

Keeping the wheels turning Quaker governance in Yorkshire

Supplementary Papers

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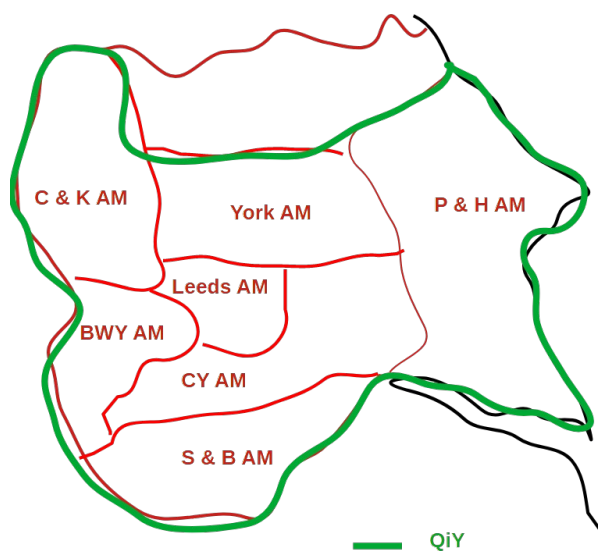
December 2023

1. Alternative models explored

- A. *Status quo*
- B. *Merger*
- C. *Single registered charity with merged AMs as Quaker bodies*
- D. *Single Area Meeting, both registered charity and Quaker body*

A. Status quo

Retain the 7 AMs + QiY as separate charities/bodies.



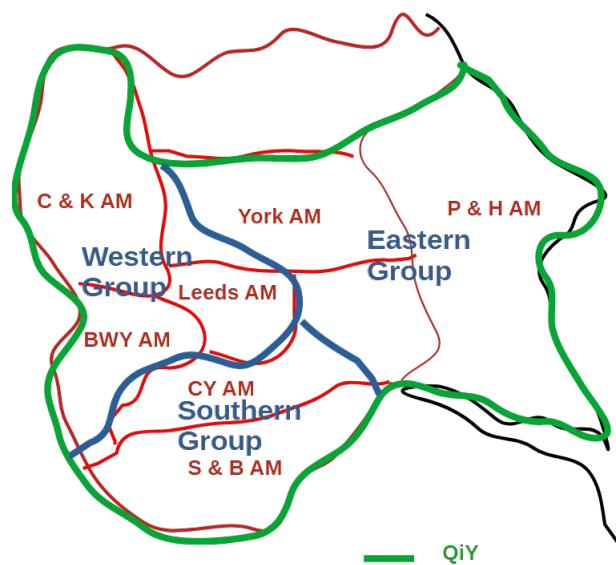
It would be possible to encourage greater collaboration and working across existing boundaries, for example sharing policy documents, sharing some appointments (e.g. registering officers, safeguarding officers), organising some joint activities. This could reduce trustees' workload to some extent, but does not address the issues of finding trustees. We felt it was insufficiently radical to make a significant difference.

B. Merger

Form existing AMs into (2 or) 3 new charities/bodies, and retain QiY as a separate charity/body as at present.

e.g. for 3 merged AMs:

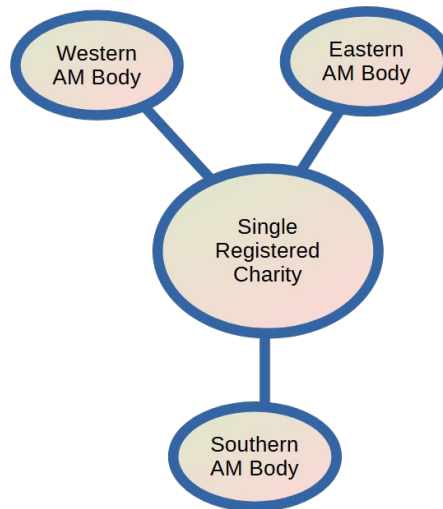
- Southern group: Sheffield & Balby + Central Yorkshire
- Eastern group: York + Pickering & Hull
- Western group: Leeds + Craven & Keightley + Brighouse West Yorkshire
- Quakers in Yorkshire



We wondered if there might also be a 2-AM option. If so, what combination of meetings could work? The mergers are less obvious than the 3-AM option.

We considered the advantages and disadvantages of merging AMs into two or three AMs across Yorkshire. This would create a larger pool for appointments and link city and rural meetings. However, it risks disengagement of Local Meetings and creating a “Them and Us” model. We felt there were considerable advantages to some functions (membership, appointment of elders and pastoral care team) remaining at the current AM level.

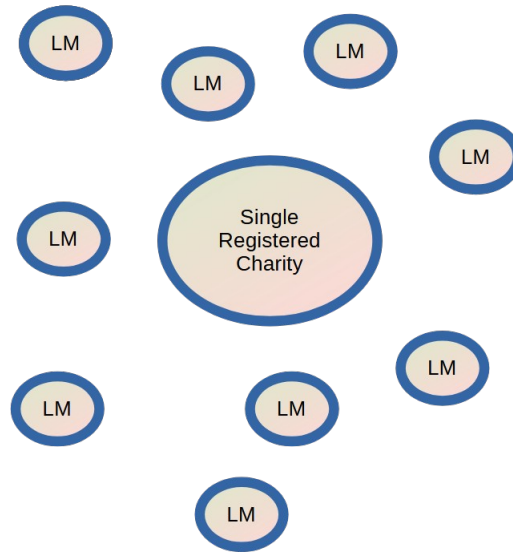
C. Single registered charity with merged AMs as Quaker bodies



This would be similar to our recommended model but with a reduced number of AMs as Quaker bodies. We felt it would require more upheaval to establish initially and it would not be desirable to implement such big changes to our AMs at the same time as changing charitable status. However, there would be nothing to stop eventual mergers of some or all of our current AMs at a later date.

D. Single Area Meeting, both registered charity and Quaker body

Lay down all current AMs. The Yorkshire-wide body is effectively a new 'Yorkshire Area Meeting', i.e. both a charity and a Quaker body.



- The Yorkshire-wide charity is responsible for all appointments, eldership and pastoral care and membership matters
- This would encourage a wide variety of fluid, informal/ad-hoc groupings to discern and carry out witness, offer spiritual nurture, provide opportunities for learning, etc.

We felt this model would be a step too far and would risk some Local Meetings becoming completely disconnected from the wider community.

2. Analysis of which trustee responsibilities require local input and which could benefit from being done Yorkshire-wide

MAPPING TRUSTEE RESPONSIBILITIES AND OTHER TASKS DONE BY AREA MEETINGS IN TERMS OF WHICH CAN BE DONE FROM ANYWHERE AND WHICH NEED LOCAL INPUT

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.	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).

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. Experience in London Quaker Property Trust 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.
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. Online booking systems can encompass local arrangements.	Some long-term hirers have relationship with local Friends which maybe lost. Knowledge of other local alternative venues might be lost.

Area of Responsibility	How local does it need to be	Advantages of doing it jointly	Disadvantages of doing it jointly
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.	None, 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.	None. Having someone in each MH responsible for H&S and other legal compliance means that key issues may end up being forgotten.
Property – Insurance	Can be done centrally and arguably should be done centrally	Economies of scale	None.
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.

Area of Responsibility	How local does it need to be	Advantages of doing it jointly	Disadvantages of doing it jointly
EMPLOYMENT			
Employment – Recruitment	Policies and procedures can be agreed centrally	More likely 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.
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.

Area of Responsibility	How local does it need to be	Advantages of doing it jointly	Disadvantages of doing it jointly
SAFETY ISSUES			
Safeguarding	Having the same policies and procedures across a wider area may well have benefits.	It is more likely that relevant expertise is available and fewer people need to be 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 a remote level may feel intrusive.
Health and Safety including Fire Safety and compliance with relevant legislation	Having the same policies and procedures across a wider area may well have benefits.	It is more likely that relevant expertise is available and fewer people need to be involved in the management and oversight of this area. Standardised risk assessments.	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	None.
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

Area of Responsibility	How local does it need to be	Advantages of doing it jointly	Disadvantages of doing it jointly
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.
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 AREA MEETINGS THAT WOULD NEED TO BE MANAGED AT A MORE CENTRAL LEVEL

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 identified.	Could make it all more remote.

Area of Responsibility	Where is it managed now	Advantages of doing it jointly	Disadvantages of doing it jointly
Pastoral Care	Currently done at AM level with Friends appointed to specific LMs	No specific advantages identified.	Could make it all more remote. Unlikely to work on a less local basis because Friends don't know each other well enough.
Funeral Care	Currently done at LM level	No specific advantages	Could make it all more remote. Unlikely to 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 (YDW) employed by BYM	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	None.
Established Activities: Glenthorne Visits, Easter Settlement, Junior Holidays, Yorkshire Friends Holiday School etc.	Easter Settlement, Junior Holidays, Yorkshire Friends Holiday School are already run by Quakers in Yorkshire. Other activities are run by AMs or LMs.	Available to everyone in region. Knowledge and expertise built-up. Dedicated volunteers available. Easier to ensure compliance with safeguarding etc.	None.

3. Thoughts and information on management of property

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 **Brighouse, Leeds & Settle Building Charity** provided an example of shared ownership. A summary of these two charities is below and there is also a summary of the number of meeting houses in the 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 with 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.**

What types of premises work are best done locally and what is 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 is 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. Applications for funding to external bodies can be co-ordinated to prevent funders receiving multiple applications from Meeting Houses.

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	

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.

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 to 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 the maintenance of properties and burial grounds in the three AMs.

The Joint Trust Funds Committee 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.

4. Quakers in Yorkshire

Quakers in Yorkshire (QiY) is a registered charity (No. 1139514) with trustees nominated by the seven AMs and appointed by QiY at one of the quarterly meetings which are open to all Quakers residing in the region.

The current role of QiY is described on their website (quakersinyorkshire.org.uk) as:

The object of Quakers in Yorkshire is the furtherance of the general religious and charitable purposes of the Religious Society of Friends in the region encompassed by the seven area meetings and beyond. It does this by work such as:

- outreach and the care and nurturing of children and young people;
- providing for relief in need for those who are Friends or Attenders of participant meetings;
- promoting the education of children of Friends and Attenders in good standing of local meetings in Yorkshire who attend a secondary school officially connected to Britain Yearly Meeting;
- assisting in the erecting, maintaining, repairing or improving of Quaker meeting houses;
- overseeing the governance of Bootham School, York and The Mount School, York;
- supporting the charitable objects of Glenthorne Quaker Centre;
- making trustee appointments to Breckenbrough School and The Retreat, York;
- administering and maintaining the organisation of Quakers in Yorkshire.

In our proposed model, QiY could either be absorbed into the new registered charity or it could continue to exist alongside it. Alternatively it would be possible to apply to the Charity Commission for a change to the governing document of QiY so that it expands to become the new Yorkshire-wide body. We have not formed a view on which route would be preferable.