

Leicester  
City Council

**WARDS AFFECTED  
CITY WIDE**

**FORWARD TIMETABLE OF CONSULTATION AND MEETINGS:**

**CABINET**

**8 APRIL 2002**

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**EDUCATIONAL AND OTHER TRUSTS**

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**REPORT OF THE DIRECTOR OF EDUCATION AND TOWN CLERK**

**1. PURPOSE OF REPORT**

- 1.1 To seek Cabinet approval for the delegation to the Director of Education of responsibility for all matters in connection which educational trusts in which the City Council has an interest.
- 1.2 To seek Cabinet approval for the delegation to the Director of Social Services of responsibility for all matters in connection with the William Buckingham V C Memorial Fund.

**2. SUMMARY**

- 2.1 Over a period of time a number of trusts have been established usually following bequests from individuals for the application of various sums of money for educational purposes. Invariably this has resulted in the appropriate local education authority establishing Trust Funds.
- 2.2 Many of the trusts were established prior to Local Government Reorganisation in 1974 and have now returned to the responsibility of the City Council following Local Government Reorganisation in 1997.
- 2.3 There is a need to undertake a review of all these trusts to see how the sums bequeathed can best be applied for the purposes envisaged by the benefactors. This may involved the rationalisation of some trusts with the approval of the Charity Commission.
- 2.4 The trusts have varying requirements as it can be seen from the details provided on each trust in the Supporting Information which will benefit from the Director of Education having the authority to resolve. This applies similarly to the Director of Social Services in respect of the William Buckingham V C Memorial Fund.

**3. RECOMMENDATIONS AND OPTIONS**

3.1 The Cabinet is asked to:

- (a) Delegate to the Director of Education responsibility for all matters connected with any educational trust in which the City Council has an interest.
- (b) Delegate to the Director of Social Services responsibility for all matters connected with William Buckingham V C Memorial Fund.

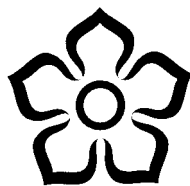
**4. LEGAL AND FINANCIAL IMPLICATIONS**

4.1 There are no direct financial implications for the City Council.

4.2 There are no direct legal implications arising from this report. (Guy Goodman, Assistant Head of Legal Services - extension 7054).

**5. REPORT AUTHOR/OFFICER TO CONTACT:**

Guy Goodman, Assistant Head of Legal Services, telephone 2527054.  
Trevor Pringle, Education Officer (Administration and Governors Services), telephone 2527790.



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**WARDS AFFECTED  
ALL WARDS**

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### **EDUCATIONAL AND OTHER TRUSTS**

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## **SUPPORTING INFORMATION**

1. INDIA EDUCATION TRUST
  - 1.1 This trust was established by the County Council Education Committee in April 1991 following a visit to India by two County Councillors and the County's Director of Education.
  - 1.2 A Trust Deed was approved in July 1993 and the trust was registered as a charity.
  - 1.3 The purpose of the trust is to advance, develop, improve and maintain the education of students and teachers of Leicestershire and India in the Science, Arts, Literature, Music, History, Economics, Philosophy, Cultural way of life and other subjects of academic study of the United Kingdom and Northern Ireland and India.
  - 1.4 The Trust Deed sets out the appointment of Trustees and other matters in relation to the management of the trust including the calling of meetings and the appointment of Trustees. The Trustees are to consist of three Elected Members of the Council, three persons who have life experience of education and cultural India (not less than two of whom shall be members of the Leicester community) and the Director of Education who is to be the ex-officio Trustee and the Secretary.
  - 1.5 There was only ever one meeting of the Trustees in 1995 at Leicestershire County Council when it was decided that the trust should be transferred to Leicester City Council on reorganisation.
  - 1.6 The value of the Trust Fund is £2,606.63.
  - 1.7 If the Trust Fund is to continue the Trustees need to be appointed.
2. ALICE ROBERTS MEMORIAL SCHOLARSHIP

- 2.1 This is a gift bequeathed by Will in the sum of £1,000 which was to go to the "Education Authority of the City of Leicester, to be applied to give scholarship to a scholar from the Newark Secondary School for Girls, to pursue a course of instruction in some college of higher education to be approved by the said Authority".
- 2.2 The value of the fund is believed to be not more than £1,021.88.

### 3. SIR JONATHAN NORTH ENDOWMENT SCHEME

- 3.1 This scheme was set up in 1926 and amended with the approval of the Charity Commission in 1958. The purpose of the scheme is to award annual book prizes to students attending any school or institution for further education in the City and the County of Leicester, including the University of Leicester. The award of prizes is to be set at the discretion of a committee.
- 3.2 The Committee is to consist of the Chair or Vice Chair of the Education Committee, the Director or Assistant Director of Education, Vice Chancellor or Pro-Vice Chancellor of the University of Leicester and the Headmaster of Wyggeston and Queen Elizabeth 1 College.
- 3.3 The value of the fund as at 31st March 2001 is £8,099.42.
- 3.4 If the scheme is to continue the committee will need to be constituted.

### 4. THE WILLIAM BUCKINGHAM V C MEMORIAL FUND

- 4.1 This trust was created in 1924 and amended in 1951. The Trust Deed and amendments specify that the Trustees should be appointed by a committee consisting of nine persons to be appointed by resolution of the City Council at its statutory annual meeting. The number of trustees shall not be less than three and it is the committee acting who shall by resolution have power to nominate the person or persons to be Trustees and the Chair shall by deed appoint new Trustees.
- 4.2 At present there is a Chair but no committee appointed.
- 4.3 The object of the Trust is to benefit persons under 30 years of age, born (or whose parents have been resident for at least the last three years) in the City with a preference for those young people who have been in the care of the City Council.
- 4.4 The value of the fund is believed to be about £70,000.

### 5. THE PEARSON SCHOLARSHIP

- 5.1 This was created by Will by Mr W P B Pearson. The fund is an award of scholarships to any suitable boys or girls who have received their early education at a County or

denominational school in the City to proceed to a training college for teachers or to a university or to assist in any way the higher education of such boys and girls.

- 5.2 The scheme was accepted by the Education Committee in 1973. In accordance with the Will the scholarships are to be awarded by the Education Committee in addition to any of the grants made by the Local Education Authority or the Government.
- 5.3 The value of the fund is £5,258.07.

## 6. LEICESTER NORTH AND RUGBY MUNITIONS FUND

- 6.1 The scheme was set up for advancing facilities for the education of engineers within Technical Schools or Leicester University. The fund is to be managed by three managing Trustees, one of whom shall be the Director of Education and two engineers of the City. The remaining trustees need to be appointed. Once appointments have been made the managing Trustees can use the income to make grants to students pursuing courses in engineering, the amounts and criteria to be at the discretion of the managing Trustees.
- 6.2 The value of the fund is £9,295.35.

## 7. WYGGESTON FOUNDATION

- 7.1 This is a registered charity dated from the Foundation of William Wyggeston's Free Grammar School in the 16th Century. A number of charities are administered and managed together under this.
- 7.2 The scheme sets out in detail how the income of the charity is to be applied, which includes special benefits for Wyggeston and Queen Elizabeth 1 College and Wyggeston Collegiate/Regent College and promoting the education, including social and physical training of the beneficiaries in ways as the managing Trustees think fit. Beneficiary means persons up to 25 years of age who need financial assistance who are attending and who have not for less than one term at any time attended one of the colleges.
- 7.3 The City Council is the Custodian Trustee. The trust provides for 5 of the 10 nominative Trustees to be appointed by the City Council as Local Education Authority. Five members of the Authority have been nominated as Trustees.
- 7.4 The value of the fund is £14, 524.89.

## 8. BERT COLE PRIZE

- 8.1 This was made by a gift in 1955. The purpose is for the provision of a prize at Green Lane Boys School and the donor provided that on the closure of the school it may be used "at the discretion of the Education Committee".

8.2 The value of the fund is £539.99.

9. AMOS SHERRIFF MEMORIAL PRIZE

9.1 This fund was set up in 1946. The Trust Deed provides that the annual income of the fund is to be applied for the award of a prize for work involving originality in connection with the Local Government of the City. The decision of the Education Committee is final concerning any matter of the award.

9.2 The value of the fund is £1,199.15.

10. RICHARD HALLAM TRUST

10.1 This was established in 1945 with a sum of £1,000. The income for the fund was to be used "for the promotion, encouragement and purposes of education in the City of Leicester". In particular the income is to be used to supplement any grants made by the City Council to any students (whose place of residence is in the City) at universities or university colleges, teacher training colleges or colleges of art and technology in Great Britain. The trust provides that it is for the Chair and Vice Chair of the Education Committee and the Director of Education to decide on the application of the income at their absolute discretion.

10.2 The value of the fund is £9,295.35.

11. MARY LINWOOD SCHOOL

11.1 A sum of £200 was bequeathed in 1971 by Mr Headley. This is registered as a charity. The annual income is to be used to award "The Headley Prize" and "Passey Prize" by the Headteacher.

11.2 The value of the fund is £256.20.

12. RUSHEY MEAD SCHOOL

12.1 A number of small bequests were left for the provision of annual prizes for pupils at Rushey Mead School

12.2 The value of the fund is presently £36.50.

13. CITY OF LEICESTER SCHOOL

13.1 A number of bequests comprise this fund and which were set up to provide annual prizes for pupils.

13.2 The value of the fund is £913.98.

14. ALDERMAN NEWTONS SCHOOL

14.1 This comprises twelve prize funds which it is believed have been amalgamated.

14.2 The value of the fund is £1,450.01.

15. GIRLS SECONDARY GRAMMAR SCHOOLS

15.1 This is the provision of annual prizes for pupils of Girls Secondary Grammar Schools.

15.2 The value of the fund is £9,042.64.

1. **FINANCIAL, LEGAL AND OTHER IMPLICATIONS**

1.1 There are no direct financial implications for the City Council.

1.2 The City Council currently holds these funds within its accounts.

2. **LEGAL IMPLICATIONS**

2.1 There are no direct legal implications arising from this report. (Guy Goodman, Assistant Head of Legal Services - extension 7054).

3. **OTHER IMPLICATIONS**

OTHER IMPLICATIONS	YES/NO	Paragraph References within supporting information
Equal Opportunities Policy	No	
Sustainable and Environmental	No	
Crime and Disorder	No	
Human Rights Act	No	
Elderly/People on low Income	No	

4. **BACKGROUND PAPERS**

Documents, notes, correspondence and financial statements in respect of each of the funds.

5. **CONSULTATIONS**

None.

6. **REPORT AUTHOR/OFFICER TO CONTACT:**

Guy Goodman, Assistant Head of Legal Services, telephone 2527054.

Trevor Pringle, Education Officer (Administration and Governors Services), telephone 2527790.