**Quakers in Yorkshire**

**Simplifying Charitable Functions Group - June 2023**

**Potential for shared management of property**

This note reviews the potential for shared management of property.

Martina has well summarised the advantages and disadvantaged in her paper “Mapping Trustee Responsibilities…“ (pages 2-4) so they will not be repeated here.

Managing property is a global issue. We all live in a home which we either look after ourselves or is looked after by a shared method. There is huge experience of different methods of property management. This is as true for Quaker management of properties as for general management of properties. The London Quaker Property Trust provides an example of shared management, whilst the historic example of the Brighouse, Leeds & Settle Building Charity provides an example of shared ownership. A summary of these two charities is in the Appendices which also has a summary of the number of meeting houses in QiY region.

In British Quakerism the historic model was for each local meeting to decide where it was going to meet and if that was in an owned meeting house to look after the premises. Usually a Premises Committee, consisting of volunteers, does the day-to-day oversight. Minor repairs and maintenance may done be volunteers, major work is done by contractors (exactly as in-home maintenance). Contractors have to be selected, managed, and paid – all tasks better done by someone which experience.

With the formalisation of charitable status in the last few decades, meeting houses are now owned by area meetings. Trustees are responsible for property and finance, but may delegate to local meetings. The extent of devolution to local meetings varies. Generally, local meetings with sufficient members manage and finance their own meeting houses whilst smaller meetings use pooled funds and resources.

**It is fair to observe that all methods of managing property can be made to work well. Crucially, there are two factors distinguishing successful management from potential conflict:**

* **Willing cooperation between all parties. This applies as much locally as shared management.**
* **Adequate sources of finance.**

The table overleaf assesses which type of premises work is best done locally or best shared.

|  |  |  |
| --- | --- | --- |
| **Types of premises issues** | **Done locally** | **Done shared**  |
| Immediate and essential (e.g. boiler failure, broken window etc) | Best done locally - assuming access to appropriate contractors. Need agreed budget. | Planned maintenance can reduce number of immediate issues and may be better shared. |
| Short to medium term maintenance (e.g. annual service, cleaning of gutters, paths etc) | Mix of local and shared experiences best. | Coordinating work across a number of meeting houses may reduce costs and ensure high standards. |
| Long term maintenance (e.g. quinquennial survey, re-roofing etc. | Can be local but then experience not shared. | Trustees should be assured that planning adequate. Programme of work best coordinated by sharing.Work best done by professionals with access to historic knowledge of premises.Shared maintenance can reduce costs and give more efficient use of resources. |
| Renovations and upgrade projects which improve premises | Proposals may be local but should be ‘tested’ wider to answer question ‘why project should be done’ (e.g. increased attendance) | Essential for Trustees to approve and ensure finance available (e.g. by appeal). Timing with other projects needs coordination. Management of project best done professionally. Planning consent can be complicated so best done professionally.Adequate budgeting requires experience. |

David Olver

20 June 2023

**APPENDICES**

**1. Meeting Houses in QiY**

There are 38 meetings in the QiY region which vary in size of membership from a handful to hundreds. There are 32 meeting houses owned by Area Meetings. But as the last column in the table below indicates, the distribution across the AMs is far from uniform.

Of the 6 meetings which do not own their meeting houses, Ackworth meeting house is owned by Ackworth School, Hope Valley uses the residential premises, and the other four rent premises (Halifax rent a room in the building which used to be the meeting house and was sold).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Area Meeting | No of Meetings | No of Meeting Houses | of which listed. | No of members per meeting house |
| Brighouse West Yorkshire | 5 | 3 | 0 | 46 |
| Central Yorkshire | 6 | 5 | 2 | 23 |
| Craven & Keighley | 5 | 5 | 4 | 23 |
| Leeds | 6 | 6 | 2 | 29 |
| Pickering and Hull | 7 | 6 | 3 | 26 |
| Sheffield and Balby | 4 | 2 | 0 | 107 |
| York | 5 | 5 | 1 | 84 |
|  |  |  |  |  |
| **Totals** | **38** | **32** | **12** |  |

**2. London Quaker Property Trust**

The London Quaker Property Trust (LQPT) is a charity and holds the Quaker Meeting Houses and some associated accommodation in trust for the seven London Area Meetings, each of which covers a geographical segment of Greater London.

There are 30 active meeting houses; 3 ex-meeting houses where LQPT still owns the property; and 16 other properties, some of which are warden’s accommodation, the others provide rental income.

The seven Area Meetings are each asked to provide two or three members to become LQPT Trustees. There is a small secretariat based at Friends House. This comprises:

* Premises Committee Support Officer who can provide advice and assistance at a local level;
* Finance and Administration Officer who is responsible for all financial matters;
* Senior Manager who has overall and policy responsibility

The LQPT acts as a shared resource whereby relevant income from each Area Meeting is pooled with that of the other six. The income comes from three sources:

* The Quota – an annual contribution determined according to the number of Members in each Area Meeting, paid out of Area Meeting funds;
* Room hire – groups and individuals hire rooms in Meeting Houses and the income is collected by Local Meetings on behalf of LQPT;
* Accommodation – rents from flats and houses

The expenditure of the LQPT is allocated according to need. How the expenditure is disbursed is determined by the LQPT Trustees informed by the LQPT management.

Each Meeting with a meeting house has a Premises Committee – which is answerable to LQPT, not to their area meeting.

**3. Brighouse, Leeds and Settle Building Charity**

This provides an example of what has happened in Yorkshire in the past and by implication what could happen again.

In 1923, the then Brighouse Monthly Meeting split into three monthly meetings but the assets (meeting houses and trust funds) were not split between the new monthly meetings. Instead they were passed to the **Brighouse, Leeds and Settle Monthly Meeting Joint Trust Funds Committee**. In 1923 there were no charities with remits of administering property, hence the setting up of a Joint Trust Funds Committee. Later, the Committee did become a charity.

When the Joint Trust Funds Committee was set up in 1923, it had 27 meeting houses, 16 burial grounds, 24 other properties, and 68 trust funds. Over the century, the trust funds were merged, some properties and burial grounds were sold. Unused meeting houses were also sold.

Gradually over time ownership of the active meeting houses was passed local/area meetings. By 2000 it had only two meeting houses (Airton and Gildersome) plus a number of burial grounds. In 2017 the charity was closed with Airton and Gildersome passing to the relevant AM. The remaining Funds were passed to Quakers in Yorkshire who administer it as a restricted fund for properties and burial grounds in the three AMs.

The body did not employ any staff but it did use regular contractors and lawyers. All work on meeting houses, or other properties, was done by local meetings. In the Trust Fund book, published in 1951, this is described as “controlled by X Preparative Meeting”. The model was that the property was owned by the Building Charity but most meeting houses were managed locally and funds for maintenance raised locally. In the latter part of the 20th century it was easy to transfer ownership to the relevant local/area meeting.