

Halesowen Area Committee – 14th September 2005

Report of the Director of Finance

Earls High School Foundation

Purpose of Report

1. Members of the Committee are asked to consider the request from the Governors of the Earls High School for a grant of £4000 from the Trust towards the cost of funding the proposed visit to Baltimore, U.S.A.

Background

2. The Foundation is governed by a scheme dated 23rd August 1989, and is a registered charity. No.527585.
3. The Trustee is Dudley Metropolitan Borough Council
4. The income of the Trust, after the payment of expenses, can be used in one of the following ways:
 - a. In providing the school with such benefits of any kind not normally provided by the local authority as may be agreed between the Trustee and the School Governors.
 - b. In promoting the education (including social and physical training) of persons under the age of 25 years who are attending or have attended the school and who are in need of financial assistance.
5. The Earls High School is organising a visit to Baltimore, USA. Two previous visits have been made to Baltimore and the Governors and Head teacher are keen to pursue this opportunity. The school already has links with 4 schools in the area who will act as hosts for the visit. The Governors believe that an active international link will enhance the profile of the school, particularly since the school has specialist status as a performing arts college, which is attractive for both pupils and staff.
6. The tour, which includes an invitation to take part in the Maryland State Dance Festival, will be organised by the Earls High School, through the Momentum Dance Company. This company is open to any Halesowen students, but primarily consists of pupils from the Earls High School. All the participants on this tour are currently attending or teaching at the Earls High school.

- 7 It is proposed to take 8 students and 3 staff during October 2005, for one week, at an approximate cost of £8000, with the pupils each contributing £500, the balance requested from the Trust.

Finance

8. The accounts of the Trust for 31st March 2005 have been prepared and are to be independently examined by the Head of Dudley Audit Services.

The Trust received the following income during the year:-

	12 mths to 31/03/2004	12 mths to 31/03/2005
	£	£
Interest Received	5815	7267
Rent	4740	4740
Dividends	151	151
	<u>10706</u>	<u>12158</u>

The Trust expended the following money:-

	12 mths to 31/03/2004	12 mths to 31/03/2005
	£	£
Donation to School	-	-
Repairs to House	258	306
	<u>258</u>	<u>306</u>

9. During the current year there has been no significant expenditure. Assuming that income levels are maintained the request for funding can be met from this year's funds.

Law

10. The council is successor to the former Halesowen Council by virtue of the Local Government Act 1972. Section 139 of the Local Government Act, 1972 empowers the Council to accept, hold and administer gifts of property, where it enables them to discharge any of their functions, and where the gifts are for the purposes of benefiting the inhabitants of their area.
11. The conditions, under which a gift is to be administered, are contained in the Deed creating the Trust, and any subsequent schemes made by the Charity Commission
12. The law relating to Trusts, which are charitable, is contained in various acts, the main ones being the Charities Act, 1960, the Charities Act 1992 and 1993, and the Trustee Investment Act, 1961.

Equality Impact

13. The Trust has been set up to benefit the school and its former pupils as outlined in paragraph 4.

Recommendation

14. It is recommended that members consider the funding application detailed in paragraph 1, in this report in light of the available funds.



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M S Williams
Director of Finance

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List of Background Papers

Letter from Earls High School.
Report outlining the request for funding.
E Mail from Head teacher