

Restricted Fund Reorganisation – Summary of Application

Introduction to Proposed Scheme

University of Aberdeen Development Trust SCIO SC050996 has applied to the Office of the Scottish Charity Regulator (OSCR) for approval of a restricted funds reorganisation scheme for:

- The variation of the purpose for which restricted funds may be used

and
- The variation or removal of any condition imposed on the charity in relation to the use of the restricted funds

under section 43A of the Charities and Trustee Investment (Scotland) Act 2005 (the 2005 Act).

The Robert Carrick Memorial Trust Fund (“the Fund”) was established from a bequest received during the University of Aberdeen’s Quincentenary Fundraising Campaign in 1995. The Development Trust received £122,000 from Dr Carrick’s estate.

Dr Carrick was a former lecturer in Zoology at the University of Aberdeen who passed away in July 1988. Dr Carrick’s interest was in providing the means for Zulu students to come to the University of Aberdeen to study for an MSc, Environmental Sciences, in order that they might contribute to the development of the Kwa Zulu.

The Fund was established to meet cost of tuition fees, maintenance costs, and return airfare for Zulu students to study a taught master’s degree in environmental sciences at the University of Aberdeen.

Reasons for reorganisation

The charity advises that no disbursements have been made since at least 2008, despite their efforts to advertise and promote the scholarship.

As such, the charity wish to broaden the terms of the Fund.

The charity also wish to make the Fund an expendable endowment, as although funds have built up, annual returns will not cover the original intention of fees, stipend and travel in the long term so that student support and research could continue on a meaningful basis.

The charity advise that current University academic staff work in South Africa with partner universities and members of local tribes, including Zulus. They therefore envision that a new Environmental Management Masters course could be delivered, partly in South Africa and partly at the University of Aberdeen. Environmental Science programmes have developed over the years and the University now offers courses in Environmental Management, environment and Biodiversity Conservation, and Geosciences Law, impacting on e.g. polluted land clean up and conservation.

Reorganisation conditions

The charity is applying for reorganisation because it considers that the following condition/s from Section 43A(2) of the 2005 Act apply:

- (a) That some or all of the purposes of the restricted funds:
 - ii. can no longer be given effect to (whether or not in accordance with the directions or spirit of the restricted funds' purposes)

and

- (b) that the purposes of the restricted funds provide a use for only part of its property

The trustees suggest that these conditions are met because considerable time has passed since this bequest was received by the University and it has not been possible to make this award for a scholarship for a Zulu student. The charity would therefore like to broaden the terms, to be able to use the funds and have an impact on the students and research at the University of Aberdeen.

The charity also suggests that changing the fund from a permanent to an expendable endowment would allow for support to continue on a meaningful basis.

Reorganisation Outcome

The trustees suggest that the restricted fund reorganisation will enable the resources of the restricted fund to be applied to better effect for charitable purposes consistently with the charity's constitution.

The trustees suggest that this outcome is met because the fund was established to meet the cost of tuition fees, maintenance costs, and return airfare for Zulu students to study a taught master's degree in environmental sciences at the University of Aberdeen. However, due to changes in course delivery, student intake and student demand, it has not proved possible to successfully recruit a Zulu student.

The charity advises that changes to course programming have emerged, and that course offerings will continue to change and develop. In 1995, the allocation of awards and the associated arrangements for the scholarship have been the responsibility of a management committee comprising the Heads of those departments which encompasses Environmental Science; namely, Geography, Plant & Soil Science and Zoology under the convenorship of the Dean of the Faculty of Science & Engineering.

The charity suggests that a similar committee could be convened by the Head of School or Faculty to ensure that the funds were utilised as closely as intended and to make a recommendation for the approval of the University of Aberdeen Development Trust SCIO. It is felt by the charity that the funds can be used by the University and the School of Biological Sciences and other disciplines to deliver related Masters courses and associated fieldwork in South Africa. The intention is to stay close to using funds in the broader Environmental Sciences subject area, at Masters level, and forging links and impact in KwaZulu-Natal and in South Africa. It is suggested that having greater flexibility, and on the recommendation of the Head of School or Faculty, it will provide comfort to Trustees that funds can be used in a considered way and as most closely aligned as possible with the original purpose and intention of the gift.

The trustees have declared that they have been unable to ascertain the wishes of the donor(s) in respect of the restricted fund/s. This is because [delete whichever is inapplicable]

- (i) The donor is no longer living

The charity have established that the donor is no longer living – the date of death has been established from their records, and online obituaries, and using the Scotland’s People Records.

How to make a representation in relation to the proposed reorganisation scheme

Any person may make a representation to OSCR either supporting or opposing this proposed reorganisation scheme. Should you wish to make a representation, you may do so by writing to OSCR providing the following information:

- Your name and address (or email address)
- The name of the charity concerned
- The nature of the representation and reasons for it

These are the terms of Regulation 7 of the Charities Restricted Funds Reorganisation (Scotland) Regulations 2012.

Representations should be sent to OSCR by post or email

Postal: OSCR
2nd Floor Quadrant House
Riverside Drive
Dundee
DD1 4NY

Email: info@oscr.org.uk

Representations can be made up to 14 days following the end of the publication period. The latest date for the receipt of representations is 08/07/2026

We cannot accept representations via social media channels.

Copies of any representations will be provided to the applicant charity for comment. If you do not wish the charity to be provided with your personal details, please indicate this in your representation.

Personal details will otherwise be disclosed to the applicant charity.

Please contact us by email or by telephone on 01382 220446 if you have any questions about the submission of a representation.

OSCR
27/05/2026

