

QUAKERS in YORKSHIRE

Role Description

Title of role: Treasurer of Quakers in Yorkshire

Length of term of service: 3 years (with possible renewal for second term)

What the role entails:

- Responsible for the care of, and accounting for, the funds of Quakers in Yorkshire (QiY) which is a registered charity (No. 1139514).
- The Treasurer is an ex-officio trustee of QiY so works with all trustees to steward the financial resources of QiY, including budgeting and producing the annual accounts.
- Working with the Clerk of Trustees to provide advice and guidance.
- QiY has an investment portfolio with Investment Managers which the Treasurer oversees in conjunction with trustees.
- QiY has inherited a number of endowed and restricted funds and the Treasurer is responsible for overseeing them.
- Income is raised from a combination of core contributions from area meetings, activities, sale of items, donations and investments.
- Expenditure is on supporting the activities of QiY and its groups. There are currently no paid staff and QiY owns no property.
- The activity groups (Easter Settlement, Junior Holidays, Holiday School) come under QiY and the Treasurer needs to approve budgets and work with organisers.
- Most banking is done online (CAF bank) and the Treasurer is responsible for recording transactions and initiating payments
- Preparation of the annual accounts.
- Interaction with the Independent Examiner.

Desirable skills, experience and availability of training:

The desirable skills and experience are the same as all Treasurers in the Society of Friends:

- Integrity;
- Organisational skills;
- Bookkeeping experience;
- Experience of SORP charity accounts;
- Knowledge of Quaker organisation at local, area, regional or national level.

Woodbrooke offers training courses for treasurers.

Frequency of meetings and the time commitment envisaged:

Trustees normally meet three times a year. Other meetings as necessary.

Regular book-keeping essential. Most time is involved in compiling financial reports for trustees, interacting with activity groups and preparing annual accounts.

Keeping Friends informed:

Work with Clerk of Trustees to keep trustees and others informed of state of QiY finances.

To find out more:

Talk to the current Treasurer or Clerk of Trustees.

Date: 21 April 2024