

Trustees' & Treasurers' News

A newsletter from Quaker Stewardship Committee



Issue 22: Spring 2022

1. Welcome to the final issue of this QSC newsletter

Dear Friends,

How good it is to feel that we are emerging again from the shadow of COVID with its weighty impact on our lives.

This will be the last issue of *Trustees' & Treasurers' News* by Quaker Stewardship Committee (QSC). We are sure that those who take on the responsibility for supporting you ([Section 2](#)) will find effective ways to communicate. QSC was created in 2002. We are grateful to have an account of the early days of QSC from John Phillips ([Section 3](#)).

We provide our usual round-up of news from CLAS, the Churches' Legislation Advisory Service ([Section 4](#)). Quaker Life has provided a list of links to sections of the BYM website that trustees will find particularly applicable ([Section 5](#)), and an in-progress list of Quaker Life staff ([Section 6](#)).

Thank you for your attention over the past six years that we have enjoyed writing *TTN* for you.

Our warm thanks also to Gaby Scott who converted our very plain text drafts into the attractive publication you have seen, and also coordinated accuracy checking of the contents.

Raymond Thompson and Fred Ashmore, Co-Editors.

2. Laying down QSC

The decision to lay down Quaker Stewardship Committee taken by Yearly Meeting 2021 will be followed by its formal laying down at this year's Yearly Meeting. The decision and those affecting future support for area meeting trustees and treasurers were reported in our last issue.

Quaker Life Central Committee (QLCC) has moved forward with taking decisions about the future shape of work to support work of area meeting trustees and treasurers in BYM.

Much of the support will be handled through staff from Quaker Life in collaboration with Local Development Workers. Advice on governance will come primarily from Quaker Life. The detailed review of AM Trustees Annual Reports and Accounts will be laid down, though the checklist developed over some years of refinement will remain available. The Link Friend role will disappear.

Conferences and learning events will be handled through Quaker Life and Woodbrooke. *Trustees' & Treasurers' News* will be replaced by a new treasurers' update, and other means to communicate with trustees and treasurers will emerge.

continued overleaf

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; YMG – Yearly Meeting Gathering; QLCC – Quaker Life Central Committee

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It is likely that peer support will become much more important in the future. The email groups for clerks of AM trustees, for treasurers and for property advice have shown the value of peer support.

Thanks to our readers over the years for their attention and all good wishes for your future work in the service of Friends.

And here are some messages to AM trustees and treasurers from the members of QSC.

Yvonne Dickson, Clerk QSC

““ *The group appointed to review the committee wrote ‘QSC members have found it to be a welcoming committee, rooted in Quaker principles’ – thank you, Friends, for this opportunity to serve.*

Mary Aiston, Assistant Clerk QSC

““ *My thanks to all Friends who act as trustees or treasurers – this is such vital work, we couldn't have our wonderful Religious Society of Friends without you.*

Peter Morris

““ *I'm grateful for all the treasurers and clerks to trustees who have worked to improve their stewardship of our financial and property resources.*

Beverley Goddard

““ *As one of the newer members of QSC, I have learned that so many Friends work diligently to account for the finances and activities of our meetings – thank you for your commitment and support.*

Louise McCann

““ *Thank you for the opportunity to serve. I have enjoyed corresponding with treasurers during my time on QSC.*

Alan Robinson

““ *Why would anyone be a trustee if they didn't have to? I remain in awe of so many Friends who are committed to making this organisation work. Thank you, Friends, for the opportunity to be of service.*

Fred Ashmore

““ *I've enjoyed my QSC Link Friend contacts with AM officers, though acting as a chaser on behalf of BYM is not to my liking. Time and again I have been struck by how civil Quakers are. With minor exceptions.*

Martin Burnell

““ *I have appreciated all the hard work done by treasurers and trustees in Yorkshire and wish them well for the future.*

3. Early days of QSC

The word 'stewardship' does not appear in the index of my (1968) copy of *Church Government*; its coverage of 'trusteeship' is primarily concerned with buildings and legacies. Starting from this position, Chapters 14 and 15 of *Quaker faith & practice* (*Qf&p*, 1995) evolved markedly during subsequent updates until in 2005 and 2013 (3rd and 5th editions) stewardship and trusteeship were given a focus as important components of Quaker witness. 'A fundamental principle of this part of our church governance is corporate integrity. All Friends share responsibility for upholding this principle. At every level Friends, personally and corporately, must be seen to be above reproach in our handling of finance and property' (*Qf&p* 14.01). Ten years of modernisation of charity management had meant a careful re-evaluation of our own structures and our own public accountability. This development within our Yearly Meeting was crystallised in Christine Davis's Swarthmore Lecture (2008) *Minding the Future*.

The Quaker Stewardship Committee (QSC) was established by Yearly Meeting in 2002 (*Qf&p* 14.36-42) as a standing committee supporting all constituent meetings and other bodies which collectively form BYM. It should 'co-ordinate the relationship between the yearly meeting and those administering charity law... enabling us to be clear that our own house is in order'. It should work through giving 'help, guidance and active monitoring in order to meet the requirements of charity law in the stewardship of finance and property, encouraging openness, accountability, transparency and integrity in all our affairs'.

Charity legislation was under development at this time (though not completed until the Charities Acts of 2005 in Scotland and 2006 in England & Wales). QSC's first priority was to work with the Charity Commission to help to determine the future requirements for religious organisations. Several lengthy meetings with two representatives resulted in us passing them a copy of *Qf&p* for their general information. Our next meeting started with both telling us that they had read through this, that it clearly provided a wonderful introduction to Quakerism, and if we could just condense it to about six pages it would provide an excellent governing document for registering British Quakers as a charity. That led to much hard work (and further liaison with our two Charity Commission friends) as we gradually worked out what is meant by adopting a governing document, and what it should contain.

Running in parallel was our own discussion about structures within BYM itself. Should there be one overarching British charity, or should each Monthly (now Area) Meeting be required to register? What would be the implications of each structure – could we ever envisage BYM taking responsibility for finances and practice across the whole Quaker community? Above all, did Meeting for Sufferings itself act as a trustee body for BYM or should there be a separate committee of BYM trustees? If the latter, what would be their respective remits? And, if area meetings should register as separate charities, would each need a body of trustees and its own governing document (as required by charities legislation) and could QSC develop a template to help them?

QSC's focus was to offer support at all levels through this process, evaluating problems as they arose and working with meetings or committees to help resolve difficult issues. It was clear that Area Meetings had a variety of ways of working and that there was no uniform model for financial service and reporting. Accounting methodology, local meeting practices, running meeting houses, supporting wardenship, consolidation of accounts, annual report writing, grant applications, security issues – the list of possible themes seemed endless. The committee undertook a huge programme over its first few years. It brought treasurers together through the Annual Conference of Treasurers, it developed a new *Treasurers' Handbook*, it worked on training programmes with Woodbrooke. Importantly, each committee member was given a geographically-linked group of area meetings to assist, in a mentoring role. QSC members themselves periodically met outside London, providing an opportunity to meet and talk with local Friends.

The committee itself developed general approaches to issues raised with it, providing guidance about good practice, record-keeping, accounts examination, dealing with losses and identifying liabilities.

What about trusteeship? This was a new and challenging area. Where would trustees fit with standard Quaker practice in area meetings – indeed, was there any role at all for such a group, and how should they work with other Meetings for Worship for Business and other local committees?

Issues were gradually resolved. Those Friends approached about possible membership were warned of the high workload, but my own experience was that it was a joy to work on the committee. Issues arose endlessly through the Link Friends, through the columns of *the Friend*, and our email discussions were endless, but the committee members all chipped in with their thoughts and possible solutions; there was a feeling that we were all helping to forge a new environment in which local Friends could live out their Quaker witness with confidence.

*John Phillips, South East Scotland AM
(December 2021)*

4. Charity Commission news and related

4.1 Holding of meetings by electronic means

The Charity Commission (England and Wales) has updated its guidance for the charity sector to remind trustees that the more flexible approach to charities holding meetings outside of the terms of their governing documents came to an end on 21 April 2022. This is relevant to all charities and CIOs.

www.gov.uk/guidance/coronavirus-covid-19-guidance-for-the-charity-sector#meetings

Quaker area meetings in England and Wales need to check if their governing document allows them to make decisions by virtual means. If they do not then they should include an additional point in the clause relating 'meetings' that says: 'Trustees may agree to hold meetings by telephone or video conference.'

If your area meeting has followed the BYM template constitution it should be possible to action this by area meeting writing a minute to approve the amendment. You will need to check the 'Power of Amendment' stated within your AM's governing document.

The Scottish charity regulator (OSCR) chose not to make a short term change to its guidance, preferring that charities amend their governing document straight away. Charities in Scotland will also need to make this provision if they have not already done so.

4.2 Quaker employers' resource update

The Quaker employers' resource and template documents has just had its annual update. It is now available to download at www.quaker.org.uk/employers. Quaker employers should note the following areas where there have been some change:

- National Living Wage and National Minimum wage rates
- The threshold for automatically enrolling an employee to a workplace pension scheme
- Confirming a job applicant's 'Right to work' in the UK

BYM has been asked whether the recommendations about employment pay and benefits should be in line with what is offered to BYM staff. This has been considered and we don't think it would be fair or practical to ask AMs to replicate BYM's offer for their employees. However if AMs would like to know about BYM's offer to staff we will make it available on request.

If you have questions about employing people or engaging someone as a voluntary worker get in touch with Quaker Life, wardenship@quaker.org.uk.

4.3 Register of Persons Holding a Controlled Interest in Land in Scotland

OSCR has announced that the Register of Persons Holding a Controlled Interest in Land (RCI), operated by Registers of Scotland, was launched on 1 April 2022. The RCI will be Scotland's new land ownership transparency register. It is likely charities that are unincorporated associations or trusts that manage land (and buildings) will need to be entered in the new register. When launched, the RCI will:

- increase public transparency over decision making concerning land
- ensure there can no longer be categories of owner or tenant where, intentionally, or otherwise, control of decision making is obscured

For further details, visit www.ros.gov.uk/rci.

4.4 Expanding the register of charities

Once the Charity Commission has dealt with applications for charitable status from cathedrals, it will turn its attention to up to 35,000 excepted church charities over the next decade. The CC has not yet announced how it is going to handle the 35,000 church charities that will need to register. All area meetings that have not yet registered will be required to do so as part of a schedule, the details of which will be shared by Quaker Life when they are available.

4.5 E-signatures

The Ministry of Justice has announced that the expert Industry Working Group on Electronic Execution of Documents has published an interim report on best practice for using e-signatures. The report sets out their analysis of the current situation in England and Wales, identifies simple best practice guidance based on existing technology, including for vulnerable individuals, and makes recommendations for future analysis and reform. See <https://bit.ly/electronicSigs>

5. Some sources of useful guidance for the future

The indefatigable staff of Quaker Life have assembled some really useful guidance for the future.

5.1 Web page for area meeting trustees

See www.quaker.org.uk/trustees for the resources and support specifically aimed at trustees. The following headings on the web page have information and guidance:

- Area meeting report and accounts
- Charity schemes
- Safeguarding
- Policies for area meetings – models and examples
- *Trustees' & Treasurers' News*
- Other documents of interest to trustees
- Charitable registration
- Training and events

5.2 Other parts of the BYM website

Make a note of these short links as they are the easiest way to reach these sections of the website.

- Data safety: www.quaker.org.uk/data-safety
- Employment advice and support: www.quaker.org.uk/employers
- Friends trusts: friendstrusts@quaker.org.uk
- Property advice: www.quaker.org.uk/property
- Safeguarding: www.quaker.org.uk/safeguarding

5.3 AM Trustees Handbook

On the web page for AM trustees at www.quaker.org.uk/trustees you will be able to find and download the AM Trustees Handbook* in PDF format. This is an essential tool for Quaker trustees (see Qf&p 15.06, trustee responsibilities).

**Please note that this handbook is currently under revision.*

5.4 Communication: Role-holder networks

There are other communications networks that might be useful for you to know about or to share with others in your local or area meeting:

Area meeting clerks

E-group: by invite or contact supportmeetings@quaker.org.uk

Website: www.quaker.org.uk/clerks

Area meeting treasurers

E-group: by invite or contact supportmeetings@quaker.org.uk

Website: www.quaker.org.uk/treasurers

Clerks to area meeting trustees

E-group: by invite or contact supportmeetings@quaker.org.uk

Online discussion network: advertised via the clerks to area meeting trustees e-group

Website: www.quaker.org.uk/trustees

Property advice informal non-legal help and peer support

E-group: <http://lists.quaker.eu.org/postorius/lists/property-advice.lists.quaker.eu.org>

Wardens (et al) Talking

E-group: <http://lists.quaker.eu.org/postorius/lists/wardenshop.lists.quaker.eu.org>

Online discussion network: advertised via the wardenship and property advice e-groups

Website: www.quaker.org.uk/employers

6. Training Courses and events

6.1 Woodbrooke training for trustees and treasurers

Woodbrooke will be offering training for trustees and treasurers in June, July and August 2022. See the details below for dates and how to book.

Treasurership in a nutshell courses

■ 18 June, 10am–4pm: www.woodbrooke.org.uk/product/treasurership-in-a-nutshell-june

■ 13 August, 10am–4pm: www.woodbrooke.org.uk/product/treasurership-in-a-nutshell-aug

Trusteeship in a nutshell – beginners edition

■ 23 July, 10am–4pm: www.woodbrooke.org.uk/product/trusteeship-in-a-nutshell-beginners

Trusteeship in a nutshell – experienced Friends

■ 20 August, 10am–4pm: www.woodbrooke.org.uk/product/trusteeship-in-a-nutshell-experienced

6.2 Quaker Life

There are two remaining sessions for trustees and treasurers about the transition of Quaker Stewardship Committee's (QSC) responsibilities to Quaker Life Central Committee (QLCC). They will be at the following times and will include information about how trustees and treasurers will continue to be supported as well as some time for questions. Members of QLCC and QSC will be in attendance.

- 6 May, 10.30am–12.00noon: www.quaker.org.uk/events/qlcc-stewardship-2
- 11 May, 2.30–4.00pm: www.quaker.org.uk/events/qlcc-stewardship-3

7. Who's who in Quaker Life

Quaker Life staff team (as of April 2022)

■ Rachel Matthews	Head of Supporting Quaker Communities	rachelm@quaker.org.uk
■ Jude Acton	Team Leader Youth, Children & Families	judea@quaker.org.uk
■ Sophie Smith	Team Leader Spiritual Nurture	sophies@quaker.org.uk
■ Alistair Fuller	Team Leader Quaker Community	alistairf@quaker.org.uk
■ Naomi Major	Team Leader Witness & Collaboration	naomim@quaker.org.uk
■ Oliver Waterhouse	Team Leader LM and AM Governance	oliverw@quaker.org.uk
■ Kirsty Philbrick	QL Officer Youth, Children & Families	kirstyp@quaker.org.uk
■ Jo Baynham	Youth Development Worker (Yorkshire)	jonathonb@quaker.org.uk
■ Eugene Nanning	QL Officer Quaker Prison Chaplains Support	augenen@quaker.org.uk
■ Stela Brinzeanu	QL Administrator	stelab@quaker.org.uk
■ Zoe Prosser	LDW, Scotland	zoep@quaker.org.uk
■ Melanie Thomas	LDW, Cumberland & North East England	melaniet@quaker.org.uk
■ Bridget Holtom	LDW, Yorkshire	bridgeth@quaker.org.uk
■ Wendy Hampton	LDW, North West England	wendyh@quaker.org.uk
■ Helen Oldridge	LDW, Wales & Southern Marches	heleno@quaker.org.uk
■ Sarah Shaw	LDW, East Midlands	sarahs@quaker.org.uk
■ Bev Smith	LDW, East Anglia	beverleys@quaker.org.uk
■ Pip Harris	LDW, South West England	piph@quaker.org.uk
■ Ruth Audus	LDW, Kent, Sussex & Surrey	rutha@quaker.org.uk

LDW = Local Development Officer, QL = Quaker Life

Britain Yearly Meeting

Update for Trustees and Treasurers

Spring 2022



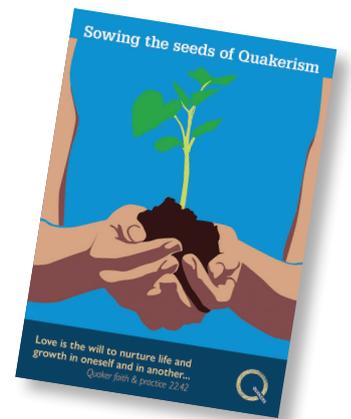
Meet the Fundraising Team at Yearly Meeting 27–30 May

The Fundraising Team are organising and will be staffing the stall at Yearly Meeting. Please drop by and say hello if you will be at Yearly Meeting. They have also organised a couple of virtual sessions in the run up to the Yearly Meeting weekend called 'Where does your money go?'. Look out for this on your Yearly Meeting planner.

Giving Advocates

A small number of Friends across Britain who are interested in encouraging giving to Quaker Work have formed a group which will meet three or four times throughout the year on Zoom. The purpose of the group is to provide support, discuss challenges and share ideas and tools. Whether you are a collector, treasurer or just interested in giving and money, you will be welcome. And if there is someone else in your meeting who might be interested, let them know.

For more information, contact Beth at bethf@quaker.org.uk



Annual reports to AM treasurers

Maisa has now sent all area meeting treasurers the contributions report for 2021. This breaks down how much local meetings and individuals within those meetings have given towards each area meeting's contribution to BYM in 2021.

For more information, contact Maisa at maisam@quaker.org.uk

Contribution levels

Below you'll find a chart detailing the average levels of contributions per member per AM.

- If everyone were to contribute an average of £20 per month (or £240 a year), that would maintain contributions at the increased level of £3m.
- We know that not every Friend will be able to give this amount. Meetings already giving at or above this level, perhaps should consider whether they can raise their own contribution to share the cost of Quaker work in an equitable way.

