



## THE RELIGIOUS SOCIETY OF FRIENDS (Quakers) IN BRITAIN

### THE SOUTHERN MARCHES AREA QUAKER MEETING

### CYFARFOD CRYNWYR RHANBARTH Y GORORAU DEHEUOL

Registered charity number: 1134528

*The Governing Document says, 'The object of Southern Marches Area Quaker Meeting is the furtherance of the general religious and charitable purposes of the Religious Society of Friends (Quakers) in Britain in the area of Southern Marches Area Quaker Meeting and beyond.'*

*Quaker faith and practice (5th Edition - London, 2013) is the current Book of Christian Discipline of the Yearly Meeting of the Religious Society of Friends (Quakers) in Britain and contains guidance on the right ordering of Britain Yearly Meeting of which Southern Marches Area Meeting is a constituent part.*

It strengthens our witness as a religious society and encourages us in our living of the testimonies. It inspires us to action, corporately in our meetings or individually and in groups. It searches our spiritual depths and refreshes our spiritual life as individuals and corporately. It reinforces the sense of community in our meetings QF&P 6.01

*Our Governing Document refers directly to it for guidance and the way that we work. (See also <http://qfp.quaker.org.uk/> for an interactive version of Qf&P).*

Throughout this document the abbreviations; Area Meeting, AM and SMAQM refer to Southern Marches Area Quaker Meeting; BYM and YM refer to Britain Yearly Meeting, LM is Local Meeting and QF&P refers to Quaker Faith & Practice

The purpose of this document is to help members of the Nominations Committee with their discernment and to describe to Friends who are approached with regard to this role the extent of the role and the demands and rewards that it will offer to anyone who is appointed.

### **Job/Role Description: Local Meeting Treasurer, Llandrindod Wells**

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The constituent Local Meetings of AM are part of the SMAQM Charity (Registration Number 1134528) for which the Trustees are responsible but which is administered locally.

1. List of main responsibilities:

- Stewardship of the financial resources of the LM and for helping Members and Attenders to understand these.
- Attending meetings of the AM Finance Committee which meets at least twice a year and reports back to Meeting for Business.
- Preparing the LM's annual accounts for submission to the AM Treasurer for external examination and consolidation in order that SMAQM complies with the legal requirements of the Charity Commission and the requirements of BYM's Stewardship Committee.
- Preparing a draft annual budget to go to Meeting for Business and then to Trustees

2. Administrative tasks involved:

- Keeping up to date and accurate financial records for the LM using the headings agreed by AM and on a Receipts and Payments basis using QuickBooks.
- Keeping account of receipts including; donations and funds reclaimed from Gift Aid, legacies, collections and letting income.
- Making payments including; the Capitation Fee to SMAQM, payments for the upkeep and maintenance of the Meeting House, and other Quaker work as agreed by LM in session.
- Inviting donors to complete Gift Aid forms and ensure that applications for Gift Aid are submitted to HMRC on a regular basis.
- Making donations, e.g to BYM or other charities, as agreed by LM in session and within the guidelines of the Charity Commission, BYM Stewardship Committee and AM.
- Acting as Letting Agent for the Meeting House.
- Liaising with LM Premises Clerk regarding future financial requirements for maintenance of the Meeting House, Quinquennial Survey and its implementation.
- Keeping LM funds appropriately and safely, having regard to the possibility of internet fraud or other potential mishaps.
- Communicating with the Bank.
- Maintaining a basic filing system
- Initiating and responding to email and other communications related to the treasurer's role.

<p>3. Frequency, location and types of meetings involved:</p> <ul style="list-style-type: none"> <li>• Attendance at Meeting for Worship for Business and LM level.</li> <li>• Meetings with AM Treasurer and other Treasurers as business requires.</li> </ul>
<p>4. Approximate monthly time commitment:</p> <ul style="list-style-type: none"> <li>• Four hours</li> </ul>
<p>5. Legal requirements, if any, relating to post:</p> <ul style="list-style-type: none"> <li>• Data Protection Law</li> <li>• Employment Law, if relevant</li> <li>• Health and Safety Legislation</li> </ul>
<p>6. Trienniums expected (and progression):</p> <ul style="list-style-type: none"> <li>• One, with the likelihood of being asked to continue for a further triennium.</li> </ul>
<p>7. Training needed to start, and ongoing:</p> <ul style="list-style-type: none"> <li>• Informal training can be given by those who have previously carried out the role of LM Treasurer and by the AM Treasurer</li> <li>• Training is offered at Woodbrooke, for example “being a Quaker Treasurer”. <a href="http://www.woodbrooke.org.uk">www.woodbrooke.org.uk</a></li> </ul>
<p><b>Personal Qualities and abilities</b></p>
<p>8. Personal qualities and skills needed:</p> <ul style="list-style-type: none"> <li>• The ability to attend to detail and accuracy</li> <li>• Good basic, practical, numerical and financial administrative skills</li> <li>• The ability to communicate numbers to those whose skills lie elsewhere</li> <li>• The ability to work as part of a team when required</li> <li>• The ability to delegate parts of the role as agreed by LM</li> </ul>
<p>9. Technical, computer use or administrative skills needed</p> <ul style="list-style-type: none"> <li>• Access to and ability to use a computer</li> <li>• Willingness to learn and use QuickBooks software</li> <li>• Understand and use the Gift Aid process</li> </ul>
<p>10. Experience needed, or desirable:</p> <ul style="list-style-type: none"> <li>• Experience of working with figures is helpful</li> </ul>
<p>11. Is membership required?</p> <ul style="list-style-type: none"> <li>• Normally Yes but exceptions may be negotiated with BYM</li> </ul>

<p>12. Knowledge of Quaker Business Method required?</p> <ul style="list-style-type: none"> <li>• This is helpful in understanding the context and nature of the work and in communicating with other Meeting treasurers.</li> </ul>
<p><b>Support in place for the post holder after appointment</b></p>
<p>13. Sources of support (including identified 'mentor/s'):</p> <ul style="list-style-type: none"> <li>• SMAQM Treasurer</li> <li>• Treasurers and or ex-treasurers from other Local Meetings</li> </ul>
<p>14. Quaker Faith and Practice references:</p> <ul style="list-style-type: none"> <li>• Chapter 13.42 – 43, Chapter 14 Finance</li> </ul>
<p>15. Other helpful sources of information and guidance:</p> <ul style="list-style-type: none"> <li>• The Memorandum of Understanding (MOU) which sets out the basis of the relationship between; SMAQM, SMAQM Trustees and the eight LMs which are within the AM.</li> <li>• The SMAQM Finance Policy &amp; Finance Procedures</li> <li>• The Association of Church Accountants and Treasurers (ACAT) Handbook is a comprehensive source of reference; to access this contact the secretary to Quaker Stewardship Committee on 020 7663 1161 or email <a href="mailto:gsc@quaker.org.uk">gsc@quaker.org.uk</a></li> <li>• Quaker Treasurers Guidance Sheets, supplementary to the ACAT handbook, can be downloaded from 'Quakers in Britain'. <a href="http://www.quaker.org.uk">www.quaker.org.uk</a> Other useful information can be found at this location.</li> <li>• Treasurers' and Clerks' Support Officer (<a href="mailto:gabys@quaker.org.uk">gabys@quaker.org.uk</a>) is the first point of contact for treasurers who need information or advice to support them in their roles,</li> <li>• <a href="mailto:treasurersIT@quaker.org">treasurersIT@quaker.org</a> provides technical support for spreadsheets and software</li> </ul>
<p>16. Help with expenses:</p> <ul style="list-style-type: none"> <li>• The Area Meeting or Local Meeting may be approached for help with expenses.</li> </ul>
<p><b>Comments and helpful information (e.g. from previous post holder)</b></p> <ul style="list-style-type: none"> <li>• Judith Baresel has written a helpful guide taken from her role as Hereford LM Treasurer – though it must be noted that demands of the role can differ between Meetings</li> </ul>
<p><b>Rewards to be found in this service:</b></p> <ul style="list-style-type: none"> <li>• This role forms an essential part of the life of a Quaker Meeting, and is valued as contributing to both the practical and spiritual work of Friends. There is much satisfaction in keeping clear accounts, contributing to the safekeeping and growth of financial resources and forward planning.</li> </ul>

**Date: 18.03.2019**