

Simpler meetings – treasurers

This document is about possibilities. It shares many ideas collected from Quakers around Britain about how we can simplify the way we organise ourselves. You can find more topics here: www.quaker.org.uk/simplermeetings. For each topic there is a document and a short video. All the topics are collected in “*Simpler Meetings – what is possible*”, which also explains ways you can approach the topics.

A survey of area meeting treasurers revealed a lot of different ways of easing the burden on treasurers.

Dividing the role

When the role of treasurer becomes a burden, or it is hard to fill the role, it can help to think about those tasks which could be done by someone else. At the trustees’ and treasurers’ conference 2019 we came up with these lists. The first list shows things that the treasurer needs to be doing. But the second list shows a lot of things that do not need to be done by the treasurer. These can be delegated. For example, making the appeal does not have to be done by the treasurer. In fact, somebody else might actually be better at it.

By the Treasurer

- Monitoring overall finances
- Reporting to trustees/business meeting
- Preparing budgets
- Advising trustees/business meeting
- Preparing for major decisions
- Oversight of accounts process and financial compliance
- Presenting accounts
- Working with colleagues
- Communicating and fixing problems

Could be someone else

- Counting and banking cash
- Making decisions on purchases
- Making payments
- Keeping accounts / bookkeeping
- Producing management accounts
- Producing end of year accounts
- Making appeals
- Applying for Gift Aid
- Paying employees, dealing with HMRC
- Risk management,
- Insurance

This approach changes the role of the treasurer from being somebody who has to do everything. Instead, the treasurer can focus on what the financial information is telling us, the decisions that are needed, and running the finances well.

Importantly, it is often easier to find a treasurer when they do not have to be the bookkeeper as well.

Paid bookkeepers

A lot more meetings use paid bookkeepers than you might think. 14% of local meetings in Britain already have a paid bookkeeper – and not just the big meetings. Some have volunteer bookkeepers too. 20% of area meetings have their area meeting accounts done by a paid bookkeeper. In about 10% of area meetings, all the local meetings use a paid bookkeeper.

Other paid assistance

There are other parts of the process that people can be paid to do. These include accounts examining, payroll, pensions, processing contributions and Gift Aid.

Electronic banking

Reducing the handling of cash and the number of times you have to take cash to the bank can really help. Electronic banking has really grown in the last few years. You can have dual sign-off of payments, just like having two signatures on a cheque. Electronic banking also allows more people to have online access to information. So the local treasurer, the bookkeeper, the area meeting treasurer and the accountant can all have access to the same information.

Online accounts packages

Quite a few area meetings now have online accounting packages, which the local treasurers use, or a bookkeeper uses, or in a combination. Once established, this can save a lot of time and energy, clarifying things, chasing up details, reconciling, and at the end of the year.

Local meetings not having their own set of accounts

At least 12 local meetings in Britain do not have their own set of accounts at all. Their few transactions may be placed inside another meeting's or the area's accounts. Alternatively the meeting may just not use money themselves at all. They make donations straight to the area meeting or to Britain Yearly Meeting, and maybe another meeting makes the payment for their rented room and the occasional bill.

Delegating

Many trustee bodies have a sub-group specifically for financial matters. Some decisions could be delegated to that sub-group. Some can be handled by the local premises committee and others by the local business meeting, or delegated to a budget holder. Not everything has to come to the full body of trustees or to the treasurer for a decision. This can also work at local meeting level, with clear budgets delegated to a committee or a person. On the other hand, sometimes it is simpler to delegate smaller decisions to the local treasurer.

Gathering consistent information

Some area meetings have an end-of-year sheet on which the local meeting treasurer fills in all the information needed to complete the accounts as a whole for the area meeting. They found that that works really smoothly and well.

Using the same suppliers

Using the same suppliers can make things simpler. Examples include property maintenance, or using the same bookkeeper. This can be within an area meeting or between neighbouring areas. Some area meetings have decided to centralise their purchasing of utilities things, like gas, electricity and found that easier to operate, and made savings.

Meeting and sharing ideas

One of the other things that came back in the survey as really important is meeting together as a group of treasurers from time to time. This might be once a year or every six months, having some cake and coffee, and informally talking over issues that are common to the group. This can smooth things along a lot.

Fewer meeting houses

Those meetings that do not have a meeting house have much less pressure on their treasurer. It greatly reduces the transactions, and the number and complexity of decisions that are needed. Of all the ways of reducing the burden on role-holders, this probably has the greatest effect. See the section on Meeting Houses Alternatives.

Questions to consider:

- Would it make it easier to be a treasurer, or find a treasurer, if we removed some tasks that do not need to be done by the treasurer themselves?
- Should we consider having a paid bookkeeper?
- Are there other tasks that could be done by someone who is not the treasurer, or reduced by doing things differently?
- Should we use online banking (or use it more), and/or an online accounts package?
- Could any of our small meetings avoid having their own set of accounts?
- Could we simplify some processes by delegating some decisions?
- Would it help if we used some of the same suppliers as our neighbours?
- Shall we get together with neighbours from time to time, to swap ideas.
- Are there meetings whose meeting house is a heavy burden? Would an alternative be better?

Can you help?

The Simpler Meetings project is gathering and sharing ways that Quakers find work well for them. The aim is to liberate the joy of being a Quaker. You can learn more at www.quaker.org.uk/simplermeetings. Please send your ideas and suggestions to Jonathan Carmichael, Simpler Meetings Project Manager at JonathanC@Quaker.org.uk.

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