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| **Lanarkshire Educational Trust Scheme**  **Individual Applicant**  **Application Pack**  Completed Application Forms and Supplementary Information  should be returned by email to:  [lanarkshiredtrust@northlan.gov.uk](mailto:ef.lanarkshiretrust@northlan.gov.uk)  ***Please retain this outer cover for your information*** |

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| **Lanarkshire Educational Trust Scheme – Guidance Notes** |

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 now operate 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 for clubs/organisations for young people, special educational equipment for schools, provision and maintenance of sports facilities, educational excursions, promoting education in visual arts, in music and in drama, limited aspects of adult education and exceptional circumstances.

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| ***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 and the **amount** requested.

Essentially the Trust offers financial assistance to individuals who reside within the area formerly known as the County of Lanark, within the categories listed below. 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.

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| ***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 all relevant evidence, must be submitted by the closing date. Application closing dates are 15 August and 15 December each year.

Applicants can make only one application per annum. Thereafter applicants are eligible to apply for funding for the same purpose or course of study for a further 2 consecutive years.

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| ***Completing the application form*** |

Every part of the form 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.

All forms of evidence such as; official confirmation of participation in a course or event, costs of course or travel must be included, otherwise the processing of your application will be delayed.

A bank mandate form should also be completed as this provides details of where an award should be paid should your application be successful.

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 usually convenes in October and March 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.

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| ***Categories as specified by the Trust Scheme*** |

**21. TRAVEL SCHOLARSHIPS**

**Guidelines**

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:

* Individual applicant - maximum award £750.
* Scholarship only available to matriculated students (evidence required).
* Grant to cover cost of fees, books or instruments (evidence required).

You will be asked to provide evidence of matriculation and costs incurred.

**Grant can only be claimed for 3 years total within a 20-year period (maximum award of 3 times).**

**22. TRAVEL GRANTS**

**Guidelines**

A grant to anyone belonging to the County, selected for an opportunity due to exceptional skill/talent, enabling them to travel either in Great Britain or abroad for educational purposes.

* Individual applicant - maximum award £750

**Application must include:**

* Details of the educational purpose of application.
* Details of exceptional skill/talent which resulted in selection for this opportunity.
* Evidence of the journey undertaken (proof of costs incurred)
* Evidence of why free travel for under 22s does not apply to you.
* **Not considered suitable:**

1. **multiple journeys (basically a claim for travelling expenses).**

**Grant can only be claimed for 3 years total within a 20-year period (maximum award of 3 times).**

**23. RESEARCH SCHOLARSHIPS**

**Guidelines**

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.

* Individual applicant - maximum award £750
* Scholarship is only available to postgraduate students undertaking a research-based degree for example Masters or PhD (evidence required)

**Grant can only be claimed for 3 years total within a 20-year period (maximum award of 3 times).**

**26. Achievement in Sport**

**Guidelines**

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

* Individual applicant - maximum award £750.
* Evidence of cost incurred.

**Grant can only be claimed for 3 years total within a 20-year period (maximum award of 3 times).**

**29. PROMOTING EDUCATION IN THE VISUAL ARTS, MUSIC AND DRAMA**

**Guidelines**

Financial assistance to groups or individuals showing exceptional promise in the above areas, enabling them to obtain special tuition.

* Individual applicant - maximum award £750
* Applicant must demonstrate exceptional talent in visual arts, music or drama (and have evidence to support claim for example, recognition by a national body).
* Evidence of cost incurred.

**Grant can only be claimed for 3 years total within a 20-year period (maximum award of 3 times).**

**30. EXCEPTIONAL CIRCUMSTANCES**

**Guidelines**

The Trust may consider applications from individuals not strictly meeting the criteria outlined in any of the other categories in exceptional circumstances where:

* A protected characteristic (under the Equalities Act) requires an alternative route for an individual's educational aspirations or attainment – [Protected Characteristics (publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/5f7f294c8fa8f51e79a92c3b/Guidance_on_Protected_Characteristics_-_v1.1.pdf)  (an individual showing promise or skill in an area of education, sport or art but for example a disability or language barrier means that they need to take an alternative route to progress).
* Financial hardship is a barrier to an individual further developing or pursuing an emerging talent, skill or aptitude to the point that they can take advantage of further educational opportunities (i.e. a young person showing promise in a musical instrument or sport but unable to purchase equipment or lessons to practice and progress).
* A person has been subject to life-altering circumstances which may impact on ability to progress equitably.

Where a request for support is linked to financial hardship awards may be subject to some means testing **you must provide details of your income or your household’s income**and for example if parents and guardians receive any of the following benefits:

* Free school meals or school clothing grant
* Housing benefit or council tax reduction
* Income support
* Income-based job seeker's allowance
* Any income-related element of employment and support allowance
* Child tax credit or working tax credit
* Universal credit
* Pension credit guaranteed credit
* Support under Part VI of the immigration and asylum act 1999
* Evidence of cost incurred
* Individual applicant - maximum award £750.

**Grant can only be claimed for a total of three years within a 20-year period (maximum award of 3 times).**