

Policy for Giving to Non-Quaker Organisations Ipswich & Diss Area Quaker Meeting and its Linked Local Quaker Meetings and Charities

(Charity Commission Number: 1134526)

1. Introduction

This policy defines how the income and property of Ipswich & Diss Area Quaker Meeting can be used in compliance with the Area Meeting's charitable objectives and in line with the policies and guidance of Britain Yearly Meeting (BYM) and the Charity Commission of England and Wales. Further information on giving to non-Quaker organisations can be found in chapter 16 of the Quakers In Britain guidance:

<https://www.quaker.org.uk/documents/treasurers-guidance-sheets-nov2019>

Ipswich & Diss Area Quaker Meeting (1134526) includes two linked charities as well as six Local Quaker Meetings (LMs): Bury St. Edmunds, Diss, Felixstowe, Ipswich, Leiston and Woodbridge. The linked charities are the Ipswich & Diss Area Meeting Property Charity (1134526-1), the Richard Waynforth Trust (1134526-3). Ipswich & Diss Area Quaker Meeting, including its LMs and associated charities, currently operates under Schemes adopted on 29 May 2012 and 7 October 2014 and was registered with the Charity Commission on 26 February 2010.

2. Charitable Objectives

2.1 Ipswich & Diss Area Quaker Meeting and the Local Meetings

The charitable objectives of Ipswich & Diss Area Meeting (AM) and its LMs are to support "the furtherance of the religious and other charitable purposes of the Religious Society of Friends (Quakers) in the area of Ipswich and Diss meeting and beyond."

Section 5, Application of the Income and Property, of the Area Meeting's governing document (adopted on 17 May 2008 by minute 44/08 of Ipswich & Diss Area Quaker Meeting) specifically states that within Ipswich & Diss Area Meeting, income and property are used to further the Area Meeting's objectives by work such as:

- i) Strengthening the life and witness of Quaker meetings both in the area of Ipswich & Diss Area Meeting and beyond;
- ii) Spreading the message of Quakers and interpreting and developing the thought and practice of the Religious Society;
- iii) Undertaking Quaker service for the relief of suffering at home and abroad;
- iv) Funding the concerns that Quaker meetings in the area of Ipswich & Diss Area Meeting or beyond have adopted or agreed to support;
- v) Providing for the pastoral care of individual members and Attenders including assistance to those in need and for education;
- vi) Maintaining and developing Quaker meeting houses as places for public worship and from which to carry our witness into the world;
- vii) Administering and maintaining the organisation of Ipswich & Diss Area Meeting and contributing to the support of Britain Yearly Meeting.

2.2 Ipswich and Diss Area Meeting Property Charity

The charitable objectives of the Ipswich & Diss Area Meeting Property Charity are to support the "meeting houses and burial grounds of the Religious Society of Friends or for such other charitable purposes of the Society as the Ipswich and Diss Area Meeting may direct and the trustees may think suitable: provided that the trustees may allow persons who are not members of the society to

use the meeting houses and premises and the remains of persons who were not members of the Society to be buried in the burial grounds.”

2.3 The Richard Waynforth Trust

The charitable objectives of the Richard Waynforth Trust are to provide “relief in need for members and attenders of the Area Meeting” through grant making. In October 2014, the Charity Commission extended the trust’s geographical coverage to include Southern East Anglia and Norfolk & Waveney Area Meetings. The relief-in-need includes paying for household bills, transport to/from Meetings for Worship, essential home refurbishment, household items and electrical appliances, mobility aids, training to get back to work, emergency travel, respite care and home help. The trust also finances attendance at Britain Yearly Meeting (BYM), Junior Yearly Meeting and Yearly Meeting Gathering for members and attenders who would otherwise find it financially difficult to attend.

3. Giving to Non-Quaker Organisations

3.1 Donations from AM or LM Funds

AM and the LMs are asked that donations from AM and LM funds are usually given to Quaker organisations. This applies to donations made directly from AM and LM funds during a financial year as well as from the AM’s and LMs’ end-of-year discretionary spending, which are funds held in excess of six months’ expenditure (see *Reserves Policy for Ipswich & Diss Area Quaker Meeting and its Linked Local Quaker Meetings and Charities*). Donations can, for example, be made to the Bury St Edmunds Long-Term Meeting House Maintenance Fund, the AM Meeting Houses Fund, Britain Yearly Meeting and to international and national Quaker and Quaker-related charities (e.g., Quaker Peace & Social Witness, Quaker United Nations Office, Quaker Housing Trust, Quaker Social Action, Woodbrooke and Glebe House).

If AM or an LM does choose to give a donation to a non-Quaker organisation from AM and LM funds, the advice from the Charity Commission implies that the charitable object of the charity receiving the donation should be in harmony with our own. Therefore, donations may be given to further a BYM concern (e.g., peace or sustainability) or an AM or LM concern. When a donation is agreed for the first time, the receiving organisation, the amount and why the money is being given must be approved and minuted at an AM or an LM’s Meeting for Worship for Business.

If a donation to a non-Quaker organisation is greater than £250, particular care should be taken to show that the donation supports a tested and adopted concern of either BYM, AM or an LM. Quaker Faith & Practice 13.12 covers the testing of concerns, and 13.14 notes that when a concern has been adopted by an LM, then the AM clerk must be informed without delay. Even when a non-Quaker organisation has not been adopted as a concern, then Quaker Faith & Practice 14.04d states that funding has to be agreed, and it follows that it is thus duly minuted.

AM and the LMs are asked to keep their giving to non-Quaker organisations under regular review and to confirm that donations are being used for the purposes for which they were given by, for example, reviewing reports from the recipient organisation or attending its meetings. Repeated donations by standing order should not be made.

The AM trustees’ annual report will identify any donations made to non-Quaker organisations from AM and LM funds. In the case of donations of more than £250, the annual report will also explain the reasons for the donation, including any donations agreed in previous years that are still being made during the year being reported. The relevant AM or LM minute will be quoted in the report.

3.2 Special Collections

The preferred way for AM and LMs to make donations to non-Quaker organisations is through special collections. With special collections, AM or an LM is acting as an agent, in that the money collected from members and attenders is completely separate from their donations and committed giving to Quaker funds. Special collections for non-Quaker organisations must be in response to

public fundraising campaigns and be approved and minuted at AM or an LM's Meeting for Worship for Business. Special collections can also be held for Quaker and Quaker-related charities.

To ensure that any organisations receiving our special collections are using the funds as we would expect them to, AM and the LMs are asked to review the organisations' annual reports and fundraising appeal materials. If special collection money is sent to support an organisation's specific programme or project, then AM or the LM is asked to request a reply letter from the organisation to confirm that the donation has been accepted with this restriction or a letter in advance that the organisation will accept the restricted donation.

3.3 Grants

AM and the LMs are asked to ensure that no grants are given to any non-Quaker organisations.

All relief-in-need grants from the Richard Waynforth Trust are made in compliance with the AM's '*Grant Making Guidelines for the Richard Waynforth Trust*' and only to members and attenders of Ipswich & Diss Area Meeting, South-East Anglia Area Meeting and Norfolk & Waveney Area Meeting, as specified in the Charity Commission Schemes adopted on 29 May 2012 and 7 October 2014.

Grants can be made by LMs to their members and attenders to pay for Quaker courses or conferences that cannot be funded by AM or the Richard Waynforth Trust. LMs can also provide funding to supplement a grant from the Richard Waynforth Trust for attendance at Britain Yearly Meeting, Junior Yearly Meeting and Yearly Meeting Gathering.

3.4 Non-Quaker Overseas Organisations

Due to the stringent requirements required to show that active steps have been taken to ensure that donations are spent only for the purpose for which they were given, AM and the LMs are asked to ensure that all giving to non-Quaker overseas organisations is through special collections only (see section 3.2 above), not from AM or LM funds, and that the funds are sent through UK-based charities.

3.5 Preferential Rates for Room Hire

Several LMs have found that some local non-Quaker charities and community groups cannot afford to pay commercial rates for hiring rooms in AM's premises or in other local organisations' premises. In keeping with AM's charitable objective of public service and witness, these LMs therefore use a two-tier pricing policy, where business users of AM's premises are charged a competitive commercial rate and the non-Quaker charities and local groups are charged a preferential rate.

Because the charging of lower room hire rates to non-Quaker charities and local groups can be considered in practice the equivalent of making donations (the difference between the commercial charge and the preferential charge), LMs are asked to minute the details of their two-tier room hire pricing structures, noting that the use of preferential rates for non-Quaker charities and local groups is in support of AM's charitable objective of public service and witness.

3.6 Interest-Free Loans to Non-Quaker Organisations for Public Liability Insurance Costs

It is AM's policy that all room hirers must have public liability insurance in order to hire the AM's premises. Very occasionally, a non-Quaker charity or local group cannot afford the upfront costs of purchasing public liability insurance, and so an LM will give the organisation an interest-free loan specifically for the purchase of this insurance. The loan is repaid in full in accordance with a schedule of instalments.

When an interest-free loan is given, the LM is asked to minute that such financial support is 1) in keeping with AM's charitable objective of public service and witness and 2) that, although the non-

Quaker organisation cannot afford the upfront costs of the insurance, it will repay the loan in full over an agreed time period.

3.7 Subscriptions for Membership of Non-Quaker Organisations

AM and the LMs are asked to ensure and minute that all membership fees paid to non-Quaker organisations are in keeping with the AM's charitable objectives. For example, the AM's and LMs' memberships in local interfaith groups (e.g., Churches Together) directly support the AM's charitable objectives. Membership in non-Quaker organisations that do not directly support the AM's charitable objectives (e.g., United Nations Association) are not to be paid for from AM or LM funds, despite the fact that such organisations are undertaking admirable work that AM Friends are in sympathy with. Membership to political parties is also unacceptable.

AM pays membership fees to some non-Quaker organisations (e.g., Community Action Suffolk, Customer Union for Ethical Banking and Churches Child Protection Agency) who, in return, provide AM with services and/or advice that could otherwise be chargeable. Since AM directly benefits from these services, the AM trustees do not consider these payments to be donations.

3.8 Related Party Transactions

Both AM and the LMs are asked to minute the process of discernment and rationale for a donation or below market hiring charge or subscription, when the recipient is an organisation where members of the AM are involved in the running of such an organisation, or where some family member of a trustee is involved. In such cases, it is essential for the AM and LMs to notify the AM trustees so that they can ensure that they meet all the requirements for reporting related party transactions.

4. Conclusion

AM and the LMs are asked to consult the AM trustees, if they have any questions or concerns about this policy or about giving to a non-Quaker organisation. The AM trustees will consult with Quaker Stewardship Committee and the Charity Commission, if they need further guidance.

Signed: _____

Elaine Green, Trustee & Clerk, Ipswich & Diss Area Quaker Meeting Trustees

Date: _____

Review Date: