

Surname Variants

*Metcalfe**Metcalf**Medcalfe**Medcalf**Metcalf**Midcalf**Medecalf**Metecalf**Metkalf**Mydcalf**Mitcalf**Mitkiff**Meytecalfe**Matecalve**Modcalfe*

Me'cca' is phonetic
dialect for Metcalfe

Can you add to this list
from records you have
come across? Please
email
editor@metcalfe.org.uk



THE METCALFE SOCIETY
Established 1980

Chairman's Musings

Well, we are now facing the onset of the autumn here in the northern hemisphere, while those of you in the southern are probably looking forward to some respite from the cold to come. What a few months we have had with all the excitement of the Women's World Football Tournament in Australia and New Zealand. Apart from the interest in the game, the views we have seen around those two countries will surely have stimulated some of us to get out of our armchairs and visit relatives and friends 'down under'.

Today, we can travel across the world in so much more comfort than our ancestors in the family did. We can only imagine the horrors of being trapped on board a ship with everything the weather could throw at us, wondering if this would be our last day on earth (or sea). Thankfully even if we do travel by ship, it is so much safer and comfortable than even 100 years ago, and yet so many Metcalfes were prepared to face the danger of a long sea crossing and the privations of being a settler in a foreign (to them) land. And often, the journey there was only the first stage. Life in many countries from the sixteenth century onwards was difficult, but without the home comforts and support of family and friends, it must have been so much worse. Thank goodness they were made of tough stuff and so many achieved great things in their new homes.

Those intrepid Metcalfes who are happy to travel not so far, North Yorkshire will once again be the venue for our Muster an AGM on Saturday 7th October. You are very welcome to come along the meeting, it is only £5.00 – to cover the cost of the refreshments, but we would be grateful if you could complete the form below to let us know you will be attending and the numbers for the catering.

The programme this year is back up to the pre-covid level, with a number of presentations from the North Yorkshire Record Office and members,

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see the programme below. If you need more information, please feel free to contact me.

We do need to apologise to members who have had problems logging in to some of the pages on the website. This was caused by a glitch imposed by the browser and hopefully it has now been cleared and everything is running well again. Also, we have now sold out of the hard copies of the *Metcalfe – History of the Clan* volume. It is still available as an e-book, either as a download or on a .usb (£10 download, £15 usb version).

We look forward to meeting up with some of you again in the near future.

Jo Heron

Approximate timings for the Muster.

9.30 Registration

10.00 North Yorkshire Archives, Dan Soudron

11.00 Publishing your family history, Dave C Metcalfe

11.30 Tea/coffee break

11.45 Annual General Meeting (papers circulated with last newsletter)

13.00 Lunch

14.00 DNA & the Metcalfes, Dianne Fox & Martin Metcalfe

15.00 Tea/coffee break

15.15 New Image Library and website, Peter Dobson, Andy Moody

Q & A

16.30 Round up and finish.

Queries and Letters to the Editor

If you have queries about your Metcalfe family or about available resources, please email enquiries@metcalfe.org.uk, You may also wish to post it in the Mecca News: send to editor@metcalfe.org.uk . Possibly you would like to volunteer your help to members researching in areas of the country that you are familiar with or live in, or visit local record offices for them, take pictures of gravestones, houses, churches and have your offer posted here. The Society is run by volunteers and is always looking for more.

In Memorium

The committee was very sorry to hear the sad news that Mary Metcalfe (member No. 1) died peacefully on Tuesday 1st August in her care home aged 95. She had Alzheimers dementia and her daughter Sally wrote that it was very sad to see her decline after such an active life.

We send our condolences to her daughters and family together with our thanks for her foresight with Vera Adams in establishing our Society over 40 years ago. They wrote the initial letter to researchers of Metcalfe ancestors who were members of the then named Yorkshire Archaeological Society Family History Section to establish if there was any interest in forming a Metcalfe One Name Society. When it was agreed that a society should be formed she became rightly Member no. 1 jointly with her husband Alan. Her role initially was as the treasurer of the society from 1980 to 1984. She, Vera Adams and Nina Benson organised the first Muster. She features third from the right on the photo of participants which is replicated on page 3 and the back cover of 'Metcalfe Family Histories' book which we published in 2020.



Mary regularly attended our Musters especially the early ones. Several of you will remember her. When I was chairman we corresponded about her attendance at Musters and she conscientiously replied with apologies when she was unable to attend. She remained interested in the well-being of

the Society throughout her life. She was a talented and keen artist and many of us bought prints of her works at Musters which she brought along for purchase by members to enhance Society funds. I have one of Nappa Hall on my wall as I type this. She used her artistic skills to design the header of our first newsletters and our first notepaper. She subsequently designed the official society notepaper and Mecca News incorporating the Coat of Arms we have used in more recent times. Her Christmas card designs were also sold by the Society for several years.

She was able to attend one of the last musters we held 'in person' at Leyburn with her daughter before Covid 19 restrictions on live events, age and infirmity made future visits impossible.

In recognition of the great debt we owed her she was appointed, with Vera, as Vice President of the Society, a post she held until her passing. A true friend and supporter of the Society. Thank you Mary for all you did.

David Lambert

Photo: The first Mecca Muster – from Left to right: David Galloway, Margaret Metcalfe, Pat Russell, Ruth Kay, Helen Offer, Vera Adams, Nina Benson, Marian Collins, David Lambert, Mary Metcalfe, Joseph Metcalfe, David (son of Joseph) Metcalfe. Photo by David Metcalfe (son of Margaret Metcalfe). [Ed, note: Photo from David's original with some enhancement.]

George Metcalfe of Hawes, Slave Owner

George Metcalfe was Acting Governor of Dominica 1805-1808. The information provided here is from <https://www.ucl.ac.uk/lbs/person/view/1289142589> which has a wealth of sourced information including genealogical.

George Metcalfe was buried in a tomb in Hawes churchyard. The inscription reads “In memory of George Metcalfe, Esq., of Rigg House many years President of the Counsel of Dominica and Colonel of St. George’s Militia in that Island. He died on 13th February 1821 aged 63. Also of Elizabeth Metcalfe his wife, daughter of William and Margaret Davis of Gargrave in this county, who died 4th January 1846 aged 60 years.”



Early 1800s Dominica 1

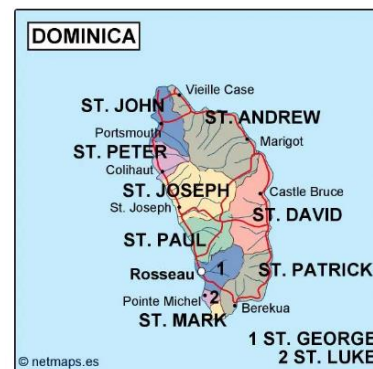
He was also a sugar plantation owner and a slave owner.

A transcription of George’s will, 21 Sep 1820, is at the above link. In part: “All real and personal property to 'my beloved wife Elizabeth' for life and at her death the Birk Rigg Estates, Rigg House Estate, Mossdale Moor Estate, Gayle Estate with all my property in Hampton Court estate and Negroes and all my Estates, Negroes and houses in the Island of Dominica to Robert Atkinson now in Richmond to Thomas Davis now in Gargrave and to Isaac Metcalfe now in London each one-third as Tenants in Common with this proviso that Robert

Atkinson & Thomas Davis assume and bear the name of Metcalf and qualify at the Heralds Office before they enter into possession.....” Photo source <http://hitchcock.itc.virginia.edu/SlaveTrade>

George Metcalfe’s Dominican Estates in 1817 had a total of 403 slaves:

Bell Hill: enslaved people: 29 female 39 male = 68
(St. George)
Brook Hill: enslaved people: 45 female 27 male = 72
(St. Joseph)
Hertford: enslaved people: 56 female 54 male = 110
(St. Paul)
Mount Morson: ensl. people: 27 female 17 male = 44
(St. John)
Picard: enslaved people: 55 female 54 male = 109
(St. John)



After George’s death, Elizabeth continued to own the Hertford and Picard Estates with most of the slaves until 1832 when the last “return” was produced. For context: The abolition of slavery in 1834 enabled Dominica, by 1838, to become the only British Caribbean colony to have a Black-controlled legislature in the 19th century.

George Metcalfe was baptized in 1757 at Birkrigg near Hawes, son of Robert Metcalfe and his wife Margaret (nee Foster). He had a brother Robert baptised at Birkrigg in 1761 and also had a sister Agnes probably born c 1755 (from Monument Inscription). Agnes Metcalfe married Edmund Atkinson in 1775 and they had a son Robert Metcalfe Atkinson (likely the Robert mentioned in George’s will).

George and Elizabeth Metcalfe did not have children. [contributed by S. Harper]

Pedestrianism



Pedestrianism was a 19th-century form of competitive walking, often professional and funded by wagering, from which the modern sport of racewalking developed.

During the late eighteenth and nineteenth centuries, pedestrianism, like running or horse racing (equestrianism) was a popular spectator sport in Britain and Ireland. Pedestrianism became a fixture at fairs – much like horse racing – developing from wagers on footraces, rambling, and 17th-century footman wagering.[1] Sources from the late 17th and early 18th century in England describe aristocrats pitting their carriage footmen, constrained to walk by the speed of

their masters' carriages, against one another. Source: By Anonymous - Illustration from Peter Piper: Practical Principles of Plain and Perfect Pronunciation, by Anonymous, Public Domain, <https://commons.wikimedia.org/w/index.php?curid=4603939>

Were any of your ancestors “Pedestrians”? Is this your relative? I haven’t found a first name for the Metcalfe mentioned below or anything about Capt. Parker but maybe one of our members will know.

THOUSAND GUINEAS MATCH—The great foot race for 1000 guineas, between Capt. Parker and Metcalf the pedestrian, was run yesterday week, a little after one o'clock, on the footpath from Bennetthorpe to the Blue Bell, over the south road at Doncaster. The Captain received 40 yards at starting out of a mile. Before they had run 300 yards, Metcalf had gained the 40 yards given, and passed the Captain, when he had all his own way, (running backwards and walking;) his opponent gave in after he had run about three parts of the distance. The winner did 1800 yards in five minutes and twenty-six seconds. Several sporting men were present, and money to a very considerable amount was bet; immediately before starting, six to four on Metcalf. The Captain was dressed in tight blue silk jacket, white cap, and buff shoes: Metcalf in pink.

Source: Newspapers.com: Leeds_Mercury_Sat_Nov 6_1824_

Women's Football World Cup

How many of us have been glued to our televisions to watch the matches in Australia and New Zealand? The women's game has proved extremely popular, fast moving and exciting, but it had a very difficult start.

The women playing football was causing a stir as far back as 1895 when Victorian ladies and girls began to demonstrate an interest in the 'beautiful game'. The first British Ladies Football Club was formed by Alfred Smith, supported by Lady Florence Dixie, a supporter of the Suffrage Movement. The first two teams were formed from adverts in the newspaper, and initially were from the London area, and although mainly in that area initially, interest soon spread. One of the London teams even had a black player. They trained two afternoons a week and played in a number of exhibition matches around the country. It was considered extremely unladylike and indecent and what we would now call their 'strip' would be considered extremely cumbersome today, although they do appear to be wearing some sort of 'bloomers' as in the pictures below of the first two teams.

But we can only imagine the backlash they faced from particularly the male population, people like the Archdeacon of Manchester who referred to the visit of the British Ladies' teams to Manchester as a 'disgrace' and was adamant that the ladies game should be banned as it was immoral. Even the British Medical Association (needless to say – all male) commented in their Journal, the BMJ 1894, *'It is impossible to think of what happens when the arms are thrown up to catch the ball, or when a kick is made with full force, and misses, without admitting the injury which may be thereby produced in the inner mechanism of the female frame. Nor can one overlook the chances of injury to breasts... in regard to the proper use of the breast, however, in the rearing of infants, there can be no doubt of the deleterious influences...'*



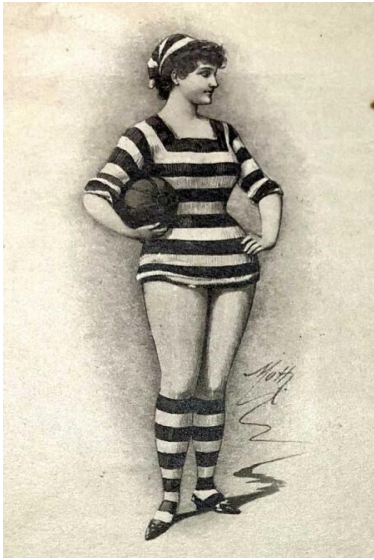
Left: British ladies Team (South) with Helen Graham Matthews, third left, who went on to have her own team. © TNA [One wonders if she was an ancestor of the great Stanley Matthews?]



Right: British Ladies Team (north) with Nettie Honeyball (?) as captain ©TNA

Helen Matthews was quoted in 'The Sketch', 9th October 1895, as saying *We object to being regarded in light of a joke. It will be a long time before the prejudice against the lady footballer dies away, but we want the public to observe our mastery of the game, not to come see us on account of the novelty... my firm opinion is that women can, if they are robust and strong enough physically, acquire a fair proficiency in Association.* It took nearly 80 years before Women's

football was accepted and now, nearly 130 years later – how true her words have turned out to be, as today, Women's Football achieves the same status as Men's.



Although their 'strip' consisted of loose fitting shirts and baggy knickerbocker trousers, long socks and caps, along with boots and shinpads completed the outfit – essentially the same as the men, there was much concern over the costume, in a period when women were expected to stay home and look after their menfolk. Ironically, one match had an attendance of 53,00 spectators,. At the time, all game profits went to charity so were outside the control of the Football Association, and it was believed that jealousy at the large number of spectators, plus the charitable donations resulted in the FA banning women's football in 1921, but they went ahead and registered the English Ladies Football Association in 1922 in defiance of the ban. A hand-written note on the prospectus says '*don't think this should ever be filed*'. The same attitude does seem to have prevailed in other nations with many banning women's

football until the late 1960's and 1970's. It wasn't until the Women's Football Association came into being in 1969 – leading the way for the Lionesses, the Matildas, the Canucks and the Ferns to come to the forefront of football today. It is easy for us to sit back and enjoy a match today, but what must those early footballers have had to go through to play a game they obviously loved.

The final word perhaps should go to the fashions with the following being the Victorian idea of the costume the ladies should have worn, as compared to the strip worn today.



Jo Heron

British Troops in Newfoundland



The first troops were sent to Newfoundland in 1697 in response the France's attempts to take the area for themselves in competition with the lucrative Grand Banks fishery. Some 299 troops of all ranks began their first winter there and, by spring the next year, 214 had died due to the harsh conditions, overwork and under-provisioning. Reinforcements were ongoing but eventually the garrison at St. John's was described as "Old, infirm and undisciplined [sic] either Men past Sixty or Boys not Sixteen".

With that in mind, it may well be that the Robert Metcalfe, Sergeant of the Blues, who was buried at St. John's Cathedral on 18th May 1765 was one of the early reinforcements or even one of the original troops. It is possible that the Sarah Metcalf, widow, also buried at the Cathedral on 3 Nov 1767, was his wife.

Were they the start of the Metcalfe families still present in Newfoundland?

A marriage was recorded Feb 12 1798 between Nicholas Metcalf & Ann Millar, at St. John's.

<https://www.heritage.nf.ca/articles/exploration/garrison-life-18-century.php>

<http://ngb.chebucto.org/>

Birth Briefs

2223 Carol Shilling

Gggd of John Daniel & Mary Ann (Mt). Mary Ann bpt.29 March 1846 East Harsley, d.o. James Mt & Anne (Megginson). James bpt 15 October 1819, East Harsley, s.o. James Mte& Sarah (Hart). James bpt 28 April 1784 East Harlsey, s.o. James Mte & Mary Jane (Croft). James bpt 1 October 1759 Hauxwell s.o. Thomas Mte & 2nd wife Elizabeth (Hillary). Thomas 1737 Hudswell, s.o. Joseph Mte & Ann (Atkinson). Joseph bpt 2 Sep 1694 Hudswell s.o. Joseph & Margaret (Kilbourne) Mte m 1 May 1681 Hudswell

Conn. M515, M624, M645, M898, M991, M1275, M1522, M1567, M1620, M1691, M1959, M1967

Apologies to Tammy Steele (M2221), we are still working on confirming your lines, complicated by two Metcalf lines. We are still waiting for returned forms from some of the new members, and hope to compete and return the information to other more recent forms in the near future.

Members are reminded that if they have found any additional information to add to their Birth Brief that they can submit it to enquiries@metcalfe.org.uk for inclusion in the database. Your little snippet may just be the extra piece of information that someone else really needs to extend their tree. If you find any errors in your Birth Brief, please let us know so that it can be corrected. Thank you.

Death of Blind Jack Metcalfe

A few days ago died, at Spofforth, near Knaresborough, aged 94, John Metcalfe, commonly called *Blind Jack*. He was born at Knaresborough in the year 1717, lost his sight when only four years old, soon after which he was instructed to play on the violin, and afterwards attended as a musician at the Queen's Head, High Harrogate, for many years, and was the first person who set up a wheel carriage, for the conveyance of company to and from the places of public resort in the neighbourhood. In the year 1745, he engaged to serve as musician in Colonel Thornton's volunteers, and was taken prisoner at the battle of Falkirk. Being soon released he returned to Knaresborough, and commenced common carrier between that town and York, and often served as a guide in intricate roads over the forest during the night, or when the tracks were covered with snow; nor was any person more eager in the chase, with the greatest avidity. Strange as this may appear to those who can see, the employment he followed for more than forty years was still more extraordinary, and one of the last to which we could suppose a blind man would turn his attention—that of projecting and contracting for the making of high roads, building bridges, houses, &c. With no other assistance than a long staff in his hand, he would ascend the precipice, and explore the valley, and investigate the extent of each, its form and situation. The plans which he made were done by a method peculiar to himself; and which he could not well convey the meaning of to others. His descendants are four children, twenty grand children, and ninety great and great great grand children.



John Metcalfe 1801 drawing above left, J.R. Smith; Statue of Blind Jack Metcalf, Market Place, Knaresborough, North Yorkshire. The device in his hand is a Viameter or Surveyor's wheel.

[https://en.wikipedia.org/wiki/John_Metcalf_\(civil_engineer\)](https://en.wikipedia.org/wiki/John_Metcalf_(civil_engineer))

At left: The Leeds Mercury Sat May 26, 1810 <https://www.newspapers.com>

The Dale that Died

- a side valley leading to a side track in research.

On my bookshelves, I have a copy of 'The Dale that Died' by Barry Crockcroft, the book of a television programme about the people of Grisedale, a little side valley off the Sedbergh to Hawes road. When I first read the book in the 1970s, I was intrigued by a photograph it contained of an agricultural worker named Joseph Atkinson, taken about 1915. The young man was so very like my father, Rowland Scargill Atkinson! In 1915 my father was schoolboy in Kendal. His Atkinson forbears came from Howgill, on the other side of Sedbergh from Grisedale. Surely there must have been some connection? But I could not see none.

Recently I reread the book, which is full of stories of the lives of farmers in Grisedale and upper Wensleydale in the early twentieth century. I noticed that the caption to the photograph reads "Joseph Atkinson of Lunds aged 20, who then moved to Mouse Syke as a hired hand." (Lunds is upper Wensleydale; Mouse Syke, a farm in Grisedale.) So he was from Wensleydale! Could he be connected to me through the Metcalfes? My father's paternal grandmother was a daughter of Ralph Tiplady Metcalfe of Bainbridge Ings near Hawes.

I went online to find Joseph's details: Joseph David Atkinson born in 1897 at High Abbotside (ie. upper Wensleydale), son of John and Isabella Atkinson. His father, John was also born in High Abbotside. Atkinson is a very common name in the north-west and there is nowhere that Joseph son of John could fit into my very extensive Atkinson tree.

The 1901 census for the farm, Shaws, North Lunds, High Abbotside, shows John and Isabella with two sons aged over twenty and three much younger ones. In between is a daughter name Frances Metcalfe aged 21. Isabella is twenty years younger than her husband and hardly old enough to have borne the eldest son. Further research showed that John was married twice (both wives were named Isabella). In 1884 he married Isabella Metcalfe, aged about 24, who brought with her to the family her 5 year old daughter, Frances.

Isabella the second was Joseph's mother. She gave her birthplace as Grisedale, so Joseph had a real connection to 'the dale that died'. Her father was Thomas Metcalf who was born in Westmorland (Mallerstang, near Kirkby Stephen). His wife Frances was born in Hawes. I enjoyed some fresh research into this family but have found no suggestion of a connection to my Metcalfes - although the Mecca Society files may know differently.

If any members belong to the family of Thomas of Mallerstang, I hope they will not mind my intrusion nor my mild amusement at some of the records:

At census date 1861 the family was living at Scale in Grisedale and Thomas was described as a retired farmer aged 36. The sons all appear as 'retired farmer's sons' which could be read in two ways, 'farmer's son' being often given as an occupation. Isabella appears as a 'retired farmer's daughter' aged 10 months. Among the sons is one named Parkin, which suggests there may be Parkins among their ancestors or were they very fond of Yorkshire parkin? Twenty years later Thomas Metcalfe (sic) was living in High Abbotside and had given up on retirement - he was now a butcher aged 57.

So I am no nearer understanding that photographic likeness: a non-paternity event which does not show in the records? or a throwback to somewhere far back in the Atkinson or Metcalfe genes? Perhaps one cannot be sure of the likeness from one small monochrome photograph. Probably just a co-incidence. . . but I recommend the book.

Judith Robinson (# 631)

Now and Then 10

INHERITANCE OF LAND PRIOR TO 1925

In previous articles I have explained how the law differentiated between real property (land) and every other kind of property (personalty), the latter being the subject of documents called testaments or the rules of distribution when there was no will and the individual died intestate.

How did the law deal with the inheritance of land held by a deceased? We are dealing with what are called 'estates'. These cover the duration of the tenure and what happened when it terminated. There were 4 estates: Fee simple, fee tail and for life, these three being what we call freehold estates with no certainty of duration and fourthly a term of years (a lease).

Tenures were held 'in fee simple' when the grant was made to the named purchaser 'and his heirs' meaning that the tenure would be inherited on the death of the tenant. It was necessary to establish who the 'heir' was and this article tries to explain how this was generally established.

Tenures held 'in fee tail' were granted by using words of limitation thus: to the named purchaser 'and the heirs of his body'. This would create a general entail. It could be further limited by requiring the heirs to be male (or less often female) only. Entails were used usually in conjunction with settlements to keep land tied up in the same family for generations. The land was inheritable following the death of the tenant but in a restricted manner. A future article in the series will deal more fully with them.

An Estate for life would be granted by using these words of limitation: 'to named purchaser 'for life' or 'for ever'.

Such inheritance was not capable of being overridden by a will and took effect by rule of law not the whim of the tenant who died.

The way in which one identified the 'heirs' of a deceased tenant holding land for an estate in fee simple could be very complicated and to explain them fully is beyond the scope of a short article such as this. However, it is possible to describe the general rules which applied to most freehold landholders.

To start with, one needs to have a general grasp of the feudal system of landholding. The King owned all the land in his kingdom and granted landholdings ('tenures') to friends and supporters (especially after the Battle of Hastings as a reward for their support). They were called Tenants in Chief, their 'Lord' being the King himself. In the Now Then Article 9, I referred to Inquisitions Post Mortem, which established by inquest, who was the heir entitled to inherit the tenure upon the death of the Tenant in Chief and the financial and practical consequences for the heir.

It was possible for the Tenants in Chief to grant land for an estate in fee simple by creating new tenures of the whole or part of the land comprised in their regal land holding, the Tenant in Chief becoming a Lord himself of his tenant (called a Mesne Tenant). The Mesne Tenant would provide services to his Lord, the Tenant in Chief, which enabled the Tenant in Chief in turn to honour his feudal services to the King. In addition fealty (the important oath of loyalty) and other feudal incidents were imposed upon the new tenant.

A Mesne Tenant himself could grant for an estate in fee simple yet another holding over the land to a new tenant and this could be repeated several times. This was called 'subinfeudation' and was the way in which land was alienated or effectively 'sold' to new purchasers by the creation of new tenures initially of manors, until it was abolished by the Statute Quia Emptores (literally 'because purchasers' the first two words of the Statute becoming its title) in 1290. It was no longer permissible for new manors to be created thereafter. Every freeman was able henceforth to sell his land.

The law of medieval inheritance from the 13th century until 1540 for tenures held for an estate in fee simple meant that they would be inherited by the heir of the deceased tenant. The tenant could not override the rules so it was not possible initially to leave his interest by will.

This was clearly not always to the liking of the tenant, so lawyers during the Middle Ages cleverly devised ways to avoid the inability to dispose of land to persons the tenant wished to prefer. Simply put, they did this by using something called a 'use'. It became normal for a land holder (A) to transfer the holding during his lifetime to another (B) with the stated intention that the latter should hold it for the 'use' (benefit) of a third party (C), not himself B, then this created what was called a 'use' (similar to what we would now call a trust). A landholder could in his will provide that the land holding should on his death not be inherited by his heir (usually as we shall see his eldest son) but rather for the 'use and benefit' of another beneficiary.

The courts of law treated the land as being owned by B, but the Chancery Courts took a different view and recognised that the land was actually 'owned' by C with the result that the 'use' could be left by will, although the land could not be. Interests in land could be transferred secretly and C in my example could evade having to comply with feudal incidents. In 1536, Henry VIII through the Statute of Uses tried to stop these 'tax saving schemes', as we might now call them. The Statute abolished 'uses' by converting them into legal estates and providing that the legal owner of land was the person for whose benefit the use was created – C in my example, making C subject to feudal incidents.

This proved to be very unpopular and in 1540 Parliament was able to pass a Statute of Wills to overcome the effects of the Statute of Uses. As a result most land held for an estate in fee simple (what we now call freehold land) could be given away by will to anyone the Testator wished, thereby avoiding the inheritance laws which hitherto stipulated who the 'heir at law' was. In 1660 the remaining feudal types of land held in fee simple were freed from inheritance laws if the testator wished to leave it (such gift of land being termed a devise) by will.

When someone died intestate or after 1540 made no mention of his land in a will, until 1833, the old common law rules of inheritance of land applied. Inheritance of land at common law followed a set of rules similar to but not identical with those which determined next of kin for the purposes of intestate succession. As a result the heir at law might be completely different from the persons who inherited the personal estate of an intestate.

Common law ascertained who the "heir" was by following certain precise rules. I briefly set out the more important.

1. To start with you needed to trace descent from the person who was last 'seised' of the land holding. This meant the person who owned the fee simple and was the legal owner in actual possession of the land. This was simplified in 1833 to refer instead to the last 'purchaser'. You identified him as being the last person to buy the land, or who was given it by gift, or left it by a will. You therefore looked at how the deceased tenant acquired his land. You would establish that their possession of the land and ownership complied with common law or, post 1833, statute.
2. One then looked at that deceased person's 'issue'. Issue meaning their children, grandchildren, great-grandchildren that is all their lineal descendants. The general rule was what is called primogeniture. Inheritance by the first born son, who survived the deceased. So you were looking to ascertain who was the oldest, living, legitimate male son of the deceased. Male issue were preferred to female.
3. You identified the males in order of their seniority of birth. The oldest male was preferred and would be the heir. Females, if there were no males alive could then inherit but females took jointly as what were called 'co-parceners'. They equally owned a specific share as co-heiresses. One did not try to identify which daughter was the oldest as they took as a class equally.
4. The issue of a deceased child, who had predeceased the deceased tenant, represented them but one applied rule 2 and 3 in selecting the heir from amongst them. So if the first born son had predeceased his father but had a son (the deceased's grandson) that grandson would be the heir and inherit the land.

A worked example might assist.

[I means the deceased tenant whose heir we are trying to identify. S1, S2 and S3 are the three sons of I. D1 and D2 are the daughters. GS1 and GS2 are grandsons of I and GD1 and GD2 the grand-daughters. They are numbered in chronological order of birth].

E.G. 1 I dies survived by S1 S2 S3 D1 and D2. The heir is S1 as he is the eldest son.

E.G.2I dies but S1 has predeceased him with no children. S2 will be the heir as next oldest male son.

E.G. 3 I dies but S1 has predeceased his father leaving two children GS1 and GS2. GS1 will be the heir as he will stand in for his father S1. Whilst there are two Grandsons only the older can be the heir.

E.G.4I dies but all of his sons have died, with no issue surviving I. D1 and D2 survive. Both D1 and D2 are the heiresses as co-parceners entitled as co-heiresses to a one half share of the land each.

E.G.5[The tricky one!] I dies after 1833 and S1 survives and is the heir. However he, S1, then dies intestate, with GS1 surviving him. The land passes to the heir of I NOT to the heir of S1 because you look for the owner of the land who was the last purchaser (see rule 1) and that was I as he bought it or was given it or inherited it by will. S1 acquired the land by inheritance following his father's death but that was not by a purchase or gift or devise by will so you have to go back up the line of descent to I who was the last purchaser donee or devisee. In my example S2 survives his brother S1 so he will be the heir of I as he is the senior surviving male heir of I. It does not matter that S1's son GS1 survives S1 he is not the heir to the land because S1 inherited the land from his father and did not buy it, nor was he given it or left it by will.

E.G.6S1 and S2 together with D1 have all predeceased I. D2 survives. The deceased siblings S2 and D1 leave children. GS1 son of D1 and GS2 son of S2. GD1 daughter of D1 and GD2 daughter of S2.

Whilst D2 survives her father she will not be the heir because there are male representatives who have priority.

The heir will be GS2 the son of S2, as he is the male representing his father, who was the only son to have surviving children. If S2 had no sons but instead had 2 daughters they would inherit as co-parceners and co-heiresses. If S1 and S2 had no issue surviving then the children of D1 being GS1 and GD1 would be co-heirs as co-parceners, since the inheritance is derived from a female not male. They share the land by standing in their mother's shoes. One of them GS1 is male so takes precedence with his sister GD1 and D2 will be ignored and not be entitled to be the heir.

5. Returning to the rules for identifying heirs, if there are no issue of the Intestate at all then you would look for the nearest lineal ancestor, the issue of a deceased ancestor standing in to represent them.

6. Paternal ancestors are preferred to female ancestors with male given preference to female once again.

So the father of the deceased tenant will be first in line to be the heir. If he is dead then his other children (the siblings of the deceased tenant) are next to be taken into account, brothers in priority to sisters, nephews in priority to nieces where brothers and sisters of the deceased have died before him, then the paternal grandfather of deceased, failing whom the issue of the grandfather of deceased (i.e. his cousins) will be taken in order of seniority. Once more rules 2, 3 and 4 applied. Only one person will be the heir unless the female line is identified as the heiress when the class will take.

7 If there were no paternal male ancestors or surviving issue then female, paternal, ancestors and their issue were next in line to be looked at.

8. If there were no paternal ancestors or their issue alive then and only then would one look at maternal ancestors and their issue with similar rules 2, 3 and 4.

9.Children tracing descent from different marriages of a common ancestor were not included in the rules so children of the half-blood did not participate until the Inheritance Act of 1833 which allowed them to be included.

The above rules for determining the heir to freehold land not left by will after 1660, were also subject to the rights of a surviving spouse. If the deceased tenant was a married man then his widow had rights of dower following his death, which could not be challenged until the 19th century when statute intervened. It must have been possible for children to have been born regardless of whether they actually were. Likewise following the death of a wife, the widower could have inalienable rights to her freehold land by virtue of 'curtesy of England' if certain conditions were satisfied. The husband only had a claim if his wife had given

birth to a child or children of their marriage, capable of inheriting the land, even if the child(ren) did not survive.

The rules for identifying an heir were also subject to variation recognised by custom. Gavelkind (applicable to land in Kent) allowed inheritance to be taken equally by all heirs of the same class not the eldest son. If there were several sons they would all be the heir to the tenure. Borough English (applicable in many parts of Sussex and Surrey) allowed inheritance on intestacy to the youngest male son not the eldest. It only applied to sons and not to other classes of heir.

All the above effectively changed with the great series of property Statutes enacted in 1925. After January 1926 all land has been held as freehold or leasehold and new intestacy rules applied. Gavelkind, Borough English, Dower and Curtesy of England were all abolished.

Next time I will deal with entails and settlements of land and how inheritance laws were modified.

David Lambert

Will of James Metcalfe of Barbados

Will of James Metcalfe; written 11 June 1697; proved 26 October 1697 Barbados and 9 January 1698 in Philadelphia. James Metcalfe Now of Island of Barbados. Merchant. Whole estate in America to wife Elizabeth who is Executrix of that portion. Legacies to brother Nicholas Metcalfe of Glandford-Bridge [Brigg] Lincolnshire, England who is Executor in England; to nephew William Sibsby [Gibsey], son of sister Elizabeth and William Sisby [Gibsey] late of Lincolne, deceased, her husband who had two other children whose names are not given; to sister Ann Bristoll; to nephews William, James and Peter, sons of brother William Metcalfe of Glandford-Bridge, Lincolnshire, England; to sister Hannah; to sister Mary Sisby [Gibsey] and to Benjamin Knight. George McKinzie of Barbados, merchant; George Joland(?) of Glandford-Bridge, Lincolnshire; William Bolton; Slevp Dolphin [sloop Doll], Nicholas Andrews, Master; Joseph Geates [Jasper Yates] of Pennsylvania, merchant. Ship Unity and sloop Philadelphia whose masters are not given, are mentioned. Witnesses: Elizabeth Dearsley, John Rye, Bridget Edgerton.

http://markhamchesterfield.com/biographies/metcjame3918_will.php

James Metcalfe's father's will:

23 June 1692. Will of Peter METCALFE, Linen Draper of Glanford Briggs, Lincolnshire.

Names sons James (see above), Nicholas, and William; daughters Hannah and Anne wife of John BRISTOW. Hannah was given his dwelling house in Brigg; gives ten pounds each to daughter DARNELLS/JANNELLS children (she must be deceased), Grandson Wm. SIBSEY; Friend George JOLLAND, Jr.; Wit: William GILLYATT, Daniel SWALLOW, William ELSTON. (Prerogative Court of Canterbury, PROB 11/410).

<https://www.genealogy.com/forum/surnames/topics/metcalfe/584/>

Bits and Bobs/Odds and Sods

Isle of Man Marriages

Civil registration began in 1849, but was not compulsory until 1878 (1884 for marriages). Records for events prior to civil registration will be found in the parish records.

Thomas Metcalf, son of John Metcalf and Isabella Faragher daughter of Hugh Faragher, married on 24 Sep 1874 at German. (FMP index of Isle of Man Marriages 1598-1950)

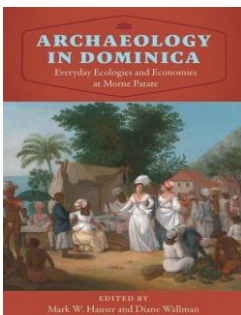
Isle of Man Baptism

Frances Clarence Metcalf born 1876 and baptised 4 Mar 1891 at Braddan, Isle of Man, born in 1876, son of William Herington Metcalfe and Elizabeth Brewer Ward (FMP index of Isle of Man Births and Baptisms 1606-1911)

Isle of Man Burial

William Hederington Metcalf, 60, born 1836, died 1896 at Douglas, Isle of Man (FMP – Isle of Man, Deaths 1877-2011)

News, Links and Books



Archaeology In Dominica by Mark W. Hauser Paper over Board | Indigo Chapters

Archaeology in Dominica examines the everyday lives of enslaved and free workers at Morne Patate, an eighteenth- and nineteenth-century Caribbean plantation that produced sugar, coffee, and provisions. Focusing on household archaeology, this volume helps document the underrepresented history of slavery and colonialism on the edge of the British Empire.

A Century of Armed Conflict in Newfoundland

By Bernard Ransom Winter 1982 <https://www.therooms.ca/a-century-of-armed-conflict-in-newfoundland>

This is a fascinating read that starts with Sir Humphrey Gilbert's annexation of Newfoundland in 1597 in order to exploit the Grand Banks fishery. Competition was from most European countries with fishing fleets.

Alida C. Metcalf, Mapping an Atlantic World, circa 1500, Johns Hopkins University Press, 2020. 224pp. incl. notes, 12 color illus., 28 halftones, 6 line drawings, ISBN: 9781421438528, \$54.95. Available as a PDF eBook at the same price.

<https://globalmaritimehistory.com/review-mapping-an-atlantic-world/>

Fully Rigged Ship/Convict Transport – the William Metcalf

<https://passengers.history.sa.gov.au/node/939237>

DNA & Australian Sources for Finding Living People

What Resources are Available in Australia?

So, you have a group of DNA matches and they obviously connect to one part of your tree. Some of these matches have good trees that are connected to their DNA and because of this, they become(?) or share(?) Common Ancestors. You can see your link to them back to your Most Recent Common Ancestor [MRCA]. Firstly, you need to confirm this link is correct using birth, marriage and death records, cemetery records, notices in newspapers and other's trees.

Some people have unconnected trees, make sure you look at their profile and check all their trees there. Often people listed their tree as private, but they may also have a public tree.

Some people have no tree or a totally private tree but also check their profile. Do they say where they live? Can you work out the year they were born, if they stated their age range on their profile? Have they put a blurb on their profile about themselves? Have they added surnames of interest? Check your female matches as they may be using their married name, can you see their maiden name in their tree? Sometimes they will include their deceased father's surname, and this will tell you what their maiden name is.

Even if they have a tree with 3 or 4 people in it and only one person is named, sometimes you only need this one person's name to build their family tree out to find your connection with them.

Use the Ancestry messaging system to contact your DNA matches, if they do not reply, which is likely try the following:

In Australia we have very strict privacy laws:

- birth indexes are closed for 100 years
- marriage indexes in Victoria are closed for 60 years, other States for longer periods
- deaths for 30 years.

Some registries open documents daily, some only at the end of the year.

We do have indexes with quite a bit of detail on them such as both parents full names however, these details vary from state to state.

Here are the links to each State or Territory's Registry Office of Births, Deaths and Marriages

Victoria <https://www.bdm.vic.gov.au/research-and-family-history/search-your-family-history> click on Search our records now and a new page opens

New South Wales <https://www.nsw.gov.au/family-and-relationships/family-history-search> halfway down the page click on Search my Ancestry and a new page opens.

Queensland <https://www.familyhistory.bdm.qld.gov.au/> start searches from this page. There are details on this page indicating years covered for the indexes.

Western Australia <https://www.wa.gov.au/organisation/departments/department-of-justice/online-index-search-tool> as per Queensland

South Australia this is the registry site to order certificates <https://www.sa.gov.au/topics/family-and-community/births-deaths-and-marriages/family-research> but for indexes <https://www.genealogysa.org.au/resources/online-database-search> you can search for free but you have to pay for extra information

Tasmania <https://www.justice.tas.gov.au/bdm/researching-family-trees> go to this page first then use the Libraries Tasmania <https://libraries.tas.gov.au/family-history/births-deaths-and-marriages/introduction/> and the Family Search website <https://www.familysearch.org/australia/>

Australian Capital Territory

<https://www.accesscanberra.act.gov.au/s/article/apply-for-a-birth-death-or-marriage-certificate-tab-related-resources> historical marriage and death indexes only;

Northern Territory

Northern Territory <https://nt.gov.au/law/bdm/search-births-deaths-and-marriages-records> no indexes online

Births, Deaths and Marriage records prior to 1870 for Northern territory are archived in South Australia <https://guides.slsa.sa.gov.au/bdm/NTbdm>

There are indexes for Australian records on Ancestry.com but the indexes at the registries often contain additional information and you can search and look in totally different ways than on Ancestry. Not all registries have indexes online.

We have another great resource for finding death notices called the **Ryerson Index**.

The search page <https://ryersonindex.org/search.php>

The home page with details of what the index covers <https://ryersonindex.org/index.htm>

How to find some of the papers mentioned in these notices:

The two main newspaper groups have Tributes online.

<https://www.mytributes.com.au/>

1. News Corp's 15+ national print mastheads like Courier Mail, Herald Sun, Daily Telegraph and The Advertiser have historical records dating back over 20 years.

Major newspaper in Melbourne, Victoria <https://www.heraldsun.com.au/tributes/aboutus/>

2. The other group of newspapers you must search individually.

The Age <https://tributes.theage.com.au/obituaries/theage-au/>

Sydney Morning Herald <https://tributes.smh.com.au/obituaries/smh-au/>

WAtoday <https://tributes.watoday.com.au/obituaries/watoday-au/>

Canberra Times <https://tributes.canberratimes.com.au/obituaries/canberratimes-au/>

Newcastle Herald <https://tributes.newcastleherald.com.au/obituaries/newcastleherald-au/>

TROVE is the source of **historical newspapers** in Australia <https://trove.nla.gov.au/>

and the link for how to use TROVE <https://trove.nla.gov.au/help>

Don't just search names, try addresses your relatives lived at.

Other newspapers online via Google News <https://news.google.com/newspapers>

Melbourne papers: The Age goes up to 1980 but there are some gaps

Sydney papers: Sydney Morning Herald goes up to 1980 but there are some gaps

Electoral Rolls – Ancestry has the rolls for each state, except South Australia, up to 1980 not every year but very useful. I normally look for the parents and then start looking for any children at the same address when they get to 21 years old up until the voting age changed in Australia to 18 years which was in 1973.

AEC the Australian Electoral Commission still have a few offices around where you can go and search the current Electoral Roll.

Any questions or queries about this please send them to agentaus@metcalfe.org.uk



The Metcalfe Society

Registered Charity no. 1000879

Annual General Meeting and Muster

Saturday October 7th 2023 – Attendance form

By arranging a meeting 'online' as well as live, we appreciate that some of you have not given us an email address, which we assume means that you might not have access to the internet. To ensure that you can still have your say, we will be offering you the chance to vote on agenda items by appointing the Chairman your proxy. The proxy form will be sent out with the next Newsletter in September so that you register how you would wish to vote on those items where a vote is to be taken if you were able to attend in person.

In the meantime, so we can make arrangements for catering at the event, or arrange the online meeting, we would be grateful if you could complete the form below. We are charging £5.00 for those attending to cover the cost of teas and coffees during the day. You can send a cheque to the address below or pay on the day.

You will need arrange your own refreshments for lunch. For Attendees, the hotel can supply pub lunches or more substantial meals, but we would request that you order your preference at the Reception Desk, before the event, in case time is short at lunchtime. The meeting is on a Saturday and it is a market day in Northallerton. Alternatively, there are plenty of shops, cafes and other food outlets on the main street.

..... (CUT HERE)

IN ORDER THAT WE CAN COMPLETE THE ARRANGEMENTS FOR THE MUSTER,

ARE YOU INTENDING TO ATTEND IN PERSON

(£5.00 to cover cost of teas and coffees, we will need to order numbers before the event)

☐

ARE YOU INTENDING TO JOIN THE EVENT ONLINE

(Details of the link will be sent to you nearer the date)

☐

Please tick/delete as appropriate.

Please complete details below, sign and return by 22nd September 2023 if you are hoping to attend in person, or by 1st October 2023 if you are hoping to attend online.

NAME: **MEMBERSHIP NO:**

ADDRESS:

EMAIL ADDRESS:

SIGNATURE: (I hope to attend)

OR PROXY CONSENT SIGNATURE:

Please sign and return the form before the date above to Jo Heron 17 Bailey Walk Wakefield WF4 3QW or send a scanned signed copy to membership@metcalfe.org.uk



The Metcalfe Society

Registered Charity no. 1000879

ANNUAL GENERAL MEETING

11.45 a.m. BST Saturday, 7th October 2023

The meeting will be held in person and online using ZOOM

Proxy Form

This year, we are returning to a live meeting with, we hope, a good number of you attending in person. However, we do appreciate that not every member will be able to attend, so we are organising for the meeting to be held as a hybrid of live and online. Also arranging a meeting 'online' we appreciate that some of you have not given us an email address, which we assume means that you might not have access to the internet. You can still have your say, by using the proxy voting form below which will allow the Chairman to hold your proxy vote for use at the meeting. The form below means that you can register how you would wish to vote on those items where a vote is to be taken if you were able to attend in person.

Please note that you can send in a proxy form at any time up to the date below, but if you are able to attend the meeting in person or online, your proxy vote will not be counted. Either complete your details and vote in the spaces provided and post to 17 Bailey Walk, Wakefield, WF4 3QW or scan by email to chairman@metcalfe.org.uk

----- (CUT HERE) -----

PLEASE COMPLETE DETAILS BELOW, SIGN AND RETURN BY 1ST OCTOBER 2023.

NAME: _____ MEMBERSHIP NO: _____

ADDRESS: _____

EMAIL ADDRESS: _____

SIGNATURE: _____ (I hope to attend)

OR PROXY CONSENT SIGNATURE: _____

Please tick the appropriate boxes if you want to appoint the chairman as your proxy.

Item	Short Description	Vote For	Vote Against
	Approval of Minutes	[]	[]
	Recommended subscriptions	[]	[]
	Elections	[]	[]
	Chairman: Jo Heron	[]	[]
	Treasurer: Peter Dobson	[]	[]
	2 Other Officers:		
	David Lambert (Trustee)	[]	[]
	David Metcalfe (Trustee & database)	[]	[]
	Appointment of Independent Examiner	[]	[]
	Acceptance of reports	[]	[]

TO VOTE, TICK THE BOXES AS PREFERRED. THE CHAIRMAN WILL HOLD YOUR PROXY TO VOTE UNTIL NECESSARY. More information on following page.

Please sign and return the form before **28th September 2022** to Jo Heron 17 Bailey Walk Wakefield WF4 3QW or send a scanned signed copy to membership@metcalfe.org.uk

SOME FURTHER DETAILS OF THE ONLINE AGM.

We would like as many of you as possible to register to attend the virtual AGM. To register please complete the form at the foot of the preceding page. We need your membership details including, crucially, your email address and your signature. Please note that if you intend to join the meeting virtually you do NOT have to give your proxy to the chairman. You might nevertheless want to do so in case you are unable to join the meeting. We will check on the day those who are online against the list we will have of those who have registered as intending to do so. Those online will not have their proxy votes included in the vote; voting will be on a virtual show of hands.

To register you can either scan the completed form or post it back to Jo Heron, whose email and postal addresses are shown at the foot of the preceding page.

We are intending to use Zoom to provide the meeting technology. Once you have registered with us, we will email you nearer the 1st October (probably 2 or 3 days before) with a username and passcode to allow you to join the AGM. You will be given then further details of where to find and how to join the meeting. The meeting is encrypted by Zoom. You should be able to see and hear the participants. You will not need to pay any fee to join the meeting.

PROXY FORM

This part of the form is for use by those who will not be participating online on the day for whatever reason. By signing the proxy you will be taken to be 'present' for the purposes of the quorum and to be in attendance at the meeting. You are asked to indicate a voting preference on those proposals which require a vote. You can still give the chairman a proxy but allow her to vote as she sees fit if you wish. To do that you should not tick any of the preference boxes.



AGENDA FOR THE ANNUAL GENERAL MEETING**TO BE HELD SATURDAY 7TH OCTOBER 2023 AT 10.00 BST**

**in the Mowbray Suite at the Golden Lion Hotel, 114 High Street, Northallerton,
North Yorkshire.**

Chairman's Opening Remarks

- 1.** Apologies for Absence
- 2.** Minutes of the meeting from 1st October 2022
- 3.** Presentation of the Accounts (Peter Dobson)
 - a. Treasurer's Report
 - b. Appointment of an Independent Examiner Mr. Ian Wright FCA
 - c. Subscription recommendation for 2024 - no change recommended
- 4.** Election of Officers
 - a. Chair (and Trustee): Mrs. Jo Heron (JH)
 - b. Treasurer (and Trustee: Mr. Peter Dobson (PD)
 - c. Two Trustees: Mr. David Metcalfe (DM) and Mr. David Lambert (DL)
 - d. Additional Committee members. We would like to encourage members to take an active part in the organisation of the Society. Can you spare a couple of hours a week/month to assist the Committee? Please contact chairman@metcalfe.org.uk for details..
- 5.** Reports to be circulated before the meeting:
 - a. Membership (JH)
 - b. Archivist (Liz Waller)
 - c. Database (DM)
 - d. DNA (Martin Metcalfe)
 - e. Publications & Promotion
 - i. Sales (JH)
 - ii. Federation of Family History Societies. (DL)
 - iii. Northwest Group of FHS. (DL)
 - iv. Yorkshire. Group of FHS. (JH)
 - v. Guild of One Name Studies (PD)
 - f. Newsletter (SH)
 - g. Social Media (Lesley Longworth)
 - h. Wills (JH)
 - i. Australian Hub (Dianne Fox)
 - j. Canadian Hub (Susan Harper)
 - k. American Hub - Agent required
- 6.** A.O.B.
- 7.** Date of AGM 2024

The Metcalfe Society**Receipts & Payments Accounts**For the Year ending 5th April 2023

	General Fund	Restricted Fund	Total Fund	Previous Year
	£	£	£	£
Receipts				
Memberships	2005	0	2005	3275
Donations	115	0	115	0
Gift Aid	246	0	246	231
History of the Clan	544	0	544	784
Metcalfe Family Histories	0	0	0	753
Other Sales	140	0	140	82
Muster Refund (Deposit 2020)	0	0	0	300
DNA Project	0	0	0	0
Interest Received	19	0	19	6
Total Receipts	3069	0	3069	5431
Payments				
Newsletter Production & Distribution	0	0	0	0
AGM/Muster - Venue Hire	0	0	0	0
AGM/Muster - Expenses	65	0	65	0
AGM Muster 2023 - Venue Deposit	0	0	0	0
Fairs & Exhibitions	80	0	80	0
Web Site Updates	28	0	28	0
Website Fees	273	0	273	94
Image Library Development	0	800	800	0
Wills project	0	0	0	0
Metcalfe Family Histories	0	0	0	0
Storage	300	0	300	300
Committee Costs	0	0	0	0
Archivist/Research Costs	0	0	0	300
DNA Project	0	0	0	0
PayPal Costs	51	0	51	86
Sales Costs & Purchases	257	0	257	295
Admin Costs (inc leaflets)	14	0	14	42
Affiliation Fees - GOONS/FFHS/YGFHS/YNP/NWGFHS/	348	0	348	179
Accountancy	210	0	210	210
Insurance	130	0	130	121
Total Payments	1757	800	2557	1627
Net Surplus/Deficit	1312	-800	512	3804

Statement of Assets & Liabilities for year ending 5 April 2023

Assets	£	£
Stock		4514
Cash Funds		
Barclays Bank	14775	
Scottish Widows	5642	
Pay Pal	509	20926
Total Assets		25440
Liabilities		
Memberships in advance		695
Total Liabilities		695


P. DOBSON
Trustee + Treasurer
on behalf of
The Metcalfe Society
6 June 2023

THE METCALFE SOCIETY**Independent Examiner's Report to the Trustees of The Metcalfe Society**

I report to the trustees on my examination of the accounts of The Metcalfe Society (the charity) for the year ended 5 April 2023.

Responsibilities and basis of the report

As the charity trustees of the charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. Accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. The accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report to enable a proper understanding of the accounts to be reached.

Ian Wright

I Wright FCA
Chartered Accountant
15 Stretton Drive
Southport
PR9 7DR

Dated: 29th May 2023

The Metcalfe Society Financial year 2022-23 (Ending 5 April) Year End Comments**Receipts**

- Memberships reduced (see Secretary's Report).
- Donations refer to overpaid memberships (at the old rate).
- Gift Aid similar to previous year based on memberships paid January 2022. Next Gift Aid repayment will be smaller.
- Sales (see Sales Report).
- Interest. Received from Scottish Widows increase in rates during year.

Payments

- Website Updates. Changes to software.
- Website Fees. Charges for hosting Metcalfe Website.
- Image Library. Cost of developing new website by Sleepy Frog Designs at a reduced rate.
- *The monies for this development have been provided by the legacy from the family of William M D Roe a former member from the USA. It is as such a restricted fund (ie available only for agreed projects). Currently there remains £2699 from the legacy.*

The Society's current financial position is satisfactory based on shown reserves. However, attention should be given to the ability to raise additional funds for any future projects.

Peter Dobson

Trustee & Treasurer 8 June 2023

Report of the Trustees for 2022-23

In order to comply with our charity law obligations I set out a report on the Society's activities for the year ending 5th April 2023, with some updates. The Society was founded in 1980.

Membership is open to anyone, who is interested in learning about the Metcalfe family in all its variants spellings or who wishes to find members with the same Metcalfe ancestors. The Society has a written constitution, which regulates how we operate. The Trustees of the charity are its officers, who are elected annually by the members at the AGM. The Trustees elected at the AGM on 1st October 2022 continued to work for the Society and to guide and advise on Society matters. We were delighted to welcome several members from overseas to the AGM, joining online. With many of the activities still in abeyance due to the pandemic, we found it easier to hold our Committee meetings online, and this we have continued to do. It has enabled us to extend the attendance at meetings of the Trustees and the Committee to include our Agents in Australia and Canada to our mutual benefit. Unfortunately, we have not been able to attract a member to act as our liaison in the United States, but we remain hopeful.

The Trustees consider that they have complied with the obligation to ensure that the 'charitable public benefit test' has been met during the year. We have continued to collect genealogical data and information about the Metcalf(e) family and disseminated it in a number of ways: via our regular bi-monthly newsletters; the Society's website, where members can research by searching the databases; answering enquiries raised directly with us and by the general public at events such as the Family History Federation (FHF) online Really Useful Show, in which we participated; by our archivist who assists members to find links to other members; by selling our publications including our 'Metcalf: History of the Clan' book and our latest publication entitled 'Metcalf Family Histories'. The Society has continued to develop links with the FHF and now retail membership and goods through their Parish Chest facility, as well as having a representative on their Committee and on the various information sessions they have set up. We have continued to attend meetings of the FHF Groups in the North West and Yorkshire when available, and build links with the Guild of One Name Studies. We again attended the live Family History Fair in York in June, when we were able to connect with those members that also attended, pick up some new memberships and answered queries from members and visitors. Our Facebook page continues to have a large number of followers although some will ask questions impossible to answer with so little available information. Sales had slumped for a long while but do seem to be picking up again more recently, and we are looking for new products to retail.

Our website has long been in need of updating, and we are still working on that, along with aiming to introduce a new Image Library at the next Muster. In the meantime, we continue to collect and collate information on Metcalfes around the world. Following the retirement of our Newsletter Editor, the post has been taken over by our Canadian representative – with excellent results, continuing the strong tradition set by her predecessors.

Membership of the society is primarily in UK but we have over 70 overseas members. Our agents Dianne Fox (Australia) and Susan Harper (Canada) whose work on our behalf is much appreciated. So too is Peter Dobson's role as treasurer, ensuring we remain solvent and able to fund our activities. His report on the accounts accompanies this report along with committee members' reports on their activities. Yet another busy year.

We will continue to look for new ways to attract new members and serve those who have remained loyal to the Society for so many years.

Jo Heron, Chair
David Lambert, Trustee

Peter Dobson, Treasurer
David Metcalfe, Database manager

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I hope you have enjoyed reading this newsletter. If you have any comments, research questions or articles you wish to contribute, please contact editor@metcalfe.org.uk

If you use social media, please 'like us' on [Facebook](https://www.facebook.com/metcalfe.org.uk) to keep up to date on our news and events.

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