

# Trustees' & Treasurers' News

A newsletter from Quaker Stewardship Committee

Issue 19: Spring 2021



## 1. Welcome to the Spring issue!

Here we are again, Friends, a Spring issue of TTN to accompany the prospect of lockdown easing and lifting. We hope.

Our usual round-up of news from the Charity Commission and other sources is in [Section 3](#) this issue. In [Section 4](#) we comment on new faces at Friends Trusts Limited and on the end of furlough for many BYM staff. [Section 5](#) confirms the extension until 2031 of the process of completion of the registration of excepted charities. In [Section 6](#) we provide links to the new BYM guidance and model documents on safeguarding. And [Section 7](#) reminds us all about data protection and trustee responsibilities. In [Section 9](#) we report on feedback from a meeting of AM Trustees about blended meetings and in [Section 10](#) reminders about burial grounds.

Britain Yearly Meeting has provided several email clusters for role holders – AM clerks, treasurers, wardens and those responsible for property. BYM has been alerted to the desire for communication among Clerks of AM Trustees (and analogous roles such as GM Clerks). An email cluster is being set up so that these important role holders can exchange news, ask for advice and raise concerns.

The editorial team, [ttnews@quaker.org.uk](mailto:ttnews@quaker.org.uk)

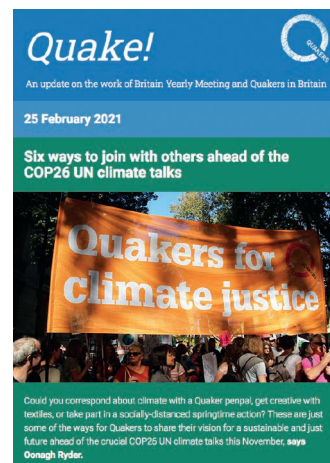
## 2. Praise for Quake! Good job, BYM

The publication *Quake!*, formerly issued monthly, became a weekly communication from April 2020 and has been a very valuable source of information during our pandemic problems. It provides headlines and a paragraph with links to take you deeper into topics of interest.

Many thanks to all those involved in its production.

We encourage anyone who has not yet seen it to subscribe at:  
[www.quaker.org.uk/quake](http://www.quaker.org.uk/quake)

*You can also view back copies on the website.*



## 3. Charity Commission, HMRC & related news

### 3.1 Handy guidance from the Charity Commission

Guidance for trustees can be quite lengthy. The Charity Commission has recently introduced its 5-minute Guides for Charity Trustees. They can be found at <http://bit.ly/5-minGuides> and cover financial oversight; achieving a charity's purposes; good decision making; addressing conflicts of interest; what to file with the Commission and what support is available.

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Abbreviations: CC – Charity Commission; 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; QSC – Quaker Stewardship Committee

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### 3.2 Virtual meetings of trustees

We wonder if trustees should consider having their charity's Governing Document modified, if necessary, to allow virtual meetings to be held once the exceptional permission for such meetings ends as we approach the end of lockdown measures. It could be prudent future-proofing. The Trustee gathering on Blended Meetings organised by QSC seemed fairly certain that blended meetings will be part of the Quaker future.

### 3.3 Caretakers /wardens and tax

Something that is set to expire at the end of March 2021 is the extra statutory concession (relating to posts that existed before 6 April 1977) by which the accommodation provided for caretakers is exempt from tax. From April 2021, it seems that the exemption will cover only those employed in full-time caretaking jobs who are on-call outside normal working hours. Please see the HMRC website if this is relevant to your meeting: [www.gov.uk/hmrc-internal-manuals/employment-income-manual/eim11339](http://www.gov.uk/hmrc-internal-manuals/employment-income-manual/eim11339) Contact [wardenship@quaker.org.uk](mailto:wardenship@quaker.org.uk) if you have any questions.

## Queries for trustees

11. Do you regularly review long-standing procedures to ensure that they meet new requirements and good practice? Consider whether alternative ways of performing some tasks (such as employing paid professional help) might free Friends from unnecessary anxiety.

*Advices & queries on Quaker stewardship*

[www.quaker.org.uk/documents/advices-queries-for-stewardship-2015](http://www.quaker.org.uk/documents/advices-queries-for-stewardship-2015)

### 3.4 National Living Wage – new rates from April.

Twenty-three and twenty-four year olds are now included.

	Up to April 2021	From April 2021	Increase
National Living Wage	£8.72	£8.91	2.2%
21-22 Year Old Rate	£8.20	£8.36	2.0%
18-20 Year Old Rate	£6.45	£6.56	1.7%
16-17 Year Old Rate	£4.55	£4.62	1.5%
Apprentice Rate	£4.15	£4.30	3.6%
Accommodation Offset	£8.20	£8.36	2.0%

### 3.5 Implications for the end of lockdown

The lockdown escape plan contains some information relevant to places of worship: From 8 March, six people are able to attend a wedding, and from 29 March it will no longer need to be in exceptional circumstances. There is currently no change in the requirement for those attending a wedding to wear face coverings and maintain social distancing. Attendance at funerals continues to be limited to thirty. It is hoped that from 12 April fifteen people will be able to attend a wedding and a reception afterwards; from 17 May that figure will be thirty and, from 21 June all attendance restrictions will be lifted.

Please see [www.gov.uk/coronavirus](http://www.gov.uk/coronavirus) for full current government guidance as restrictions change. BYM also provides guidance at [www.quaker.org.uk/coronavirus](http://www.quaker.org.uk/coronavirus) which includes Scottish and Welsh links.

## 4. BYM and Friends Trusts Limited staffing

Those concerned with property will have become accustomed to Friends Trusts Limited being always there, unchanging as the custodian of property and assets, with its staff equally unchanging. No more. Many thanks to Chris Gregory as he retired after years of faithful service to all of us. The new secretary of Friends Trusts Limited is Maureen Sebanakitta. The email address to use is [friendstrusts@quaker.org.uk](mailto:friendstrusts@quaker.org.uk). Paul Whitehouse, Chair of FTL can be contacted on [paul@dunstanburgh.net](mailto:paul@dunstanburgh.net).

Most BYM staff are back from furlough, working from home. Staffing continues to be affected by the impacts of the pandemic, such as childcare and some sickness, and there have been staff departures, and changes of responsibility; but as far as possible support for AM trustees and treasurers is continuing as before. Please email [gabys@quaker.org.uk](mailto:gabys@quaker.org.uk) if you have a treasurer role update to report or would like support with treasuring matters. Please email [supportmeetings@quaker.org.uk](mailto:supportmeetings@quaker.org.uk) for anything else.

## 5. News on registration

The registration of previously excepted charities (which includes 20 AMs) was meant to be completed by the end of March 2021. This has now been extended by 10 years to March 2031. It is expected that the Charity Commission will introduce phased registration of excepted charities based on income. See Mary Aiston's article in *The Friend* (12 March 2021). We can expect further details later this year.

## 6. New safeguarding policy – thirtyone:eight

BYM has published new model documents on safeguarding at [www.quaker.org.uk/safeguarding](http://www.quaker.org.uk/safeguarding). AM Trustees should take note. The contact point at Friends House is [safe@quaker.org.uk](mailto:safe@quaker.org.uk). Safeguarding expertise can be found via thirtyone:eight's expert manual at <http://bit.ly/318manual>. There's a good piece by Deputy Recording Clerk Juliet Prager in *Quake!* of 11 February at <http://bit.ly/Quake200211>. (thirtyone:eight is the name of the organisation formerly known as CCPAS)

### Sustainability A&Qs

We have become accustomed to offering you one of the *Advices & queries* for Trustees and for Treasurers in each issue of TTN. Be aware that we have available a set of *Green Advices & queries* accessible at <http://bit.ly/GreenAandQ>. (It's a PDF so check your downloads after the click).

## 7. Do we need to revisit GDPR ?

It is now some time since we were hit by GDPR. We may have dealt with it and effectively put it to one side. But has anything changed? Did we really complete it in every respect? Can we put our hands on the written policy we should have about what to do if we have a data breach? Do we recall that such a breach has to be reported to the Information Commissioner's Office within 72 hrs? The ACAT website (to which all AMs and LMs have access) has two 50 minute videos, covering the legal points and the practical implementation, which are well worth a revisit or even a first-time visit.

## 8. Gleanings from the Treasurers' Cluster

The long running discussion about accounting software and Area Meetings continues. QSC are no more willing now than they were before to offer a firm recommendation. Nor is ACAT. Very sorry.

## 9. Future online and blended meetings

On 11 February, QSC arranged a meeting for AM Trustees to talk together about Blended Meetings, which was reported in *The Friend* of 26 February. There was a strong sense that Blended Meetings are a way forward for Friends. Trustees will already be thinking about their responsibilities for inclusion and diversity of those who might become subject to a 'digital divide' in which some Friends might feel excluded by new technology. The pandemic has presented very significant questions to all Quakers, including treasurers and trustees, and has shown us new opportunities and ways of working which may become embedded in our practices. We hope that the emergence from the pandemic will be seen as an opportunity to tackle the future shape of our meetings, our ways of worship and of doing business and how our distinctive and valuable witness can continue through the decades to come.

### Queries for treasurers

4. Do you get the support you need in drawing up annual accounts and ensuring their collation, where required, in good time? Do you keep the trustees informed about this process?

*Advices & queries on Quaker stewardship*

[www.quaker.org.uk/documents/advices-queries-for-stewardship-2015](http://www.quaker.org.uk/documents/advices-queries-for-stewardship-2015)

## 10. Trustees conversations – Burial grounds

A recent online meeting of AM Trustees organised by QSC discussed the serious subject of burial grounds. Beyond the advice in *Quaker faith & practice* (14.31, 14.32 and 14.34) there are some duties which trustees should note which apply even for out of use burial grounds. In addition to the obvious responsibilities of inspecting for decrepit walls, tumbling grave markers and unstable trees, there is a legal requirement to keep a register of burials, their locations and the names of those buried at each location. Details of the duties are available, set out in guidance from the Department of Constitutional Affairs in their 'Guide for Burial Ground Managers (November 2005): <http://bit.ly/BurialGrounds>. We heard of some cases of disputed leases and rights. Trustees would do well to review the documentation of ownership and control. If these are unclear or disputed, competent legal advice becomes highly advisable (and it's a trustee duty to take appropriate advice). Friends Trusts Limited may be able to suggest firms that have been found adequate. Some of the interesting points for discussion included charging for plots and whether plots can be reused after a time.

## 11. Woodbrooke & ACAT courses and events

Woodbrooke hosts a wide variety of courses covering Climate Crisis; Exploring Quakerism; History & Theology; Peace & Social Justice; Spirituality & Retreats; Supporting Quaker communities; The Bible. Help others look for a suitable course at [www.woodbrooke.org.uk/our-courses](http://www.woodbrooke.org.uk/our-courses).

See Woodbrooke's new Simpler Meetings Series at [www.woodbrooke.org.uk/simpler](http://www.woodbrooke.org.uk/simpler) which has relevant material for treasurers and trustees (more information in BYM sheet at end of TTN).

ACAT also provides courses on a variety of topics. March courses include Being a Treasurer: The Basics - Session 1: Charity Law, Finance Processes and Bookkeeping, and Risk and Health and Safety Management: Session one. Current training events may be seen at [www.acat.uk.com/training-events](http://www.acat.uk.com/training-events).



# Britain Yearly Meeting

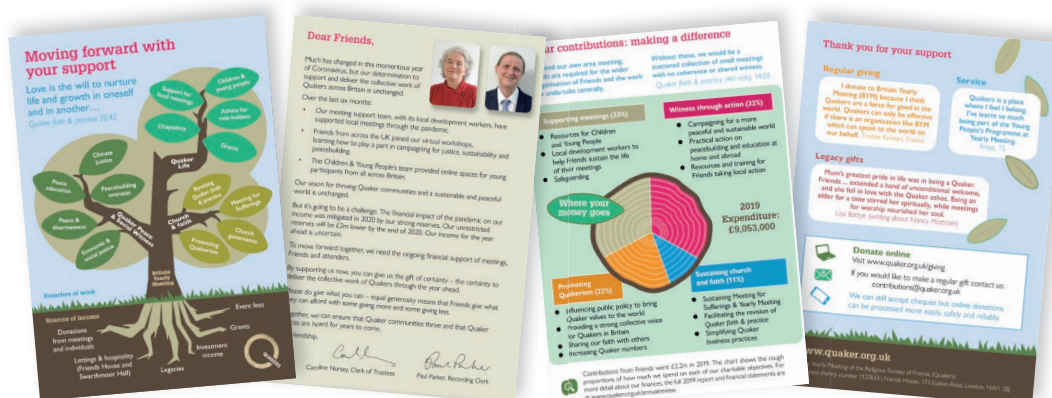
Update for Trustees and Treasurers

Spring 2021



## Contributions Leaflets 2021 – ordering paper copies

In 2020, many treasurers asked us to create a digital version of the contributions leaflet that can be emailed to Friends. This was mainly due to the pandemic – most Friends are not going to MfW in person but via Zoom. Even prior to the pandemic, we had requests from treasurers for a digital version to reduce paper wastage. This is available at [www.quaker.org.uk/contributions](http://www.quaker.org.uk/contributions).



However, if your meeting does need printed copies, please complete the online order form at <https://forms.quaker.org.uk/contributions2021> and we will arrange for them to be delivered.

Please note that this form is intended to be completed and submitted online. If you have any problems with the form, you can send an email with your order to [contributions@quaker.org.uk](mailto:contributions@quaker.org.uk).

**The deadline for completing the form is 9 April 2021.**

## Let us know about new treasurers please

We have not received Treasurer role update information from all meetings. If you are receiving this but are no longer your meeting's treasurer, please email the details for the new meeting treasurer to [updates@quaker.org.uk](mailto:updates@quaker.org.uk).

## ACAT subscription

We will be shortly sending out details of the ACAT (Association of Church Accountants and Treasurers) subscription to all treasurers and it's particularly important that new treasurers receive this information. BYM pays for two subscriptions for each area meeting and one for each local meeting. These are really useful so please do make sure that we have details for new treasurers.

## Clusters for treasurers and trustees' clerks

We will also be updating the details of those who wish to be part of the Treasurers' email cluster and the new Trustees' Clerks email cluster. Please be sure to let us know the details of anyone new in role. All role updates should be sent to [updates@quaker.org.uk](mailto:updates@quaker.org.uk).

## Reporting on survey results & meetings with Quaker treasurers

Hopefully, many of you will have noticed the blog post written by the member of the BYM fundraising team and Young Friend Charlotte McMenamin-Walshe.

In the blog, she reports on the results of July 2020 survey we did with all treasurers and the learning about the impact of Covid on the finances of Quaker Meetings.

You can read it at: [www.quaker.org.uk/blog/connecting-with-quaker-treasurers](http://www.quaker.org.uk/blog/connecting-with-quaker-treasurers)

## Quarterly/annual reports

Maisa Monteiro has been sending out the final quarterly reports for 2020 to all area meeting treasurers. Please could AM treasurers also share this with your local meeting treasurers as we know that LM treasurers are also interested in the information.

## Future plans

We are developing a Welcome Pack for New Treasurers which we hope to be distributed to all new treasurers by the end of May. We will be sending out a new survey to all treasurers for 2021, similar to the one we sent in 2020.

Later this year, we hope to have Zoom meetings later in the year to update everyone on the current financial position of BYM and to launch new contribution materials for 2022. We also want to provide treasurers and schedule collectors with more support on asking for contributions and giving.

## Simpler Meetings – new Woodbrooke series

How can trustees and treasurers help make our Quaker meetings simpler?

Pick the sessions most relevant to you in this flexible online course exploring ways to do things differently in your meeting:

- Fundamentals
- Simpler ways for trustees and treasurers
- Area meetings working together
- Simpler ways for Quaker roles
- Simpler ways for small Quaker meetings
- Simpler ways without a meeting house
- Imagine ways with Zoom
- Moving forwards

To book these sessions visit: [www.woodbrooke.org.uk/simpler](http://www.woodbrooke.org.uk/simpler)

There are also half-hour 'Bitesize' sessions on each topic on Sunday lunchtimes: [www.woodbrooke.org.uk/bitesize](http://www.woodbrooke.org.uk/bitesize)

