

PAPER Hiii

QUAKERS IN SCOTLAND



**The Religious Society of Friends (Quakers)
in Scotland**

DRAFT

GENERAL MEMORANDUM OF UNDERSTANDING

May 2025

Quakers in Scotland—Coordinating Group

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Introduction

1. What is a 'memorandum of understanding'?

A memorandum of understanding (MOU) describes who does what within Quakers in Scotland (QiS), whether by QiS itself or its trustees, or its constituent Local Meetings (LMs). It seeks to provide clarity about

- Who does what particularly in areas of overlapping responsibility
- What should be reported to whom
- Legal responsibilities of the trustees and where these are delegated to QiS or LMs

Quakers in Scotland (QiS) functions as an Area Meeting for its constituent LMs, and Quaker faith & practice advises that:

Each local meeting should agree with its area meeting the duties and responsibilities which the local meeting undertakes on behalf of the area meeting. This agreement should be formally recorded as part of a memorandum of understanding. The local meeting should report regularly, as required, to its area meeting on the discharge of these responsibilities. In the case of smaller meetings which are not able to carry forward all the responsibilities listed above, the recorded agreement should make clear the work that they are able to do themselves and what is done in co-operation with another local meeting.
(Qf&p 4.34)

Trustees are responsible for the assets of Quakers in Scotland, which in law includes all the assets of its constituent local meetings, and for the stewardship of its resources; in practice day-to-day decisions and the running of Local Meetings are left to local Friends.

What this document attempts, is to give guidance on who has responsibility for what. It aims to prevent misunderstandings and oversights, and is tailored to the circumstances of each meeting. It is not a legal document. Local Meetings (LM) and the Quakers in Scotland (QiS) are mutually interdependent. We are part of the same community and share the same overall purpose.

The Memorandum of Understanding will be reviewed every five years, or earlier if an LM or Trustees feel this would be helpful and agreed to re-issue the memoranda to all local meetings. We therefore ask each LM to adopt their Memorandum by minute, with a cover sheet signed by the clerk, and send this minute to the clerk of QiS Foundation trustees.

Stewardship involves prayer, and it involves thought, and it involves applying what emerges from the two. As individuals our particular talents may lead us to greater emphasis on one of those two elements, but they can never be wholly divided within any of us, and as a community we need to be faithful to all three: prayer, thought and application. (Christine Davis Qf&p15.01)

2. Charitable registration

Quakers in Scotland is the body registered with the [Office of the Scottish Charity Regulator \(OSCR\)](#) and has adopted a governing document and appointed trustees to conform to charity law. Trustees are responsible for the whole of the area meeting charity including the local meetings; the memorandum of understanding indicates how the trustees formally delegate certain powers and tasks to other groups of Friends, though remaining ultimately responsible.

3. Trusteeship

The QiS Trustees have a responsibility to ensure that all LMs behave with probity in the management of the assets entrusted to them and in the carrying out of activities which are subject to legal regulation, including work with children, employment of staff, data protection and health and safety

The property and funds of each LM belong in law to QiS. The funds of an individual LM form a restricted fund which may only be spent with the approval of that LM. All funds must be accounted for in the financial statements prepared annually by the QiS Treasurer for inclusion with the Trustees Annual Report and submitted to OSCR.

4. Local Meeting

This **Memorandum** sets out the terms of understanding between Quakers in Scotland and the Local Meeting with regard to the relationships and responsibilities between the two for each area where Trustees have a legal responsibility. It is intended that the Meetings for Worship for Business of the Local Meeting and Quakers in Scotland retain their management roles as set out in *Quaker faith & practice, particularly chapter 4* while maintaining effective communication and clarity of responsibility among the two meetings and the Trustees.

Alteration to this *memorandum of understanding* requires the agreement of the Trustees of Quakers in Scotland and the Local Meeting.

In this document

Local Meetings (LM), refers primarily to their formal business proceedings and the actions of those Friends appointed to specific roles. Qf&p 4.32 refers to their relationship with QiS/AM

Worshipping communities (LMs and worshipping groups) may wish to meet together, with agreement of the QiS clerk, as an **Intermediate Meetings (IM)**, to consider delegated QiS business relevant to their group of LMs. The role of an IM is not included in this document as their possible format is flexible and the range of delegated responsibilities will vary and be specific to any particular IM.

Quakers in Scotland (QiS), refers primarily to their formal business proceedings at a Quakers in Scotland meeting for worship for church affairs (**QiS in session**) their Quaker minutes and the actions of those Friends appointed to specific roles, unless otherwise stated as a named committee responsibility.

QiS is a **Scottish Charitable Incorporated Organisation SCIO** with appointed trustees. Every member of QiS is a member of the SCIO. The members appoint and oversee the work of its trustees.

Trustees are the trustees appointed by members of the SCIO and work in accordance with its governing document which sets out how the charity and its assets are to be administered and managed.

Trustees are required to take responsibility for the affairs of the membership body in relation to:

- a) Ensuring that its financial procedures are appropriate and its funds are put to proper use
- b) The maintenance and management of properties
- c) Ensuring that potential risks, including reputational risks are identified, evaluated and managed
- d) Compliance with legal requirements pertaining to charitable bodies including such matters as employment, safeguarding, health and safety and property management. This includes compliance with the Charities (Regulation and Administration) (Scotland) Act 2023 and the regulations of the Office of Scottish Charity Regulators OSCR.

Trustees will act independently in these areas of responsibility, but on any major issue impacting on the life of an LM or of QiS itself will consult with them.

Communication

It is the responsibility of the trustees to report to QiS and its membership as laid down in the Governing Document and to establish, maintain and publicise the communication channels by which QiS can raise matters with the Trustees.

Informal communication between trustees and roleholders in LMs and QiS is important but formal matters should be dealt with by means of an exchange of minute. The QiS committees for Employment, Finance and Property will provide an important communication link between LMs and trustees

Minutes of Trustee meetings will be sent to the QiS clerks for information and are publicly available on the QiS website. Where confidential matters have been raised and minuted, these may be redacted before being made publicly available.

QiS minutes will be sent to the clerk of trustees for information.

The table which follows sets out the delegation and division of responsibility and the various actions that are required.

A separate Property MOU gives more detail relating to property responsibilities, so the table only contains a very brief outline.

Quaker Work	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Meeting for Worship (see <i>Qf&p chapter</i>)	- Discerns arrangements appropriate for the size of their meeting. - Makes all the arrangements. - Reports as required to QiS	Receives report of the spiritual life of the LMs	Reports on public benefit and spiritual life of Quakers in Scotland in annual report
Membership (see <i>Qf&p chapter</i>)	- Encourages attenders to consider membership at an appropriate time - Brings forward names of Friends to serve as visitors	- Accepts Friends into membership, minutes deaths, terminations and arranges for transfers to and from another AM - Appoints a QiS Membership Administrator to maintain the register of members and complete the tabular statement	Ensures the register of members is kept in compliance with the Governing Document.
Spiritual care (see <i>Qf&p chapter</i>)	- Discerns arrangements appropriate for the size of their meeting - Brings names of Friends willing to serve as elders/spiritual care Friends to QiS nominations committee	- Appoints Elders/Spiritual Care Team QiS Spiritual Care Team - Holds periodic meetings of Friends appointed. - Ensures eldership support is available to all meetings - Reports to QiS in session	
	Some meetings may choose to combine the responsibilities for Spiritual and Pastoral care and appoint Friends to provide both.		

Quaker Work	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Pastoral care (see Qf&p chapter)	• Discerns arrangements appropriate for the size of their meeting. • May appoint pastoral care Friends • Brings names of Friends willing to serve as pastoral care support team to QiS nominations committee • Report regularly to the QiS pastoral care support team	• Appoints Pastoral Care Support Team. • Receives reports annually QiS Pastoral Care Support Team • Holds periodic meetings of Friends appointed. • Ensures pastoral care support is provided to all meetings • Reports to QiS in session	
Children in meeting (for safeguarding see legal)	• Discerns arrangements for children and young people appropriate for the size of their meeting. • Appoint LM Children's committee if appropriate	• Appoints Children's Advocates to support LMs. Children's Advocates • May arrange occasional events for children and young Friends.	
Outreach	• Makes the presence of Friends known in their local community • Brings names of Friends willing to serve to QiS nominations committee	• Appoints QiS Outreach Team • Appoints Quaker representatives to other organisations to work with Churches Together in Scotland and other relevant public and voluntary bodies in Scotland QiS Outreach Team • Arranges occasional events for enquirers. • Sources and shares relevant information • Working with BYM staff, arranges events and material about Quakers in Scotland.	

Quaker Work	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Witness	• Encourages witness and involvement in groups working locally on matters of Quaker interest. • Brings names of Friends willing to serve to QiS nominations committee	• Receives reports of the activities of LMs • Encourages and organises involvement with witness within Scotland including arranging for Quaker views to be presented to the Scottish parliament. • Appoints Parliamentary Engagement Working Group QiS Parliamentary Engagement Working Group • Support the Parliamentary Engagement Officer.	
Library	• Discerns arrangements appropriate for the size of their meeting. • Arranges for the purchase of materials and encourages their use as appropriate for their meeting	• Holds a central library of resources	
Environment	• Considers the environmental impact of their activities including that of any meeting house or other property.	• Considers the environmental impact of their activities. • Organises involvement with witness within Scotland	• Takes account of the environmental impact in any discernment about property and policies
Meeting for church affairs (see <i>Qf&p</i> chapter)	• Appoint LM Clerk and Assistants if appropriate for the size of their meeting • Using the Quaker business method, holds a meeting for church affairs as appropriate for the size of their meeting • Send minutes to QiS clerk	• Appoint QiS Clerk and Assistants as required. • Using the Quaker business method, holds regular meetings to discharge its responsibilities and consider the spiritual nurture of its members and other matters of Quaker interest • Holds preparation meetings as appropriate	• Using Quaker business method, holds regular meetings to discharge its responsibilities

Quaker Work	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Membership list for Book of Members and Attenders	• Reports any changes to QiS membership administrator and checks the list annually	• Arranges for the compilation and production of the Book of Members and Attenders	
Archives (see <i>Archive policy for details</i>)	• Follow QiS policy	• Follow QiS policy	• Agrees policy on archives. Ensures records are kept in accordance with the policy
Communication	• Communicate with QiS as required	• Liaise with Trustees as required • Provide information to BYM as required by QF&P	• Communicate with membership, report to BYM and OSCR as required • Reports annually to QiS in session
Newsletter	• Provides information and articles for the newsletter. • Produces local newsletters as appropriate	• Appoints an QiS Editorial team to produce and distribute the newsletter Scottish Friend	
Representation	• Appoints Friends to attend QiS in session • Encourages Friends to attend Britain Yearly Meeting in session	• Appoints Representatives to Meeting for Sufferings (MfS), Quaker Council for Christian & Interfaith Relations (QCCIR), Quaker Life (QL) and any other relevant body	
Nominations (see <i>Qf&p chapter</i>)	• Finds Friends to undertake the tasks required for running their LM • Contributes to QiS nominations process by bringing names to serve on QiS roles.	• Appoints a QiS Nominations committee to find Friends to undertake the tasks required for QiS via the nominations process.	• Ensure there are sufficient trustees appointed to fulfil its purposes. • May co-opt Friends who have been nominated to serve. If there are insufficient trustees and none are nominated, may co-opt appropriate Friends to serve.

Finance	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Financial control (see <i>Financial policy for details</i>)	• Appoint LM Treasurer and Assistants if appropriate for the size of their meeting • Nominates to the QiS Finance Committee if appropriate	• Appoints QiS Treasurer and Assistants as required • Appoints QiS Finance Committee QiS Finance Committee • Meet regularly • Report to trustees	• Appoint accountant/bookkeeper and Auditor • Appoint 1 or 2 Trustees to QiS Finance Committee
	• If a meeting does not have a bank account or handle money appoints an LM Administrator to liaise with the QiS treasurer as required		
Bank accounts (see <i>Financial policy for details</i>)	• Larger meetings may hold bank accounts with appropriate security, if agreed by the trustees. • Small meetings hold money in the QiS bank account as separate funds.	• Hold bank accounts with appropriate security	• Authorise the opening of bank accounts
Bookkeeping (see <i>Financial policy for details</i>)	• Follow the bookkeeping system of the QiS or delegate to QiS bookkeeper	QiS Finance Committee • Implement and hold the central bookkeeping system	• Agree the bookkeeping system as part of process of appointing accountant/bookkeeper.
Delegated Finances (see <i>Financial policy for details</i>)	• All expenditure must reflect the charitable objectives of QiS. • Trustees may set appropriate limits on expenditure.	• All expenditure must reflect the charitable objectives of QiS. Trustees may set appropriate limits on expenditure. • Funds include those for work delegated by BYM.	• Trustees may set appropriate limits on expenditure for LMs and QiS • Receive some funds from BYM for delegated work.
Investments (see <i>Investment policy for details</i>)	• Consult with the QiS Finance Committee on investment of funds.	QiS Finance Committee • Consult with trustees on investment of general, designated, restricted and endowment funds	• Regularly review and monitor investments across QiS taking ethical considerations into account

Finance	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Reserves (see <i>Reserves policy for details</i>)	Hold sufficient funds for the LM's activities, in accordance with the QiS reserves policy	Holds sufficient for QiS activities, in accordance with the QiS reserves policy	Discern the reserves policy and the level of reserves to be held by LMs and by QiS
Income (see <i>Financial policy for details</i>)		QiS Finance Committee - Agree the level of contribution required by QiS and distribute this information to LMs. - Distribute information to encourage Friends to contribute to the LM, QiS and to BYM funds in line with their personal circumstances - May also include sales of books, residential event bookings and other activities.	Apply for and receive grants from bodies such as BYM, trusts, etc
Accounts (see <i>Financial policy for details</i>)	- Ensure accounts are kept, are shared with the LM and sent to the finance committee and accountant/bookkeeper with relevant paperwork for audit purposes - Accounts will be recorded online (see Bookkeeping above).	QiS Finance Committee - Ensure accounts are kept and shared with the finance committee and accountant/bookkeeper with relevant paperwork for audit purposes. - Accounts will be recorded online accounts (see Bookkeeping above).	- With the finance committee and accountant/bookkeeper, arrange consolidation and audit of accounts. - Annual report to be written by trustees. - Annual report and accounts to be presented to QiS in session and, after approval, forwarded to BYM and OSCR and uploaded to the QiS website.
Budgets (see <i>Financial policy for details</i>)	Prepare, agree, and monitor an annual budget for the LM; agree and share that information with the finance committee.	QiS Finance Committee Consider and make recommendations for the budget	Finance committee and accountant/bookkeeper to prepare annual budgets for trustees' discernment, and monitor after acceptance.
Insurance (see <i>Insurance policy for details</i>)	Inform trustees (through the finance committee) of any exceptional activities that are planned so that trustees can ensure they are covered.	QiS Finance Committee Inform trustees of any exceptional activities that are planned so that trustees can ensure they are covered.	Purchase insurance to cover all aspects of Quaker work undertaken by its constituent bodies and all property and contents.

Property (see <i>Property MoU</i> for details)	Local Meeting with a meeting house	Quakers in Scotland (QiS in session)	Trustees
Property Management	- Appoints a Local Property Committee (LPC) - Nominates to QiS Property Committee	Appoints QiS Property Committee	- Appoints 2 Trustees to QiS Property Committee.
Day to day management of meetinghouses & staff	Manage day to day cleaning, hirings and staff.	QiS Property Committee - Meet regularly - Report to trustees.	Has legal responsibility for property and Clerk of trustees signs all legal documents.
Major works buying or disposing of property	Discern best way forward in liaison with trustees	QiS Property Committee Discern best way forward in liaison with trustees and LM	Discernment of best way forward in liaison with LM and QiS
Maintenance	Manage day to day maintenance. Respond to quinquennial survey in liaison with QiS Property Committee and trustees	QiS Property Committee - Organises quinquennial survey of all property. - Liaises with LM about implementing recommendations	
Burial grounds	Day to day management of nearby burial grounds as agreed with trustees.		- Provide budget for burial ground management. - Ensure they are inspected annually

Legal	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Compliance (see <i>Governing Document</i> for details)	Supports the nomination process	Appoint Trustees	- Co-opt additional Trustees if required. - Ensures the Register of trustees is maintained and up to date
Health and safety, risk assessment (see <i>Health & Safety policy</i> for details)	- To be aware of these issues in relation to any LM activity. - Follow QiS policy	- Appoint QiS Health & Safety Officer. QiS Health & Safety Officer - Monitors and advises on issues in relation to any QiS activity.	- Keep policy under review, ensure constituent bodies are complying - Review, update and report on risk register annually

Legal	Local Meeting (LM)	Quakers in Scotland (QiS in session)	Trustees
Safeguarding (see <i>Safeguarding policy for details</i>)	- Discerns arrangements appropriate for the size of their meeting. - May appoint LM safeguarding officer - Report incidents immediately to QiS Safeguarding Officer and report externally as required - Report annually to QiS	- Appoint QiS Safeguarding Officer QiS Safeguarding Officer - Report incidents immediately to trustees - Report annually to trustees	- Appoint Safeguarding Trustee - Keep policy under review - Ensure constituent bodies are complying, - Report annually to BYM
Data Protection (see <i>GDPR policy for details</i>)	Follow policy, reporting to QiS as required under QiS data protection policy GDPR compliant	- Appoint QiS Data Protection Officer QiS Data Protection Officer. - Monitors and advises on the data protection policy. - Reports to trustees as required	Keep policy under review, report to BYM as required
Employment (see <i>Employment policy for details</i>)	If appropriate, appoints line manager	QiS Property Committee - Responsible for all aspects of employment relating to property - Liaises with line managers - Meets regularly - Reports to trustees QiS Finance Committee - Responsible for all aspects of employment relating to finance and administration - Liaises with line managers - Meets regularly - Reports to trustees	- Employ an administrator / manager / principal officer to support and advise the QiS committees - Agree employment policies - Agree to employment of staff
	Responsible for day-to-day line management	QiS Property Committee & Finance Committee - Agree with LMs and trustees where staff need to be employed - Recruit suitable staff	- Has legal responsibility for employment. - May delegate signing contracts to relevant committee.

		• Ensure appropriate induction and training is provided as required	
Risk Register	•		• Monitoring risks • Maintain risk register
Legal advice	• Via trustees	• Via trustees	• Seek legal advice as necessary

Alteration

The terms of this Memorandum may be altered at any time by mutual agreement in the form of Minutes of the constituent bodies and the Trustees respectively.

Signed on behalf of the proposed SCIO Quakers in Scotland

..... (Clerk of Trustees) Date.....

Signed on behalf of Constituent body

..... (Clerk) Date.....