



Carnegie PhD Scholarships Terms and Conditions of Award

Background and introduction

The following Terms and Conditions of Awards cover the Carnegie PhD Scholarships, Carnegie-Cant Scholarship in Plant Science as well as the Caledonian Scholarships (henceforth referred to as the “Carnegie PhD Scholarships”-- all awarded by the Carnegie Trust for the Universities of Scotland (“The Carnegie Trust”).

The Carnegie Trust administers the Caledonian Scholarships on behalf of the [RSE Scotland Foundation](#) (RSESF). These Scholarships are awarded and held under identical conditions as the Carnegie PhD Scholarships but are under the charge and control of the Trustees of the RSESF, who retain the power to alter the rules and to change the purpose and destination of the Scholarships.

The Carnegie PhD Scholarships are awarded each year to support students (“Carnegie Scholars”) undertaking a PhD at one of the following Scottish Institutions of Higher Education (“host HEI”): the universities of Aberdeen, Abertay, Dundee, Edinburgh, Edinburgh Napier, Glasgow, Glasgow Caledonian, Heriot-Watt, Highlands & Islands, Queen Margaret, Robert Gordon, St Andrews, Stirling, Strathclyde and West of Scotland, the Glasgow School of Art and Royal Conservatoire of Scotland.

The following Terms & Conditions are organised in the following parts:

- Part I covers the general terms & conditions of the award for the intention of Carnegie scholars, their supervisors and host HEIs
- Part II covers responsibilities of the PhD Supervisors, and
- Part III includes duties and responsibilities specific to the **host HEI** where the Carnegie Scholar will be/is undertaking their PhD
- Annexes covering Sickness leave arrangements and family friendly policies relating to maternity and partner leave

The Trust encourages all parties to familiarise themselves with the full terms & conditions detailed in the following pages.

For all enquiries, please contact: phd-scholarships@carnegie-trust.org

Part I: General terms & conditions of award

A. About the Carnegie PhD Scholarships

1. Carnegie PhD Scholarships are personal awards and are therefore not transferable to a different student at the same Host HEI for any reason. Should a Scholar decline the offer of a Carnegie Scholarship, or withdraw after accepting the award, the Trust will offer the Scholarship to a candidate on its reserve list.
2. Carnegie PhD Scholarships are not tenable simultaneously with any other tuition fee or stipend award intended for the same purpose, to the exception of incidental discretionary or hardship funds or charitable grants awarded to a Carnegie Scholar for their personal or family expenses.

B. Tenure, start date and period of award

3. Scholarships are normally tenable for up to 36 months full-time or up to 72 months for part-time students, subject to satisfactory progress. If requested at the time of application and approved by the Trust in the award letter, a Scholarship may be held for up to 42 months.
4. The official start date for all Carnegie PhD Scholarships is **1st October in the year of award**, which corresponds to the payment date for the first instalment of the stipend. A delayed start may be requested in writing at the time of award, if a suitable case is made. The Trust reserves the right to cancel a Carnegie Scholarship if the Scholar fails to commence their studies within 12 months of the official start date.
5. Carnegie PhD Scholarships can be held for part-time or full-time study. Part-time study is possible with a minimum of 50% of full-time.
6. Carnegie Scholars may hold, and indeed are encouraged to apply for, research grants from their host HEI or any other funding body to support their research activities or fieldwork.
7. Visiting fellowships to undertake a period of study or research at another organisation, whether in the UK or overseas, may be held in conjunction with a Carnegie PhD Scholarship. Depending on the circumstances and financial value of the fellowship, payment of the stipend, tuition fees and/or research allowance may be temporarily suspended, in which case the end date of the Carnegie PhD Scholarships may be extended.

C. Value of the Carnegie PhD Scholarships

8. Carnegie PhD Scholarships are training awards and do not cover remuneration for duties which would reasonably be considered to constitute employment.
9. Carnegie PhD Scholarships have three components:
 - **Stipend:** the value for academic year 2021-22 is £16,800. This amount may be adjusted each year for inflation. The stipend is intended to cover the Scholar's personal expenses incurred in relation to undertaking their PhD studies.
 - **Tuition fee payment** up to the standard UKRI tuition fee rate, taking into account any alumni discount for which the Carnegie Scholar may be eligible. Any difference between the UKRI fee-payment level and what an institution charges, including international fees, **should not** be met by the Carnegie Scholar. Host HEIs are expected to waive any shortfall.
 - **Research allowance** of up to £3,000 for the full tenure of the PhD Scholarships. The allowance can be used for:
 - Travel, subsistence and accommodation expenses incurred as part of the Scholar's research, including field trips, data collection, library or archival visits, attendance of conferences, seminars or workshops.
 - Attendance at a summer school, or any other relevant training or personal development activities (expenses may include registration fees, travel, accommodation and subsistence).
 - Use of specialised services (e.g. translator or interpreter, scribe, technical assistance)

necessary to the Scholar's research.

- Small items of equipment and any consumables necessary to operate this equipment (for example, a laptop and flashdrives, printer and ink cartridges etc.).

Note: costs of consumables such as re-agents, lab supplies etc. must be covered by the Scholar's department at their host HEI. The Research Allowance is not intended to cover the cost of staff employed by the host HEI who provide the Scholar with research, technical or administrative assistance.

10. A Carnegie PhD Scholarship is a training award and is not regarded as income for income tax purposes. Additional income from other sources, including teaching, may be liable for tax. It is the responsibility of Carnegie Scholars to ensure they are aware of their tax liabilities and of any impact the stipend payments may have on benefits such as Universal Credit. **The Trust is unable to provide advice on tax, national insurance, pensions or benefits issues.**

D. Payment of the Scholarship stipend, tuition fees and research allowance

11. **The stipend** is paid directly to the Scholar's bank account. It is paid monthly, in advance, starting on 1st October. Award-holders will be notified of the payment dates at the start of each academic year.
12. **Tuition fees** are paid directly to the Scholar's host HEI on receipt of an invoice. It is the responsibility of host HEIs to ensure the Trust is invoiced for tuition fees.
13. **Research allowance:** payments are made directly to the Carnegie Scholar, who must complete, in advance, a claim form detailing the costs to be incurred. The request must be endorsed by the Scholar's supervisor before the form is returned to the Trust. The supervisor and the Scholar should explain how the expenses relate to the Scholar's research. Costs should not be incurred without prior approval from the Trust.

E. Teaching and demonstrating

14. The Trust recognises that gaining teaching or demonstrating experience will help the PhD Scholar to develop essential skills for their post-doctoral career. Where compatible with their doctoral studies, and approved by the Supervisors, Carnegie Scholars may undertake teaching or demonstrating work as long as it does not interfere with the progress of the doctorate. The amount of teaching time should be kept to a reasonable amount, e.g. no more than six hours in any week.

F. Progress Reports

15. Scholars and Supervisors are required to complete an annual progress report, by a stated deadline in July, using the link to the form on the Trust's website.
16. Payment of the Scholar's stipend may be withheld until these reports are received.
17. The Reports are reviewed by the Trust's staff who will assess the Scholar's progress. In instances where issues relating to a scholar's progress are raised the Trust may seek comment and advice from an expert (Adviser) in the relevant field. The Trust may contact the Scholar and supervisor to discuss any issues raised by the Adviser.
18. In cases where progress is deemed unsatisfactory, Advisers may be asked to make a formal recommendations to the Trust as to any remedial action, which could be undertaken to address the concerns raised.
19. On completing their studies, Scholars should notify the Trust that their PhD thesis has been submitted for examination and of the outcome of their oral examination.

G. Changes in circumstances

20. Scholars are required to notify the Trust of any circumstances lasting longer than 3 weeks that may have a negative impact on the progress of their research. In addition, Scholars must bring such a matter to the attention of their supervisors and the relevant (Graduate) School/Department at their host HEI.
21. Scholars, supervisors and the host HEIs should ensure that the Trust is informed, as promptly as practicable,

of any suspension of studies.

22. Should the Scholar wish to transfer to a different HEI within Scotland, the Trust should be notified in writing at least 3 months before the transfer date with a summary of the circumstances. If approved, this HEI will become the new host institution. Agreement to transfer to a university outside Scotland would require exceptional circumstances to have arisen.

H. Sick Leave, Maternity & Parental Leave

23. The Trust operates a policy that provides allowances to Scholars for periods of Sick Leave as well as for Parental Leave. Details of these schemes can be found in the Annex to this document.

I. Suspension of studies

24. Sympathetic consideration will be given to requests made by Carnegie Scholars, and supported by their Supervisors, for abeyance due to personal or family reasons not covered by the separate Sick leave or Parental leave policies. In these cases, suspension of an award is limited to a maximum of 12 months unless exceptional circumstances prevail.
25. Where a suspension has been granted, the Studentship end date and expected submission date will be extended by the same number of months as the period of abeyance. Payment of stipend, fees and other allowances will be discontinued during the suspension period.
26. Any request for temporary suspension must be done in writing as soon as practically feasible and approved by the Scholar's supervisor and host HEI.

J. Switch to part-time study

27. In certain circumstances, a Scholar may request continuing their studies on a part-time basis. Requests for part-time study should be approved by the Scholar's supervisor and Host HEI and submitted in writing to the Trust. If approved, the remaining award value will be distributed on a pro-rata basis.
28. Requests for less than 50% of full-time will not be considered.

K. Cancellation or termination of an award

29. Scholars wishing to withdraw from their course should initially contact the Trust to discuss the matter informally.
30. The Trust will only consider termination of a PhD Scholarship as a last resort. When a Scholar is experiencing difficulties, every effort must be made by their supervisor and university to work with the Scholar to enable the successful completion of their studies. The Trust may also wish to discuss the issues with the Scholar and the supervisor before agreeing to the termination of the award.
31. If the Scholar then decides to resign from their Scholarship tenure, the Trust should be notified in writing at least one month in advance.
32. If a Scholar completes his or her studies and submits a doctoral thesis before the end of the Scholarship tenure, the Trust may terminate the funding, giving 1 month notice.
33. If a Scholar submits his or her thesis before the end of the award, continuation of funding can be considered if the Carnegie Scholar has an agreed programme of work for the remainder of the grant period related to the publication of the research.
34. If a Scholar takes up paid full-time employment before the end of their award, the award will terminate on the date of that appointment unless a prior arrangement has been made with the Trust to transfer to a part-time award.
35. The Scholar and Supervisors are responsible for notifying the Trust of the thesis submission date and/or any new employment status.

L. Work Placements

36. Carnegie Scholars may undertake a work placement or internship where this is either directly related to the Carnegie Scholar's training, or provides valuable transferable skills and, provided this is well justified and approved in advance by their Supervisor and host HEI.
37. The placement may be an integral part of the award, in which case a suspension of the Carnegie Scholar's funded period is not required. In other cases, there may be a case for the award to be extended. However, if a placement is not directly part of their doctorate programme or the Carnegie Scholar is receiving a payment for the placement, then the Scholarship will be suspended.

Part II: Obligations and Responsibilities of PhD Supervisors

M. Provision of facilities, health and safety

38. PhD Supervisors must liaise with their HEIs to ensure that:
 - Adequate facilities and resources are made available for the Carnegie Scholar to carry out their research; this includes providing access to a workspace, work station, as well as supplying all necessary equipment and consumables at no charge to the Carnegie Scholar;
 - Research supported by a Carnegie PhD Scholarship complies with all relevant legislation and Government regulation, including that introduced while work is in progress;
 - The Carnegie Scholar carries out their research in a safe working environment, both on and off-site, that meets the requirements of health and safety legislation, and any other legislation concerning the health, welfare and rights of a Carnegie Scholar, including all relevant data protection legislation;
 - The Carnegie Scholar has access to Research Training Programmes for doctoral students providing training in generic and transferable skills.

N. Changes to supervisory arrangements and enrolment status

39. PhD Supervisors must notify their HEI and the Carnegie Trust immediately of any changes to the Carnegie Scholar's circumstances. In particular:
 - Revised supervisory arrangements (e.g. change of PhD supervisor, ongoing absence of PhD supervisor etc.);
 - Changes to enrolment status and mode of study, including temporary suspensions for health or personal reasons or changes from full-time to part-time study and vice versa;
 - Any other factors, which might affect the successful completion of the Carnegie Scholar's doctoral studies.

O. Research Ethics, Misconduct and Conflicts of Interest

40. The PhD Supervisor must liaise with their HEI to make sure that the Host HEI can meet its responsibilities in:
 - ensuring that ethical issues relating to the postgraduate research activity funded by the Carnegie Trust are identified and brought to the attention of the relevant approval or regulatory body. Before any work requiring such approval begins, approval must have been granted by the relevant body.
 - ensuring all necessary permissions are obtained before the research begins, that there is clarity in roles and responsibility between Carnegie Scholars, Supervisors and any other Third Parties, as well as investigating and reporting unacceptable research conduct.
 - Ensuring that potential conflicts of interest in research are declared and subsequently managed, and that the measures taken to manage conflicts are recorded.
 - Complying with the provisions of the Animals (Scientific Procedures) Act 1986, and any amendments, where applicable and ensuring that all necessary licenses are in place before any work requiring approval takes place.

41. The Supervisor must work with their HEI to report to the Trust any investigations and their outcomes into research misconduct associated with the Carnegie PhD Scholarship in advance of any enquiry whether informal or formal, and upon request, provide information on the host HEI's management of research integrity and ethics.

Part III: Duties and responsibilities of the Host HEI

P. Provision of facilities, health and safety

42. Host HEIs must ensure that:
- Adequate facilities and resources are made available for the Carnegie Scholar to carry out their research; this includes providing access to a workspace, work station, as well as all supplying necessary equipment and consumables at no charge to the Scholar;
 - Research supported by a Carnegie PhD Scholarship complies with all relevant legislation and Government regulation, including that introduced while work is in progress;
 - The Carnegie Scholar carries out their research in a safe working environment, both on and off-site, that meets the requirements of health and safety legislation, and any other legislation concerning the health, welfare and rights of a Carnegie Scholar, including all relevant data protection legislation;
 - The Carnegie Scholar has access to Research Training Programmes for doctoral students providing training in generic and transferable skills.

Q. Tuition Fees

43. The Carnegie PhD Scholarships include a tuition fee component payable directly to the Carnegie Scholar's host HEI on receipt of an invoice in each year of the Scholar's tenure, for a maximum of 3 years for full-time study and 6 years for part-time study.
44. It is the responsibility of the host HEI to ensure that the Carnegie Trust receives an invoice for the Carnegie Scholar's tuition fees in each year of the Scholarship.
45. The Carnegie Trust will cover tuition fees only up to the standard UKRI tuition fee rate, taking into account any alumni discount for which the Carnegie Scholar may be eligible. Any difference between the UKRI fee-payment level and what an institution charges, including international fees, **should not** be met by the Carnegie Scholar. Host HEIs are expected to waive any shortfall.
46. In the case of 42 months Scholarships, host HEIs will be asked to confirm that tuition fees will be waived for the final 6 months of the Carnegie PhD Scholarship when formally accepting the Scholarship offer.
47. Bench fees or any other expenses relating to the Scholar's doctoral studies are not covered by this award. Host HEIs are expected to waive these fees and under no circumstances should these be passed on to the Carnegie Scholar.

R. Changes to supervisory arrangements, enrolment status or mode/place of study

48. Host HEIs must notify the Trust immediately of any changes to the Carnegie Scholar's circumstances. In particular:
- Revised supervisory arrangements (e.g. change of PhD supervisor, ongoing absence of PhD supervisor etc.);
 - Changes to enrolment status and mode of study, including temporary suspensions for health or personal reasons or changes from full-time to part-time study and vice versa;
 - Any other factors, which might affect the successful completion of the Carnegie Scholar's doctoral studies.
49. Should the Scholar wish to transfer to a different HEI within Scotland, the Trust should be notified in writing at least 3 months before the transfer date with a summary of the circumstances. If approved, this HEI will

become the new host institution. Agreement to transfer to a university outside Scotland would require exceptional circumstances to have arisen.

S. Research Ethics, Misconduct and Conflicts of Interest

50. The host HEI is responsible for:
- ensuring that ethical issues relating to the postgraduate research activity funded by the Carnegie Trust are identified and brought to the attention of the relevant approval or regulatory body. Before any such work requiring approval begins, approval must have been granted by the relevant body.
 - ensuring all necessary permissions are obtained before the research begins, that there is clarity in roles and responsibility between Carnegie Scholars, Supervisors and any other Third Parties, as well as investigating and reporting unacceptable research conduct.
 - Ensuring that potential conflicts of interest in research are declared and subsequently managed, and that the measures taken to manage conflicts are recorded.
 - Complying with the provisions of the Animals (Scientific Procedures) Act 1986, and any amendments, where applicable and ensuring that all necessary licenses are in place before any work requiring approval takes place.
51. The host HEI must report to the Trust any investigations and their outcomes into research misconduct associated with the Carnegie PhD Scholarship in advance of any enquiry whether informal or formal, and upon request, provide information on the host HEI's management of research integrity and ethics.

T. Sharing of Information relating to the Carnegie PhD Scholarships

52. Host HEIs must ensure that Carnegie Scholars, Supervisors and project partners, if applicable, are made aware of what information, including personal data, is provided by the host HEI to the Carnegie Trust for the Universities of Scotland, and how that information about the Scholarship will be used by both the Trust and the host HEI, including, but not limited to:
- sharing with the Carnegie Trust any information that the Trust requests regarding the progress of the student's studies, the submission of the thesis (where appropriate), and the completion of studies;
 - providing equality and diversity data relating to the selection of nominees for the Carnegie PhD Scholarships to help assess how effective policies and procedures are in eliminating unlawful discrimination and promoting equal opportunities. The Trust may use this information for statistical purposes, on an anonymous basis only, and it will be treated in confidence and in line with all relevant data protection legislation.

Annex I: Sickness allowance

1. In cases of absences covered by medical certificates, eligible Carnegie scholars will continue to receive their normal monthly stipend payment as follows:
 - Full stipend for up to 6 months (pro-rata for part-time Scholars)
 - 50% normal month stipend for an additional 3 months (pro-rata for part-time Scholars)
 - After 9 months, payments are suspended.
2. To be eligible to receive their stipend during medically certified sick leave, Scholars must:
 - Be in tenure of a Carnegie PhD Scholarship on the first day of the medically certified illness;
 - Temporarily suspend their studies with their Host HEI;
 - Notify the Carnegie Trust of the start date for the suspension of studies and indicate a prospective return date. The Scholar will be given a Sickness Allowance Form to complete and return to the Trust as soon as reasonably possible. The latter must be signed off by their supervisor and a suitable representative at their Host HEI who will confirm the start and length of the agreed suspension of studies.
3. A Carnegie Scholar may request several periods of medically certified absence during their tenure up to a maximum of 12 months when aggregated over the length of the Scholarship.
4. The end date of the Carnegie PhD Scholarship will be extended by the same number of months as the medically certified absence, up to a maximum of 12 months.
5. The Trust reserves the right to terminate a Carnegie Scholarship if a Scholar does not return to their studies after a 12 month suspension.
6. Retrospective requests for the sick leave allowance will not be considered. The Trust will not continue payments of the stipend, research allowance and tuition fees during absences that are not covered by a medical certificate for which the Scholar has taken a leave of absence from their HEI.
7. The payment of tuition fees and research allowance will be suspended during the period of sick leave.

Annex II: Maternity and Partner Leave

This policy guide sets out The Carnegie Trust for the Universities of Scotland's ("the Carnegie Trust") policy on Parental and Partner Leave for its Carnegie PhD Scholars. Carnegie PhD Scholarships are training awards and do not cover remuneration for duties, which could reasonably be considered to constitute employment, nor does the Trust provide payments covered by relevant statutory Government legislation. The Trust does recognise that parenthood brings additional responsibilities and is keen to support Carnegie Scholars balancing their personal commitments with the pressure of completing a PhD.

Carnegie Trust aims to ensure that as far as possible Carnegie Scholars are able to combine their PhD studies and family responsibilities. The Trust values its Scholars returning to studies after Parental Leave, Partner or Shared Parental Leave and every effort will be made to support Carnegie Scholars in the completion of their PhD.

A. Maternity Leave

1. Scope and Eligibility

1. Carnegie Scholars may take a leave of absence of up to 12 months for Maternity Leave. The arrangements apply to any PhD Scholar in receipt of a Carnegie PhD Scholarship who is pregnant and whose due date falls within the tenure of their Scholarship.
2. The Leave entitlement applies both to full-time and part-time students, regardless of the length of the Carnegie PhD Scholarship.
3. There is no limit to the number of periods of Maternity Leave that can be taken during a Carnegie PhD Scholarship.
4. Scholars should provide a written confirmation from their host HEI that they are suspending their studies for the duration of the Maternity Leave.
5. Payment of tuition fees to the host HEI and payment of the research allowance will be suspended during maternity leave.
6. The end date of the PhD Scholarship will be extended to reflect the number of months taken for maternity Leave.

2. Continued stipend payments

7. Scholars who meet the following requirements are eligible for continued payment of their stipend while on a leave of absence for Maternity Leave:
 - have been a Carnegie Scholar for at least 3 continuous months before the expected due date;
 - are still a Carnegie PhD Scholar and enrolled at their Host HEI by the expected due date as well as throughout the period of maternity leave;
 - have suspended their studies due to Maternity Leave; and
 - have given the Trust at least 6 weeks notice of their intention to suspend their intention to take maternity leave.
8. The stipend payments will continue for a maximum of 9 months as follows:
 - First 6 months: full monthly stipend (pro-rata if studying part-time)
 - Following 3 months: 50% of the monthly stipend (pro-rata if studying part-time)

The final 3 months of a 12 month maternity leave would be unpaid.

3. Return to studies

9. If a Scholar decides not to return to their studies, written notice of resignation must be given as soon as possible and in accordance with the required notice under the Terms & Conditions of the Carnegie PhD Scholarships.
10. If a scholar does not return to their studies at the end of Maternity Leave, their PhD Scholarship will be terminated immediately unless there are extenuating circumstances.
11. The Trust reserves the right to recoup the Maternity Allowance paid to a PhD Scholar if the latter decides not to return, or fails to return, to their studies at the end of Maternity Leave.

B. Partner Leave

1. Scope and eligibility

1. These arrangements apply to any Carnegie PhD Scholar who satisfies the following conditions:
 - have been a Carnegie Scholar continuously by the 15th week before the Expected Due Date
 - are continuing to be a Carnegie PhD Scholar up to the date of the birth and during the period of Partner Leave;
 - will be responsible for the child's upbringing;
 - will be the biological father of the child, or the mother's husband or partner, or the child's adopter, or the husband or partner of the adopter;
 - will be the intended parent (if having a baby through a surrogacy or adoption arrangement).
2. You must contact the Trust in writing with evidence that you meet the above eligibility conditions and have notified your supervisor and your host HEI that you intend to take Partner Leave.

2. Length of Partner Leave

3. Partner Leave is subject to a maximum of 1 month, taken as a single block.
4. Leave cannot begin before the birth and must end within 2 months of the birth.

3. Notifying the Trust

5. Scholars must inform the Trust in writing of their intention to take Partner Leave before the Expected Due Date unless this is not reasonably practicable. The notification should include the start and end date of the partner leave and should be approved by the Scholar's supervisor.

4. Continued stipend payment

6. Scholars taking Partner leave will continue to receive their monthly stipend at the normal rate for the duration of their Partner Leave, up to a maximum of one month.
7. No suspension of studies is required during Partner Leave and the Scholarship end date will be amended to take into account the period of Partner Leave. In practice, under this arrangement Carnegie Scholars gain one additional month of stipend payments at the end of their Scholarship, if they are still in post. No additional funding is available for tuition fees.

C. Unpaid and Shared Parental Leave

Unpaid Parental Leave

Where an acceptable case can be made, the Trust will consider placing a Carnegie Scholarship in abeyance for the duration of a suspension of studies for family reasons not covered by the Parental or Partner leave policies.

Where a Carnegie Scholar has responsibility for the care of a child under 18 years of age and wishes to suspend their studies for such a period so as to exercise this responsibility, they should, in the first instance, agree this arrangement with their supervisor and formally suspend their studies – according to their host HEI's regulations. On being notified of these circumstances, the Trust would then agree a matching suspension of the Scholarship.

Payments of tuition fees, stipend and research expenses would resume once the suspension has been terminated and studies re-commenced. Details of the reason for the suspension should be provided to the Trust for consideration. The need to take Shared Parental Leave is one example of an acceptable circumstance for such a Scholarship suspension.

Shared Parental Leave

Shared Parental Leave enables individuals with shared responsibility for a child to share their parental and/or maternity Leave entitlement with their partner who must be eligible for Shared Parental Leave through their employer or funder (if undertaking sponsored studies) or be self-employed.

The Carnegie Trust is keen to support its PhD Scholars wishing to share parental Leave with their partner. Given the particularities of each individual Scholar's circumstances, Scholars who intend to take Shared Parental Leave should contact the Trust in the first instance to discuss how to proceed.