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Quaker Charity Governance Annual Return

Reporting year 2026/27

BYM staff collect this information on behalf of Quaker Life Central Committee (QLCC). The responses are used to report to Yearly Meeting annually on governance compliance throughout the Society of Friends in Britain. The information you share with through this form will be viewed in full by staff to determine where additional support may be needed, and will be viewed in aggregate, with personal details removed. Data will be held in line with the QiB Data Policy, www.quaker.org.uk/privacypolicy.

Area		Question	Response
Basic information and regulatory compliance	1	Name of Area Meeting / Quaker Charity	Free text, short
	2	Clerk of Trustees name	Free text, short
	3	Clerk of Trustees contact details	Free text, short
	4	Treasurer name	Free text, short
	5	Treasurer contact details	Free text, short
	6	Has your charity had individuals in the roles of Clerk of Trustees, Treasurer and Safeguarding Co-ordinator throughout your most recent financial year? If not, what arrangements have been put in place to hold the work associated with these roles?	Free text, long
	7	Charity Registration number (if registered) *This question is only required for charities registered with the charity regulator for their country.*	Free text, short
	8	AM financial period (e.g January to December)	Short text
	9	Date that your most recent TARA was submitted to Charity Commission / OSCR on *This question is only required for charities registered with the charity regulator for their country.*	Date / not relevant
	10	Was this within the required timeframe for your regulator? *This question is only required for charities registered with the charity regulator for their country.*	Yes / no / not relevant
	11	If required, have you submitted your TARA and completed a confirmation statement with Companies House?	Yes / no / not relevant
	12	Most recent TARA shared with Quaker Life via Supportmeetings@quaker.org.uk on date	Date
	13	Are your lists of Trustees up to date on your regulator's websites (Charity Commission or OSCR, Companies House)	Yes / no / not relevant
Safeguarding	14	Safeguarding Co-ordinator name	Free text, short
	15	Safeguarding Co-ordinator Contact details	Free text, short
	16	Deputy SGC (if relevant)	Free text, short
	17	Is the charity registered with a safeguarding advisory agency such as 31:8?	Yes / no
	18	If yes, name of agency	Drop-down

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Area		Question	Response
			31:8 Volunteer Scotland Other
		If no, please tell us where your AM / charity gets specialist safeguarding advice from?	Free text long
	19	Has all necessary role-holder safeguarding training been undertaken or scheduled? If not, please set out measures to be taken to address this.	Free text, long
	20	Does the AM / charity have any contracts in place with any individuals, to ensure the safety of all?	Yes / no
	21	If yes – please provide details of the number of contracts but **do not include any names or other personal details**. E.g. *one contract with registered sex offender in place since [date].*	Free text, long
	22	Have there been any safeguarding issues or concerns within the AM over the last 12 months?	Yes / no
	23	If yes, did you contact the BYM Safeguarding Officer to discuss each of these?	Free text, long
	24	If yes, did you contact a specialist safeguarding advisory service to discuss these?	Yes / no
	25	Did your AM deal with any safeguarding concerns (which may not ultimately have become a safeguarding issue) that the BYM Safeguarding Officer is not aware of? Please provide outline details here. Non-safeguarding examples might be issues of harassment, bullying or discrimination. **Please do not add personal details.** The BYM Safeguarding Officer may contact your Safeguarding coordinator to request further details.	Free text, long
Annual sustainability reporting	27	Please put in details of progress made by any LMs and their award level (Bronze, Silver, Gold). If your AM / charity does not have any LMs that have joined EcoChurch, please give a short charity-wide narrative report on each of the themes. Worship and teaching Buildings Land Community and global engagement Lifestyle	Enter number 0-25 Short freetext box for each field
Policies and Risk Management	28	Please let us know which of the following policies your charity has in place, and when these were last reviewed by trustees: Safeguarding Data Protection Code of conduct (employees and volunteers) Health & Safety Fire Safety Investment Policy (if relevant) Complaints Procedure Hirings and Lettings	Each option to have a yes / no / carried out al LM level option. Date
	29	Do your charity trustees regularly consider key risks, and manage these through a risk register or similar system?	Yes / no

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Area		Question	Response
Record Keeping	30	Are Trustees content that the Area Meeting is keeping records of necessary matters (Trustees and Area Meeting business meeting minutes and burials, records of property and investments held) securely?	Yes / no
	31	If no, please outline your concerns about record keeping in your Area Meeting	Free text - long
Serious Incidents / Notifiable Events	32	Has your Area Meeting experienced any incidents which were reportable to either the Charity Commission or OSCR which you haven't told us about elsewhere in this form in the last 12 months?	Yes / no
	33	If yes, did Trustees inform a staff member at BYM about this at the time?	Yes/ no
	34	If BYM staff are not already aware of this, please give us outline details of this serious incident or notifiable event, and a suitable contact email address	Free text – long
Additional information	35	Additional information	Free text - long

Sustainability reporting

Quakers in Britain is running a trial asking **all Quaker communities** to report on sustainability using the EcoChurch themes.

- Worship and teaching
- Buildings and energy
- Land and nature
- Community and global engagement
- Lifestyle

Your Quaker community is **not** being asked to join EcoChurch. However, if your Quaker meeting is not currently an EcoChurch member you might wish to consider this. Whether or not your meeting wishes to join EcoChurch, we are asking **all meetings** to give a narrative report based on the themes EcoChurch uses.