Quaker governance update

Quaker Life Network newsletter

Issue 14: Winter 2026

1. Welcome to Quaker governance update



Photo by John Price on Unsplash

Welcome to the issue 14 of Quaker Governance Update, winter 2026. This channel is for information relevant to Quaker trustees, treasurers and other Friends involved in Quaker governance.

If you have questions about any of the items in the newsletter or about any other governance of finance related issue please get in touch with Quaker Life, **supportmeetings@quaker.org.uk**.

2. Quaker Governance support and guidance

2.1 Governance Annual Return

The **Quakers in Britain (QiB) Annual Return form is now live**. It is a new form on a different platform but asks that same questions as it has in previous years. The functionality may be slightly different to previous form but it should work in a fairly similar way. It has been tested, but as it new to this platform there may be something we have missed. If you find something that doesn't work, please add me a message in the free-text box at the end or send me an email, **oliverw@quaker.org.uk**.

As in previous years we would like just one submission from each charity and we ask for this to be coordinated by the Clerk to Trustees. There is a set of **Quaker annual return questions** that you can look at in advance to help you gather the required information. Once you have all the information the form will take around 20-30 minutes to fill in.

This year we have extended the end-date for responses to help you plan gathering the data a bit better. We are asking that all charities send an entry by **31 March 2027**.

Please ensure that you fill in the online survey / form linked above. If you send back a completed copy of the Word question set we can't use those responses and we will ask you to complete the survey as well.

2.2 Reminder: Sending in TARA documents

Most charities should have submitted their annual return to the Charity Regulator, with the exception of a small number of charities whose reporting year does not begin and end in January and December. Please make sure you know when your reporting deadline to the regulator is and submit on time. When you have completed your Regulator Annual Return and submitted or made your Trustees Annual Report and Accounts (TARA) available on your website, please also email a copy to **supportmeetings@quaker.org.uk**. Please **DO NOT** send TARA documents in the post to QiB at Friends House, Euston as we no longer store any paper copies there.

Abbreviations: CC – Charity Commission; CLAS – Churches' Legislation Advisory Service; BYM – Britain Yearly Meeting; LM – local meeting; AM – area meeting; ACAT – Association of Church Accountants and Treasurers; OSCR – The Office of the Scottish Charity Regulator; YMG – Yearly Meeting Gathering; QLCC – Quaker Life Central Committee

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2.3 Charities SORP 2026



Many of you will have finished your reporting on your most recent financial year and will be starting to think about the next cycle. If your AM or Quaker charity uses accruals accounting, the next set of accounts that your charity prepares will need to follow the guidance from the Charities SORP (Statement of Recommended Practice) 2026. The full charities SORP is available to download online at **www.charitysorp.org/download-a-full-sorp**. And the previous version of the SORP is also available.

There are a few changes that we think will affect Quaker charities which I have listed below.

- **The new three-tier reporting framework**
- Simpler rules on what is required to be reported in your Trustees Annual Report (TAR)
- Changes to Financial Statements and Technical reporting on non-exchange transactions

An article is being written on these changes to expand on what each of them means for your charity reporting, and which tiers in the new structure they are relevant to. This will be published in January 2027 in time to help your TARA preparations.

Changes to accounts and examination requirements (England & Wales)

As well as changes to the SORP there have **been changes to the thresholds and requirement for independent examination and audit**. These changes came into effect on **30 September 2026** and affect all charities who are regulated by the Charity Commission.

2.4 Excepted (church) Charities



Charities excepted from registration with the Charity Commission, or Excepted Charities now have a little over 4 years to register. This week Civil Society Media is reporting that the **Church of England in seeking to have that deadline extended**.

There are a small handful of Quaker AM charities that still have Excepted status. As things are going it looks likely to be very close to having all of those register them self or register as part of one of the single charity pieces of work that are already in process in various parts of the yearly meeting.

There are limited ways that a charity could gain Excepted status, being a church charity is one of those. We are not sure whether there are other church charities, such as Quaker regional or general meeting charities, that were granted Excepted status. These may still function in some way or could be essentially defunct even if the charity still exists. These charities are no longer part of the formal Quaker structure, but we are encouraging Friends to find out if any of those charities still exist and either close them and transfer their assets to another body, or ensure that if they are still active, registration is considered.

If you think there may be a charity in your region that may have been Excepted and still exists but are not sure, do get in touch to arrange a conversation to talk through what you might need to do. Contact **supportmeetings@quaker.org.uk**.

2.5 Signing the Quaker charities MoU

There has been an update to the Quaker charities Memorandum of Understanding (MoU). The update was made because of the following three things, each of which meant that the previous version had become out of date.

1. Since Meeting for Sufferings has been laid down, all places where Meeting for Suffering was named in the MoU have been replaced with either; Yearly Meeting (YM), or Agenda Planning Committee (APC).
2. The original version of the MoU had not included reference to the Quaker Life Approvals Panel (QLAP). This is a body that is convened when an individual's DBS certificate is returned 'blemished'. QLAP discerns whether the information on the DBS prevents the individual from doing work with children or adults at risk. This is not a new process, but it is now reflected in the text of the MoU to give a more complete picture of safeguarding arrangements.
3. The law has changed in Scotland on charities reporting on notifiable events. This is when a charity has had to deal with a significant event or incident. The Office for the Scottish Charity Regulator's (OSCR) approach is now less onerous for charities than it had been previously and so the MoU needed to reflect the change.

Trustees are being asked to look over the new document, which is linked below alongside a link to the current document so you can see the changes. If your trustee body is willing to agree the new text please send a minute of agreement to, **drc@quaker.org.uk**, by **31 December 2026**. Please note that if you do not return this, your organisations will be considered to have left the MoU.

New MoU text: www.quaker.org.uk/documents/quaker-charities-mou

Original MoU text: www.quaker.org.uk/documents/memorandum-of-understanding-february-2024

2.6 Changes in Church Governance

Quaker faith & practice

At Yearly Meeting on 21 November, further changes were agreed to the text of *Quaker faith & practice*. There are changes relating to Crynwr Cymru – Quakers in Wales, Quaker Life Representative Council and the Annual Conference of Treasurers. The details can be found at **www.quaker.org.uk/documents/yearly-meeting-2026-november-qfp-amendments-paper**, updated by Yearly Meeting minute.

These changes will be made on the web version **https://qfp.quaker.org.uk** in due course. Michael Booth, Church Government Adviser, can be approached with your questions, **qfp@quaker.org.uk**

Our Quaker Way

The draft of *Our Quaker Way* has been launched. However, Quaker faith & practice remains our Book of Discipline and the regulations in that book remain current. So, this is to confirm that there is no change to our governance arrangements. Information about Our Quaker Way can be seen at **www.quaker.org.uk/newbook**.



2.7 Protecting charities from extremist abuse: consultation



Source, CLAS applies to England & Wales

The Government has announced a consultation on proposals to strengthen the Charity Commission's powers to tackle extremist abuse of charities by trustees and senior managers.

The proposals extend the list of offences that automatically disqualify a person from acting as a charity trustee or senior manager. Under existing powers, we know that many Friends serving as charity trustees or senior managers already face disqualification if charges brought against them in connection with support for the proscribed organisation Palestine Action are upheld. We believe it should be up to charities themselves to decide whether their conviction makes them a threat as a trustee or member of staff, so we are opposing extending the list.

In addition, the proposals would give the Commission new discretionary powers to disqualify an individual whose behaviour falls short of a criminal offence but who, in its opinion, has promoted violence or racial or religious hatred. It will also be able to decide whether someone who has been deprived of citizenship, or excluded from entering the UK, should be similarly disqualified.

We are encouraging Friends who have views on how they, or charities they serve, are affected by existing or extended powers to complete the consultation.

The consultation is open for both individuals and organisations to respond to, and we hope to encourage as many Friends as possible to take part. Quakers in Britain is drafting text that could inform your response. We are aiming to have it ready as far as possible in advance of the **23 December closing date**, and it will be circulated via the Clerks to Trustees e-group for any Friend who wishes to use it as a basis for their response.

Consultation on the extension of the Charity Commission's powers to tackle extremism - GOV.UK

2.8 Keeping Our Meetings Safe (KOMS)



This resource was developed by Quakers in Britain staff and Friends in Scotland. It has been produced to be a *panic free approach to safeguarding*. It brings together Quaker knowledge, experience and practice in a set of guidance to support Quaker communities across Britain. The guidance includes:

- Information about what safeguarding is,
- Videos and model session plans to engage your community in good safeguarding practice,
- Links to other places where advice and support are available,
- Writing from Quakers and other churches on safeguarding.

All of this is available in this **online resource** that is designed to be used as part of learning in Quaker communities.

3. Events and training opportunities

3.1 Meeting for Learning with a focus on giving



Quakers in Britain's fundraising team offers meetings the opportunity to hold a Meeting for Learning with a focus on giving.

These sessions are opportunities for Friends to learn, ask questions, share concerns, and explore the relationship between Quaker values, our work, and the resources needed to sustain them. They are not intended to be a fundraising appeal, or a lecture about finances. Your meeting can ask its **Local Development Worker** to join the conversation.

Maisa Monteiro, Membership and Individual Giving Fundraiser, supports these events in Quaker meetings and has written this piece to bring them to life. Read, **www.quaker.org.uk/communities/news/meeting-for-learning-on-giving-a-conversation-about-our-shared-work**, to find out more and request one for your Quaker community.

Learning opportunities offered by Woodbrooke

3.2 Quaker Trusteeship in a Nutshell



Saturday 30 January 2027, 10am to 4pm

Are you a new or relatively new Quaker Trustee, or looking to increase confidence in carrying out your trusteeship in a Quaker setting? Join us to explore your role with a focus on its spiritual underpinning and Trustee responsibilities and relationships.

www.woodbrooke.org.uk/courses/quaker-trusteeship-in-a-nutshell

3.3 Practical Skills for Brilliant Quaker Outreach



Wednesday 24 February to Wednesday 24 March 2027

Would you like to share Quaker ideas widely? Would you like people in your local area to understand Quakers better? This course offers practical skills in communication for modern and traditional media and outreach.

www.woodbrooke.org.uk/courses/practical-skills-for-brilliant-quaker-outreach

3.4 Quaker Eldership and Pastoral Care: Residential Course



Friday, 16 to Sunday, 18 April 2027,
The Hayes (Swanwick, Derbyshire)

This weekend residential is a great opportunity for in-depth learning and reflection on the practice of Quaker eldership and pastoral care. As well as hearing from the experienced team of tutors, there will be opportunities to meet Friends who are, like yourself, curious and committed.

www.woodbrooke.org.uk/courses/quaker-eldership-and-pastoral-care-residential-course

3.5 Questions About Quakers: A Guide to Giving Clear Answers



Friday, 28 May to Sunday, 30 May 2027
(Glenthorne Guest House, Grasmere)

Much of what Quakerism offers is unique and what we might comfortably say about it will change from person to person. The tutors will draw on their experience, facilitate activities and share stories to help us joyfully discover our own words.

www.woodbrooke.org.uk/courses/questions-about-quakers-a-guide-to-giving-answers

3.6 Other learning opportunities for trustees

Charity Commission events and webinars

The Charity Commission (CC) in England and Wales frequently holds events and webinars to support trustees and those running charities. They usually have events over the next three months advertised. You can find out what is coming up and book to attend at **https://bookwhen.com/cetevents**.

4. Grants and financial help

4.1 Meeting Houses Fund

The Meeting Houses Fund provides financial assistance for carrying out improvements to Quaker premises. Find out what can be applied for and the application process by visiting the BYM website, **www.quaker.org.uk/mhfunds**.

4.2 Places of Worship Funding Index

The Good Faith Partnership and Historic England have developed a new Places of Worship Funding Index to help make funding opportunities more accessible to places of worship across England.

This resource brings together potential sources of financial support for building projects and is available at **https://historicengland.org.uk/content/docs/grants/places-of-worship-funding-index**.

Britain Yearly Meeting

Contributions update

Winter 2026

New contribution pack

The new contribution pack is now ready and has been sent to meetings.

Please do share with all in your meetings, it's only through the support of Friends that Quaker work, discerned by you, can happen.



You can see and download the leaflet at **www.quaker.org.uk/contributions**.

Annual treasurer survey



Each year, the Quakers in Britain (QiB) fundraising team carries out a survey of all area and local meeting treasurers to understand how the current economic climate is affecting meeting income and anticipated contributions.

The summary of the survey is now available on the QiB website on the treasurers' pages, **www.quaker.org.uk/treasurers**. A link to the document is here, **www.quaker.org.uk/documents/bym-2026-treasurers-survey**.

Giving advocates



Our giving advocates group meets quarterly and we'd love new members.

If you are passionate about talking about giving, please have a look at our giving advocates page at **www.quaker.org.uk/giving-advocates**.

Our next Zoom meeting is Thursday 11 March, 7pm. Email Beth Follini at **bethf@quaker.org.uk** to register your interest and get the Zoom link.

'Beyond Funeral Planning' network

Our 'Beyond Funeral Planning' network for those giving support and advice around a range of issues to do with planning for death (including will writing and funeral planning), dying and bereavement will be meeting on 20 January 2027 at 7pm.

Please email Jac Blacker at **jacb@quaker.org.uk** to sign up and receive the Zoom link.