

Policy on Giving to non-Quaker UK Charities

Background

In Autumn 2016 Trustees sent a letter to Local Meetings on this topic. The text of this draft policy follows the wording of that letter with the exception of the penultimate paragraph (in red), which has been added to cover the eventuality of a Local Meeting wanting to send money overseas. The sections in the table referring to bequests may need amendment once Trustees have considered how to handle bequests (a group is currently working on this).

If a Local (or Area) Meeting funds another UK charity or UK organization the Local (or Area) Meeting must be sure that the work supported is charitable in nature and fits with Area Meeting's charitable objectives. Local and Area Meetings are also responsible for checking that the money has been used in the way stated by the charity or organization. The decision to fund and the details must be recorded in the minutes of the Business Meeting. Amounts over £250 need to be the result of a "tested and adopted concern", and will be recorded in the narrative text of the Annual Statement of Accounts.

Trustees will note when Area or a Local Meeting has made such a grant from the minutes, but it would be helpful if Area and Local Meeting Clerks could alert the Clerk of Trustees when this has happened.

Offering reduced rates to an organization hiring a room or rooms in a meeting house also constitutes a donation to the organization and must be treated in the same way.

Trustees offer the table summary overleaf as a useful reference point for both Area and Local Meetings.

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Adopted by YAQM Trustees 10/06/2018

Giving to Non-Quaker Organizations

Special collection for a named UK charity or organization	
Friends give money to the collecting Friend, who sends the money off and simply presents the Meeting with a receipt from the charity or organization.	The money does not pass through the Meeting's accounts. Present arrangements can continue unchanged.

<p>Special collection for a named UK charity or organization</p> <p>Friends give money to the Meeting Treasurer. The money passes through the Meeting's accounts as an in/out process.</p>	<p>Although the money passes through the Meeting's accounts, it is "passport" and is not available for the Meeting to use for any purpose other than supporting the particular UK charity or organization.</p> <p>Present arrangements can continue unchanged.</p>
<p>The Meeting* receives a donation or bequest and decides to use some / all of it to benefit a UK charity or organization.</p>	<p>The money belongs to the Meeting. Decision(s) must be recorded in a Business Meeting minute. Items over £250 must result from a "tested and adopted concern" and will be reported in the Area Meeting annual accounts.</p>
<p>The Meeting* decides to allocate some of its funds to benefit a UK charity or organization.</p>	<p>The money belongs to the Meeting. Decision(s) must be recorded in a Business Meeting minute. Items over £250 must result from a "tested and adopted concern" and will be reported in the Area Meeting annual accounts.</p>
<p>The Meeting* allows a UK charity or organization to hire its premises at a reduced rate or without charge.</p>	<p>This is in effect a donation from the Meeting. The decision to offer the reduced rate or free use must be recorded in a Business Meeting minute and the amount thereby donated to the hiring organization (over each calendar year) noted. Where the effective donation is over £250 per year this must result from a "tested and adopted concern" and will be reported in the Area Meeting annual accounts.</p>

* Legally, all funds belong to York Area Quaker Meeting.

In practice Local Meetings currently take decisions on the use of funds within the Local Meeting.

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