Mapping Trustee Responsibilities and Other Tasks done by AMs in terms of which can be done from anywhere and which need local input

REsponsibiilties of Trustees

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| Area of Responsibility | How local does it need to be | Advantages of doing it jointly | Disadvantages of doing it jointly |
| **Finance** |  |  |  |
| Budgeting | That depends on the level of financial integration desired by the LMs/AMs | Provides overview of finances across the whole area (could be AM or Yorkshire-wide) | Loss of local autonomy (may be more ‘felt’ than real); lack of local knowledge about needs and priorities; will it favour assets over witness? |
| Day-to-day management of transactions (in and out) | Can be done centrally | This could be a job that could be paid for and release Treasurers/minimise the need for Treasurers | Could become overly bureaucratic and could also lead to lack of control at local level. Will still require local authorisation as long as there are local budgets. |
| Book-keeping | Can be done centrally if a common accounting package is used | This could be a job that could be paid for and release Treasurers /minimise the need for Treasurers  It could give Treasurers the time and ability to review what is happening financially rather than doing the actual book-keeping job | If book-keeping is done centrally then Treasurers may feel that they lose control. |
| Annual Accounts | Can be done centrally if a common accounting package is used. So long as the AMs are separate charities this may be less useful, though. But if there was a desire to move towards one charity for all or several AMs then this would be necessary | Can be done professionally and will take a lot of pressure off Treasurers and others | There are costs involved: full audit because it would be a larger charity (if all or several AMs join up).  Trustees would have to have a wider view across a larger charity; does that mean a larger Trustee body rather than several smaller ones? |
| Area of Responsibility | How local does it need to be | Advantages of doing it jointly | Disadvantages of doing it jointly |
| **Property** |  |  |  |
| Managing the asset – Major Work | Can be done centrally but only if there is someone employed to do it who has the necessary expertise. This won’t come cheap. | Pooling of expertise and knowledge. Releasing the energy of hard pressed premises committees dealing with major works.  Pooling money over a wider number of Meeting Houses means that larger works can be contemplated.  Quota payments support a wider area. | Can lead to delays in progressing work; if there are a lot of calls on the expertise of the staff this can create bottle necks. Money pooled over a wider number of Meeting Houses can have disadvantages. What if a number of Meeting Houses need major works at the same time?  Quota payments may be resented if work isn’t progressed as fast as local Friends wish.  My experience with what was Six Weeks Meeting is that local premises committees still get involved with a lot of detail. This needs to be thought through at the outset. |
| Managing the asset – routine work and costs (including utilities, cleaning and gardening) | There is a need to think through the level of work delegated upwards.  If utilities are purchased across a number of Meeting Houses there can be advantages in terms of price. | Economies of scale; if there is a list of approved contractors it can streamline work and reduce costs.  Expertise especially with historic or listed buildings can be pooled better. | The size of the geographic area may make it less feasible for small local contractors to get on the list.  What work is done and managed locally needs to be clear from the outset. This is even an issue within existing AMs. |

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| Area of Responsibility | How local does it need to be | Advantages of doing it jointly | Disadvantages of doing it jointly |
| Lettings - bookings | Can be done centrally if there is a common booking system in place (online) | One point of contact for potential building users; gives them more choice (if one place isn’t available another one – nearby – may be; this is only an advantage in areas with several Meeting Houses (i.e. York, Leeds)  Lettings becomes less reliant on one or a small number of Friends in each Meeting. | Some long-term hirers have relationship with local Friends; maybe lost. |
| Lettings – making local arrangements | Cannot be done centrally |  | If there is a need to set up for hirers (heating, access, equipment, refreshments etc) this all needs to be done locally. So this would be an area where local Friends would still have to be involved and available unless local people are contracted to do this on a sessional basis – which could make for complicated employment relationships. |
| Lettings – invoicing and chasing outstanding invoices | Can be done centrally | Becomes a routine which means it is done more effectively. | No real advantages unless some hirers are locally known and there are sensitive issues. |
| Property – legal compliance | Can be managed centrally but in terms of routine inspections may involve local Friends in LMs/AMs | A standard approach taken; it becomes a routine with checklists and regular prompts from task lists. | I see no real advantages to doing this locally. Having someone in each MH responsible for H&S and other legal compliance means that key issues may end up being forgotten. |

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| Area of Responsibility | How local does it need to be | Advantages of doing it jointly | Disadvantages of doing it jointly |
| Property – Insurance | Can be done centrally and arguably should be done centrally | Economies of scale | No advantages I can see. |
| Property – Burial Grounds | Can be done centrally and this might lead to greater pooling of expertise | Pooling of expertise | With regard to the upkeep of burial grounds and the management and oversight of actual burials etc this is likely to remain in part a local function. |
| **Employment** |  |  |  |
| Employment – Recruitment | Policies and procedures can be agreed centrally | It means that the process of recruitment is conducted in line with legal requirements | Not so much a disadvantage but elements of the procedure will need to be managed locally especially for part time jobs on relatively low wages |
| Employment – Contracts | Can be done centrally | Contracts will be standardised and can be operated on a menu depending on the job; legal requirements are met systematically; contracts aren’t developed over and over again. | Allows for local variations in contracts but this could be covered by a menu of options if done jointly. |
| Employment – Policies including Lone Working | Can be done centrally but it isn’t always appropriate to operate the same policies across a wide range of situations (e.g., sick pay) | Less work if policies are only reviewed once for a wider area. Economies of scale in terms of work. | Can have locally agreed policies and T&Cs that are appropriate to the local circumstances. |

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| Area of Responsibility | How local does it need to be | Advantages of doing it jointly | Disadvantages of doing it jointly |
| Employment – Pay scales | Can be done centrally but this can end up becoming clumsy because of different employment market conditions in different parts of the area | It might feel more equitable to pay the same rate for the same job across a wider area; if everyone has the same approach to setting pay rates (e.g., Living Wage Employer) this could be helpful. | Local circumstances vary; local job markets differ. The financial resources in different AMs are different and so pay rates need to be set bearing these in mind. Could lead to a lot of friction especially if staff realise that pay rates in some parts of the wider area are better than in others. |
| Employment – Pensions | There will be different arrangements in place – can they be streamlined? | Probably a complex issue given where we are. | Complex area and where there are schemes in place, difficult to change. |
| Employment – Line Management | On the basis that it needs to involve regular contact with staff – at least some of which has to be face to face this is principally a local function | If there are those in a wider charity body who have expertise and skills in this area that can help.  There might be some scope to restructure the staff team so that line management would be done by the most senior member of staff for all others with only the most senior member of staff line managed by a Trustee. | The relationship between staff and the locality where they work is essential and thus this area needs significant local input.  Where only the most senior member of staff is line managed by a Trustee the relationships between the senior member of staff and local meetings where other staff are based would need to be established. |
| **Safety Issues** |  |  |  |
| Safeguarding | Having the same polies and procedures across a wider area may well have benefits. | It is more likely that relevant expertise is available and fewer people need to involved in the management and oversight of this area. | Actual incidents will still need some local input; people involved with children and vulnerable adults at all levels will still need to be trained and vetted. Having oversight at to remote a level may feel intrusive. |

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| Area of Responsibility | How local does it need to be | Advantages of doing it jointly | Disadvantages of doing it jointly |
| Health and Safety including Fire Safety and compliance with relevant legislation | Having the same polies and procedures across a wider area may well have benefits. | It is more likely that relevant expertise is available and fewer people need to involved in the management and oversight of this area. | As all premises still need to be inspected regularly, it will continue to need someone locally to do that. However, if some of the property management is done by staff this can be done by staff on routine visits to properties.  H&S Incidents will need to be managed and responded to locally especially if they are serious and involve potential reputational risk. |
| Unauthorised Access to buildings, damage, and theft | This is a quintessentially local function which needs procedures in place that have to recognise local conditions and circumstances. | There seems little benefit in centralising this beyond having procedures in place and verifying from time to time that they are up to date and being followed. | If responsibility is seen as remote, there is a risk that less care is taken locally. |
| Insurance | Can be done centrally and arguably should be done centrally | Economies of scale | No advantages I can see. |
| Data – Archives | Archives are already reasonably centralised at Leeds University | No benefits in managing process more remotely | Documents are generated in each LM, AM and need to be collected there, prepared for archiving and then submitted to Leeds University. Essentially a local function |
| Data – online issues | Registration with Data Commissioner could well be done for a larger body with some savings in time and effort | Economies of scale and streamlining of procedures | There will still be a need for LMs to be fully aware of the issues and the procedures that need to be followed. It may make it more cumbersome to carry out oversight if at the level of a larger body. |
| Area of Responsibility | How local does it need to be | Advantages of doing it jointly | Disadvantages of doing it jointly |
| Compliance – generally | There is a whole range of legislation that we need to comply with; the management of this can be done centrally and across a wider body but will require oversight and communication with LMs | One place where the information, requirements, procedures and so on are located; skills pooling. | Friends in LMs still need to be informed of the requirements that apply to them and this may become cumbersome and may become seen as interference with local decision-making. |

Responsibilities of AMs that would need to be managed at a more central level

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| Area of Responsibility | Where is it managed now | Advantages of doing it jointly | Disadvantages of doing it jointly |
| Membership – Applications | Currently done at AM level | If not at AM level then why not at YM level? | If membership were to sit at the level of a larger body there could be a loss of a sense of belonging.  Process of visiting and reporting becomes unwieldy if the body is too large (numbers and geography). |
| Membership – Tab Statement | Currently done at AM level | Fewer returns to BYM – makes their job easier | Loss of disaggregation of data; already an onerous job – would get more onerous. |
| Eldership | Currently done at AM level with Friends appointed to specific LMs | No specific advantages I can see | Could make it all more remote. |
| Pastoral Care | Currently done at AM level with Friends appointed to specific LMs | No specific advantages I can see | Could make it all more remote. Indeed, I don’t think it would work on a less local basis because Friends don’t know each other well enough. |

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| Area of Responsibility | Where is it managed now | Advantages of doing it jointly | Disadvantages of doing it jointly |
| Funeral Care | Currently done at LM level | No specific advantages I can see | Could make it all more remote. Indeed, I don’t think it would work on a less local basis because Friends don’t know each other well enough.  Also, liaison with Undertakers and relevant services would be too difficult if across a wide area. |
| Registering of Marriages | Currently done at AM level; but LMs provide the space and have an involvement. | There may be an advantage in sharing the responsibility over an area wider than one AM but probably not across the whole of Yorkshire | It might make it even more difficult to ensure that there is Quaker representation, especially if the couple are not fully involved in the local meeting as is often the case |
| Working with and developing Young People in the Meetings | Currently done locally but with a Yorkshire wide Youth Development Worker employed | The current mix of local and Yorkshire wide activity is probably a good compromise; will need review to see whether the YDW is making a difference |  |
| Established Activities: Glenthorne Visits, Easter Settlement, Yorkshire Friends Summer School etc | Not sure at what level all these are currently being organised (probably a mix |  |  |