

## Survey of QSC effectiveness

### 1. Introduction

The Quaker Stewardship Committee (QSC) annual report to Yearly Meeting 2018 (see Reference) makes 12 statements describing QSC's work under the following headings:

- Support for trustees
- Property advice and guidance
- Support for treasurers
- Education and training
- The law
- Dissemination of good practice

Because it is the experience of treasurers and trustees that matters, not that of QSC, we carried out a survey of all area meetings on the effectiveness of QSC's work.

The survey was sent to area meeting treasurers and clerks to trustees in late May 2018 with reminders sent in July and August. The survey form asked a set of questions for each of the 12 statements. The text of the statements and the set of questions is given in Appendix I.

Most of the questions were followed by a tick box for a yes/no response which has enabled percentages of 'Yes' answers to be calculated for these questions; those results are given in Section 2. The last question for each statement asked for a response in words; these results are given in Section 3.

This document contains the following sections:

1. Introduction
  2. Survey Responses in Numbers
  3. Survey Responses in Words
    - 3.1 Recommended Actions
  4. Acknowledgements
  5. Reference
- Appendix I – Survey Form  
Appendix II – QSC response to "Recommended Actions"

### 2. Survey Responses in Numbers

Here are the results for the tick box questions on the survey form. In total, 44 survey responses were received from 40 area meetings by the end of August 2018.

There were 19 survey responses from clerks of trustees (CofTs), 22 responses from area meeting treasurers (AMTs) and 3 combined responses.

The full text for both the 12 statements and the tick box questions is given in Appendix I.

Quaker Stewardship Committee 2018 - Survey of QSC Effectiveness - Responses					
		Are you aware of QSC work on ...	If so, was it useful or very useful	or was it not very useful or not relevant	Is it likely to be useful in the future
1	... Quaker Life agreement...	59%	69%	19%	59%
2	... Trustees Conference ...	82%	72%	14%	68%
3	... Property Advice Cluster ...	64%	61%	21%	64%
4	... Vibrancy ...	50%	32%	45%	32%
5	... annual reports & property registers ...	95%	76%	10%	75%
6	... reserves ...	82%	78%	14%	68%
7	... ACAT ...	82%	61%	11%	68%
8	... Woodbrooke training ...	98%	86%	2%	84%
9	... online report-writing course ...	64%	36%	32%	55%
10	... annual report checklist ...	89%	82%	8%	77%
11	... T&T News ...	98%	95%	0%	82%
12	... queries from meetings ...	75%	79%	3%	68%

The results show a high level of awareness, and perceived usefulness, for QSC's work.

For example, 100% of AM treasurers are aware of work on:

- Annual Reports
- ACAT
- Woodbrooke training
- T&T News

and 91% of AM clerks of trustees are aware of work on the Trustees conference;

the lowest levels of awareness were:

- 64% of all responses for Property Advice Cluster
- 64% of clerks of trustees for ACAT
- 59% of all responses for Quaker Life agreement
- 52% of AM treasurers for Online report-writing
- 50% of all responses for Vibrancy

For AMs who were aware of each statement, the highest percentages of those ticking "useful" or "very useful" were:

- 96% of AM treasurers for T&T News
- 95% of clerks of trustees for T&T News
- 91% of AM treasurers for Annual Report checklist
- 90% of clerks of trustees for Woodbrooke training
- 86% of AM treasurers for Reserves

and the highest percentage of all responses for "not very useful" or "not relevant" was 45% for Vibrancy which may simply reflect the small number of AMs currently involved.

In answer to the question "is it likely to be useful in the future", positive responses of 80% or over were given for:

- T&T News
- Woodbrooke training
- Annual Reports & Annual Report checklist (AM Treasurers)
- ACAT (AM Treasurers)

### 3. Survey Responses in Words

Here are the results from the last question for each of the 12 sections:

### How could this work be more useful for your AM?

Some comments added to the tick box questions are also included in this section.

Written responses which recommend actions have been collated in Section 3.1 "Recommended Actions". A representative selection of other comments is included here.

The most controversial aspect was the Annual Reports (TARA) checklist which was scored highly by most AMs for both current and future usefulness (Section 2.1).

#### *AM comments on Support for Trustees*

- We need to work more simply not fear regulation.
- OSCR is slightly different from the English model.
- Examples of help given by Vibrancy workers would help in the future.

#### *AM comments on Property Advice*

- Recent changes make it overlap with the email Wardenship Support Group.
- We are part of BYM's Property Support Pilot Study so unlikely to contact in near future.
- Need to know that volunteers have appropriate/ up to date skills / expertise.
- Not sure how well-versed the cluster is in Scottish property law.
- Encourage more Friends to join.
- Is a list of speakers willing to make a presentation at AM possible?

#### *AM comments on Annual Reports & Property Registers*

- As a newly appointed Treasurer, I found the questionnaire itself quite informative.
- Please continue!
- Feedback needs to be sensitively given. Friends having put a lot of work into the annual report have been distressed by the manner in which feedback was delivered.
- No feedback was given. How do you know if your report is sufficient?
- I'm not sure what "property registers" refers to ...
- Give more advanced notice of any changes required.
- An essential element is an active link between the QSC link person and the AM Treasurer and Clerk to Trustees.

#### *AM comments on Reserves*

- We cannot address all issues straight away. It takes time and resource, which is very scarce. A simple default policy to use in the interim would help.
- Don't make it more complex than it needs to be.
- Make sure that any new thinking is communicated to AM treasurers.

#### *AM comments on ACAT (Association of Church Accountants & Treasurers)*

- A very very good educational source.
- It is also of benefit to trustees not just treasurers.
- Our current Paxton person attended one of their training days and found it very useful.
- ACAT necessarily addresses more hierarchical structural approaches than we would be comfortable with in my experience at least in the day course that I attended recently. We need to be briefed that our particular circumstance as Friends is going to be different to the majority of churches in terms at least of their decision-making processes and decision-making structures.
- I look forward to the supplementary Quaker handbook sheets.

### *AM comments on Education & Training*

- More visibility.
- Make it widely known and encourage more Friends and Attenders to get involved.
- If we can find new treasurers and trustees, they will need training.
- Meetings on particular topics for trustees could be really useful.
- On-line report-writing course:
  - Do it again please.
  - I couldn't access it – probably my poor internet skills.
  - More publicity - none of our trustees had knowledge of this.
  - We are meeting all QSC requirements for our annual report and have established a format for our narrative report, which we are happy with.

### *AM comments on the TARA (Annual Report) Checklist*

- I found it a really useful checklist when finalising last year's accounts.
- We find the Tara checklist too judgemental.
- Last year's advice on additional administration for the Report was too demanding.
- The TARA checklist was so confusing! Help from Link Friend was useful but still didn't help with the terminology or confusing layout.
- QSC appear to have stricter criteria than the charity commissioners – is it the law or is it church government? Friends need to understand why they are required to do things.
- The principle is fine, and the link person is available for consultation.
- Check that it doesn't become a tick box exercise with no follow up.
- Keep updating it.
- Please get the Checklist out earlier in the year.

### *AM comments on T&T News*

- Excellent keep up the good work.
- Continuing to have relevant content.
- Can more of it be made readable for Trustees?
- More support for clerks.
- It would help to know when the next one is due – gaps between issues seem to vary.
- We could circulate to all members of our Finance Committee.

### *AM comments on Queries from Meetings*

- Carry on with what you are doing! ... essential.
- They couldn't be more helpful.
- In our AM, the right use of funds and meeting house hirings was not sufficiently clear in places and led to more questions than answers.

### *General comments by AMs*

- Please just appreciate that there are very few people doing an enormous amount of work - they have limited capacity, particularly as they need to train others along the way and some are reluctant learners!
- We were concerned to discover that our awareness of what QSC has to offer was lower than expected - possibly linked to the fact that we are the largest AM in the country, and relatively self-sufficient, but we would like to do more to raise awareness within the relevant parts of the AM, not only to take better advantage of what is on offer, but also to make what we do more compatible with central Quaker custom and practice.
- We will be interested in the outcome of the survey.

### **3.1 Recommended Actions**

#### ***A - Support for Trustees***

A1. Focus on guidance documents for trustees to avoid reinventing the wheel in each AM, eg Luton & Leighton AM offer model guidance documents for AM trustees and LMs.

A2. Provide more support for the recruitment and retention of trustees.

A3. Hold trustee conferences annually, sharing good practice and highlighting trustee duties in a motivational way. Publicise the topics to be covered well in advance. Keep asking trustees for topics they need help with to feed into the agenda.

#### ***B - Property Advice***

B1. Provide regular information on the Property Advice Cluster so that AMs realise that help is available and fully appreciate its scope.

#### ***C - Support for Treasurers (& Trustees)***

C1. Give examples of good annual reports and/or provide an agreed standard format for the YM since much of it is standard text and repeated each year. Consider issues such as presentation, future use to the AM, etc. Producing annual reports is wider than treasurers.

C2. Advice on reserves needs to be clearer and recognise that some AMs may have restricted funds specifically for property where an endowed property has been sold and the funds or income are restricted to use on the AM's properties. Link to investment policy, Publicise best practice. Advise how to create one AM policy from very diverse LMs.

C3. Improve awareness of ACAT services, ACAT courses, and how to access them.

#### ***D - Education & Training***

D1. For new trustees, run more frequent training courses.

D2. For new treasurers, provide online resources that are available at any time of year.

D3. Provide courses for more experienced trustees, specifically for clerks to trustees - managing all the issues trustees need to deal with, prioritising, remembering that it is as much about people as property and finance etc.

D4. For treasurership and financial stewardship make clearer where Receipts & Payments (R&P) differ from Income & Expenditure - the limit for R&P went up to help small charities and it would save work for smaller AMs if they were aware they could use it.

#### ***E - The TARA Checklist***

E1. Consider separating the form and the instructions/information on the TARA Checklist.

#### ***F - Dissemination of Good Practice***

F1. Make T&T News contents searchable online.

F2. Give more advanced warning in T&T News of upcoming issues, particularly those which will result in a lot of work for trustees and where supporting resources are not available from QSC or other BYM departments.

F3. Arrange for all AMs to have access to the questions asked by individual AMs and the answers given by Link Friends, ensuring that (a) the AM agrees to wider circulation of the issue and (b) all QSC members have had an opportunity to comment on the answers.

F4. Provide online FAQs (Frequently Asked Questions) and answers.

## **G – General**

G1. Look at the reported difficulties in finding documents for trustees and treasurers on the BYM website. Co-ordinate all relevant advice sources. Either cross-reference or consider combining trustee and treasurer sections of the website. Add more documents (eg QSC work, template policies). Improve access to “news” for those who miss emails or who are not on the appropriate mailing list. Regularly remind trustees and treasurers to look at the trustee and treasurer sections.

G2. Regularly remind AM trustees’ clerks and AM treasurers to forward relevant information to all the trustees and treasurers in the AM.

Appendix II gives QSC’s response to the Recommended Actions listed in Section 3.1.

## **4. Acknowledgements**

44 responses to the survey were received from clerks of trustees and/or treasurers of the following 40 Area Meetings by the end of August 2018:

Bournemouth Coastal	Leeds	South London
Brighouse West Yorkshire	Leicester	South Wales
Bristol	Lincolnshire	Southern Marches
Cambridgeshire	Luton & Leighton	Staffordshire
Central England	Mid Essex	Surrey & Hampshire Border
Chilterns	Mid Thames	Thaxted
Cornwall	Norfolk & Waveney	West Kent
Cumberland	North of Scotland	West Scotland
Devon	North Somerset	West Somerset
Dorset & South Wiltshire	North Wales	West Weald
East Scotland	Nottinghamshire & Derbyshire	West Wiltshire & East Somerset
Hertford & Hitchin	Oxford & Swindon	Wirral & Chester
Ipswich & Diss	Pendle Hill	
Kingston and Wandsworth	South East Scotland	

## **5. Reference**

The Quaker Stewardship Committee (QSC) annual report to YM 2018 is printed on pages 19 to 20 of Yearly Meeting’s Agenda & Notes (<http://www.quaker.org.uk/ym/documents> - Documents in advance – Agenda & notes (PDF))

## Appendix I – Survey Form - SURVEY ON THE EFFECTIVENESS OF QSC’S WORK

Are you aware of this work?				
Was it for you or your AM	very useful?	useful?	not very useful?	not relevant?
Is it likely to be useful in the future?				
How could this work be more useful for your AM?				

The questions above were asked for each of the 12 statements from QSC’s annual report to YM 2018 listed below.

### Support for trustees

1. QSC reached a formal agreement with Quaker Life Central Committee (QLCC) on how to work together to support trustees, treasurers and, through them, area meetings.
2. The national Trustees’ Conference took place at Woodbrooke on 17–19 February 2017. The theme was ‘Spinning the plates: juggling the joys and challenges of trusteeship’.

### Provide property advice and guidance

3. The Quaker Life Network Property Advice Cluster has continued to provide support for meetings and can be contacted through Helen Griffith at Friends House. ...
4. We met with representatives of the Vibrancy programme to explore how we can work with them, particularly around property support.

### Support for treasurers

5. To help ensure every part of Britain Yearly Meeting is producing proper annual reports and property registers, the Committee has continued to review the reports and accounts of area meetings. and has offered guidance and support to meetings in their production.
6. QSC has produced guidance for area meeting treasurers on the development of reserves policies and on the use of excessive reserves.
7. The committee has surveyed the use of BYM’s group subscription for local and area meeting treasurers to the Association of Church Accountants and Treasurers (ACAT). This showed that the ACAT’s online handbook and other services are increasingly being used and are well received. In particular, treasurers appreciate ACAT’s one day courses delivered across the country and its annual conference.

### Ensure education and training are available

8. The committee continues to work with Woodbrooke Quaker Study Centre to provide relevant and accessible training for Friends involved in finance and property matters. During 2017 training was available on trusteeship, treasurership, financial stewardship and property.
9. We have worked with Woodbrooke to develop a new online course for area meeting trustees entitled ‘Writing brilliant reports’.

### Enable meetings to act within the law

10. The committee has updated and expanded the agreed checklist for trustees’ annual reports and accounts to bring it into line with current Charity Commission and Office of the Scottish Charity Regulator requirements.

### Disseminate good practice

11. *Trustees & Treasurers News* continues to be published on a regular basis to provide news of changes in the regulatory framework and to share good practice.
12. The committee have responded to queries from meetings on a variety of topics, including the right use of funds, meeting house hirings and appointment of trustees.

## **Appendix II – QSC Response to “Recommended Actions”**

### ***A – Support for Trustees***

A1. This is a priority and we are working with the Simpler Meetings project on it.

A2. This is an issue for nominations committees, so we agree to draw it to the attention of Quaker Life Central Committee. QSC’s contribution is to make it as easy as possible to be a trustee.

A3. QSC is currently working to provide the best possible conferences for trustees through QSACC. The resource available to run conferences limits what can be provided.

### ***B – Property Advice***

B1. We ask Trustees & Treasurers News to have a regular item on this.

### ***C – Support for Treasurers (& Trustees)***

C1. We ask Trustees & Treasurers News to showcase good examples, using links to Charity Commission and area meeting websites.

C2. We will review the reserves policy advice. There is revised coverage of this topic in chapter 9 of the Treasurers’ Handbook.

C3. This has been done in the revised Treasurers’ Handbook.

### ***D – Education & Training***

D1. We agree to notify Woodbrooke of this request.

D2. The revised Treasurers’ Handbook provides this.

D3. We agree to notify Woodbrooke of this request. A course for clerks to trustees is already being developed.

D4. This has been done in the revised Treasurers’ Handbook.

### ***E – The TARA Checklist***

E1. This will be considered when the checklist is revised for 2019.

### ***F – Dissemination of Good Practice***

F1. There is no resource available to do this.

F2. We do this when we can. We do not always get much warning either.

F3. We do this when we can. Not all questions are suitable for this treatment.

F4. We try to keep Quaker-specific information up-to-date and available. The resource available to do this is very limited.

### ***G – General***

G1 This is being worked on centrally and by specific projects such as the Simpler Meetings project. The resource available to do this is limited.

G2. Clerks need to use their discretion on this.