

**MACDOUGALL PLACE SHELTERED HOUSING, MULL**

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**1. EXECUTIVE SUMMARY**

- 1.1 MacDougall Place Sheltered Housing complex transferred to ACHA in 2006. The Council hold a Trust Fund in the name of the MacDougall Trust that was created from surplus sums from a bequest to Argyll County Council made by John William MacDougall to build an eventide home, subsequently varied to a sheltered housing complex, for the Ross of Mull.
- 1.2 The balance on the Trust Fund as at the end of financial year 2018-19 was £844,726.
- 1.3 ACHA have been in contact with the Council as they have been reviewing the condition of the communal areas at MacDougall Place. A schedule of works has been prepared for the benefit of the tenants and ACHA are seeking approval from the Council that this is funded from the MacDougall Trust, rather than charge the tenants additional service charges. The value of the works is estimated to be £27,534 and this could be met from the interest received in 2018-19.
- 1.4 It is recommended that the Committee approve that the resources required to update the communal areas at MacDougall Place (estimated to be £27,534) are met from the MacDougall Trust Fund.

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**2. INTRODUCTION**

- 2.1 MacDougall Place Sheltered Housing complex transferred to ACHA in 2006. The Council hold a Trust Fund in the name of the MacDougall Trust that was created from surplus sums from a bequest to Argyll County Council made by John William MacDougall to build an eventide home, subsequently varied to a sheltered housing complex, for the Ross of Mull.
- 2.2 ACHA have been in contact with the Council as they have been reviewing the condition of the communal areas at MacDougall Place and a schedule of works has been prepared for the benefit of the tenants that they would request the Trust funds.

**3. RECOMMENDATIONS**

- 3.1 It is recommended that the Committee approve that the resources required to update the communal areas at MacDougall Place (estimated to be £27,534) are met from the MacDougall Trust Fund.

**4. DETAIL**

- 4.1 Funding for the provision of Sheltered Housing at MacDougall Place, Bunessan, Mull, was provided by the bequest to Argyll County Council made by John William MacDougall. The Sheltered Housing was built instead of an eventide home for the Ross of Mull. The Court of Session agreed to this variation in the terms of the will and the remaining funds are held in a Trust Fund, The MacDougall Bequest.
- 4.2 MacDougall Place Sheltered Housing complex transferred to ACHA in 2006 and is the only Sheltered Housing facility in the Ross of Mull. In 2005, the Trust Fund paid for a lift to be installed improving access for tenants and in 2017 paid for the fire alarm system to be upgraded. Both items of work were paid from interest received on the Trust Fund.
- 4.3 The balance on the Trust Fund as at the end of financial year 2018-19 was £844,726 and the interest received during 2018-19 amounted to £29,248.
- 4.4 ACHA have been in contact with the Council as they have been reviewing the condition of the communal areas at MacDougall Place. A schedule of works has been prepared for the benefit of the tenants and ACHA are seeking approval from the Council that this is funded from the MacDougall Trust, rather than charge the tenants additional service charges. The value of the works is

estimated to be £27,534 and this could be met from the interest received in 2018-19. The schedule of proposed works and estimated costs is detailed in the table below.

<b>Works Required</b>	<b>Estimated Cost £</b>
External lighting to paths – additional light fittings to external footpaths	2,019
Handrail systems to front entrance stairs and ramp	1,500
Remove existing Charnwood heating system in common areas and replace with Quantum electric storage heaters	12,501
Electrical rewire and associated works in common areas	3,150
Remove existing communal area kitchen and replace within new kitchen including replacement hot and cold water services	3,674
Remove and replace common area floor coverings	740
Contract prelims	2,950
Contract contingency	1,000
<b>Total Estimated Cost</b>	<b>27,534</b>

- 4.5 The Area Committee on 18 December 2018 considered a report ‘Charity and Trust Funds’ and resolved that ‘no monies should be granted from either the Mrs Mellors Bequest or the MacDougall Trust until the re-organisation of the charities is finalised’. The re-organisation of the charity and trust funds is ongoing, however it has proven to be both complex and resource intensive. The Area Committee will be asked to consider proposals for the reorganisation of Charity and Trust Funds as matters progress and in the course of 2020.

## **5. CONCLUSION**

- 5.1 Works are proposed on the communal areas within MacDougall Place Sheltered Housing Complex and ACHA are seeking approval from the Council that this is funded from the MacDougall Trust Fund.

## **6. IMPLICATIONS**

- 6.1 Policy – Council require to make decision in respect of the Trust Fund.
- 6.2 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.
- 6.3 Legal – If there was an objection raised as to the use of the funds in a particular way, there is a risk that the Council could have to pay the costs themselves and repay the Trust the costs.
- 6.4 HR – None.
- 6.5 Fairer Scotland Duty – None.
- 6.6 Risk – If there was an objection raised as to the use of the funds in a particular way, there is a risk that the Council could have to pay the costs themselves and repay the Trust the costs. The level of risk is considered to be acceptable.
- 6.7 Customer Service – None.

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5 August 2019**

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