

## ESTATE CHARITY OF THOMAS ROGERON

The Trustees are concerned that, according to one member of the Parish Plan steering committee, Parishioners are not aware of how the Trust works, nor how it benefits the community. Whilst the large sums of money, which are annually distributed by the Trust, speak otherwise, we would like to take this opportunity to clarify the situation.

There are in fact two charities; the Estate Charity of Thomas Rogeron, Registered Number 212255 and the Hundon Relief In Need Charity, Registered Number 206373.

As with other similar local charities around the country, they are both an amalgam of a number of small charities brought together, to make administration easier. At least one of these is over 300 years old.

At one time, the Trust owned considerable amounts of land. However, much of this has been sold off over the years, although there are still meaningful holdings, such as the allotments. Obviously the main purpose of the Trust is to disperse the excess funds it receives. Much of this income is derived from interest earned on stocks and share holdings, which have been selected for their safety and reliability. That portfolio is managed by the Charity Official Investment Fund; an arrangement recommended by the Charity Commissioners

A Limited Company, operates and is managed, according to a document known as its Articles of Association; the Trust is very similar. What it may or may not do, how it should acquire or dispose of assets, to whom and in what circumstances it may make cash grants, are all set out in minute detail.

However there is a major difference between a Registered Charity and a commercial concern. The way in which the Trust is managed, how it conducts its financial affairs, as well as its overall performance, are all overseen by the Charity Commissioners. In other words the Trust is subjected to the same legislation and supervision as any other charity.

There are three main beneficiaries of the Trust: the Hundon Education Foundation, the Church, and the Relief in Need Charity, with the money being allocated according to a laid down formula. As many will be aware the Church recently used money from the Trust to extend the working life of the graveyard. The Education Foundation benefits many, from pre-school to university and beyond, whilst Relief in Need seeks to help those less fortunate than others.

Of course, it is not possible to publish anything which might lead to a beneficiary being identified. Nevertheless, we can say that recently upwards of £13,000.00 has been awarded annually to many individuals and organizations in the Parish. Naturally the amounts vary according to income which, to a very large extent, is dictated by the rise and fall of the bank interest rate and the performance of the stock market.

The Parish Plan has certainly occupied the time of a lot of

people recently. The list of "Recommendations" is most intriguing. It calls for a great number of initiatives, many of which already seem to be in place. For example, it is difficult to see how the Parish Council can be more open and transparent when we are all welcome to attend its meetings. Likewise with the Rogeron Trust, when it calls for it to "*publish its activities at least once a year*". The Trust is required, by law, to prepare an annual set of accounts and does so; these are independently audited by Ensors, at no cost to the Trust. Copies of these are already submitted to the Parish Council AGM, usually together with a short report.

As we all know, the allotments are in need of improvement. Indeed, that has been the case for decades, and that is an indication of how intractable the problem is. The difficulty is how to achieve that improvement to the satisfaction of all, without eroding the Trust's capital base. The allotments have become much less used since the end of the "Dig For Victory" campaign, although numbers have recently increased; they are now such that the Trustees can seriously consider the issue of a mains water supply. How the water supply would be managed and actually paid for on an ongoing basis, is somewhat of a problem however. The Trustees have been discussing the matter with Anglian Water and other allotment organizations for a while. It also has to be said that the Trustees have always been surprised that the allotment holders have not formed an association.

The Trust has existed for a very long time, and benefited a great many parishioners and organizations. It is a huge and valuable asset to the community and is not a toy to be played with or fought over.

Everyone has to understand that the Trust is an independent body in law; the Trustees of which are responsible only to the Charity Commissioners.

As was ever the case the Trustees receive no benefit, financial or otherwise, with even the Clerks claiming very little in the way of expenses.

Any resident of the Parish of Hundon is entitled to benefit from the Trust and all are invited to apply, in writing, through the two Clerks detailed below. Please understand that the Boards of Trustees only meet, on average, two or three times a year. Naturally all applications are treated in absolute confidence.

### **Clerk to the Trustees : Thomas Rogeron Trust**

Miss S Upson  
31 Windmill Rise  
Hundon  
CO10 8EQ

### **Clerk to the Trustees: Hundon Education Foundation**

Mr. B. Beer  
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Mill Road,  
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