

Trustees' & Treasurers' News

A newsletter from Quaker Stewardship Committee



Issue 21: Autumn 2021

1. Welcome to the Autumn issue!

In this edition we have the usual collection of useful snippets from the Churches Legal Advisory Service (CLAS) in **Section 2**. In **Section 3** we signpost Trustees to the 'model and example policies' now in the Trustees section of the BYM website. In **Section 4** is an article provided by Norfolk & Waveney AM's reassessment of its property holdings and needs. **Section 5** has information on Trustees and Sustainability and, finally, **Section 6** is a brief report on QSC's survey of the use of accounting software. Sorry Friends, still no firm recommendation from QSC about what to use.

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Quaker Stewardship Committee to be laid down

Next year, Quaker Stewardship Committee will be laid down at the rise of BYM 2022. Quaker Life Central Committee (QLCC) will take over the responsibilities for Advice and Guidance that QSC has been doing for a number of years. In practice, this will mostly be organised through the Quaker Life staff team. Conversations are already in progress between representatives of the two bodies.

Meeting for Sufferings and BYM Trustees will take responsibility as set out in Minute 27 (below). MfS responsibilities for oversight of certification are broader than those currently laid on QSC which concern financial reports and property records. We hope that the new arrangements will be conveyed to Trustees and Treasurers well in advance of the laying down of QSC.

"We agree to lay down Quaker Stewardship Committee, with effect from the rise of Yearly Meeting 2022. We agree that its advice and guidance functions should be transferred to Quaker Life Central Committee. We have heard the need for support of Area Meeting trustees.

We ask Meeting for Sufferings to take responsibility, on behalf of Yearly Meeting, for the oversight of certification of Area Meeting compliance responsibilities.

We ask Britain Yearly Meeting Trustees to take responsibility for liaising with the Charity Commission on matters of general concern to Quakers, and, working with General Meeting for Scotland, for liaison with the Office of the Scottish Charity Regulator (OSCR)."

excerpt of Minute 27 of Yearly Meeting Gathering 2021

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

Published by the Quaker Communication & Services Department of Britain Yearly Meeting, 173 Euston Road, London NW1 2BJ. Registered charity no. 1127633

COP26 and ahead

This week, the UK took over the Presidency of the UN climate talks COP26. Over the coming weeks and months there will be lots of ways we can work to build a peaceful and sustainable world.

Take a look at the climate and economic justice pages of our website to find out more:

www.quaker.org.uk/climate-economic-justice.

You can also read about the many different types of social action we can take in our 'Taking action for climate justice' resource:

www.quaker.org.uk/documents/taking-action-for-climate-justice-2021.

2. Charity Commission news and related

2.1 Guidance on Managing faith charities as trustees

The Charity Commission has renamed its Faith in good governance guidance. It is now called Managing faith charities as Trustees and is available at <https://bit.ly/FaithCharities>. Although most of the content should be familiar territory to any Quaker Trustee, it provides a helpful summary and lots of links for further information. It may be especially useful to new trustees.

2.2 E-signatures on accounts

The Charity Commission is accepting e-signatures on the annual Trustees' Report and Accounts filed with the Charity Annual Return. Details can be found at section 3.2 in its updated accounts guidance at <https://bit.ly/AccountsGuidance>. E-signatures can also be typed signatures or scans of a handwritten signature unless your governing document forbids it, or you are a charitable company filing at Companies House.

2.3 Revised guidance on independent examination

In July 2021 the Charity Commission revised its guidance documents CC31 Independent examination of charity accounts: guidance for trustees and CC32 Independent examination of charity accounts: examiners. The guidance for Trustees does not identify any changes from the previous guidance but is a handy summary. The guidance for examiners is largely unchanged and reflects the current guidance on thresholds for being required to have an audit. CC32a is a checklist of the items examiners will check. Trustees and treasurers familiar with this will be able to present matters in a way that makes the accounts easier to examine.

Separate guidance for Scotland is available at <https://bit.ly/Guidance-OSCR>.

2.4 Scotland's Places of Worship Forum

Built Environment Forum Scotland has publicised the Places of Worship Forum (see <https://bit.ly/PoWforum>). It is a non-denominational, strategic forum seeking sustainable future uses (within, and beyond worship) for Places of Worship within Scotland. If your meeting has an interest in the sustainability of communities, this could be worth investigation.

2.5 Historic England guidance on metal theft

Replacing lead by terne-coated stainless steel has sound advantages. Details may be found at <https://bit.ly/LeadReplacement>. Look out for the links to pdfs, and towards the bottom of the page there are notes on prevention & response and on other replacement materials.

2.6 Faith New Deal Pilot Fund

The UK Government has announced a £1 million Faith New Deal Pilot Fund, under which faith groups will be able to apply for grants for projects providing innovative solutions to issues such as food poverty, poor mental health, combating loneliness and isolation, providing debt advice and helping those who were unemployed during the pandemic get back to work.

The fund will be open to faith-based organisations to deliver projects to provide community wide services open to all the local population. Additionally, the funded projects will aim to have a positive impact in fostering good relations between people of faith and those of other faiths or none within local communities. For more information see <https://bit.ly/FaithNewDeal> which contains a link to the prospectus.

2.7 Minister for Civil Society appointed

The new Minister for Civil Society and Youth, appointed nearly a month after the reshuffle process began, is Nigel Huddleston MP, a Parliamentary Under Secretary at DCMS. In addition to his civil society brief, he is also Minister for Sport and Tourism. DCMS confirmed that the civil society brief continues to include social enterprise and loneliness policy. See <https://bit.ly/CSsupportFund>.

2.8 Tied accommodation

Lexology has published a helpful short guide to what employers need to know about tied accommodation. See <https://bit.ly/TiedAccom>.

Trustees A&Qs

Advice 1: Do you make time to consider the spiritual as well as the financial aspects of stewardship?

2.9 Food safety and allergen labelling

There are new regulations (from 1 October) concerning the labelling of allergens in pre-packed direct sales food and drink items. This probably does not apply to us but, for example, selling jam or pickles made in the meeting house kitchen for Quaker funds might do. However, accurate labelling might be good practice anyway.

There is a helpful guide to what is known as Natasha's Law on Stone King's website. See <https://bit.ly/LabelRegs>.

2.10 Contactless card payment

This has cropped up on the Treasurers' Cluster. We have no answers or recommendations, but it is suggested that average digital giving is 2 or 3 times higher than cash giving.

There can be digital links in emails to giving platforms and card readers in the meeting house. You could create a QR code (it's free) and link it to an online donation system (this will take a percentage) but has no ongoing or upfront costs to the meeting.

You will need to be aware of transaction charges which can be quite variable.

Some possible firms or systems to follow up are: Stripe, GoCardless, Data Developments, SumUp, Zettle, GoodBox. No doubt there are others.

2.11 Responsible investment

The Charity Commission drafted revised guidance on responsible investments for charities. It carried out a consultation on the revisions in 2021. The results of the consultation were published in July 2021. There is to be a court case in 2022 to clarify the position on some aspects of the guidance. Until that has been heard, no publication of the revisions.

3. Model and example policies

Examples of Quaker policies are now available online. You can now find examples online of many policies that may be needed by Quaker area meeting trustees. The policies are in use by Quaker area meetings and are offered informally as examples rather than templates. There are examples of investment, reserves, conflict of interest, complaints and risk policies.

Find them on the area meeting trustees webpage, www.quaker.org.uk/trustees.

Treasurers A&Qs

Advice 5. Do you present the accounts clearly to the meeting so that all Friends can understand essential points? Do you use written notes and simple graphics to help wider understanding?

4. An AM's reassessment of its property holdings and needs

Norfolk & Waveney Area Meeting has a significant property portfolio with 11 local meetings and nine meeting houses (some listed buildings) plus other tenanted domestic and commercial properties. About 25% of the buildings had not been regularly cared for and were in a state of some disrepair – some dangerously so.

Property issues took the lion's share of agenda time and service by Friends.

The meeting decided that this needed a whole Area Meeting approach to the 'right use of property', the care of buildings, and their use. It held a residential meeting on the theme.

'What is the ministry of our buildings?' Each local meeting gave a talk about the role of their meeting house in Quaker witness within local communities and how well they serve that ministry.

A review of the 'investment' properties revealed that they did not, in fact, raise money for Quaker work or necessarily progress Quaker values. Staff at BYM told Trustees about the Churches' Conservation Trust (CCT). The AM decided to have a contract with CCT for annual property checks and routine preventative maintenance at meeting houses. The CCT officer meets with the premises clerk, talking through the survey report to explain/advise/recommend actions.

The AM has sold off some surplus property. The outcome seems generally highly positive with smaller workload for Trustees responsible for property. All the AM's buildings are watertight and there is full understanding of repair requirements. And of course, relieved of these concerns, there is more time for spirit led matters.

We wish Norfolk & Waveney well as they set about systematically reducing the burden from property ownership.

5. Trustees and Sustainability

AM Trustees have been asked to provide a section in their annual report on the sustainability work of the local meetings and their achievements. QSC has extracted these pieces about sustainability as part of the review of all TARAs and assembled them to provide the basis of a report for Meeting for Sufferings which should give an overview of the Church's work for sustainability.

6. Survey of AMs use of accounting software

QSC member Beverley Goddard carried out a survey of the accounting software which is in use by AMs throughout the British Isles. Friends from 12 AMs responded and the packages on which there were comments included Quickbooks, Xero, Liberty, Sage and the Sharman spreadsheets. No package received overwhelming support and half of respondents would recommend the package their AM uses. It seems that whether an accounting package is recommended is as much about who is using it and their level of comfort doing so, as the functionality of the software.

There is some appetite for buddying out there.

7. Training courses and events

Please see www.woodbrooke.org.uk/learn for Quaker courses relevant to role holders including treasurers and trustees.

The Association of Church Accountants and Treasurers (ACAT) also offers courses. For more details and bookings, use your treasurer's login to the ACAT website at www.acat.uk.com.

If you haven't signed up to ACAT yet, please see information about BYM's block subscription for Quaker meeting treasurers at www.quaker.org.uk/treasurers.

If you need help with the signing in process please email membership@acad.uk.com. They should be able to send you a PDF sheet with instructions on the signing up process for the BYM ACAT block membership. This membership covers two treasurers for each AM and one per LM.

Looking back on Twenty Years – over to you!

We wonder whether there is a Friend who would like to share comments on the state of the church – from the point of view of Trustees and Treasurers, of course – in 2002 and its state today. We wonder how the AM Trustees found the task of agreeing their first published Trustee report with their AM and sending it to the Charity Commission. We wonder greatly about the work of the first Quaker Stewardship Committee and how they evaluated the first batch of Annual Reports they received from Area Meetings.

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Britain Yearly Meeting

Update for Trustees and Treasurers

Autumn 2021



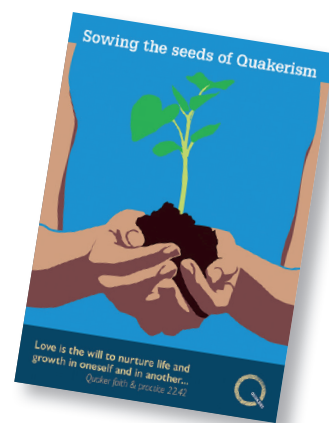
Thanks to everyone who came to the September Zoom meetings for treasurers!

Contribution 2022 pack

All treasurers have been sent the latest contributions pack 'Sowing the seeds of Quakerism' digitally. It can be used on its own or treasurers and collectors can use this to supplement their own schedules.

We know that many treasurers like to distribute paper copies – please order your paper copies by completing the form at:

<https://forms.quaker.org.uk/contributions2022>



The deadline to fill this in is the 5 November.

Read the blog

To complement the pack, Maisa Monteiro wrote a blog post explaining her visions for the new contribution leaflet and what inspired her, please read it here: www.quaker.org.uk/blog/sowing-the-seeds-of-quakerism

Contribution levels

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

- Only 21% of area meetings are giving more than £200 per member. (*figures below are a 3 year average of contributions from 2018, 2019 & 2020*)
- 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.

