



Okehampton United Charities

Funding for the Community

Okehampton United Charities

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*).

Four charities formed the greater part of the property transferred to the amalgamated Okehampton United Charities in **1873**;

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.

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

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.

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 19th 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.

1873: The scheme of 1873 established **Okehampton United Charities** and brought together (*united*) the four original charities and two other charities:

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.

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.

Administration

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

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.

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 and 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'**.

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: A surveyor was appointed and the letting of lands for allotments regulated.

1906: The scheme of 1906 divided the 1873 charity into;

- i) **Okehampton (United) Ecclesiastical Charity** for the Parish and Church Lands, with the Chapel of St. James and,
- ii) **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 new Okehampton (United) Ecclesiastical Charity. The scheme also added two additional trustees to be appointed by Okehampton Hamlets Parish Council.

1910: The Board of Education scheme of 1910 separated the educational part with its accumulated funds and three sevenths income as the new **Okehampton (United) Educational Foundation** with common trustees. 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.

1922: A further scheme for the **Okehampton (United) Educational Foundation** was issued 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 (which remains the current 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'.

2001: A new scheme (which remains the current scheme) was issued for **Okehampton (United) Non-Ecclesiastical Charity**.

A separate **Almshouse Branch** was created for Brocks Cottages and a **United Charity Branch** for the remainder. 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).

The scheme provided that 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 income must be applied to specific projects and not paid to the Town Council as had been done in the past.

Recent history (2000 to the present day)

Most 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 amounted to 85 acres, of which 12 acres of original Common Land which were held jointly with Okehampton (United) Ecclesiastical Charity. There are also three allotment sites and a community garden amounting to 10 acres. The total 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 residential development for £2,150,000. This had the effect of increasing annual income to approximately £100,000 per annum.

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 with 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 a sale of the land to Barratt Homes for £8.1 million was completed in January 2007.

2006: The trustees decided that the name of the charity was confusing and it was resolved to change the name to **Okehampton United Charity** (which was in effect a return to the name of 1873). The trustees also resolved to drop the word 'United' from the name of the **Okehampton Educational Foundation** charity.

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

2011: The administration of the charities, its properties and investments were managed by two employees; a part-time professionally qualified Treasurer and a full-time professionally qualified Clerk. The Clerk also provides a clerking service to another local charity, Simmons Homes. The charity is reimbursed for this work and 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.

2020: The trustees purchased from Okehampton United Ecclesiastical Charity the remaining one half share of the original Common Lands known as Kempley Meadows, at the market value of £51,000. This brought to an end the responsibility for the payment of half of the income arising from the land, to Okehampton United Ecclesiastical Charity.

2021: The trustees purchased 33 acres of land at Kempleys Barn and Tramlines alongside the East Okement river, at a cost of £701,000. The trustees made the purchase to ensure that the land is retained for recreational and educational purposes.

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.

At the end of 2021 the capital fund of Okehampton United Charity was valued at £16.2 million, with the land holdings valued at £1.8 million and investments at £14.4 million. Grants awarded in 2021 totalled £357,399.

2022: The trustees decided to update the annual amount payable to Okehampton Ecclesiastical Charity for the upkeep of St James' Chapel, to £4,500 per annum. The trustees also decided to merge Okehampton Educational Foundation with Okehampton United Charity to reduce unnecessary

administration. The 1975 scheme rules of Okehampton Education Foundation were to be managed as a designated fund within Okehampton United Charity.

2024: Trustees resolved that the charity should be converted into a Charitable Incorporated Organisation (CIO) as defined in the Charities Act 2011. The Charity Commission have approved the change to a CIO to take effect on 31st December 2024.

The CIO will have a new name; Okehampton Foundation, however the day-to-day operations of the charity will continue to use the name Okehampton United Charities, and the charitable objects will remain the same as they are now.