

The Founder's Memorandum

A first draft of a Memorandum on the proposed Trust, marked 'Exceedingly Private', took the form of a paper to Joseph Rowntree's advisers. Some of his intentions were expressed as questions; examples of possible initiatives were given; relations with the Rowntree Company were left uncertain since the form and amount of the property to be appropriated to the Trust had not been settled. But, in essentials, that first paper differed little from the Memorandum written from the founder's home in St Mary's, York, and dated 29 December 1904, which has remained the principle source of advice and inspiration to the Trustees of the three Trusts which he had decided to establish. This is what Joseph Rowntree wrote:

THE JOSEPH ROWNTREE CHARITABLE TRUST. THE JOSEPH ROWNTREE SOCIAL SERVICE TRUST LIMITED. THE JOSEPH ROWNTREE VILLAGE TRUST

I desire in the following Memorandum to indicate in general terms the considerations which have induced me to found the above Trusts. I wish it, however, to be distinctly understood that it is of no legal or binding force in any way or direction, and is not intended to restrict or extend the full discretion given to the Trustees and Directors by the legal instruments creating the Trusts, or to affect the interpretation of those instruments. I have thought, however, it might assist those who will be associated with me, and who will succeed me in the direction of these Trusts, to know the thoughts which have influenced me in their creation, and which will guide me in their administration so long as I am spared to take part in it.

It is frequently and truly said that money is generally best spent by persons during their lifetime. I have in the past, according to my power, endeavoured to act in remembrance of this. Considerably larger means have, however, come to me in later life, and the practical question was presented to me: How can this property be applied in the future so as to secure equal results to those which have might have been obtained had I had the administration of it over a lengthened period? It is a matter of great satisfaction to me that these Trusts have been established with the cordial assent of my wife and children.

It will be observed that the Joseph Rowntree Charitable Trust and the Joseph Rowntree Social Service Trust, Limited, will come to an end not later than 35 years from the date of their formulation, while the Joseph Rowntree Village Trust is permanent. The two former Trusts are, in all human possibility, likely to be mainly administered by the original Trustees, who are closely in sympathy with my general thoughts and aims, and will, I believe, give to the administration of these Trusts the same thought and direction which I should have given them myself. The Charitable Trust is established for purposes which are "charitable" in the legal sense of the word; the Social Services Trust for purposes which, though to my mind at least of equal importance to the well-being of the community, are, as I am advised, mostly outside the limits within which the law at present confines the operations of Charitable foundations, and would, if included in the former Trust, impair its legal validity. I hope that in the future those limits may be considerably widened, and that it may be permissible to include among charitable objects those which can only be attained by alterations in the law of the land. If this should be so, the Directors of the Social

Service Trust may find themselves able to transfer some of their property to the Charitable Trust. However this may be, my motives in creating two Trusts are the same. I regard the distinction between them as merely a legal one. In connection with both of these Trusts, there is one general principle that I hope will be kept in mind, namely: that the Trustees and Directors should not, except in very special cases, make grants to existing associations, but should themselves direct and guide the appropriation of the funds. Any appropriations which tended to interfere with donations or subscriptions which others ought to give should in my view be carefully avoided.

The original Trustees and Directors will be familiar with the thought which I now wish to express. I feel that much of the current philanthropic effort is directed to remedying the more superficial manifestations of weakness or evil, while little thought or effort is directed to search out their underlying causes. Obvious distress or evil generally evokes so much feeling that the necessary agencies for alleviating it are pretty adequately supported. For example, it is much easier to obtain funds for the famine-stricken people in India than to originate and carry through a searching enquiry into the causes and recurrence of these famines.*¹ The Soup Kitchen in York never has difficulty in obtaining adequate financial aid, but an enquiry into the extent and causes of poverty would enlist little support. Every Social writer knows the supreme importance of questions connected with the holding and taxation of land, but for one person who attempts to master this question there are probably thousands who devote their time and strength to relieving poverty and its accompanying evils. In my view, therefore, it is highly undesirable that money should be given by the Trusts to Hospitals, Almshouses, or similar Institutions. The objects of these two Trusts fall under three heads – Religious, Political, Social. I append a few notes as indications of my thoughts in connection with each.

RELIGIOUS

If the Charitable Trust is to achieve practical results, its income must not be too widely scattered, and doubtless objects connected with the Society of Friends will have a first place in the minds of my co-trustees as they have in my own. For the reasons stated above I should not, unless under very special circumstances, think it wise that money should be given towards the erection of Meeting Houses, Adult Schools or Social Clubs, whether in connection with Adult Schools or otherwise. The need for suitable and well-equipped buildings is so obvious, that I think it is almost to certain to be supplied. On the other hand, the need for Religious teaching to the Members of the Society of Friends of all ages, especially with a view to the fostering of a powerful Ministry, is a need which is not clearly seen, but upon the right meeting of which the prosperity of the Society will largely depend. I should, therefore, entirely approve of support to the Woodbrooke Settlement, or to kindred efforts. I should, however, regret if it were necessary to make grants on account of buildings, but should desire rather to supplement the funds appropriated for the support of a lecturing staff in order that no lack of money should stand in the way of securing the best possible teaching. It would also be in accordance with my views that grants

¹ Whilst taking this illustration from India, I hope that by far the larger portion of this fund will be spent in this country, or in the solution of problems directly connected with it.

should be made for Scholarships to the Woodbrooke or similar Settlements; although an obvious need of the kind is, I believe, less likely to require support than the object previously mentioned.

I should also approve of expenditure necessary for strengthening the periodical or other literature of the Society. The historical enquiry in relation to the Society of Friends which my son John Wilhelm is undertaking, with a view to elucidate right principles of Society action, is an object which would rightly come within the scope of the Trust.

In connection with Religious, Political and Social work, it is to be remembered that there may be no better way of advancing the objects one has at heart than to strengthen the hands of those who are effectively doing the work that needs to be done. Not unfrequently one hears of persons doing excellent work whose service is cramped, or who are in danger of breaking down through anxiety about the means of living. It would be quite in accordance with my wish that cases of this kind be assisted.

Then with regard to our Public Schools, and especially Bootham and the Mount – I doubt whether teachers of the present high calibre will be secured in the future without a considerable advance in salary. Neither the need for these higher salaries nor the supreme importance to the society as a whole, and to the individual children, of wise Quaker training, appears to be sufficiently seen by Friends, and I do not think that the working of supply and demand will secure an adequate income for the teachers. If, therefore, the Trustees saw their way to give money as to secure highly qualified men and women of moral earnestness as Teachers, without relieving the School Committees of ordinary expenditure I should quite approve of such educational grants being made. And further, if the prosperity of the Schools demanded a certain number of Scholarships for Members of the Society, I should quite approve of these.

Whilst in favour of an expenditure upon the Schools of the kind indicated above, I should not for reasons already given, think it wise to expend money upon building alterations.

POLITICAL

Perhaps the greatest danger of our national life arises from the power of selfish and unscrupulous wealth which influences public opinion largely through the press (e.g. the Opium and Drink traffic, and the South African War). If the funds permitted, and the Directors of the Social Services Trust were equal to the task, it would be quite in accordance with my wish that they should control, by purchase of otherwise, a newspaper or newspapers, conducting them not with a primary view to profit but with the object of influencing public thought in right channels.

If, commencing with an experiment near home the Trustees found that they were able, without undue strain, to undertake this work, they might possibly extend it cautiously elsewhere. This should not, however, be done on such a scale as seriously to impoverish either the Religious or Social effort.

I hope those who come after me will do their best to maintain the purity of Elections in York. For this end it may occasionally be necessary to prosecute offenders or to lodge petitions against the return of those who have been elected through corrupt means. I should wish the funds of the Social Service Trust to be available for such purposes.

Ordinary subscriptions to political organisations will, I believe, be inexpedient, but occasional crises might arise when the funds of this Trust might rightly be drawn upon. In illustration: It is said that the campaign led by Joseph Arch for the elevation of the Agricultural labourers was on the point of breaking down for want of funds, but was saved by a timely gift from Samuel Morley.

SOCIAL

The thought to which expression has already been given of the need to search out the under-lying causes of weakness or evil applies with a special force to social questions. If the enormous volume of the philanthropy of the present day were wisely directed it would, I believe, in the course of a few years, change the face of England. Perhaps there is no need more urgent in the present day than for the wise direction of social and philanthropic effort. In a semi-private Memorandum of this kind I may allude to the Temperance work in which I have been engaged as illustrative of what I mean. It was necessary to ascertain once for all the actual facts as to intemperance, its causes – legislative and social – and when these were understood, the remedies that must be applied. I hope this particular work will be carried on so long as the occasion for it lasts.

I have already alluded to the Land question. Such aspects of it as the nationalisation of land, or the taxation of land values, or the appropriation of the unearned increment – all needs a treatment far more thorough than they have yet received.

If one or other of the directors and Trustees were able to collaborate with competent investigators and workers upon these questions, it would be quite suitable for large sums to be appropriated in this direction.

The same remarks apply to the question of our Foreign policy and Imperialism.

It will be observed that the amount of money given to the Social Service Trust is larger than the value of the property with which the Charitable Trust has been endowed. This larger appropriation with the Social Service Trust is made in view of the heavy demands which the establishment or support of newspapers may involve, and also in view of the fact that while the Social Service Trust will have power to make grants towards objects which fall under the Charitable Trust, it will not be within the power of the Charitable Trust to make grants to the objects which fall under the Social Service Trust.

As already stated, the Charitable Trust and the Social Service Trust will come to an end not later than 35 years from the date of their formation. Great liberty is, however, given to the Trustees with regards to the manner in which the Trusts shall be wound up. Three separate courses are open to them:-

- (1) The Trustees have the power, during the continuance of the Trusts to make use not only of the interests but of the principal, and they might so arrange that the principal was exhausted with the term of 35 years.
- (2) If the Trustees were acquainted with men in whose judgment and integrity they had confidence, who would carry out the Trusts, either one or both of them, in accordance with the general aims of the Founder, it would be open to the Trustees, before the end of the 35 years, to create new Trusts and to hand over the property to the new Trustees with such conditions regarding the winding up of the new Trusts as they might deem fitting.
- (3) The property of the two Trusts can be transferred to the Joseph Rowntree Village Trust.

If the second course be adopted, I hope that in the selection of Trustees for the new Trusts the question of their relationship to me or to the then Trustees and Directors will be regarded as altogether subordinate to the paramount consideration of their fitness for the offices they will have to fill.

The question of the creation of a new Trust in connection with the Social Service Trust is one that ought to be maturely considered before the 35 years come to an end. This Trust may very possibly acquire Shares giving to it a predominating influence with a portion of the newspaper press, and it will be of great moment that a right influence should be secured for the future of these papers. I hope that they may sound a clear note with regard to the great scourges of humanity, especially with regard to war, slavery, intemperance, the Opium traffic, impurity, and gambling. The influence of the newspaper should also be on the side of religious liberty, Free Trade and economical government. I feel further that every measure which tends to improve the position of the great mass of the population resident in these islands is of paramount importance. It is difficult so to forecast the industrial and economic development of the country in the next 35 years as to speak in other than general terms of what this social policy should be, but if legislation is influenced by the spirit of human brotherhood and alive to the claims of social justice, the right measures for social advancement will be increasingly seen.

If the Trustees were able so to arrange that after the expiration of the 35 years, this newspaper influence should be exercised in the direction indicated above, it would, I have no doubt, be a source of great satisfaction to themselves and entirely in accordance with my wishes.

I turn now to the Joseph Rowntree Village Trust. As this is of a permanent character, its Trustees will not be burdened with any questions similar to those just discussed. I have sought, in view of the modifications of social conditions which must ensue with the lapse of time, to make the provisions of the Trust as elastic as may be compatible with adherence to the objects of the Trust as defined in the Deed of Foundation. I may be allowed to draw attention to the words in Clause 4 of the deed which say that "the Founder is specially desirous that nothing may be done under the powers hereby conferred which may prevent the growth of civic interest and the sense of civic responsibility amongst those who may live in any community existing on the property of the Trust". I should regret if there were anything in the organisation of these village

communities that should interfere with the growth of the right spirit of citizenship, or be such that independent and right-minded men and women might resent. I do not want to establish communities bearing the stamp of charity but rather of rightly ordered and self-governing communities – self-governing, that is, within the broad limits laid down by the Trust.

I began this Memorandum by saying that it was not intended to have any legal or binding force. I wish in closing it not only to repeat this disclaimer, but to express the hope that nothing I have written may discourage those who will have the administration of these Trusts, and of any new Trusts which may be created to continue their work, from entering into fields of social service which I have not indicated and which I cannot at present foresee.

Still more emphatically would I urge that none of the objects which I have enumerated, and which under present social conditions appear to me to be of paramount importance, should be pursued after it has ceased to be vital and pressing in the interests of the community.

I hope that the Institutions to which contributions are made from these Trusts may be living bodies, free to adapt themselves to the ever changing necessities of the nation and of the religious Society of which I am a member. The need of seeking to search out the under-lying causes of weakness or evil in the community, rather than of remedying their more superficial manifestations, is a need which I expect will remain throughout the continuance of the Trusts, and some of the principles indicated in the Memorandum, as to the most effective methods with regard to the appropriation of funds, are I think likely to have continued force. At the same time, realizing not only that “new occasions teach new duties”, but that “time makes ancient good uncouth”, I have given to the Trustees and Directors of these foundations, very wide powers and very few directions of a mandatory nature as to their exercise.

JOSEPH ROWNTREE
St. Mary's
YORK

29th December, 1904

Footnote

Whilst taking this illustration from India, I hope that by far the larger portion of this fund will be spent in this country, or in the solution of problems directly connected with it.