



Treasurers



Information on how to access the resources and support available to local and area meeting treasurers and those managing financial contributions.



Contribute to Quaker work

Contribute time – There are many opportunities to get involved with the work we do on behalf of Quakers in Britain, including serving on committees, volunteering at events and joining the Quaker Life Network. Visit www.quaker.org.uk/quaker-service to find out more or email nominations@quaker.org.uk or phone 020 7663 1121.

Contribute money – You can contribute to Britain Yearly Meeting funds direct or via your local or area meeting. To find out more about making a financial contribution visit www.quaker.org.uk/contributions or email contributions@quaker.org.uk or phone 020 7663 1015.

Leave a legacy – Legacy giving helps sustain Quaker work for future generations. After taking care of family and friends, please consider leaving a gift for Quaker work in your will. Visit www.quaker.org.uk/legacy or email legacy@quaker.org.uk or phone 020 7663 1019 for more information.

Find out more and connect with us

Find out more – You can find out more about all of Britain Yearly Meeting's work by reading the Trustees' annual report. Copies are sent to every meeting in April or visit www.quaker.org.uk/annualreport. *Quaker News* is a free magazine about the work of Britain Yearly Meeting. It is distributed via local meetings. You can also subscribe by email, access electronic back issues and read it online at www.quaker.org.uk/qn.

Connect with us – Contact details for specific areas of work are provided throughout the Directory of Services. The general contact details for Friends House are:

Friends House, 173 Euston Road,
London NW1 2BJ
www.quaker.org.uk
Email: enquiries@quaker.org.uk
Switchboard: 020 7663 1000.

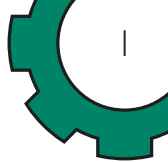
Quaker Centre Bookshop

You can order books, book boxes, resources and posters from the Quaker Centre Bookshop at Friends House, London.

Quaker Centre Bookshop, Friends House, 173 Euston Road, London NW1 2BJ

www.quaker.org.uk/shop
quakercentre@quaker.org.uk
020 7663 1030/1031.

Treasurers



Introduction

“[Treasurers] will need to be familiar with numbers but neither accounting skills nor a computer are necessary. More important is sensitivity in helping each member and attender to give what is appropriate, allaying feelings of guilt whilst informing them of the need for money both at a local level and for our central work.”

Quaker faith & practice 13.43

Treasurers manage the finances of a Quaker meeting. They provide a vital point of contact between Britain Yearly Meeting (BYM) and local Friends with regard to financial contributions and are responsible for sending and receiving information about financial contributions to and from BYM.

We support treasurers by providing information, training and networking opportunities, and offer advice on matters such as claiming Gift Aid on contributions.

Resources

The following printed and electronic materials support Quaker treasurers.

A vulnerable victim?

This is an account of the theft of an area meeting's money by its treasurer, including lessons learned.

See www.quaker.org.uk/dos-treasurers.

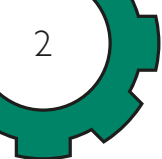
Britain Yearly Meeting ethical investment policy

BYM has a policy on managing its investments ethically, which is available to Friends for reference and information. To access it, visit www.quaker.org.uk/dos-treasurers

Information on BYM's divestment from fossil fuels can be found at www.quaker.org.uk/divestment.

Checklist for report and accounts

Area meetings should send a copy of their report and accounts/ financial statements to the Friends House staff member for the Quaker Stewardship Committee (QSC), at qsc@quaker.org.uk.



This checklist gives a broad outline of what should be included in your report and accounts and is available at www.quaker.org.uk/dos-treasurers.

Contributions information

The financial contributions we receive from Friends and meetings enable our Quaker work to continue. Contributions can be made in a variety of ways, details of which can be found at www.quaker.org.uk/contributions or you can email us on contributions@quaker.org.uk or phone 020 7663 1015.

Contributions leaflets are produced annually. They include descriptions of current Quaker work, details of how Friends can contribute and forms for direct BYM giving and/or giving through your local and area meetings. You can order a leaflet or amend a recurring order by contacting our Treasurers' and Clerks' Support Officer (details on page 4 under 'Help with Contributions').

Gift Aid allows donations made to a charity by a UK taxpayer to be treated as having been made from income not subject to tax. This is achieved by the charity claiming from the government the tax already paid by the donor. Donors only need to make a short declaration to make their donations eligible for Gift Aid. You can order declaration forms by contacting our Treasurers' and Clerks' Support Officer (details on page 6).

There is also a Gift Aid Small Donations Scheme that may apply to meeting fundraising. Information on this can be found at www.quaker.org.uk/dos-treasurers. If you're unable to find the answer to your question, please contact our Treasurers' and Clerks' Support Officer (see page 6). Visit the contributions section of the Quakers in Britain website at www.quaker.org.uk/contributions.

Managing our financial resources

This pack gives information and sources of support for all those working to manage the financial resources of local and area Quaker meetings. It is available online at www.quaker.org.uk/dos-treasurers. For a printed copy, contact our Treasurers' and Clerks' Support Officer at tcsupport@quaker.org.uk or on 020 7663 1045.

Written guidance for treasurers

● ACAT Handbook

The Association of Church Accountants & Treasurers (ACAT) publishes a handbook for treasurers. It offers guidance on all manner of tasks and strategies for fulfilling the role of treasurer. BYM provides two subscriptions per area meeting (for area meeting treasurers and one other), and the handbook can be accessed online, with your login details, at www.acat.uk.com/membership/handbook.php.

For more information on the handbook or to arrange access to it, area meeting treasurers can contact the Personal Assistant to the Recording Clerk at recordingclerk@quaker.org.uk or on 020 7663 1161.

Local meeting treasurers wishing to access information from the handbook will need to contact their area meeting treasurer.

● Quaker-specific guidance for treasurers

To supplement the ACAT Handbook we provide additional written guidance on dealing with Quaker-specific issues, including ethical finance and property. This is available online at www.quaker.org.uk/dos-treasurers.

Treasurers' spreadsheets

These are available to assist treasurers in managing local and area meeting accounts. Further information and download links can be found at www.quaker.org.uk/dos-treasurers.

Quaker Stewardship Committee also recommend an accounting software package developed specifically for charities by Paxton. For contact details see 'Other organisations' on page 7.

Trustees' and treasurers' news

A triannual newsletter for Quaker meeting trustees and treasurers. If you have an item you feel it would be useful to share with either role-holder, please email the editors at ttnews@quaker.org.uk. To subscribe to the newsletter or to update treasurer details, please contact our Treasurers' and Clerks' Support Officer (details below).

Your Faith, Your Finance

This is a website that helps Friends learn more about, and explore, ethical finance issues. It has been produced by Quaker Peace & Social Witness (QPSW) and the Ecumenical Council for Corporate Responsibility (ECCR). It contains

information on banking, investing and spending, as well as personal actions and group discussion prompts.

See www.yourfaithyourfinance.org for more information.



Support

Help with contributions

In certain circumstances, our Treasurers' and Clerks' Support Officer may also be able to provide support to some meetings with their annual contribution mailing where there is a need for this. For further information, email tcsupport@quaker.org.uk or phone 020 7663 1045.

Link Friends to the Quaker Stewardship Committee

Each member of QSC is personally linked (as 'Link Friends') with area and other meetings in a particular region. The purpose of these links is to provide all meetings with an individual on the committee who will build up knowledge of that meeting and be a listening ear.

Link Friends are not necessarily experts, and are not able to provide any sort of audit or examination of accounts. However, drawing on their contacts within QSC, they can help to pass on useful ideas or point Friends towards help from staff at Friends House.

Help can be offered in a number of ways; for example:

- advice via email or phone;

- an informal visit to talk to a group about managing change;
- a more formal visit to talk with the area meeting.

Link Friends will receive copies of the relevant annual accounts and reports, which are submitted to Friends House each year. Link Friends also bring significant concerns (about issues within meetings they are in contact with) to the attention of QSC as a whole. This will enable others to help, rather than leaving issues unanswered.

You can contact any member of QSC and obtain paper copies of QSC publications at qsc@quaker.org.uk or on 020 7663 1161.

Quaker Stewardship Committee (QSC)

QSC was set up by Britain Yearly Meeting to “give help, guidance and active monitoring in order to meet the requirements of charity law in the stewardship of finance and property, encouraging openness, accountability, transparency and integrity in all our affairs” (*Quaker faith & practice* 14.38).

A leaflet on QSC is available at www.quaker.org.uk/dos. To contact any member of QSC, or obtain paper copies of QSC publications, contact the staff member for QSC at qsc@quaker.org.uk or on 202 7663 1161. Other sources of advice on charity law are the Charity Commission or the Office of the Scottish Charity Regulator (for contact details see ‘Other organisations’ on page 7).

Treasurers’ and Clerks’ Support Officer

Our Treasurers’ and Clerks’ Support Officer is the first point of contact for treasurers who need information or advice to support them in their roles, or who wish to update their subscriptions to relevant newsletters and other mailings.

Email tcsupport@quaker.org.uk or phone 020 7663 1045.

Training and events

Annual Conference of Treasurers (ACT)

This conference seeks to address the key needs and concerns of experienced treasurers and collectors as well as those who are

new to the role. It is a valuable opportunity to share challenges, solutions and ideas with financial role-holders across our yearly meeting.

Every area meeting in Britain should – ideally – be represented at the conference, and all treasurers, clerks, trustees, collectors and fundraisers are welcome to attend. More information is available under 'Training and events' at www.quaker.org.uk/treasurers.

Questions can be directed towards the Events & Committee Support Manager at ecs@quaker.org.uk or on 020 7663 1062.

Treasurers' training

Woodbrooke Quaker Study Centre offers a diverse range of courses appropriate for treasurers, including 'Being a Quaker Treasurer' (for new and prospective local and area meeting treasurers), 'Area Meeting Treasurers' and 'Financial Stewardship'. For more information, and for bookings, please visit www.woodbrooke.org.uk, email enquiries@woodbrooke.org.uk or phone 0121 472 5171.

Key contacts

- **Treasurers' and Clerks' Support Officer** (first point of contact for enquiries relating to being a Quaker treasurer): tcsupport@quaker.org.uk; 020 7663 1045.
- **Events & Committee Support Manager** (for enquiries relating to the Annual Conference of Treasurers): ecs@quaker.org.uk; 020 7663 1062.
- **Woodbrooke Quaker Study Centre** (for details of upcoming training courses for new, prospective and current treasurers): www.woodbrooke.org.uk; enquiries@woodbrooke.org.uk; 0121 472 5171.

Other organisations

- **Association of Church Accountants & Treasurers (ACAT)**
By providing training, advice and information on accounting, legal, financial and other related issues, ACAT helps its

members achieve efficient and effective financial church management. BYM has purchased two ACAT membership subscriptions per area meeting to enable all local and area meeting treasurers to access its support (see page 3). Find out more at www.acat.uk.com.

- **Charity Commission** Independent regulator for charities in England and Wales: www.charitycommission.gov.uk; 0300 066 9197.
- **Office of the Scottish Charity Regulator** Independent regulator and registrar of Scottish charities: www.oscr.org.uk; 01382 220 446.
- **Paxton** Accounting Software for charities and churches. Find out more at www.paxtoncharities.co.uk; 01234 216 666.

Supporting information

Safeguarding – Safeguarding is protecting children, young people and vulnerable adults from harm. For more information visit www.quaker.org.uk/safeguarding. Here you will find a link to Meeting safety, which outlines the responsibilities for Quaker meetings in Britain. We recommend that area meetings join the Churches' Child Protection Advisory Service. Visit www.ccpas.co.uk or email info@ccpas.co.uk.

For general safeguarding advice, as well as Quaker advice on how specific safeguarding matters may affect the pastoral needs of individuals and the meeting community, contact our Safeguarding Coordinator at safe@quaker.org.uk or on 020 7663 1023.

General issues relating to a Quaker meeting

– If you have concerns about issues in your Quaker meeting that you would like to talk over, contact our Support for Meetings Officer at supportmeetings@quaker.org.uk or on 020 7663 1023. Alternatively, contact the Recording Clerk's Office at recordingclerk@quaker.org.uk or on 020 7663 1161.

Information updates – Please keep us informed of changes to the key role-holders in your local and area meetings: clerk, treasurer, safeguarding coordinator, registering officer, clerk of (area meeting) trustees. To let us know of any such changes please contact our Database Administrator at updates@quaker.org.uk or on 020 7663 1119.

Data safety – Quaker meetings in Britain need to store information on their members and attenders in accordance with the Data Protection Act 1998, which protects individuals from the unauthorised use of their personal information. Friends House Data Safety Group can offer meetings general advice on data safety. For more information visit www.quaker.org.uk/data-safety. Here you will find a link to Data Safety and Information Security, which offers guidance to meetings. You can also contact our Data Safety Officer at datasafety@quaker.org.uk or on 020 7663 1161.

Complaints and feedback –

Britain Yearly Meeting's complaints and feedback procedure enables anyone to let us know about problems or to give feedback on service received from staff at Friends House. To find out more visit www.quaker.org.uk/contact-us. Complaints can be made in writing to the Recording Clerk's Office at Friends House. Alternatively, email feedback@quaker.org.uk or phone 020 7663 1161.

Quaker faith & practice – *Quaker faith & practice* is the book of Christian discipline of Quakers in Britain. It expresses the breadth of Quaker theology through the experience of Friends and describes our corporate structures. Copies can be purchased from the Quaker Centre Bookshop. It is also available at <http://qfp.quaker.org.uk>.

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Information on how to access the resources and support available from Britain Yearly Meeting




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Information on how to access the resources and support available to local and area meeting clerks.




Directory of Services

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Treasurers



Information on how to access the resources and support available to local and area meeting treasurers and those managing financial contributions.




Directory of Services

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Directory of Services

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Directory of Services

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Information on how to access the resources and support available to Friends running outreach events and sharing the Quaker experience.



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Information on how to access the resources and support available to those challenging inequality and working for a fairer society.



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Sustainability



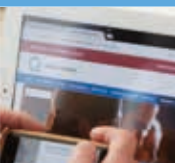
Information on how to access the resources and support available to those working locally and globally to build sustainable communities.




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Speaking out




Information on how to access the resources and support available to Friends engaging with politics and the media to call for positive change.




Directory of Services

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The library



Information on how to access the resources, support and advice available from the Library at Friends House.



www.quaker.org.uk

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or see our Facebook page at
www.facebook.com/QuakersinBritain

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