



Advices & queries on Quaker stewardship

- **Does your meeting have a sense of spiritual strength and community?**
- **Is there a feeling of mutual accountability?**
- **Do those taking responsibility feel supported?**

These queries are offered to the following groups of Friends to help reflection on how well they work together, to share responsibility and leadership:

- Clerks
- Elders and overseers
- All those involved in the nominations process
- Trustees
- Treasurers

Queries for trustees

1. Do you make time to consider the spiritual as well as the financial aspects of stewardship?
2. Is your stewardship of the affairs of the meeting based on integrity and loving care of the whole meeting community?
3. How do you remain faithful to the discernment of the area meeting? Keeping the meeting informed of your decisions can help to build trust.
4. How do you support the area meeting to fulfil the legal requirements of the Charity Commission or the Scottish Charity Regulator?
5. How do you ensure that area and local meetings have adequate resources, both financial and human, to care for properties for which they are responsible?
6. Have you considered the possible risks facing the meeting and its property and funds? Seek to reduce any risks without creating unnecessary bureaucracy or a fearful attitude.
7. How do you personally, and your local meeting and area meeting, uphold the work undertaken locally and centrally by Friends? Be imaginative and courageous in using reserves and property in helping to address social and economic injustice.
8. How do you support the meeting to enable it to comply with regulations on safeguarding children and vulnerable adults?
9. What steps have you taken to ensure that the meeting holds secure copies of all essential records?
10. Are you familiar with the financial procedures in use in your meeting? Do you receive regular financial reports, including verification of bank balances?
11. Do you regularly review long-standing procedures to ensure that they meet new requirements and good practice? Consider whether alternative ways of performing some tasks (such as employing paid professional help) might free Friends from unnecessary anxiety.
12. Do you receive the advice and support you need as a trustee group, and the right information to perform your duties? Give some time to a consideration of how well you are working as a body of trustees.

Queries for treasurers

1. Do you have adequate and regular support, such as a support group or an assistant treasurer? Having others who understand your work will make it easier to share some tasks and duties, particularly at busy times – and to find a successor in due course.
2. Are bank mandates changed as soon as new people are involved? Do all cheques above a certain limit require two signatures?
3. Do you keep written evidence in support of all receipts and payments as vouchers for examination by an auditor or independent examiner?
4. Do you get the support you need in drawing up annual accounts and ensuring their collation, where required, in good time? Do you keep the trustees informed about this process?
5. Do you present the accounts clearly to the meeting so that all Friends can understand essential points? Do you use written notes and simple graphics to help wider understanding?
6. Do you work effectively with the meeting's trustees so that they and the area meeting are confident that the meeting's resources are efficiently used and are aware of whether they are adequate?
7. Do you evaluate and explain the financial implications of the meeting's decisions?

Queries for elders, overseers, clerks and nominations committees

1. How do you build an atmosphere of trust and community in your meeting, encouraging openness with one another so that everyone feels free to ask questions?
2. How do you support those, such as clerks, trustees and treasurers, who undertake responsibility for the meeting?
3. What steps do you need to take to identify tasks clearly and to review roles regularly? When can tasks be shared?
4. How do you manage the handover for those newly appointed? How do you induct them into their roles? How do you ensure that the experience of previous incumbents is not lost? How might they serve the meeting in new ways?
5. Do you check how those appointed are getting on? How do you ensure that they have the necessary up-to-date information and training?
6. Does everyone know to whom to turn if they have difficulties? If an appointed Friend is not coping with their responsibilities, can you be sure that support needs would be identified in good time?

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