

Overview of The Melton Trust for the Annual Parish Meeting 24th April 2019

It may be of interest to note that the Trust was originally called the Poor's Estate Charity (inclusive of the Bequest of James Alexander Burness). The name Melton Trust came into being on the 20th May 1991.

The history of the Trust is scanty but it appears as if the Melton Charities were derived from several sources

- 1) The Will of Richard Cook dated 12th July 1539
- 2) The Will of Richard Halifax dated 3rd July 1699
- 3) A gentleman named Histed.

These gentlemen by their Wills left certain lands and buildings which gave rise to a flow of income to benefit the poor of the Parish of Melton and the maintenance and beautifying of the Melton Church. These lands were known as "charity lands" and the income paid for church repairs and for purchasing coal for the poor.

The charity of these Gentlemen established a means to relieve hardship experienced by the people of Melton. This remains a key policy of the Trust today and while the practical aspects were established in the 16th century they have been continually updated to meet the ever changing needs of the 21st century.

The Trust today is run by a small group of local trustees including the incumbent Rector of the Parish of Melton. The activities of the Trust cover a very broad spectrum of need. Grants are given to individuals and families to relieve sudden distress particularly where specific financial help is required and no other form of Government support is available.

We also will make capital purchases for individuals in need to help improve their quality of life. The Trust has also formed an educational and learning fund to support activities within the Local Primary School where Government funds are not available. We also support community based activities within the Parish.

Where the Trust has surplus income the Trustees are very happy to support local service groups set up initiatives to improve the quality of life for those in need of help and where such help cannot be obtained through normal government or local council services.

The Trust always welcomes approaches from voluntary groups with ideas for a Dementia Friendly Melton, Respite holidays for distressed families or their carers and any help with respect to mental health in the community, help in the home or specific purchases for children with special needs.

The Trust will seek to help people with specific financial problems, debt relief and other personal issues.

One of the key objectives of the Trust is the disposal of its yearly income and even though there is much hidden poverty in the Parish it is becoming ever more difficult to get individuals to approach the Trust and even more difficult for the Trust to deal with individuals because of all the surrounding legislation, data protection and personal safe guarding of vulnerable people.

A review of our funds distribution shows a marked change over the last couple of years. Grants to organisations that act as facilitators to "families in need", is proving to be a successful strategy. A prime example is the funds provided to Melton Primary School that support a number of initiatives such as breakfast clubs, mental health initiatives, and voucher schemes for school trips, help with purchasing school uniforms etc. Not only do disadvantaged children receive a benefit but the family also benefit in the long-term

To meet these difficult times the Trust is moving its efforts to working with third parties who have access to those in need. To this end we are now commencing a search for partners and possible third party agents who can promote our resources and bring relevant need to our attention.

Some of the projects we are supporting in Mental Health are very costly and can easily absorb the majority of our income so we are now looking at partnerships with other charitable foundations where some of the higher ongoing costs can be supported by others thus providing a longer term continuing commitment which the Melton Trust under the terms of its Deed cannot do. The Trust will be piloting some of these new approaches this year.

The financial status of the Trust continues to be robust despite the turbulence in the markets in the latter half of the year. Whilst we had a negative growth in our long term funds the Fund depreciated at far less a rate than if it had been invested in the FTSE100. Our reserves remain high at £47k and our income is circa £12k. This gives a healthy backstop for fund distribution in 2019.

Despite the above The Melton Trust has had yet another very proactive year and a not unsatisfactory one with respect to meeting its obligations in the distribution of funds.

The Trust is now preparing a new strategic plan for the forthcoming years and based upon the results over the last two years we see a positive future for the Trust.

The Board continues to test new ideas and build on its current initiatives and is continually looking for new partnerships to support ongoing projects as well as providing for a more caring and compassionate community.

John D Patman
Chair Melton Trust.