

**Yorkshire Quaker Governance Group**  
**Proposals for a Yorkshire Quakers charity**  
**September 2024**

## **Objectives**

The objectives of these proposals are:

- To simplify the organisation of Quakerism in Yorkshire by having a single charity.
- To help reinvigorate Yorkshire Quakerism.

This paper sets out proposals for a single charity, to be called **Yorkshire Quakers**, which would be the merger of the existing seven Area Meeting charities plus the Quakers in Yorkshire (QiY) charity. The new charity would be responsible for the finances, employment of staff, properties and regulatory requirements over the QiY region. This would enable Area Meetings to concentrate on supporting worship and witness as they would no longer be separately registered charities.

This paper summarises the proposals. More detail is available using the underlined links in the paper, or go to <https://quakersinyorkshire.org.uk/governance-links/>

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## How we got here

Yorkshire Friends were enthused with a talk by Paul Parker, Recording Clerk, in April 2019 and this led to the setting up of GRASP (Group to Reinvigorate and Simplify Processes) which produced the [GRASP report](#) in February 2021. This made a series of recommendations, many of which have been implemented in Local and Area Meetings. The proposals received widespread support. The desire for simplification led to a group to consider how to simplify charitable functions across the Quakers in Yorkshire region. The report from that group, titled [Keeping the wheels turning](#) asked the seven Area Meeting if they agreed in principle with the proposal to form a single charity. During Spring 2024, all the seven Area Meetings agreed in principle ([see minutes](#)) and asked for detailed proposals.

## Need for simplification and re-invigoration

The circumstances which have led to these proposals are well rehearsed:

- Slowly ageing and declining membership ([see latest data](#));
- Challenge of trying to find Friends willing to undertake the roles needed at all levels;
- Relatively small numbers of new visitors and attenders;
- Differing needs of young people;
- Some meetings are struggling to survive – whilst others are doing relatively well;
- Ongoing significant needs of properties, including burial grounds;
- More effort now needed to satisfy regulatory requirements (safeguarding in particular).

There are some encouraging signs that change can bring a brighter future. The Yorkshire Youth Development Worker has been a success (funded mainly by Yorkshire meetings). So has the Local Development Worker. Both demonstrating that paid support can assist in re-invigorating Quakerism.

It is worth emphasising that the GRASP report said that in order to reinvigorate and simplify there is a need to return to the core of Quakerism:

- Worship, arising from conviction of the power of the Spirit/God, is central to us;
- Through our shared testimonies we aim to translate faith into action in spirit-led daily living;
- We seek to be an inclusive, diverse, supportive community at all stages of life;
- We aim to be non-judgmental, listening to and learning from each other, especially when we sense difference;
- We aim to support Friends called to witness their faith, in the wider world;
- We want to give service with joy.

## Approach taken in developing proposals

In developing these proposals, the following have been kept in mind:

- Local Meetings are at the heart of our worshipping communities;
- Simplification of our structures and roles is the purpose of the proposals;
- Build on work done elsewhere, particularly by Friends in Wales who have adopted the same model as us and already registered a single charity;
- The aim is an effective and efficient charity. We recognise that this will incur costs but we want to keep these as low as feasible;
- Adopt an evolutionary rather than big-bang approach to the process of merging.

## Financial arrangements

In recent years there have been considerable moves to simplify and consolidate the financial arrangements at area meeting level. This has been driven by the demands placed on Treasurers and the potential for online book-keeping and banking. Across the 7 Area Meetings, there are a number of different requirements relating to finance:

- overall strategic direction (which is the role of Trustees but may need a small amount of external support from a professional);
- day to day financial management including reporting to Trustees and Area Meetings and Local Meetings;
- assisting in drafting budgets (this could be provided by a qualified professional working with a book-keeper);
- book-keeping.

In order to be simple, the finance system needs to have a single accounting system and a single bank account. A single accounting system could be managed by professional book-keepers or an in-house team. Within a single accounting system it is possible to have numerous funds, e.g. for each meeting, for donations, for investment income.

It is essential to enable local finances to continue at all times, so it is proposed to take an evolutionary approach to moving from the present arrangements to the consolidated arrangements.

Local Treasurers would continue to determine what is spent and authorise payments. They would have access to online records but would not need to do book-keeping or produce accounts. They would need to work with Trustees and finance staff to produce realistic budgets and keep them informed of expected costs.

Funds currently held by Area Meetings and Local Meetings which are *restricted*, or *endowed* will not change. Restricted funds and endowed funds are so called because the donor, or subsequent charitable scheme, have specified the restrictions. Trustees of any charity cannot change the restrictions.

[\[More information on proposed financial arrangements available here\]](#)

## Property arrangements

Properties are owned by the charity. Currently this means the Area Meeting charities. So ownership would transfer to the Yorkshire Quakers charity.

An evolutionary approach is envisaged to looking after property. Current arrangements for property upkeep, maintenance, refurbishments or developments would continue at least initially. These vary across the 7 Area Meetings. A considerable proportion of the current expenditure is on property and this is likely to continue. There is merit and cost-savings in having consolidated insurance, valuation and access to professional advice.

The management of the combined property portfolio involves some routine matters (minor repairs, utilities, purchasing of supplies, etc) which might be more efficient if done jointly. Long term maintenance planning requires professional expertise and knowledge as does the commissioning such works at the right time in the right way, given the constraints of some of our buildings. Occasionally, there are major projects to develop and commission and this, too, requires professional input. It is no longer sensible to rely on voluntary Friends to supply the professional expertise. In addition, using outside professionals provides the reassurance of their professional insurance. We have a number of listed buildings (and some other listed

structures) and this requires expert professional knowledge in relation to the listed status and how to obtain consent for work to be done.

[\[More information on properties available here\]](#)

## **Regulatory requirements**

In recent years the regulatory requirements placed on Friends and meetings has increased considerably – particular for safeguarding. There is obvious merit in having a single set of policies and procedures across Yorkshire. These would cover all aspects of compliance, including safeguarding, data protection, lettings and health and safety. [\[More details here\]](#)

It is around the subject of safeguarding that there are the greatest benefits from a consolidated approach. Currently each Area Meeting charity needs to have a Safeguarding Coordinator and Deputy and a set of safeguarding policies and procedures. Yorkshire Quakers would have a single set of safeguarding policies and use professional advice to ensure high standards when dealing with any safeguarding issues affecting young people or vulnerable adults in meetings, activities and events.

Local and Area Meetings will continue to need trained and DBS checked Friends who can run activities involving children and vulnerable adults, as will Yorkshire Quakers for Yorkshire-wide events. So this will continue to be a shared activity.

## **Constitution**

It is envisaged that the new charity will be a Charitable Incorporated Organisation (CIO). The Association CIO model is used by the new merged charity *Quakers in Wales and the Marches* so their constitution can be adapted for Yorkshire Quakers. They have successfully registered with the Charity Commission in early 2024 and are in the process of merging each of their area meetings into the new charity. Currently in Yorkshire we have 5 registered standard charities, one CIO (Brighouse West Yorkshire AM), one charitable company (York AM) and one non-registered charity (Central Yorkshire AM).

Every Association CIO has to have an Annual General Meeting and can have any number of General Meetings to which all members have the right to attend. There could be quarterly meetings, following the well-established practice of Quakers in Yorkshire. The members of the CIO will be the Members recorded by Area Meetings.

To avoid creating new committees, it is envisaged that the committees of Quakers in Yorkshire will be adapted and used in the new charity.

## **Trustees**

It is proposed to have a minimum of one Trustee from each Area Meeting and a maximum of two Trustees from each Area Meeting. The Trustees must be Members of Britain Yearly Meeting. There would also be a Clerk and a Treasurer and up to two co-opted Trustees. The total number of Trustees would then be between 9 and 18. This compares with the current position where there are about 70 Friends serving as trustees across Yorkshire.

The Trustees would be found by a Nominations Committee, composed of two members from each Area Meeting and appointed by their Area Meeting. This Nominations Committee could replace the current QiY Nominations Committee.

Concern has been raised that the load on the Trustees would be considerable. However it is anticipated that many of the administrative tasks would be done by professionals. They would be managed by, and supported by, the Trustees.

## **Employment**

Current employees of the participating Area Meetings will be transferred to the new charity. Under national TUPE rules their terms of conditions will remain the same as at present and any changes in the future will be done by agreement with staff and using best-practice guidelines for the charity sector. The costs of employing these staff will be the same as at present.

It is proposed that one of the benefits of the single charity is that it will be large enough to justify employing staff to do the administrative work which is such a burden for volunteers. Most needed from the start will be a person to manage the implementation, and support the financial and administrative tasks of running the new charity.

## **Costs**

No money has been spent to date and none will be until Area Meetings have agreed to merge their charitable functions.

In considering the cost of running the new charity, it is worth bearing in mind that the combined expenditure in 2022 of the 7 Area Meetings plus Quakers in Yorkshire was about £1.5 million. [[Details here](#)]. This would place the Yorkshire Quaker charity in the medium to large charity sector.

The costs can be divided into the implementation costs and the annual costs.

The implementation costs will be made up of a number of items including: legal costs associated with forming and registering the new charity; costs of transferring staff to the new charity; costs of setting up an integrated financial system; costs of transferring ownership of properties; costs of establishing a real or virtual office environment. The implementation costs are currently estimated to be between £20K and £30K.

The annual costs will consist of the cost of using professionals (either by employing staff or by contract) for the administration, finance, property and compliance responsibilities. The current Area Meeting charities already spend considerable amounts doing this work and the aim of the new charity is to integrate this work and give much more effective and efficient processes. This might be done in phases. The extra annual running costs, over and above what is already paid for in the Area Meeting charities, are currently estimated to be of the order of £100K per annum.

The costs of running the new charity will need be found from the usual income streams. Quakerism has benefited from having many Friends who have been willing to do the administration voluntarily. Now there are fewer Friends able and willing to do this work. If we are not able to pay for this work with our time, then we need to pay with our money. The combined income in 2022 from all the AM charities was equivalent to £1,000 per member. The extra costs of using professionals might increase this by about 10%.

## **Risks**

There are risks associated with merging charitable functions. But there are risks by remaining with the current structures. An assessment of the main risks is being developed by the Yorkshire Quaker Governance Group.

## **Area Meetings**

The 7 Area Meetings vary in size (from 107 to 349 members). 6 of the 7 Area Meetings had large enough turnovers to become registered charities, the seventh, Central Yorkshire Area Meeting, is a charity but not registered. Currently the Area Meetings have regular business meetings with the duty of overseeing the work of their charity trustees. If it is agreed to merge charitable functions, then this duty would be passed to the General Meetings of Yorkshire Quakers. Area Meetings would then be free to concentrate on promoting the worship and witness in their area as well as relating to the central functions of Britain Yearly Meeting and particularly the continuing Yearly Meetings which will replace Meeting for Sufferings.

The future role of Area Meetings will evolve as the changes proposed in this paper present opportunities for simplification and re-invigoration. In the future, it may be that Area Meetings decide that they wish to merge with surrounding Area Meetings. It is for each Area Meeting to decide its own future. These proposals do not depend upon, or envisage, any alteration to the current Area Meeting boundaries.

It is clear that the Yorkshire Quaker charity needs to establish and maintain good two-way communication with Area Meetings, Local Meetings and Members.

## **Local Meetings**

For many Friends (members, attenders, enquirers), their Local Meeting (or worshipping community) is the heart and soul of Quakerism. Only a small proportion of Friends who call themselves Quakers wish to get involved at a wider level. This would not change under these proposals. Local Meetings would continue to function much as now. However the 'business' orientated role-holders (clerks, treasurer, premises committee) would need to interact with Yorkshire Quakers.

To work effectively, the new charity needs to establish effective two-way communication with local role-holders. The new charity needs to be responsive to local concerns. Financial constraints currently limit what can be provided locally and this is likely to continue. A joint approach to solving issues is the only way to build an effective Yorkshire Quaker community.

For local finances, it is envisaged that there will be an evolutionary approach to new book-keeping arrangements. The aim must be to make the task of local treasurers easier to do by providing mechanisms which are as simple as feasible. Annual accounts would be handled by Yorkshire Quakers.

For premises matters, much of the routine business of meeting house and other property maintenance happens at local level and this would continue. Yorkshire Quakers would provide support and share best practise so that local properties are use as effectively and efficiently as feasible. The Yorkshire Quaker charity will be able to draw on more resources (money and professionals) than available to a single Local Meeting. Over time a strategy for satisfying the needs of the local worshipping communities could be developed. This would need to be flexible and responsive as local issues can change quite quickly.

Memorandum of Understandings will be consulted and agreed with Local Meetings.

## Quakers in Yorkshire

Quakers in Yorkshire (QiY) is currently a separately registered charity and this means that the name cannot be used by the new charity. QiY Trustees have agreed that it is sensible to merge QiY into the new Yorkshire Quakers charity. This means that the roles and responsibilities of QiY can be used to help run the new charity. There are certain unique responsibilities held by QiY, particularly as the responsible body for Bootham and The Mount Schools, and consideration will be needed as to how best to deal with these responsibilities. QiY Trustees have set up a working group to produce proposals.

## Schedule

The proposals in this paper can be considered by Area Meetings in autumn 2024 with appropriate consultation. It is hoped that the Area Meeting clerks can work with the Yorkshire Governance Group to agree a timescale that fits their needs.

If agreement to merge is discerned by early 2025, then the year 2025 would be taken up with preparation to implement the proposals. This could lead to the new charity starting in January 2026 and the phased merging into Yorkshire Quakers.

An implementation group consisting of representatives of current Area Meeting trustees might be tasked with doing all the necessary preparations, including legal aspects, preparing the constitution, agreeing initial budgets and employing a person to assist with implementing the merged charity.

## Next steps

Area Meetings are asked to consult their Local Meetings and their Trustees before discerning whether the proposals in this paper are the right way of helping to simplify our organisation and help reinvigorating Yorkshire Quakerism. It is likely that there will be a range of views so Area Meetings will need to discern whether a merged charity will enable the future of our Society to be simpler.

The basic question for Area Meetings is *Do you wish to commit to merging into a single Yorkshire Quaker charity?*

Responses, feedback, questions should be sent to David Olver (email: [david@olver.plus.com](mailto:david@olver.plus.com))

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