

## **GLOUCESTERSHIRE AREA QUAKER MEETING JOB DESCRIPTION**

**Title: Area Meeting Treasurer**

### **General Context of the Role (Quaker Faith and Practice: 13.42-3, 14.01-21):**

The Area Meeting (AM) as the primary Meeting for church affairs must keep those affairs in proper order. A key person in seeing to this is the AM's Treasurer.

The Treasurer:-

- 1 works for, reports to and advises the AM on its financial affairs;
- 2 is aware of relevant legislation on the keeping of charity accounts;
- 3 is aware of the charitable status and its responsibilities;
- 4 is informed about the current and likely future financial requirements of Britain Yearly Meeting (BYM);
- 5 takes an interest in the financial affairs of the AM's subordinate Meetings.

The Treasurer is amply supported in all this by the AM's Property and Finance Committee (P&FC), especially its Clerk; by the Treasurer's Handbook, a compendium of good practice and information updated by Quaker Communications Department (QCD) at Friends House; and by other information from Friends Trusts and QCD. An Examiner, as is legally required, annually inspects the work and reports to P&FC. It is a very interesting job to do.

### **Experience and qualifications sought:**

The Treasurer does **not** have to be an accountant or well versed on investment matters; in fact no formal qualifications are required. Being at ease with figures is however an advantage, as is being able to adopt a methodical approach to their handling and to the work in general.

For the scale of the MM operation it is helpful to have computer skills and a computer<sup>(1)</sup>, though currently more for the correspondence than for extensive spreadsheet work. Such skills and equipment are not essential, however. The chief thing to look for is a seasoned Friend familiar with the ways of the Society in Britain. Someone who is careful, reliable, methodical, physically and mentally able and ready to learn on the job can be confident that the Treasurer's Handbook, annual Treasurer's Conferences and courses for Treasurers at Woodbrooke will give most of the general information and support needed. The P&FC will give the local "steer" and guidance.

### **Main Responsibilities<sup>(2)</sup>:**

These can be locally summed up as:

- 1 Keeping the AM solvent and helping it achieve its objectives
- 2 Ensuring the AM makes its appropriate contributions to BYM
- 3 Being ex officio a member of the AM Property and Finance Committee,
- 4 Overseeing the raising of money to fund the AM's annual outgoings, through a Quota requested from PMs and RMs
- 5 Keeping the books straight throughout the year,

- 6 Dealing with claims and payments received,
- 7 Advising as needed on financial matters for individuals or Meetings, and
- 8 “Banging the drum” for BYM if necessary.

### **In practice this means...**

- 1 maintaining suitable balances in the various funds held by AM
- 2 preparing the accounts (Dec-Feb) and presenting them to the Mar/Apr AM
- 3 drafting the budget and proposing the scale of the Quota each year (Mar-May)
- 4 dealing with bills and receipts and where needed chasing up due payments
- 5 working to appropriate arrangements for signing of cheques
- 6 dealing with expenses and other claims from Friends on AM work,
- 7 seeking grants (or assisting P&FC in this) for some AM works
- 8 making proposals to the AM and giving it options to choose between
- 9 dealing with queries about finance from a variety of sources
- 10 offering support to PM Treasurers as needed (and receiving some too)
- 11 keeping the records up to date and clear on a regular and fairly frequent basis
- 12 to achieve the above:
  - a. maintain a small office system in your home
  - b. be ready to accept/do some business most weeks
  - c. be able to seek and accept guidance from P&FC<sup>(3)</sup>
- 13 making sure your own expenses are clearly recorded and regularly claimed
- 14 “learning on the job”, at Treasurers’ Conference and other courses as needed
- 15 submitting the accounts for appropriate Examination each year<sup>(4)</sup>

### **Rewards and satisfactions of the job:**

“It’s good to see a job well done”. There are satisfactions in getting all the figures to meet and balance.

“It’s my ministry to the Meeting”, “something I can do”. More humbly, someone said that it was good to get a positive response from the Examiner.

### **Notes:**

- 1 The AM will provide computer facilities if necessary.
- 2 Some of these matters are confidential.
- 3 Members of Property and Finance Committee are in contact often with the Treasurer, at or outside their meetings. The Clerk of that Committee will see or consult or be consulted by the Treasurer on a quite frequent basis and is expected to give support and where needed specific guidance, especially on property and charitable status issues.
- 4 The Examiner of our accounts is currently not a Friend but is becoming accustomed to our ways. The Examiner should be experienced in doing this sort of work and should always be “at arms length” from our affairs, i.e. preferably not involved in them at all.

Updated ‘monthly’ to ‘area’ 02.11.2010 EMW