

**CHARITABLE TRUSTS, BEQUESTS AND TRUST FUNDS – AWARD
RECOMMENDATIONS**

1.0 APPLICATIONS

- 1.1 This report gives Members information regarding a number of applications that have been received for support from the John of Lorn Bequest, MacKinnon Ledigham Bequest, Archibald Dow Bequest and Coals for the Poor Oban.

2.0 RECOMMENDATIONS

- 2.1 The Oban, Lorn and the Isles Area Committee are asked to:

1. note and consider the number of awards made from the John of Lorn Bequest since March 2024;
2. note that no applications had been submitted to the MacKinnon Ledigham Bequest;
3. agree to award £50 to the two individual applicants who meet the criteria of the Archibald Dow Bequest;
4. refuse the 2 family applicants and 1 individual applicant who do not meet the criteria of the Coals for the Poor Oban fund.

3.0 JOHN OF LORN BEQUEST

- 3.1 The Oban, Lorn and the Isles Area Committee on 09 September 2020 agreed new distribution arrangements for the John of Lorn Bequest, which had been established to support 'poor persons resident in the Burgh of Oban'. In order to be considered for an award applicants must:

- 3.1.1 be in receipt of a qualifying benefit (Jobseekers Allowance, Employment Support Allowance, Income Support, or Universal Credit) and for those people who are employed/self-employed, they must be in receipt of some amount of Universal Credit as well (a nil payment due to deductions for earned income would mean they do not qualify);
- 3.1.2 live within the Burgh of Oban; and
- 3.1.3 be over the age of 16.

- 3.2 Furthermore, it was agreed that successful individual applicants would receive

£50 while those applying on behalf of their family would receive £100.

- 3.3 The Area Committee on 14 September 2022 agreed to delegate to the Executive Director with responsibility for Legal and Regulatory Support or officers nominated by him, in consultation with the Chair, the authority to make awards from the John of Lorn Bequest using the criteria agreed in September 2020 and that reports be submitted to subsequent Area Committees to update trustees on awards made under this delegation.
- 3.4 Prior to this delegation those in need of support could wait up to 14 weeks for payment. Applications are now processed on receipt with payments made once applicants submit their banking details.
- 3.5 A total of 32 applications have been received since the March 2024 meeting of the Area Committee. Officers, in consultation with the Chair have confirmed awards for 15 family and 11 individual applications, with a total of £2050 being awarded to individuals living within the Burgh.
- 3.6 Six applications were refused. Applications will only be refused if the applicant has either received a grant this calendar year or they live out with the Burgh of Oban. Details of each application can be found at **appendix 1**.
- 3.7 The total funds available for distribution from the John of Lorn Bequest at the time of preparing this report is around £3k.

4.0 Mackinnon Ledigham Bequest

- 4.1 The Oban, Lorn and the Isles Area Committee on 06 March 2024 agreed distribution arrangements for the Mackinnon Ledigham Bequest, which had been established to offer relief of aged persons in the Ross of Mull.
- 4.2 In order to be considered for an award applicants must be of state pension age, 66 years of age and above, and live within the Ross of Mull. Furthermore, it was agreed that successful applicants would receive £50 and that applicants receive a maximum of one award each calendar year.
- 4.3 Despite advertising the availability of this fund widely no applications have been received. Legal and Regulatory Support Officers will undertake further promotion of this fund.
- 4.4 The total funds available for distribution from the Mackinnon Ledigham Bequest at the time of preparing this report is around £4.2k.

5.0 ARCHIBALD DOW BEQUEST

- 5.1 The Oban, Lorn and the Isles Area Committee on 06 March 2024 agreed distribution arrangements for the Archibald Dow Bequest. In order to be considered for an award applicants must be:
 - be in receipt of a qualifying benefit (Jobseekers Allowance, Employment

Support Allowance, Income Support, or Universal Credit); and

- for those people who are employed/self-employed, they must be in receipt of some amount of Universal Credit as well (a nil payment due to deductions for earned income would mean they do not qualify).
- 5.2 In order to be considered for an award applicants must be a resident of Taynuilt. Furthermore, it was agreed that successful individual applicants would receive £50 and families would receive £100.
- 5.3 A total of 2 individual applications have been received since the introduction of the application process. Of these applications both are recommended for award. Details of each application can be found at **appendix 2**.
- 5.4 The total funds available for distribution from the Archibald Dow Bequest at the time of preparing this report is around £1.3k.

6.0 COALS FOR THE POOR OBAN

- 6.1 The Oban, Lorn and the Isles Area Committee on 06 March 2024 agreed distribution arrangements for Coals for the Poor Oban. To ensure a consistency in approach it was agreed that the criteria for the Coals for the Poor Oban be the same as the Archibald Dow Bequest, specifically applications would only be welcomed by those on a qualifying benefit or from those who are employed/self-employed in receipt of some amount of Universal Credit.
- 6.2 In order to be considered for an award applicants must be over the age of 16 with awards set at £50 for individuals and £100 for families and limited to one award each calendar year.
- 6.3 A total of 3 applications have been received since the introduction of the application process. Of these applications none are recommended for award as the applicants live out with the defined locality. Details of each application can be found at **appendix 3**.
- 6.4 The total funds available for distribution from the Coals for the Poor Oban at the time of preparing this report is around £2k.

7.0 CONCLUSION

- 7.1 Members are asked to consider the applications that have been received for support from the John of Lorn Bequest, Archibald Dow Bequest and Coals for the Poor Oban and to approve the financial awards recommended within the report.

8.0 IMPLICATIONS

- 8.1 **Policy** – None
- 8.2 **Financial** – None, the Council acts as trustee for the Fund, it does not represent assets of the Council. However, there is a risk that the Council

would have to repay the Trust if an objection was raised as to the use of the funds.

- 8.3 **Legal** – Area Committees, as Trustees, must ensure that the distribution arrangements comply with the terms of the funds, failure to do so would result in the Council being liable.
- 8.4 **HR** – None
- 8.5 **Fairer Scotland Duty** – None
 - 8.5.1 **Equalities – protected characteristics** – None
 - 8.5.2 **Socio-economic Duty** – None
 - 8.5.3 **Islands** – None
- 8.6 **Climate Change** – None
- 8.7 **Risk** – None
- 8.8 **Customer Service** – None
- 8.9 **The Rights of the Child (UNCRC)** – None

**Douglas Hendry -
Executive Director with responsibility for Legal and Regulatory Support**

Councillor Mark Irvine, Policy Lead for Community Planning and Corporate Services

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APPENDICES:

- Appendix 1: Spreadsheet of applications** – John of Lorn Bequest (exempt)
- Appendix 2: Spreadsheet of applications** – Archibald Dow Bequest (exempt)
- Appendix 3: Spreadsheet of applications** – Coals for the Poor Oban (exempt)