

Matterdale School Foundation (charity no. 526809) Consultation on changes to the Charity Objects

Frequently Asked Questions

What is Matterdale School Foundation?

Matterdale School Foundation is a charity established in 1906 by the merger of a School, founded by Robert Grisdale, and Jonathan Murray's Educational Foundation, to support elementary education in Matterdale parish (the 'area of benefit' for the Charity). Matterdale Parish at that time was separate to Watermillock Parish; the two civil parishes merged in 1934.

What was the charity set up to do?

The Charity was set up to support elementary education in the building known as the New School, which it owned. The Charity was responsible for using any income to maintain and insure the building, with any remaining funds being used to provide prizes to the schoolchildren and books for the school library. These are the Charity's 'Objects' and are detailed in the Charity's governing document written in 1906.

Why am I being consulted?

Changes to these 'Objects' are being proposed and because of this the Charity Commission (regulator of charities in England and Wales) requires that the community is consulted. The focus for this consultation is on those living in the charity's 'area of benefit' which is the old civil parish of Matterdale, before it merged with Watermillock.

Who runs the charity?

Matterdale Parish Council is the Charity Trustee and is responsible for managing the Charity. Originally this was Cumberland County Council, then Cumbria County Council. In 2004 negotiations started for the Parish Council to take over the responsibility for running the charity and in 2015, following public consultation and a community meeting, this was agreed.

What am I being consulted about?

A charity's Objects are a statement of its purpose and what it has been set up to achieve. The Charity Trustee believes the current Objects, written in 1906 are no longer appropriate and need to be broadened for a number of reasons:

- Education and School library facilities are provided by the state.
- Details of the 'prizes' for local schoolchildren, such as for girls' needlework and for boy's arithmetic, are no longer appropriate today.
- The local community has shown a desire for a community building in Matterdale, to provide educational, recreational and leisure facilities.
- The Charity Commission has stated that the proposed new Objects are close to the original aims of the founders. (See proposed new Objects over page)

What are the proposed new Charity Objects?

The Charity Commission has drafted a document called a Scheme which, if agreed, would amend the Charity's Objects enabling the Charity to:

- 1) *advance education; and***
- 2) *to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents.***

If the Objects are changed in line with this draft Scheme it would give the Charity the power to establish a community building for educational, recreational and leisure time activities.

What happens if the Charity Objects are not changed in line with this Scheme?

The Charity would need to renegotiate with the Charity Commission.

Would 'no change' mean funds are available for local educational grants?

Not necessarily. The Charity Commission has previously indicated that the Charity would need to provide evidence that funds are not required by Cumbria County Council for improvements to schools.

Matterdale Village Hall – background:

Matterdale had a village hall for over 100 years, initially in the Old School building leased from Cumbria County Council. When the authority decided to sell the Old School, the village hall moved to the New School, however, the condition of the building meant it was of limited use or appeal.

In 2013 a public meeting voted to support the Matterdale School Foundation charity to re-establish a community building (village hall), if possible in the New School, with the former teacher's house in the same building being home for a caretaker. It was recognised that significant funds would be needed to refurbish and repair the New School building and make it fit for purpose.

In 2015 a survey of households in Matterdale showed significant ongoing support for a community building to be re-established, for a wide range of activities and community events. As a result of this the Charity trustee (Matterdale Parish Council) has been in discussions with the Charity Commission to change the Charity's 'objects' to allow a broader range of educational and community activities, including the provision of a community building.

Why was the former village hall in the Old School closed?

The limited size, inadequate facilities and poor condition of the Old School building meant it was not fit for purpose as a village hall. The freehold was owned by Cumbria County Council and leased on a yearly tenancy to the Parish Council, making it difficult to access grant funding for improvements. Compensation was paid to the Parish Council when it closed (see notes on funds over the page).

New School building – background:

The school closed in the 1970's and the building was used as a Residential Centre for children and young people until 2002/3 when it closed following the Foot and Mouth outbreak. Since then the building has been used very little. When the Parish Council became the Charity Trustee, Cumbria County Council transferred the building and around 2 acres of land, with no other cash or assets. Ongoing running costs for the building included Council Tax, electricity, water rates and repairs.

The Lake District National Park Planning Authority only gave permission for the New School building to be converted into a single dwelling on the understanding that the Charity would establish another community building.

Why was the New School not converted to a village hall?

The estimated cost to do this was a minimum of £300k and the estimated running and maintenance costs were higher than for a purpose built, new build property. Significant grant and loan finance would have been needed as the Charity had no cash and little financial resource.

What funds are available for a new community building?

The sale of the New School building and land behind it is expected to provide the Charity with **over £400k**. In addition, if planning consent is obtained as expected, the Charity has land potentially available for local housing – probably two 'affordable' and two local occupancy houses. The Charity would be left with a small area of grazing land to the rear of the Old School which may generate some additional cash in the long term.

Matterdale Parish Council itself has around **£65k** to put towards the cost of a new community building. None of this is from the precept (tax payers), the funding originates from:

- £18k Matterdale Recreation Fund – part of the assets of the Parish Council. This has built up over time from rental income from the three holdings of grazing land, formerly school recreation areas. Successive Parish Councillors have regarded this as funds to support the village hall in Matterdale.
- £25k received by the Parish Council in January 2016 as compensation for the surrender of its annual tenancy of the hall part of the Old School. This was linked to the planning consent which Cumbria County Council obtained for its use as a single private dwelling, and the use of the New School as a village hall. The Planning authority has throughout been firmly of the view that a village hall should be available in the Matterdale Valley.
- £23,883.28 received by the Parish Council in June 2016 from the committee which ran the Residential Centre in the New School building, which closed following the Foot and Mouth outbreak.

Contributions from grant funders may also be available.

What will a new community building cost?

A new community building has not yet been designed, nor has a site been decided, but it is estimated to cost at least £400k. The Charity would aim to ensure best value for money for a high quality, low energy use building.

Will the cost of a new community building use up all the Charity's funds?

This would depend on decisions made on the design, construction, equipment and landscaping for the project, and the outcome of a tendering process for work. Further community consultation would be needed to inform these decisions.

Is a site for a new community building available?

The Recreation Field, used with Matteredale School prior to its closure, is owned by the Parish Council. It is more-or-less level two and a half acre field with highway access. A planning application would be required, to include detailed design drawings and landscaping proposals. The outcome of this consultation will need to be known before the costs of applying for planning permission can be justified.

Would a new community building be financially sustainable?

The Charity believes there is sufficient demand for a new community building in Matteredale and that it would be financial sustainable. This is based on evidence from community consultation activities, the level of local interest and support shown, and the use of community buildings in the wider area. The intention is to employ a live-in caretaker / manager to develop use of the building for a wide range of educational and community purposes. A business plan would be prepared as part of the process.

Who would run the new community building?

The Charity intends to lease the new community building to Matteredale Community Association (also a charity) on a long term lease at a nominal rent. As the Charity Trustee, the Parish Council would remain the freeholder and ensure the terms of the lease are observed, including that the purpose of the building is respected, particularly its use for education.

Will there be any funds for educational grants?

It is hoped that there would be a sum which the Charity can invest, the income from which can be awarded in educational grants to residents of Matteredale Valley, in keeping with the original 'area of benefit' for the Charity. The amount of any such funds would depend on the contribution needed from the Charity to pay the cost of providing a new building.

Thank you for taking the time to read this.

**Please complete the short survey to give your views and return by
Sunday 10th June**