No | £500 | £500 |
| In 5 | Lisa Marie | Clelland | 22 Sutherland Crescent | Hamilton | 21 | NCTJ Courses-Press Photograph(Sheffield College) | £900/Travel | No | £500 | £500 |
| In 6 | Jill | Todd | 6 Waterloo Drive | Lanark | 23 | Postgraduate Diploma In Broadcasting Journalism (Bell College) | £3,000 | No | £500 | NA |
| In 7 | Craig | Steele | 19 Blaneview | Stepps | 29A | Scottish Youth Theatre Summer Festival July For Two Weeks | £155 | Yes | £75 | £75 |
| In 8 | Kirstie | Steele | 19 Blaneview | Stepps | 29A | Ballet West Summer School (Taynuilt Argyll) | £280 | No | £140 | £140 |
| In 9 | Lyndsey | Macpherson | 28 Dalveen Drive | Uddingston | 26 | Scottish Judo Scotland Squad Competitions | £745 | Yes | £500 | £500 |
| In 10 | Scott | Macpherson | 28 Dalveen Drive | Uddingston | 26 | Scottish Judo Scotland Squad Competitions | £1,350 | Yes | £500 | £500 |
| In 11 | Ross | Clarke | 28 West Drive | Petersburn | 22 | Apprentice Classical Ballet Dancer (Pitzburgh USA) | £860 | Yes | £500 | £500 |
| In 12 | Russell | Clarke | 28 West Drive | Petersburn | 29B | 2002 AIYF Dance Summer School | £185 | No | £185 | £185 |
| In 13 | Alison | Plummer | Cadzowburn | Hamilton | 22 | Ghana Expedition (Scottish Guide Association) | £1,400 | No | £500 | £500 |
| In 14 | Susan Drummond | Hannah | 37 Coursington Place | Motherwell | 22 | Ghana Expedition (Scottish Guide Association) | £1,400 | No | £500 | £500 |
| In 15 | Derek | Russell | 3 Laird Grove | Uddingston | 22 | American Football (Glasgow Tigers) USA Training | £671 | No | £500 | £500 |
| In 16 | Melissa | McBride | 58 Beauly Crescent | Wishaw | 22 | World Congress of Pharmacology/Travel Conference in America | £1,900 | No | £500 | £500 |
| In 17 | Craig | Nisbet | 120 Brownside Road | Cambuslang | 21 | Sixth Year Studies (American High School) | £4,000 | No | £500 | £500 |
| In 18 | Michael | Martin | 42 Sempie Street | Hamilton | 22 | Musical Thearte Arts EducationI School (Course In London) | £25,000/yr3 | Yes | £500 | £500 |
| In 19 | Mehjebeen | Patel | 27 Ellisland Wynd | Newarthill | 21 | Iamea -Tal-Imam Mohammad Zakaria (Bradford) StudyDegree | £3,500 | No | £3,500 | £500 |
| In 20 | Janette | Stewart | 2 Fir Court | Coatbridge | 23 | The Challenge Of The Social Sciences/Open University | £460 | No | £460 | NA |
| In 21 | Fiona | Paterson | 53 Machanhill | Larkhall | 29A | Edinburgh Youth Orchestra Summer Course | £430 | Yes | £330 | £330 |
| In 22 | Pamela | Maxwell | 25 Lochpark Ave | Carluke | 29 | The Italia Conti Academy of Theatre Arts | £9,000 | No | £9,000 | £500 |
| In 23 | Clare | Scott | 28 Peveni Avenue | Burnside | 26D | Training&Competition for Scotland Under 18 Hockey | £650 | Yes | £250 | £250 |
| In 24 | Arlene Holmes | Henderson | Harvest Hill Garrion Bridge | Larkhall | 21 | Undergraduate BA in Classics (Oxford University) | £1,100 | No | £500 | £500 |
| In 25 | Peter | Berks | 11 McKirdy Court | Blackwood | 21 | Study Abroad (Universite Paris Dauphine) | £4,150 | No | £500 | £500 |
| In 26 | Caroline | Millar | 69 Dovecastle Drive | Strathaven | 23 | Aromatherapy HNC Glasgow College Of Commerce | £1,700 | No | £500 | NA |
| In 27 | Louise | Stewart | Gateside House | Stepps | 29B | Professional Dance (Musical Theatre) London | £8,706 | No | £26,100 | £500 |
| In 28 | Joanne | Bell | 4 Muirhead Gate | Uddingston | 29B | The Stage School Of Scotland | £1,105 | Yes | £500 | £500 |
| In 29 | Brian | Cunningham | 33 Banyan Crescent | Viewpark | 29A | NYCOS Residential Course | £385 | Yes | £385 | £385 |
| In 30 | Alan | Harrison | 8 Princess Square | Wishaw | 22 | GB Lions Flag Football Team (Playing In Barcelona) | £560 | No | £500 | £500 |
| In 31 | Richard | Jose | 44 Southfield Ave | Shotts | 22 | World Youth DayTrip/Toronto/Canada | £850 | No | £500 | £500 |
| In 32 | Emma | Kirkpatrick | 33 Hamilcomb Road | Bellshill | 22 | World Youth DayTrip/Toronto/Canada | £850 | No | £500 | £500 |
| In 33 | Eamon | Walls | 18 Kirklands Crescent | Bothwell | 22 | World Youth DayTrip/Toronto/Canada | £850 | No | £500 | £500 |
| In 34 | Kathleen | McKean | 18 Kirklands Crescent | Bothwell | 22 | World Youth DayTrip/Toronto/Canada | £850 | No | £500 | £500 |
| In 35 | Frances Jeanie | Maguire | 6 Maple Way | Blantyre | 22 | World Youth DayTrip/Toronto/Canada | £850 | No | £500 | £500 |
| In 36 | Sarah Jane | Lynch | 30 Elmbank Avenue | Viewpark | 22 | World Youth DayTrip/Toronto/Canada | £850 | No | £500 | £500 |

APPENDIX (11)