

# Trustees' & Treasurers' News

A newsletter from Quaker Stewardship Committee



## Issue 14: Spring 2019

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### 1. Welcome to *Trustees' & Treasurers' News* Issue 14.

We approach Yearly Meeting in interesting times, full of uncertainties. But one thing is certain, copy dates and Yearly Meeting will continue to roll around. Charity Commission News (article 2) contains some 'musts' for Trustees and Treasurers on ICO registration related to GDPR (Sorry, but it's the law).

Please send us items for inclusion (things you've written) or suggestions (things you'd like us to look into) for the Summer 2019 issue by 1 June 2019.

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

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### 2. Charity Commission news

#### Data Protection and area meeting registration

Britain Yearly Meeting's registration status with the Information Commissioner's Office (ICO) has changed. Now BYM's registration covers only Britain Yearly Meeting, the charity. Many Area Meetings are already ICO registered separately. Any AM that isn't ICO registered must complete the self-assessment on the ICO website to see whether they should register independently:  
see <http://bit.ly/ICOassess>

Please feel free to contact BYM Data Protection group for more information: [dataprotection@quaker.org.uk](mailto:dataprotection@quaker.org.uk)

#### Changes to public display names on the charity register

From 1 April 2019 the full legal names of trustees will be displayed to the public where public display names have been used on the charity register. Where this might put people in personal danger it is possible to apply for a dispensation. See <http://bit.ly/CCnamedisplay>. (Trustees with an existing dispensation need not reapply.)

#### National Living and Minimum Wage levels

From 1 April 2019:

The National Living Wage was increased from £7.83 to £8.21.

The National Minimum Wage was increased as follows:

Workers aged 21 to 24 – from £7.38 to £7.70.

Workers aged 18 to 20 – from £5.90 to £6.15.

Workers aged over compulsory school age under 18 – from £4.20 to £4.35.

Apprentices – from £3.70 to £3.90.

On 6 April there were changes to auto-enrolment rates for pensions: the minimum contribution rates increased to 3% for employers and 5% for employees.

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We will avoid abbreviations in *Trustees' & Treasurers' News* where possible, but some will occur:

CC – Charity Commission   LM – local meeting   BYM – Britain Yearly Meeting   AM – area meeting  
OSCR – The Office of the Scottish Charity Regulator   QSC – Quaker Stewardship Committee

### **Gift Aid Small Donations Scheme increase approved by parliament**

From 6 April 2019, the maximum donation upon which a charity can claim a Gift Aid style top-up payment under the Gift Aid Small Donations Scheme (GASDS) was increased from £20 to £30.

### **Gift Aid claims and full forenames**

It was to have been the case that full forenames were to be used in Gift Aid declarations from April 2019. However, HMRC has agreed not to introduce this requirement. Instead HMRC wants to see a gradual improvement in claims including full forenames. Current Gift Aid declarations will remain valid and charities may use names that donors could reasonably be known by, including shortened names like Chris or even Lottie. Charities should try to request full names on future declarations and they are encouraged to document any actions undertaken to improve collection of first name information.

HMRC has published a new online guide (see <http://bit.ly/HMRC-GAGuide>) intended to help charities complete their Gift Aid donations schedules accurately. It will be particularly useful for those who are new to Gift Aid or who have been having difficulties filling in their schedules.

HMRC has also published helpful guidance (see <http://bit.ly/HMRC-GAGuide2>) on how to use the schedule spreadsheet, with information on appropriate software.

### **Charity Commission: changes to the 'update charity details' service**

From 12 November 2018, all charities MUST check and update their details before they can access the annual return. The changes also include an update on public displays of trustee names, the requirement for bank account details and an emphasis on keeping all contact details for the charity and its trustees up to date. Don't let these required changes take you by surprise!

See <http://bit.ly/CCupdateDetails> for guidance.

### **Waste collection and charging for churches**

Waste from places of religious worship is regarded as domestic waste and the authorities may not charge for its collection. However, waste arising from the hiring of our premises for other than our religious objects is regarded as commercial waste for which a charge could be made. This is presumably why some organisations require hirers to remove their own waste. Local authorities will no doubt differ in their consideration of this distinction.

## **Queries for trustees**

8. How do you support the meeting to enable it to comply with regulations on safeguarding children and vulnerable adults?

*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. E-group for clerks to AM trustees**

We're going to have another e-group cluster for clerks to AM trustees. As with other groups, this will allow clerks to trustees to share concerns, solutions, information or hot tips for how to keep their group in order.

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**To update treasurer contact details and for treasurer support please contact:  
Gaby Scott, 020 7663 1045, [gabys@quaker.org.uk](mailto:gabys@quaker.org.uk).**

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## 4. QSC at Yearly Meeting 24–27 May 2019

During Yearly Meeting, QSC will present its annual report on the state of compliance of our area meetings with the law. That's the summary of all the checking we do on behalf of BYM, and it's an important safeguard for BYM. QSC will also hold a workshop at Yearly Meeting on the Sunday at 17.45 in Drayton House Room B06.

'Supporting Quaker stewardship in meetings' will be an opportunity to meet members of QSC, ask questions on the QSC report to Yearly Meeting, and discuss problems and solutions in upholding right stewardship in meetings. I rather hope we will discuss whether AM Trustees are worrying about the right things. Should the focus be financial risk, safeguarding and long term viability rather than compliance with Charity Commission guidance?

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## 5. Trustees and Treasurers Conference 2019

The combined Trustees & Treasurers Conference with around 85 participants was vibrant and informative. We were well looked after by the centre and by our own staff. Presentations from Charity Commission and HMRC staff were useful and interesting and can be found on the BYM website at [www.quaker.org.uk/trustees](http://www.quaker.org.uk/trustees) and [www.quaker.org.uk/treasurers](http://www.quaker.org.uk/treasurers). Combining the interests of treasurers and trustees may have challenged a few of us, but for those of us who are both it was ideal. The workshops were wide-ranging, that on reducing the treasurer's load attracting the largest number. The Simpler Meetings Project is underway collecting and disseminating ideas in plenty. We all seem to be doing well in some aspects of our work but a conference like this reveals calmly and kindly where further work is needed. For any feeling overwhelmed, the message is prioritise.

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## 6. Registering as a charity – conversations with recently registered AMs

The 2021 deadline for registering as a charity for those area meetings that are excepted charities continues to approach. But some good news.

QSC received a report of a phone survey of six AMs that have registered as charities recently. All are glad that they made the switch to CIO. It has helped recruitment of trustees and increased the comfort of trustees. It hasn't all been simple – the survey commented on banks being slow and sometimes obstructive in opening new bank accounts for the CIO. But the new model governing document worked well.

We hope that ACAT will be organising training for organisations that need to register as a charity.

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## 7. Treasurers' Cluster

The Treasurers' Cluster, due to launch during April, is an email group for area meeting treasurers and assistant treasurers. It provides a way to communicate directly with treasuring teams in other area meetings to air challenges, offer comments and share experience. Role holders will be emailed by Leslie Bell, Meeting Relationships Officer, just before their email address is added to the cluster. If you haven't had an email by the end of April and think you should be included, first check your spam or junk folder to see if the email is there. If it isn't, then contact Leslie Bell at [leslieb@quaker.org.uk](mailto:leslieb@quaker.org.uk).

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## 8. News from our property adviser

### Chubb fire equipment servicing cost savings

Quaker meetings can take advantage of a contract that the Methodist Church has put in place with Chubb, the fire and security company. The contract is to service, test and supply fire extinguishers and fire blankets. The contract was originally put in place by the Methodists' central property team but is now open to any place of worship, irrespective of denomination.

My local meeting has used Chubb for some years. We recently had our extinguishers serviced under this national contract and found that we saved about 40% over what we had previously paid Chubb via our individual arrangement.

BYM does not endorse any particular supplier and each meeting should make up its own mind about who it chooses to carry out its fire systems work. If you are interested and would like to find out more, get price information or arrange a service visit contact Joanne White, Chubb contract administrator, 0161 654 2256 or [joanne.white@chubb.co.uk](mailto:joanne.white@chubb.co.uk)

You can find more information about property matters generally on the property page of the BYM website: [www.quaker.org.uk/property](http://www.quaker.org.uk/property)

### 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))

## 9. AMs investment policy

We recommend that Quaker charities should have an investment policy. There has been some publicity about the BYM investment policy approved in September 2018. You can find this on the BYM website at [www.quaker.org.uk/bymtrustees](http://www.quaker.org.uk/bymtrustees).

We are not advising AMs to create something so substantial. An alternative approach is adopted by Cumberland AM whose policy is published at <http://cumberlandquakers.org.uk>.

## 10. COIF Deposits and Bank Guarantees

Your editor was concerned when he learned (while moonlighting for a non-Quaker charity) that COIF (Charities Official Investment Fund) deposits are not covered by the guarantee scheme for bank deposits. CCLA (Churches, Charities and Local Authorities), who manage the COIF deposits, sent a standard letter explaining why the organisation considers that their risks are very low and the risk to depositors minimal. We are happy to make it available to Friends on request.

## 11. Woodbrooke courses for trustees and treasurers

See separate courses sheet. There is also a 'Being a Quaker Treasurer' course 15-17 November. Full details and online booking at [www.woodbrooke.org.uk/being-a-quaker-treasurer](http://www.woodbrooke.org.uk/being-a-quaker-treasurer)

# Notices from Britain Yearly Meeting



Spring 2019

## 2019 contribution materials

The 2019 contribution materials have now been sent out and should be with the person who receives them for your meeting. If you were expecting materials but the appropriate person has not yet received them, please contact the Treasurers' and Clerks' Support Officer, Gaby Scott, at [gabys@quaker.org.uk](mailto:gabys@quaker.org.uk) or on 020 7663 1045.

## 2018 annual report and review

Britain Yearly Meeting's 2018 annual report and financial statements will be published online during April. You will be able to read the report at [www.quaker.org.uk/annualreport](http://www.quaker.org.uk/annualreport) and we hope that you will find it useful and informative. In May we will publish a shorter and more colourful annual review. This will be online in the same place and in addition hard copies will be sent to each local meeting. Copies of both documents will be available at Yearly Meeting.

Please do take a look at the review when it arrives and encourage others in your meeting to do so. The work described in the report and review is guided by Friends, funded by Friends and done in Friends' name.

## Handbook and guidance sheets for treasurers

The Association of Church Accountants & Treasurers (ACAT) publishes a handbook for treasurers. BYM has paid for ACAT membership for all meeting treasurers (AM and LM), giving them access to this handbook. This is your primary source of information and you can find it online at [www.acat.uk.com](http://www.acat.uk.com). If you are a treasurer and do not have the ACAT login details, please contact the secretary to Quaker Stewardship Committee on 020 7663 1161 or email [qsc@quaker.org.uk](mailto:qsc@quaker.org.uk).

The ACAT handbook is supplemented by a set of 25 guidance sheets written especially for Quaker treasurers and following the exact same structure. All 25 sheets are contained in a single PDF file, which can be read or downloaded at [www.quaker.org.uk/treasurers](http://www.quaker.org.uk/treasurers).

## Posting cheques to BYM

We are so grateful for donations from Friends and meetings, which in 2018 made up almost a quarter of our income. If you are sending a donation via post, please make sure the cheque is made out to 'Britain Yearly Meeting' and the envelope is marked 'C2019' (or C + the current year). We suggest marking the envelope in this way because it does not make it obvious that a cheque is enclosed (minimising the risk of postal theft), but does ensure that it will be handled appropriately once it arrives at Friends House. Please avoid addressing the envelope to a specific member of staff as this can cause delays in handling the cheque if they are not at work.

# Simpler Meetings Project update

This project aims to find ways to reduce the administrative burdens on key Quaker role holders – especially area meeting trustees, treasurers and clerks – so there is more time for spiritual nurture, community building, outreach and witness in the world. The following is an update from the project manager, Jonathan Carmichael:

## Sharing ways to reduce the burden

Thank you to those area meeting treasurers who completed the recent survey. Points emerging are: being clear about which tasks must be undertaken by a treasurer and which can be done by someone else; the advantages of using online banking; having a paid bookkeeper; and using online accounting systems. The results were shared at the conference recently, and will be circulated once a few more responses have been received.

If your trustee body has found good ways of reducing the load on trustees, or simplifying your work, please do let me know, so others can benefit from them.

## Considering significant changes?

Another part of the project is to work with a few area meetings on major changes they want to consider or pursue. Some area meetings and trustees are considering working together more closely with other area meetings, perhaps with a shared property trust, or sharing Quaker roles or staff, or merging in some way, or using common approaches. If you would like some discussion or assistance with this, do get in touch, as there may be lessons we could all learn and share.

## Model policies

We are developing a set of model policies and templates that area meetings can adapt and adopt, to avoid re-inventing the wheel. In the next few months we aim to offer model policies on: *safeguarding, risk management, health & safety, bullying & harassment, equal opportunities, complaints, social media*, as well as model *room hire conditions*.

Trustees that are considering updating or creating these policies may wish to use these, rather than create them themselves. I will shortly be asking all clerks of area meeting trustees to share their current policies with the project, to help assess where the gaps are greatest and provide good examples that can feed into the models being developed. The next phase of the project will be to work on some of the following topics: *investment, conflicting interests, volunteer management, counter fraud, data protection (updated), sustainability, records & archiving, lone working safely, business continuity*, and some further *employment policies*.

Note that there are already model policies at [www.quaker.org.uk/employers](http://www.quaker.org.uk/employers) for: *grievance, disciplinary & capability, sickness, annual leave, employee data protection, whistleblowing, and data protection*. Guidance on *reserves* can be found in the Trustee Handbook at [www.quaker.org.uk/trustees](http://www.quaker.org.uk/trustees) and broader data safety information at [www.quaker.org.uk/datasafety](http://www.quaker.org.uk/datasafety).

## Contact

Jonathan Carmichael, Simpler Meetings Project Manager, [jonathanc@quaker.org.uk](mailto:jonathanc@quaker.org.uk)

## Useful sources of information for trustees

An updated sheet at [www.quaker.org.uk/documents/useful-info-trustees-apr2019](http://www.quaker.org.uk/documents/useful-info-trustees-apr2019) highlights the many ways trustees can access support.

# TRAINING FOR TRUSTEES & TREASURERS WOODBROOKE 2019



A selection of courses aimed at equipping and supporting trustees and treasurers within Quaker meetings and organisations. Courses include both practical training from experienced tutors and exploration of the spiritual basis of the roles.

## Clerk to Trustees: an online training course

Thursday 11 - Thursday 25 April 2019

£54 online course

This three week course will help clerks to Area Meeting Trustee bodies develop their skills and confidence. We'll talk about what's involved in the role, being a trustee in a Quaker context, building good working relationships, and where to go for help. Possible topics include; planning agendas, writing minutes, contracts and employment, trusteeship and faith, using subcommittees, and what needs doing when. There will be links to useful material and a forum to discuss your particular circumstances and questions.

Book online via [www.woodbrooke.org.uk/clerk-to-trustees-training](http://www.woodbrooke.org.uk/clerk-to-trustees-training)

## Managing our Meeting Houses

Monday 2 - Wednesday 4 September 2019

£245 residential £170 non-residential

This training and support event for meeting houses of all sizes and functions includes: Witnessing to Quaker values; workshops for staff and employers on employment law and good practice and on health and safety legislation; as well as sessions on meeting house administration matters, and on building working relationships and support networks. The course aims to respond to the needs of participants so everyone will gain increased enthusiasm, skills, confidence and knowledge to enhance the life of their meeting house.

Book online via [www.woodbrooke.org.uk/managing-our-meeting-houses](http://www.woodbrooke.org.uk/managing-our-meeting-houses)

## Being a Quaker Trustee : an online course

Monday 7 October - Sunday 17 November

£115 online course

This six-week online course will provide easy-to-understand information and enjoyable learning, to make trusteeship approachable and rewarding. We will be factual and practical, but all we do will be underpinned by the spiritual question of what trusteeship means within Quakers? What does God require of us? What does the law require? What is considered good practice for charities? How does this fit with Quaker good practice? How do trustees, area and local meetings relate to each other? How can trustees best serve our meetings? This course is particularly suitable for new/less experienced Area Meeting trustees.

This course involves a time commitment of approximately two to three hours per week.

Book online via [www.woodbrooke.org.uk/being-a-quaker-trustee-online](http://www.woodbrooke.org.uk/being-a-quaker-trustee-online)



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