

Memorandum of Understanding

between

Devon Area Quaker Meeting and _____ **Local Quaker Meeting**

Approved by Minute _____ of Devon Area Meeting held on _____

Approved by Minute _____ of _____ Local Quaker Meeting held on _____

A Memorandum of Understanding sets out the relationship between a local meeting and its area meeting. It indicates where in our organisation functions are carried out and where responsibility lies for compliance.

It may (and indeed should) be revised to meet changing circumstances. As the size or assets of a meeting change, it may be appropriate for it to take on more responsibilities or to lay some down.

Part 1 below covers standard Quaker activities other than finance and running a meeting house

Part 2 concerns financial arrangements

Part 3 is about managing a meeting house

Part 4 covers legal issues with which we must comply

Not all parts will be relevant to all meetings depending upon the responsibilities involved.

Before a change in the law abolished the status of excepted registration, we were required to comply with the law but we were not registered. At that time, it was the practice amongst Quakers to regard all members as trustees so that everyone had a responsibility to be good stewards of our resources. Following the abolition of excepted status and the need for registration it became clear that the Charity Commission was not prepared to accept such a large gathering as a body of trustees and that we had to appoint trustees to hold the responsibilities laid down by law and, of course, we have the same laws to comply with as before.

As Quakers we wish to retain as many of our practices as we can which have contributed to our 350 year history. So we wish Area Meeting to corporately promote good stewardship even though we have to appoint trustees to take certain responsibilities required by Charity Law.

This document, amongst other things, shows where legal responsibilities lie. Responsibility is not the same as “doing”. The “doing” helps us individually to retain a clear stewardship element – the “responsibility” complies with the law and shows where trustees will need to be assured that the correct policies, procedures and actions are in place.

We need to avoid a situation in which important matters are simply “left to the trustees”

The tables use codes with meanings as follows:

D	Does the work, possibly delegated by others (and is responsible for it if not delegated by others)
R	Responsible for ensuring the work is done (non-legal)
L	Legally responsible for ensuring the work is done
S	Source of information
I	Those who should be informed
A	Those from whom advice must be sought
LM	Local Meeting
AM	Area Meeting
TR	Trustees
FH	Friends House

The D, R and L designations need some explanation.

There may be activities which are solely the responsibility of a local meeting – a D will be in the row but neither an R nor an L, the D meaning “Does the work by nature of being responsible for it”

Some activities may be done locally but be the responsibility of AM or the Trustees – such rows would contain both a D and an R or an L.

1	Quaker Activities	LM	AM	TR	FH	QF&P	Trustees Handbook	Governing Document	Notes
1.01	Meeting for Worship	D	R			2.35-40; 4.07abc			
1.02	Clerkship	D				3.12-20			
1.03	Eldership	D	R			12.12			
1.04	Oversight	D	R			12.13		5v	
1.05	Nurture of children	D				10.10; 22.60-69; 4.18			
1.06	Nurture of Members	D							
1.07	Nurture of newcomers	D							
1.08	Local Business Meetings	D	R			3			
1.09	Area Business Meetings	I	D	I		4		10	
1.10	Trustees Meetings		I	D		15.05		17	
1.11	Library	D				4.07p; 13.41-42			
1.12	Outreach	D			S	4.11; 13.33; 28		5ii	
1.13	Links with other churches	D							
1.14	LM appointments	D				3.22-25			
1.15	AM appointments	S	D					12	
1.16	Training for Quaker work	D			S				
1.17	Marriages	D	L			16 esp 16.22-56			
1.18	Funerals and burials	D	L			17			

2	Finance	LM	AM	TR	FH	QF&P	Trustees Handbook	Governing Document	Notes
2.01	Bank Accounts	D	R	L		14.20-23	6.2	15xii	
2.02	Schedules & contributions	D				14.08		15i	
2.03	Investments	D		L		14.18,24; 15.06-07; 20.56-57	6.6	15v	
2.04	Reserves	D		L			6.6	15iv	
2.05	Payment of expenses	D	R					15xi	
2.06	Accounting records	D	R	L					
2.07	Annual accounts	D	R	L		14.22-23	6.7; 7.1	19	
2.08	Examination of accounts	R	R	L			6.7		
2.09	Consolidation of accounts		D	L	I		7.3	19	

3	Meeting House	LM	AM	TR	FH	QF&P	Trustees Handbook	Governing Document	Notes
3.01	Minor works	D							
3.02	Major works	D	A	L					
3.03	Room hire charging policy	D							
3.04	Room hire terms	D				15.16			
3.05	Quinquennial survey	D		L					
3.91	Tenancy Management	D		L					
3.92	Tenancy Liaison	D							

4	Legal	LM	AM	TR	FH	QF&P	Trustees Handbook	Governing Document	Notes
4.01	Health & Safety	D		L					
4.02	Insurance	D		L				15xiii; 15xiv	
4.03	Risk Management	D		L					
4.04	Data Protection	D	A	L	S	4.47			
4.05	Child Protection	D	A	L	S				
4.06	Employment	D		L	S		3.6		
4.07	New Legislation	I	I	D	S				
4.08	Preserving Records	D	L			63/100			