



# Okehampton United Charities

*Funding for the Community*

## Historical Background

The Okehampton charities date from the 15th century and have a complex history. The original four charities were comprised of properties, grouped according to their purpose and origin. The charities were managed by bodies of feoffees (*feudal term for a trustee holding land for the use of the beneficial owner*).

The four charities form the greater part of the property transferred to the amalgamated Okehampton United Charities in 1873;

1. **Ancient Town Lands.** These are the oldest of the charities. Some were associated with the Chapel of St. James, lands having been left for the saying of obits, i.e. masses for the souls of the dead. Such obits were abolished at the Reformation, and the town acquired the lands for the maintenance of the Chapel of St. James which was the Town Corporation's chapel. The Corporation appointed the chaplain, who was also the master of the little town grammar school which existed from the reign of Elizabeth until about 1800. Other parcels of the Ancient Town Lands had been left for the benefit of the town or the maintenance of the poor.
2. **Borough Lands.** Okehampton obtained its charter from James I in 1623, and the town proceeded to buy out the rights of the Lords of the Manor in the town, thus acquiring other property. The profits from these and other purchases were used by the Mayor and Corporation for the improvement of the town, the relief of the poor, and the maintenance of the Chapel of St. James and the grammar school
3. **Church Lands.** These were lands left not to the town, but to the parish church for such purposes as the saying of obits, the maintenance of divine service, the upkeep of the parish church, or the relief of the poor of the parish (as distinct from the poor of the town). The appointed feoffees handed over the profits to the vicar and churchwardens for these purposes.
4. **Common Lands.** The term means lands held in common for the benefit of both town and parish. Such lands had been left partly for the maintenance of the parish church and the relief of the poor of the parish, and partly for the improvement of the town and the relief of the poor of the town. One half of the income was handed to the vicar and churchwardens and half to the Mayor and Corporation for these purposes.

On the whole the various charities had been fairly well administered, but there was considerable friction at times between the town and parish authorities. There were difficulties with the various sets of feoffees, whilst a succession of vicars claimed possession of the Chapel of St. James. A period of neglect set in during the 18th century and there was some mishandling of funds. The grammar school was abandoned and by the early 19<sup>th</sup> century and the Chapel of St. James was in a state of near ruin and very little used. Far

worse evils were common elsewhere in the country and the government of the time appointed a Charity Commission which would investigate charities all over the country and devise schemes for their future management.

### **Scheme of 1873**

The scheme of 1873 established **Okehampton United Charities** which brought together (*united*) the four charities ie; the Ancient Town Lands, the Borough Lands, the Church Lands and the Common Lands. In addition, two other charities were amalgamated with Okehampton United Charities:

- (a) **Brock's Almshouses.** In 1588 Richard Brock left two cottages and 1 acre of land for the maintenance of two poor, decayed, inhabitants, and Grace Brock added £10 to the endowment in 1636. The charity had originally been managed by the mayor and corporation.
- (b) **Barton Barn Estate.** By a charter of 1292, Hugh de Courtenay granted the townspeople of Okehampton the right of winter pasturage over his demesne lands, a substantial area to the east of the town. By the 19th century this arrangement had become inconvenient, and a division was made by an enclosure award of 1850. The then lord of the manor received the larger part, while the town's portion was placed under the management of elected trustees for the improvement of Okehampton. The trustees handed the profits to the Mayor and Corporation for use in the reduction of the rates.

The charity had eight elected and seven ex-officio trustees and the elected trustees served for four years. The properties were divided into two groups:

- i) the **Parish and Church Lands** made up of the original Church Lands and half of the Common Lands which was accounted for separately and the income paid to the churchwardens.
- ii) the **Borough Charity Lands** comprised the remainder of the properties. £60 of the income was paid for the maintenance of divine service in the Chapel of St James which remained under the control of the trustees. The remainder of the income was split; **'four-sevenths was to be applied towards the general purposes of the Borough and three-sevenths was to be applied for the promotion of education in Okehampton, according to a Scheme to be approved by the Commissioners'**.

### **Later Schemes.**

The 1873 scheme worked quite well except in two respects: i) the control of the Chapel of St. James by the trustees led to continual disputes and ii) the trustees were reluctant to do anything effective about education, the funds being merely allowed to accumulate. Consequently the 1873 scheme was modified by later schemes:

1892 The appointment of a surveyor was authorised and the letting of lands for allotments regulated.

1906 This scheme divided the Okehampton United Charities into; **Okehampton (United) Ecclesiastical Charity** for the Parish and Church Lands, with the Chapel of St. James. The remainder was renamed the **Okehampton (United) Non-Ecclesiastical Charity** which retained a responsibility for the payment of the £60 in respect of the Chapel of St. James. It was also responsible for the administration of the Common Lands and consequently for the payment of half of the income arising from them to the Okehampton (United) Ecclesiastical Charity. The scheme also added two additional trustees to be appointed by the Parish Council of Okehampton Hamlets.

1910 The educational part of Okehampton (United) Non-Ecclesiastical Charity ie its accumulated funds and the three-sevenths income, was separated as the **Okehampton (United) Educational Foundation** with common trustees. In 1910 a scheme of the Board of Education provided for £1,500 to be paid towards the building of a Higher Elementary School (later the Grammar School), and £100 annually to the Devon Education Committee. Arrangements were made for a further scheme to be drawn up, and this was completed in 1922.

1922 This scheme for the Okehampton (United) Educational Foundation was to continue the annual allowance of £100 to the Local Educational Authority. The remainder of the income was to be used for Exhibitions (scholarships) for 'boys and girls resident in the Borough of Okehampton or the Parish of Okehampton Hamlets'.

1975 A new scheme was issued for the Okehampton (United) Educational Foundation. *The scheme provides that not more than one third of the net income shall be used to 'provide special benefits of any kind not normally provided by the local education authority for the Okehampton Comprehensive School or Primary Schools as may be agreed between the trustees and the Governors of Okehampton Comprehensive School'. The balance of the income is to be used for scholarships and bursaries, financial assistance for beneficiaries entering a profession, calling or trade; maintenance and travel allowances to pursue education; assisting in provision of facilities not provided by the local education authority; financial assistance to enable beneficiaries to study music or other arts and otherwise promoting the education of beneficiaries. Beneficiaries are defined as 'young persons who have not attained the age of 25 years'.*

This is the current scheme.

2001 A new scheme was issued for Okehampton (United) Non-Ecclesiastical Charity. The number of trustees was reduced to 13 appointed as follows:  
3 ex officio (Mayor, Past Mayor, Rector)  
4 Nominated (2 Okehampton Town Council, 2 Okehampton Hamlets Parish Council)  
6 Co-opted (Appointments to be made using a selection process by the trustees) A separate **Almshouse Branch** was created for Brocks Cottages and a **United Charity Branch** for the remainder. **The annual amount payable to Okehampton (United) Ecclesiastical Charity (£2,500) and to beneficiaries for the relief of need and**

*sickness (£1,000) were updated. The remaining income is split into seven equal parts and three parts are to be transferred to Okehampton (United) Educational Foundation and four parts are to be applied to such charitable purposes for the benefits of the inhabitants as the trustees may decide. The area of benefit was stated as 'the parishes of Okehampton and Okehampton Hamlets'.* The Charity Commissioners also clarified that this must be applied to specific projects and not paid to the Town Council as had been done in the past.

This is the current scheme.

### **Recent history (2000 to the present day)**

The majority of the land held in 1873 has been sold and the proceeds retained as a capital investment fund. By the end 1999 this had resulted in funds being held as investments of £626,000 of which £307,000 was held jointly with Okehampton (United) Ecclesiastical Charity. The remaining land holdings amount to 85 acres of which 12 acres are held jointly with Okehampton (United) Ecclesiastical Charity and there are also three allotment sites and a community garden amounting to 10 acres. Annual income for 1999 was £45,000 comprising investment income and rents from land.

2000: A field of 5 acres on Exeter Road known as Pound Park, was sold for development for £2,150,000. This had the effect of increasing annual income to approximately £100,000 per annum. In 2002 the Trustees decided to employ a Clerk with professional qualifications on a part time basis.

2003: One half of the investments held jointly with Okehampton (United) Ecclesiastical Charity, were transferred to them to avoid any conflicts over investment decisions.

At the end of 2003 it was decided to employ an Assistant Clerk. This person, based in Okehampton, would take responsibility for the allotments, almshouses and land holdings.

2004: The trustees were successful in ensuring that two fields owned by the charity at Broadpark on Exeter Road, were included in the Local Plan for residential development. One field was being used as allotments and it was decided in June 2005 to transfer the allotments to a new site on nearby land at Fatherford Road which was owned by the charity. Outline planning permission for residential development of the fields was granted in June 2005 and the property was sold to Barratt Homes for £8.1 million. The sale was completed in January 2007.

2005: The trustees decided to appoint professional investment managers to manage the charities' portfolio of investments.

2006: The trustees decided that the name of the charity was unwieldy to use and often misunderstood by the public and it was resolved to change the name to **Okehampton United Charity** which was in effect a return to the name of 1873.

At the same time the trustees resolved to drop the word 'United' from the name of the **Okehampton Educational Foundation** charity.

2009: The trustees arranged a major refurbishment of the Brocks Cottages almshouses, at a cost of just under £100,000.

2009: The trustees approved the transfer to income of Okehampton Educational Foundation investments amounting to £107,000. Extensive research had established that Okehampton Educational Foundation had never received any endowment funds and that the charity now derives its income from the three-sevenths share of the income of Okehampton United Charity.

2017: At the end of the year the capital fund of Okehampton United Charity was valued at just under £12.5 million. Land holdings were valued at £927,000 and the investment portfolio's market value was £11,571,000. The total grants awarded and allocations made in 2017 to Okehampton and Okehampton Hamlets beneficiaries, totalled £361,253 for both charities.

The administration of the charities and its properties and investments is undertaken by two employees; a part-time professionally qualified Treasurer and a full-time professionally qualified Clerk. The Clerk also provides a clerking service to two other local charities; Simmons Homes and Holditch and Others. The charities are reimbursed for this work. In addition, Okehampton Town Council and Okehampton Hamlets Parish Council contribute towards the costs of the Clerk managing the provision of the three allotment sites in the town.

The funds of Okehampton United Charity remain an expendable endowment however the trustees have adopted a strategic investment objective of protecting the capital investment fund against inflation whilst providing a long term sustainable level of income to fund grant making.

2018: The total amount of income (after administration and maintenance expenses) to be available for grant awards is set at **£383,000** divided between Okehampton United Charity £225,000 and Okehampton Educational Foundation £158,000.

The broad strategic split of the grants to be awarded is; 31% for Community projects & services, 20% for Community Recreation & Sport, 7% for supporting Creative Arts & the Museum, 19% for educational support to Okehampton College & Primary Schools, 19% for individual student Scholarships & Bursaries, and 4% for supporting Music & Arts education. The annual amounts (in accordance with the 2001 scheme) payable to Okehampton (United) Ecclesiastical Charity; £2,500 and to beneficiaries for relief of need or sickness; £1,000 are included under the Community services allocation.

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