

# Trusteeship: useful sources of information

## Quaker sources online

The first stop has to be the wealth of online resources available on the Britain Yearly Meeting website, under 'Our organisation'. Some are in the section on 'Support for meetings', and others under 'Quaker roles'. You can also use the search box.

### ***Quaker faith & practice***

Chapter 15: 'Trusteeship' provides a helpful starting point. The latest version is to be found at <https://qfp.quaker.org.uk/chapter/15>.

### **Britain Yearly Meeting website**

The page for area meeting trustees at [www.quaker.org.uk/trustees](http://www.quaker.org.uk/trustees) contains information about annual reports and accounts, safeguarding, charitable registration, charity schemes, presentations from the Trustees and Treasurers Conference 2019, and a host of other useful documents and links. The page also shows how you can sign up to BYM's *Trustees' and Treasurers' News*, and a link to the last few issues.

### ***Handbook for trustees of Quaker meetings***

Also at [www.quaker.org.uk/trustees](http://www.quaker.org.uk/trustees), this handbook was prepared by Quaker Stewardship Committee as guidance for area meeting trustees (latest edition published 2014). This is worth reading cover to cover as it explains the whole role. In the appendices you will find some useful templates.

### **Treasurers resources**

These are available online at [www.quaker.org.uk/treasurers](http://www.quaker.org.uk/treasurers) along with other advice for treasurers. The old *Treasurer's Handbook* no longer exists and has been replaced by *Treasurers' Guidance Sheets*, and link directly to the Association of Church Accountants and Treasurers (ACAT) Handbook. This will sometimes be the best way to find the answer to a finance-related trustee question. It also covers some broader administration topics relevant to trustees, not just treasurers. There is more on ACAT below.

### **The Employers and wardens page**

This page at [www.quaker.org.uk/employerswardens](http://www.quaker.org.uk/employerswardens) contains useful information, including the Quaker employers' resource, which gives you essential information to be a good and legally compliant employer. It also provides some information on engaging volunteer resident wardens and on engaging self-employed people. In some cases, there are example template documents and several example employment policies – all downloadable from the web page. In others, you are referred to relevant sources of information. The page shows how to join the Wardenship e-group that allows members to share ideas and information, and the Quaker Centres' Facebook group, and also covers training and events.

### **Property advice**

This is available at [www.quaker.org.uk/property](http://www.quaker.org.uk/property). This contains the 'Property advice sheets', a 'Meeting house handbook template', and information about sources of

funds for meeting houses. It also shows how to join the Property advice e-group which operates to support Friends involved in looking after meeting houses and other property held by Friends.

### **Other useful pages for trustees**

These include:

- 'Data safety' [www.quaker.org.uk/datasafety](http://www.quaker.org.uk/datasafety)
- 'Record keeping and archiving' [www.quaker.org.uk/records](http://www.quaker.org.uk/records)
- 'Safeguarding' [www.quaker.org.uk/safeguarding](http://www.quaker.org.uk/safeguarding)
- Safeguarding coordinators [www.quaker.org.uk/safeguardingcoordinators](http://www.quaker.org.uk/safeguardingcoordinators)
- Clerks [www.quaker.org.uk/clerks](http://www.quaker.org.uk/clerks)
- For some inspiration, see the 'Patterns and examples' section [www.quaker.org.uk/patterns](http://www.quaker.org.uk/patterns) with stories of which will inspire, inform and enable you to bring about your own changes.

### **Quakers to talk to**

If you cannot find what you need on line, you can use the following:

#### **E-groups**

- Wardenship e-group – join via the Employers and wardens page above
- Property advice e-group – join via the Property advice page above
- Treasurers e-group – join via the Treasurers page

#### **Trustees of neighbouring area meetings**

Other trustees are often happy to help, as they may have already found solutions – or you could co-operate on solutions.

#### **Link Friends and Quaker Stewardship Committee (QSC)**

Each area meeting is linked to QSC through a Link Friend who can access many sources of information and can help with problems. They can offer support on the phone, by email or by visits, and can put you in touch with someone who can help if they cannot. You can find out who your Link Friend is by contacting Helen Griffith in Friends House on 020 7663 1161 or emailing [heleng@quaker.org.uk](mailto:heleng@quaker.org.uk). You can find out more about QSC at [www.quaker.org.uk/qsc](http://www.quaker.org.uk/qsc). It is helpful for QSC to build up experience about matters, large or small, that cause difficulty and no Friend should feel that a matter is inappropriate for seeking guidance. They also do useful things like checking your annual report and accounts meets the legal requirements (when you send them the checklist and a copy of the report).

#### **Staff at Friends House**

If the sources above do not provide solutions, Britain Yearly Meeting staff are always willing to assist meetings over issues related to trusteeship, and Friends are encouraged to contact staff through the Recording Clerk's Office.

For general trustee queries contact Helen Griffith at [heleng@quaker.org.uk](mailto:heleng@quaker.org.uk) or 020 7663 1161.

For specific advice on a topic contact the relevant person in the contact box at the foot of each BYM webpage.

## **Woodbrooke Quaker Study Centre**

Woodbrooke provides training on issues connected with trusteeship, which are delivered residentially in Birmingham, regionally and by arrangement with particular meetings. Contact Woodbrooke via [enquiries@woodbrooke.org.uk](mailto:enquiries@woodbrooke.org.uk) or on 0121 472 5171.

## **Non Quaker sources**

There are a number of really useful non Quaker sources, but you need to remember you have to 'Quakerise' the advice.

### **Charity Commission**

The most useful source of general information is the Charity Commission website at [www.gov.uk/government/organisations/charity-commission](http://www.gov.uk/government/organisations/charity-commission). Guidance relevant to Scotland is found on the website of the Office of the Scottish Charity Regulator at [www.oscr.org.uk](http://www.oscr.org.uk).

*CC3 The Essential Trustee: What you need to know, what you need to do* Charity Commission, 2018 is the key document from the Charity Commission: a readable and authoritative guide at [www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3](http://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3)

### **Association of Church Accountants and Treasurers (ACAT)**

The Association of Church Accountants and Treasurers. This is not specifically Quaker, but it is particularly useful in relation to the financial questions religious organisations encounter. Treasurers are strongly encouraged to go on their courses, but there is material on their website ([www.acat.uk.com](http://www.acat.uk.com)) of use to all trustees and finance committees. BYM's *Treasurers' guidance sheets* link directly to the ACAT *Trustee Handbook*. BYM has paid for a subscription for area meeting treasurers plus one other person, and for local meeting treasurers. To get the login details contact Helen Griffith [qsc@quaker.org.uk](mailto:qsc@quaker.org.uk). Other subscriptions can be purchased directly.

### **Other non-Quaker sources**

Other organisations providing very useful information in a form accessible for non-specialists are the National Council for Voluntary Organisations and its Scottish counterpart the Scottish Council for Voluntary Organisations, and the Directory for Social Change.