Simpler Meetings Series

Simpler Ways for Trustees and Treasurers

Hello Friends,

I'm Jonathan Carmichael, a Quaker from Watford meeting in Hertfordshire in the East of England, and Simpler Meetings project manager for Britain Yearly Meeting.

This talk is about ways that meetings around Britain have found to make life simpler and easier, so there's more time and energy for *being Quakers,* rather than *doing Quakers.* We'll start with ideas for area meeting trustees, then look at managing properties, and then think about treasurers. I'll pick out ways that can save you time, frustration, energy, or make the role easier to do, and help solve the difficult problem that no-one wants to take on a particular role.

So first: area meeting trustees.

The relationship between the area meeting and its trustees needs to work smoothly, to avoid duplication and frustrations. You need a common understanding of which decisions are to be made by the area meeting in session, and which decisions are right for the trustees to make. It can really help to write this down, and then get it out from time to time, so everyone is clear. Sometimes of course issues do need to move between one and the other. But they don't need to keep moving back and forth again and again, or one continually re-doing the discernment of the other body. When we appoint trustees, we ask them to take certain responsibilities for the area, and discern some aspects for us. We need to trust our trustees. Good communication really helps this trust.

Another key relationship is between the clerk of trustees and the clerk of the area meeting. Do they get on well? Do they talk often? Do they have the same view about which decisions are taken where? Working on this relationship can really help things run more smoothly, and avoid the bumps that make life far from simple.

Like any organisation, like any meeting, it is really important to prioritise which things are important to spend time on and which are less important or can be dealt with differently.

Quite a few Quaker trustee bodies use sub-groups to spread the load. They might for have three: perhaps finance, property, and policy & people. Or another combination. Then each trustee does not have to think in detail about all of the issues. They can rely on their colleagues to go into the detail on a topic, while the high-level decisions come to the whole trustee body for discernment. Some decisions can be delegated to a sub-group to take, perhaps for smaller levels of spending, or certain types of item. They could be delegated completely to the sub-group, or be confirmed at the full trustees meeting.

And on these sub-groups, some area meetings involve non-trustees. For example, they might have a human resources professional who is happy to share some of their expertise, sitting on the people and policies sub-group. They can contribute without taking on the whole of the trustee role. Involving non-trustees can make better use of the skills available, and be inclusive. It can also draw in people who go on to become trustees.

Another way of reducing time for trustees is having online meetings, like with Zoom. This can save a lot of travel time. It can lead to shorter meetings, or let you have meetings when you need them. And it reduces our carbon footprint. It lets people join in who would be prevented or would say no. This won't replace all face to face meetings, but you might say use it for every other meeting.

Policies for area meetings is a place where we seem to be reinventing the wheel a lot. We've gathered some model policies, and some examples, on the BYM website – search for the area meeting trustees page.

Some area meetings are exploring doing things together with another area. This is covered in another topic in this series.

Here's another aspect: we already pay people to do some tasks for us. We have paid wardens, cleaners, someone to fix the boiler, or clear the gutters. Can we pay people for some other functions too? Which tasks could other people do, so Quakers can spend more time doing what only Quakers can do?

Some area meetings have a part-time administrator. This might be very part-time, say 10 hours a month. An administrator could deal with membership records and transfers, contact lists and GDPR, Gift Aid processing, arrange insurance - things that otherwise can land on the AM clerk, or treasurer, or clerk to trustees. In some areas this kind of area admin is handled by extending the role of one warden.

Some meetings pay someone to manage meeting house lettings. Or a lettings agent for investment properties.

I will talk about paid bookkeepers in a little while.

There are already paid youth workers in two of our regions. Some meetings have a paid children's worker. Of course the largest group of staff are Wardens.

Britain Yearly Meeting has a whole set of resources for employers, on our website – search for “employer’s resource”. There’s standard policies that area meetings can adopt, standard terms and conditions for employees, and guidance on a range of topics. Using reliable policies and procedures can save a great deal of time and effort.

And people don’t have to be employees – some could be independent contractors, which can reduce trustees’ work for some roles.

Let’s think now about property management.

If you ask Friends what tends to take up the most time and energy, and what are some of the biggest burdens, very often the answer is “our properties”. Some of them do generate very useful income for us, or serve us very well, while some are absorbing our money and draining our time and energy – they may not be fulfilling the purpose we actually need. So getting the balance right is really important. We need to be strategic about which buildings serve our purpose really well, and which really don’t. Less could be more.

I’ve got to say this: in all my work on simplifying, the biggest way of reducing the burden on role-holders is having fewer meeting houses. Less work for treasurers, less issues for trustees, no premises committee, no warden to manage, fewer items for local business meetings… It can liberate energy for other aspects of our Quaker lives. With 30% of British local meetings not having a meeting house to look after, and with much of the growth in our Quaker meetings coming where there aren’t meeting houses, we need to look at this seriously. In another session in this series, we’ll look at ways that meetings can thrive without a meeting house.

For the 70% of meetings which currently do have meeting houses, there are many ways to make life easier. A good place to start is the property advice page on the BYM website – search for “property”. There you’ll find the Property Guidance Sheets that cover many useful topics. There is also the Meeting House Handbook Template, with useful information set out in a way that each meeting house can use. You can also join the Property Advice email group there, and get advice from Quakers all around Britain.

Closer to home, meetings can share which tradespeople they use. Some area meetings do this on a whole area basis - the same electrician inspects all their properties, or the same company does fire prevention. This does not always work for every kind of trade, and geography may prevent it – you probably want a local plumber. But it can save meetings time and trouble, and avoid some aspects being neglected.

Some area meetings are using a property management service, relieving Friends of tasks which can be quite a burden.

A really good example is the way Norfolk and Waveney Area Meeting works with with the Churches Conservation Trust. This is a specialist organisation - historic buildings are their thing. Each meeting house gets an annual visit, with a series of checks, and some planned maintenance like gutters and drains. They have a good discussion with the premises committee about further pieces of work that might need to be done, and take on projects. They have a pool of reliable tradespeople they work with - their team is really focused on historic buildings and faith communities.

The reports from Norfolk and Waveney are very positive. They are sure the work gets done to protect their buildings, and Friends do not have to spend as much time and energy working out what to do. They found the cost of the service is often recouped by getting better prices for the work the Trust's staff then oversee.

On the income side, it can be fruitful to work together to increase income from certain meeting houses in an area. This could pay for support for others, or cover costs of support across the area, reducing the volunteers' workload.

Let's move on to simpler ways for Treasurers

When the role of treasurer becomes a burden, or really hard to fill, it can help to work out which tasks which can be done by someone else. At the Trustees' and Treasurers' Conference in 2019 we came up with these two lists. On the left are things the treasurer needs to do. On the right are things that don't have to be done by the treasurer. These can be delegated – to a volunteer or someone paid.

Only the Treasurer	**Could be someone else**
Monitor overall finances	Count and bank cash
Report to trustees	Decide on purchases
Advise trustees	Make payments
Agree budgets, delegated	Bookkeeping
Prepare for major decisions	Produce management accounts
Oversee accounts, compliance	Produce end of year accounts
Present accounts	Make appeals
Work with colleagues	Apply for Gift Aid
Communicate and fix problems	Pay employees, deal 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.

It is often easier to find a treasurer when they do not have be the bookkeeper as well. And sharing out the tasks can make things easier for a local treasurer too.

When I surveyed area meeting treasurers in 2019 this revealed lots of ways to reduce the load on treasurers. I discovered 1 in 6 local meetings in Britain had a paid bookkeeper – and not just the big meetings. Some have volunteers who do bookkeeping for the area or for other local meetings. In 10% of area meetings, all the local meetings use a paid bookkeeper. 20% of area meetings use a paid bookkeeper for all their area level transactions accounts.

Other processes can have people being paid, like accounts examining, payroll, pensions, contributions and Gift Aid.

I talked earlier about trustees delegating some decisions. This can also work at local meeting level, with clear budgets delegated to a committee or a person. Sometimes it is simpler to delegate smaller decisions to the local treasurer, within some limits.

Reducing the handling of cash can really help, with fewer times you have to take cash to the bank. Electronic banking has really grown in the last few years, and in the pandemic. You can still have dual sign-off of payments, just like having two signatures on a cheque. One treasurer explained how electronic banking allows the local treasurer, the area meeting treasurer, a bookkeeper, and the accountant to all see the same information.

Quite a few area meetings now use online accounting packages, which the local treasurers use, or a bookkeeper uses, or in a combination. It can take time and effort to establish, but quite a few treasurers told me how it can save a lot of time and energy, clarifying things, chasing up details, reconciling, and at year end. I've heard a lot of enthusiasm for having a single current account across the area meeting – all the transactions go through the same system, while each local meeting still has their budgets to spend from.

A dozen local meetings have cut out having to produce their own set of accounts altogether. Instead, the few transactions they have sit in another meeting's accounts, or the area's. And some do not use money themselves at all. They make donations straight to the area meeting, and the area meeting pays for their rented room and the occasional bill.

Several treasurers spoke enthusiastically about how it can be really helpful to meet together as a group of treasurers in the area from time to time. Maybe once a year or every six months, over some cake and coffee, and informally talk over issues that are common to the group. This can smooth things along a lot.

And you can seek advice from other treasurers via the area meeting treasurers' email group, and from the Treasurers' Guidance Sheets – find both on the Treasurers page of the BYM website.

I hope this talk gives you some ideas you could use in your meeting, or discuss in your area. They can help reduce the workload and pressure on trustees and treasurers, to free up time spent on *doing Quakers,* to have more time for *being Quakers.*

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