

# Quaker governance update

Quaker Life Network newsletter

Issue 5: Autumn 2023



## 1. Welcome to Quaker governance update

Welcome to the Autumn 2023 edition of Quaker governance update for Quaker trustees, treasurers and other Friends involved in Quaker governance. If you have questions about any of the items in the newsletter or about any other governance or finance related issue please get in touch with Quaker Life, [supportmeetings@quaker.org.uk](mailto:supportmeetings@quaker.org.uk).



## 2. Quaker Governance support and guidance

### 2.1 Trustees Annual Report and Accounts (TARA) documents



It is that time of the year again Friends when we are required to report to the charity regulators. If your AM's year' end is at the end of December the reporting period is either the end of September (Scotland) or the end of October (England and Wales). When your TARA is ready and you have reported to your charity regulator, please remember to send a copy to BYM via email to [supportmeetings@quaker.org.uk](mailto:supportmeetings@quaker.org.uk).

If your AM is an Excepted Charity (England and Wales) you will not be required to submit a copy to the Charity Regulator. But please send a copy to BYM as we like to keep a record of them and they are useful for us to get a sense of the health of governance across BYM.

There is a brief document on the BYM website at [www.quaker.org.uk/trustees](http://www.quaker.org.uk/trustees) with details of [Quaker Life's support offer and what we ask AMs to report](#).

### 2.2 Quaker charities memorandum of understanding



The Quaker charities memorandum of understanding work is ongoing and reaching the point where a final document will be available and meetings will be asked to sign.

To give a very brief update on where things are:

- On 6-8 October Meeting for Sufferings approved the draft document.
- It is currently with BYM's lawyers undergoing final scrutiny to ensure that it does not create additional commitments between the parties.
- In late 2023 to early 2024 the document will be formally finalised and a published version will be available.
- In Spring 2024 those Quaker bodies requested to join the MoU will be sent a copy with advice on how to sign.

If you have questions please direct them to Siobhán Haire, [siobhanh@quaker.org.uk](mailto:siobhanh@quaker.org.uk).

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**Abbreviations:** CC – Charity Commission; CLAS – Churches' Legislation Advisory Service; 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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### 2.3 Quaker trustees handbook revision



The Quaker trustees handbook revision is nearing completion as well. A draft has been prepared in collaboration with Woodbrooke and many Friends have commented on it and helped shape the text to make it as useful as it can be for Quaker needs. The new revision will have more of a focus on the Quaker aspects of trusteeship and point towards the places where secular aspects of charity trusteeship can be found from charity regulators.

The draft text is currently with BYM's lawyers to ensure that the document is fit for purpose legally. We expect the legal comments to be complete so that the design of the handbook can be worked on during December and hope that we will have the final revision ready and with Friends in the early part of 2024.

### 2.4 Consultation: Changes to the Annual Return for charities



**Source, CLAS**

OSCR has been consulting on proposed upgrades to the Annual Return for Scottish charities. As a consequence, there will be more questions for some charities to answer. OSCR says that, even so, "the Annual Return should not be difficult to complete for anyone who understands how the charity operates". Look online to [find out about what changes OCSR is proposing](#).

The consultation has now closed for feedback but we will share any changes to the process here in a future edition of Governance Update.

### 2.5 Chancellors Autumn Statement



Just as a reminder that the Chancellor of the Exchequer has announced that he will present his Autumn Statement to the Commons on 22 November 2023, accompanied by an economic and fiscal forecast prepared by the Office for Budget Responsibility.

If there are things that are announced that are relevant to Friends we will share details in a future edition of the Governance Update.

### 2.6 Charities and Social Media



**Source, CLAS**

The Charity Commission has published [new guidance on charities and social media](#). It points out that, though social media can be a powerful communication tool for charities, it can also have risks:

- its fast pace can increase the risk of posting content that is inappropriate or harmful;
- content, once posted, can be hard to undo; and
- professional and personal lives can overlap, and the line can become blurred.

The guidance suggests that trustees should think about how their charity can use social media effectively to benefit it, the possible risks it may bring and they may be managed.

Trustees of charities that use social media are responsible for:

- agreeing and putting in place a social media policy so that you have internal controls that are appropriate and proportionate for your charity's needs and which are clear to everyone at the charity using social media.

- ensuring your charity’s **social media use helps you achieve your charity’s purpose** (what your charity was set up to do) and in a way that is in your charity’s best interests.
- complying with relevant laws.
- ensuring any campaigning or political activity that your charity does on social media **complies with the rules on political activity and campaigning**.
- ensuring your processes help you keep people safe online including any extra considerations when dealing with vulnerable users. **Read the “Operating online” section of CC guidance on safeguarding**.

CLAS adds:

*“The original draft seemed to suggest that charities should monitor their employees’ and volunteers’ personal use of social media – a suggestion that attracted a good deal of adverse comment from legal commentators concerned about the apparent mismatch with Article 10 ECHR (freedom of expression).*

*The final guidance states unequivocally that: “Trustees, charity employees and any other individuals have the right to exercise their freedom of expression within the law in their communications, including when using social media” and adds that “There is no expectation that trustees monitor personal social media accounts.” It does, however, go on to suggest that if trustees “become aware of content posted or shared by an individual being associated with and having a negative effect on the charity, they should consider what action to take to protect the charity” – which does not seem to be unreasonable.”*

## 2.7 Trustee quiz



As a resource for new trustees the Charity Commission provides some **5 minute video guides**. Alongside the guides they have put together a quiz to test how much trustees know about their role. It takes just a few minutes to answer the 10 questions.

See how much you know by taking the quiz:  
<https://beingacharitytrustee.campaign.gov.uk/take-the-trustee-quiz>



## 2.8 Copyright: be careful

Source, CLAS

The Diocese of Oxford recently reported that one of its parishes had been approached by representatives of a picture agency for unlicensed use of a photograph; in this instance, the parish website was hosting a PDF copy of a PowerPoint given by an external speaker at a church event.



Copyright holders are increasingly using bots to spot unlawful use of copyright material. The Oxford case is a timely reminder of the dangers of copying material from image libraries, internet search engines or news sites, in case one becomes liable for an unintentional breach of copyright. Before you post anything on the Web, always **check that it isn’t copyright protected**.

### 3. Events and training opportunities

#### 3.1 Woodbrooke Quaker roles courses



WOODBROOKE

Woodbrooke offers a variety of courses on Quaker roles and service.

Use Woodbrooke's [online search tool](#) to find all the service and roles courses that are currently being offered.

[www.woodbrooke.org.uk](http://www.woodbrooke.org.uk)

### 4. Grants and financial help



#### 4.1 Meeting Houses Fund

The Meeting Houses Fund provides financial assistance to Meetings for carrying out improvements to their premises. Find out what can be applied for and the application process by visiting the BYM website, [www.quaker.org.uk/mhfunds](http://www.quaker.org.uk/mhfunds).

#### 4.2 Hope Grants

Hope Grants are small grants of up to £750 to improve the quality of life of Quaker members and attenders who are unemployed or unable to make a living wage. For more information and an application form please visit [www.quaker.org.uk/hopegrants](http://www.quaker.org.uk/hopegrants).

# Britain Yearly Meeting

Contributions update

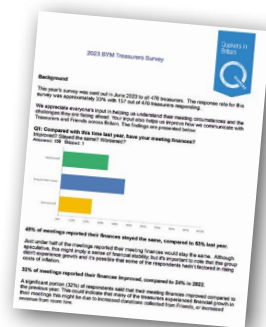
Autumn 2023



## Treasurers survey

This summer a survey was sent out to all 476 treasurers, and approximately 33% (157) responded. Friends can read about the findings in the [report of the 2023 Quaker treasurers survey](#).

We are thankful for your input to help us understand your meeting house circumstances.



## Contribution material 2024

You can see all the new contributions material on our website now at [www.quaker.org.uk/contributions](http://www.quaker.org.uk/contributions). The theme this year is 'Building Community', and the main leaflets feature examples of some of the work that is funded through the generosity of Friends. In addition, you will find the letter from the treasurer, updated slides and a link to the video which helps Friends understand the impact of the work that is discerned by Friends. As our treasurer Paul Whitehouse says in his letter, 'the Yearly Meeting is all of us as individual Friends working together to make the world a better place'.



## An introduction to using QR codes

In this edition, we will walk you through the transformative tool that has been revolutionising the way charities fundraise and promote their cause with QR codes. We will show the advantages of using QR codes in your activities and provide a step-by-step guide on how to implement them effectively.

Go to the [QR codes guidance sheet \(PDF\)](#).

## Contactless card devices

If your meeting house is considering implementing contactless card devices, here is a list of suppliers in the UK who offer contactless card devices for donations to non-profit charities. In the guidance sheet you can see a few suppliers and the considerations to help you make an informed choice.

Go to the [Contactless card devices guidance sheet \(PDF\)](#).

