

# Quaker governance update

Quaker Life Network newsletter

## Issue 7: Summer 2024



### 1. Welcome to Quaker governance update

Welcome to the Summer 2024 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).



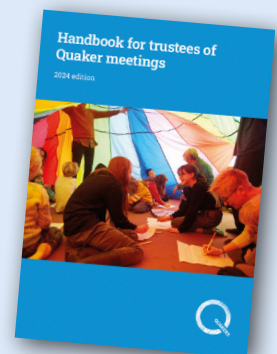
### 2. Quaker Governance support and guidance

#### 2.1 Trustee Handbook

This year the revised trustee handbook was published. It is available to download from the support for area meeting charities section of the website [www.quaker.org.uk/trustees](http://www.quaker.org.uk/trustees).

We have been asked if we are going to produce a paper version of the handbook. Having considered this, we have arranged initially for a small run to be printed. To help cover the cost of the print run we are going to charge £5 per copy. These will initially be available to buy at Yearly Meeting.

See item 3.1 for details of the course that Woodbrooke is running in August to introduce the new handbook. Have your paper version ready in time for you to attend.



#### 2.2 Quaker Charities Memorandum of Understanding

In February Area Meeting Trustees were asked to minute their agreement to signing the Memorandum of Understanding (MoU) between Area Meetings, General Meetings and Britain Yearly Meeting, a copy of which is available online, [www.quaker.org.uk/documents/memorandum-of-understanding-february-2024](http://www.quaker.org.uk/documents/memorandum-of-understanding-february-2024). More than half of Area and General Meetings have now done so, and the remaining organisations are asked to send their minute of agreement to Siobhán Haire, Deputy Recording Clerk – [siobhanh@quaker.org.uk](mailto:siobhanh@quaker.org.uk) when agreed. If any Area Meeting Trustees are unsure about signing the MoU, they are encouraged to email Siobhán for further information about this document and the background to it.



Flower photo by Jack Blueberry on Unsplash

**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 Gift Aid – Significant Changes for Quaker Meeting Claims



There are going to be some significant changes to the way many Quaker meetings claim Gift Aid. Please read on to find out about the changes and share this information with anyone in your Quaker community that will need to be involved in making this change happen.

*giftaid it*

Gift Aid is managed by HMRC which is changing its rules on the organisations that can claim. For many years local meetings (LM) have been able to claim independently of the area meeting (AM) they are a part of. This has meant that across a single AM there may be multiple Gift Aid accounts and claims. HMRC is changing its rules meaning that local meetings will no longer be able to register to claim Gift Aid independently of their AM. This is because they want only registered charities to be claiming Gift Aid.

As well as changing the rules on the organisations that claim, HMRC is going to de-register organisations that should not be claiming. That means that any local meeting that is claiming independently will not be able to carry on claiming.

Quaker Life realises that this change has the potential to affect a lot of Quaker communities. We have been working with HMRC to agree a timetable and a set of documents to help make this change happen as smoothly as possible. See the timetable below and the guidance documents to help your LM and AM work through this process.

**25 July 2024:** Quaker Life notifies Quakers about this change via the Governance Update. Guidance documents available at, [www.quaker.org.uk/treasurers#giftaid](http://www.quaker.org.uk/treasurers#giftaid).

**31 July 2024:** HMRC starts contacting Quaker meetings that it thinks should not be claiming Gift Aid to advise that they will be de-registered.

**Ongoing:** Throughout the Autumn and Spring Quaker Life continues to notify Friends of this change and gathers a FAQ document which will be available on the Quaker website.

**5 April 2025:** Planned date for HMRC to complete the change. LMs will no longer be able to make new Gift Aid claims after this date.

Please see the following guidance to help your LM and AM through the transition process. Remember that Gift Aid claims can be made up to 4 years after the time of the claim so if everything is not in place before 5 April 2025 you have time to get everything in order.

#### ■ Step-by-step Gift Aid Transition

This document is a step-by-step guide for meetings that need to transfer their Gift Aid claim from LM to AM.

#### ■ Gift Aid: how it works?

This document is the main advice and guidance on setting up Gift Aid for your Quaker community. It needs to be used alongside the step-by-step transition document.



Find both documents at [www.quaker.org.uk/treasurers#giftaid](http://www.quaker.org.uk/treasurers#giftaid)

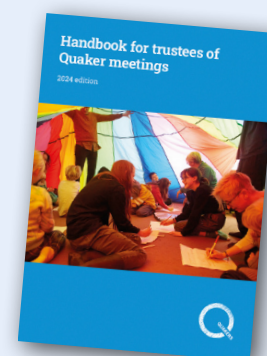
## 3. Events and training opportunities

### 3.1 Trustee Update: New Handbook

**Wednesday, 28 August 2024, 19.00-21.00 (UK time), online**

Are you a serving Quaker Trustee? Take a walk through the new 2024 Trustee Handbook with its editor and Woodbrooke staff tutor Rhiannon Grant to find out how this updated and improved resource can support you further in your role.

[www.woodbrooke.org.uk/courses/trustee-update-new-handbook](http://www.woodbrooke.org.uk/courses/trustee-update-new-handbook)



### 3.2 Treasurership in a Nutshell

**Saturday 30 November 2024, 10:00-16:00 (UK time), online**

Are you about to be or have just become a Quaker Treasurer? This one-day session will provide clear information about what being a Quaker Treasurer entails and cover the basics of how to carry out your role well. Join us to explore your role with a focus on its spiritual underpinning and treasurer responsibilities and relationships. You will gain confidence and understanding in your role through accessible information and interactive learning.

[www.woodbrooke.org.uk/courses/treasurership-in-a-nutshell](http://www.woodbrooke.org.uk/courses/treasurership-in-a-nutshell)



## 4. Grants and financial help



### 4.1 Meeting Houses Fund

The Meeting Houses Fund provides financial assistance for carrying out improvements to Quaker 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

These are small grants to improve the quality of life of Quaker members and attenders who are unemployed or unable to make a living wage. Friends in financial need can apply for a grant of up to £750 towards items or activities that will improve their quality of life. More information and the application form are available from our website: [www.quaker.org.uk/hopegrants](http://www.quaker.org.uk/hopegrants).

### 4.3 Pastoral Care Grants

These grants supplement funds available to pastoral care role-holders locally and can be used in situations of hardship and suffering through old age, or to support Friends in need. Please contact the Grants Programme Officer ([grants@quaker.org.uk](mailto:grants@quaker.org.uk), 020 7663 1053) for further information and an application form.

# Britain Yearly Meeting

Contributions update

Summer 2024



## Faith Will

From autumn onwards, churches and Quaker meetings around the UK will be holding Faith Will 'moments' to explore how people can leave a gift to their local church and Christian Aid, to support neighbours near and far. Wills can tell a powerful story of someone's faith and the choices we make can ensure our values live on for generations to come.

Faith Will... ...live on through gifts in Wills



If you are interested in holding an Afterword or discussion, you can download free resources including a Quaker specific resource pack here: [www.christianaid.org.uk/appeals/key-appeals/faith-will](http://www.christianaid.org.uk/appeals/key-appeals/faith-will).

## Film on Swarthmoor Hall, Margaret Fell and George Fox

A new film has been produced telling the story of Swarthmoor Hall, Margaret Fell and the early Quakers and their relevance to Friends today. We wanted to produce this film to tell their story which includes how Margaret Fell established a solid system of governance and fundraising which we still use today!

Please share the film with Friends in your meeting – it's only 6 minutes long and we have had great feedback from Friends already! It's available here:

[www.youtube.com/watch?v=Weu2xDsryR8](http://www.youtube.com/watch?v=Weu2xDsryR8).



Beth Follini, Fundraising Manager at BYM explains how early Quakers created a strong structure including a strong financial structure.

## BYM projects that need support

When meetings are left a large legacy or have high reserves, we know that Friends in those meetings consider how they might donate some of those excess funds to support Quaker work. We've now produced a sheet of projects which will be updated every six months that could do with extra support from Friends. We will be emailing this to meetings who have been left a large legacy or who have let us know that they have high reserves.

Please email us at [contributions@quaker.org.uk](mailto:contributions@quaker.org.uk) if your meeting is going to be going through a discernment process on gifting legacy or reserve funds and we will send you this information.

## Offer of help

In addition to emailing her quarterly reports to treasurers, Maisa will be emailing an offer of assistance to meetings whose level of contributions has either dropped significantly or whose contributions fall under the recommended guidance of £240 per year per member. She has put together financial charts showing giving and we hope meetings find this useful. We're always here to support you in your valuable work to ensure that the Society of Friends is resourced.