

BERWICK ACADEMY CHARITABLE FUNDS

(FORMALLY THE GEORGE CRINGLE SCHOLARSHIP TRUST AND THE BERWICK UPON TWEED COMMUNITY HIGH SCHOOL ENDOWMENT FUND)

1. Introduction

By decision of the Governors the school charitable funds were transferred to the Community Foundation in June 2010. They will remain as separate funds within the Foundation on the ruling of The Charity Commission who have approved the transfer. A shortened title of “Berwick High School Charitable Funds” (“the school fund”) will be used by the Community Foundation and the Berwick High School on an everyday basis. The George Cringle Scholarship Fund originated from the benevolence of George Cringle, an ex pupil who made his fortune trading wheat in Canada in the early part of the 20th century and endowed this scholarship fund in his will. The High School Endowment Fund consisted primarily of the Boys’ Grammar School Fund which was started in 1880 and the Girls Leaving Scholarship Fund which was created on the amalgamation of the two schools in 1946 to ensure that boys and girls receive equal opportunities. The other smaller funds amalgamated into the Endowment Fund were the Guthrie Fund (1903), the Margaret Hamilton Fund (1957), the George Lamb Fund (1946), the Margaret Tasker Fund (Not known) and the Margaret Meister Fund (1924). The management of all these funds remained in the hands of Northumberland County Council until 1996 when the school took them in hand. The value of the school funds at transfer on 15th June 2010 was:-

George Cringle Scholarship Fund	£85,102.15
Berwick High School Endowment Fund	<u>£145,828.38</u>
Total value	<u>£230,930.53</u>

2. The objective of the school fund

The objective of the school fund is to further promote the education and development of persons under the age of 25 years who are past or present pupils of Berwick upon Tweed Community High School (“the school”) or any succeeding educational establishment.

3. Working procedures

(a) The trustees of the Community Foundation will be the trustees of the school funds. The trustees will be responsible for the management of the school funds, the ratification of grants and the issue of cheques on the recommendation of the school.

(b) The trustees of the Community Foundation will manage the school funds to their best ability and will issue to the school a quarterly statement of the value of the school fund and the accrued income transferred into the grant pool (see (c) below).

(c) The Community Foundation will maintain a grant pool which will be established at the initial transfer of the school fund with an opening balance of £5,000. Income will be added to the grant pool quarterly. Grants will be deducted from the grant pool as they are distributed. The purpose of the grant pool is to give flexibility to the school as to the total sum of grants which they may wish to recommend at any one time.

(d) A High School Charitable Funds Sub-committee (the sub-committee) will be appointed by the Governing Body of the school. The Community Foundation will be informed of the names and e-mail addresses of the members of the sub-committee. The sub-committee will be responsible for seeking applications for grants, examining the applications for compliance with the guidelines and recommending successful applicants and the amount of grant to the Community Foundation for the approval of the trustees. (e) The school will be responsible for ensuring that potential applicants are fully aware of the application procedures and the consequences of not obtaining the necessary supporting documentation required by the sub-committee. Errors in the completion of applications are likely to lead to a delay in approval.

(f) The application procedures and guidelines will be published on the school web site and will be issued to potential applicants with the application form. A meeting of the sub-committee will be held each term to consider and make recommendations on applications. Community Foundation ratification meetings are held fortnightly. Final dates for receipt of applications for grants in school will be programmed to allow sufficient time for staff to check each application for compliance with the procedure laid down before being sent out to members of the sub-committee at least 7 days prior to their meeting.

(g) On receipt of the school's recommendations for grant awards, the trustees of the Community Foundation, subject to their satisfaction that funds are available and that the recommendations meet the agreed guidelines, will ratify the recommendations of the school, issue cheques made payable to the successful applicants and send them to the school. The school will attach a letter explaining the conditions under which the grant is made to each cheque and pass it on to the beneficiary.

(h) The school and the Community Foundation will each appoint a member of their staff who will be the primary point of contact. The school's point of contact will be the Finance Officer (currently Mrs Helen Joy). The Community Foundation's point of contact will be the Fund Manager (currently Peter Storey). In the event of any dispute between the school and the Community Foundation, the matter will be referred to the Head Teacher of the school and the Chief Executive of the Community Foundation who will, together, resolve the issue.

4. The guidelines under which applications for grants will be considered

(a) The applicant must be under the age of 25 and be or have been a pupil of Berwick High School/Berwick Academy.

(b) All grant awards and the grant ceiling (see (f) below) will be subject to the amount of money available in the grant pool.

(c) Each applicant will be expected to demonstrate his or her commitment to the proposed activity by contributing a fair share of the total cost of the activity through their own fundraising and family support. The sub-committee will decide whether or not the applicant's contribution to the cost of the activity is acceptable. The amount of grant awarded will determine the proportion of the total cost to be paid by the applicant.

(d) The over-riding condition pertaining to the issue of a grant is that it should genuinely enhance the extra-mural development of the applicant as a person. This leaves a considerable amount of discretion to the sub-committee and trustees but, in the past, a principle has been followed that structured and organised ventures are eligible whilst unstructured personal travel, such as wandering the world in a gap year, is not.

(e) All applications must be supported by a letter from the host organisation or expedition leader certifying the details of the activity in which the applicant wishes to partake. Where there is no such host or leader the sub-committee must take particular care to ensure that the proposed activity meets the guidelines.

(f) Currently, the individual grant ceiling does not normally exceed £500 per applicant per year. However, it is the responsibility of the school to recommend to the trustees of CF any changes to the grant ceiling which may be required to take account of inflation or, where appropriate, individual circumstances where a higher grant is appropriate.

(g) Applications for grants to pay fees for normal further education at a university will not be eligible. Fees for specialist training courses which lead to a professional qualification will be eligible.

(h) Applications for grants to pay for equipment and other accessories which will enable an applicant to achieve best value from his educational or training course will be eligible.

(i) An application from a student who is still at school and whose particular talent could benefit by the award of a grant for the purchase of a particular piece of equipment, such as a musical instrument, is eligible but in such circumstances the grant application should be made by

the Head of Department of the school and the equipment or instrument should become the property of the school and be available to that student during his/her time at school. The instrument would then be available to benefit future students whilst the original beneficiary could apply for a grant to buy his/her own instrument on leaving school if he/she so wishes.

(j) The Head Teacher may apply for specific grants to enhance the ability of a particular department within the school to further the skills or career potential of students. However, such grants should only be awarded when the grant pool has funds surplus to normal grant applications and the trustees of the Community Foundation consider that the application is genuinely outside the normal funding of schools and of genuine benefit to the pupils of the school.

(k) These guidelines will be reconsidered annually by the school at the autumn term meeting of the School Advisory Committee and any recommendations for amendments passed to the Trustees of The Community Foundation for their agreement.

Berwick Academy Charitable Funds

Eligibility: Persons under the age of 25 who are or have been pupils of Berwick upon Tweed High School/Berwick Academy.

Types of Grant: One-off grants of up to £500 pa towards specific study, training and coaching (eg. in music or sport), extra-curricular activities (eg. Ocean Youth Trust, Operation Raleigh) and to support elements of Further/Higher Education courses (eg field trips, study abroad). No assistance with activities which can /should be supported by others (eg. University course fees).

Applications: There is a joint application form, which can be submitted at anytime, but the Trustees only meet to consider applications three times a year (March, November and June). Dates for 2011/12 academic year are as follows:-

Application forms to be submitted to Mrs Joy by:-

1. 9th November 2011;
2. 14th March 2012; or
3. 13th June 2012

For which the dates of the meeting when they will be considered are:-

1. 23rd November 2011
2. 28th March 2012
3. 27th June 2012

Application forms need to be completed as **fully** as possible by the applicant (not the parents) with supporting evidence such as confirmation of place on course; estimates of costs eg how much items are from suppliers or cost of training or field trip costs.

Correspondent: Mrs H Joy
Business Manager
Berwick Academy
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Berwick upon Tweed
Northumberland
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Tel: 01289 305083

E-mail: Helen.Joy@northumberland.gov.uk

Contact: Mrs Helen Joy

Berwick Academy Charitable Funds

Grant Application Form

Name	
Address	
Telephone	
E-mail	
Date of birth	
Period of attendance at Berwick upon Tweed Community High School/Berwick Academy :	
Course and/or equipment for which grant is sought (Please supply confirmation of acceptance onto course or expedition etc. and any other supporting information including sample costs of any equipment):	
Details of Provider/Organiser:	
Name:	
Address:	
Tel:	
E-mail:	
Reasons in support of your request eg. personal development, field trip description, whether part of course and benefits to applicant:	

Likely cost of the course and/or equipment: £
Amount of grant applying for: £
Any other grants/sponsorship applied for or received in regard to this proposed expenditure:
Other relevant financial information eg. parental contribution or family circumstances:
Any other information which you consider relevant:

I undertake to account to the Trustees for expenditure of the Grant received and provide an interim progress report (where applicable) and a completion report.

Signed Date

PLEASE GIVE AS MUCH INFORMATION AS POSSIBLE TO ENABLE THE TRUSTEES TO MAKE AN INFORMED DECISION.