

CENTRAL ENGLAND QUAKERS - FUNDING FOR FRIENDS AND ATTENDERS **INFORMATION FOR OVERSEERS/ PASTORAL CARE AND TREASURERS (March 2018)**

AREA MEETING GENERAL FUND:

The purpose of the General Fund is to support Quaker activities across the Central Area Meeting, and also beyond (e.g. Britain Yearly Meeting, ecumenical links with Church organisations in the West Midlands). A copy of the 2018 Budget is available to show the range of present commitments. These include allowances which are set aside for training for Friends for specific roles within the Area Meeting and for Friends attending conferences and courses.

FUNDING FOR ATTENDANCE ON CONFERENCES AND COURSES:

(based on CEQ Finance Committee note: 2.12.10, rev. 2.3.12)

It is important to note the distinction between:

- (a) funding for Friends undertaking essential “training” or Friends appointed by Area Meeting to attend specific events. The work undertaken by Friends appointed to specific roles by Area Meeting contributes to the governance of the charity and we have a duty, as a charity and a Religious Society, to equip our volunteers and staff properly for their governance tasks - and
- (b) bursary support for activities which are aimed at Friends’ general spiritual nourishment or personal development

FUNDING ARRANGEMENTS:

- 1) Area Meeting offers full funding, from the AM General Fund, for the cost of training courses (internal or external) and associated travel expenses for Friends *undertaking specific Quaker roles* such as Elder, Overseer, Clerk, Treasurer, Examiner, Trustee, etc. *Applications for funding for such training courses should be made in writing to the General Fund Treasurer (see para.4 below).*
- 2) Full funding is also provided to Friends *appointed by Area Meeting* to attend specific conferences or events which involve a fee and/or travel expenses. *Please inform the General Fund Treasurer (email address below)*
- 3) For Friends wishing to attend other, *non role-specific* conferences or courses, at their own request, Bursary support is available from Area Meeting, using an existing procedure, which is:-
 - The Friend concerned should first approach his/her Local Meeting Overseers, who would consider the request and determine what the Friend can afford and what support the Local Meeting could provide. If further support is still needed, the request should be passed to the Area Meeting Bursaries Committee who would consider the request and decide on the amount of bursary support to be offered from central AM funds. Bursary Committee would then make a recommendation to the General Fund Treasurer.
 - Typically, Area Meeting would meet 25% of the cost, the Local Meeting a further 25% and the Friend concerned, the rest. The Bursaries Committee has discretion to agree a higher proportion of the costs where Overseers consider that more help is needed or when local Meeting is unable to give as much financial help themselves.
 - Applications should be sent to the convenor of the CEQ Bursaries Committee (*currently Jane Holt; janeholt57@gmail.com*), through Local Meeting Overseers, preferably as a minute. It is helpful if this is done via e-mail as it enables the Bursaries Committee to respond more quickly.
 - The following information should be included:
 - the name of the Friend(s) concerned
 - the name, date and other relevant details of the event which they wish to attend
 - the total cost of the event
 - the amount of bursary which is requested
 - the amount which the local meeting will contribute
 - details of to whom the payment should be made (address (for cheque) or bank account details)

4) The contact (within the AM Finance team) for the administration of all grants, bursaries and associated travel expenses, is the General Fund Treasurer, (currently Ted Raybould; e.raybould@blueyonder.co.uk). Written (preferably email) requests for grants and bursaries, together with any supporting Minutes from authorising Committees, should be directed to this Treasurer.

In the case of additional bursary funding from AM, recommendations will normally be made by Bursaries Committee to the General Fund Treasurer, on the Friend's behalf. The actual payments to individuals (or to event organisers, if appropriate) will be arranged by the Area Meeting Secretary (currently David Brayley-Willmetts; AM office: ceq@phonecoop.coop), acting on instructions from the General Fund Treasurer.

The sequence for seeking *additional* Bursary funding from Area Meeting may be summarised as follows:-
Friend to **LM Overseers** to **AM Bursaries Committee** to **GF Treasurer** to **AM Secretary**
(request) (minute support) (recommend to GF) (authorises) (arranges payment)

5) Special Note re. Courses at Woodbrooke Quaker Study Centre

Friends applying for courses at Woodbrooke should be advised as follows:

- (a) If the Friend applies to Woodbrooke in person (i.e. in writing), we would ask that the Friend specifically requests Woodbrooke Study Centre to forward (email) the relevant Invoice to the General Fund Treasurer (with a copy to the Area Meeting Secretary) for their attention.
- (b) If the Friend makes the application on the Woodbrooke website, pays for the course online, hoping to receive either full or partial bursary funding from Area Meeting, they must ensure that the Invoice (or email version of it) is sent to the General Fund Treasurer. (If email, a copy should also be sent to the Area Secretary at the same time).

6) An estimate of expenditure on fees, grants and bursaries will be included in the General Fund budget for each year. Records of all grants and bursaries will be kept by the General Fund Treasurer and a commentary on expenditure over the year will be included in the annual report to Area Meeting.

OTHER FUNDS WHICH OVERSEERS & TREASURERS MAY CONSULT FOR FINANCIAL ASSISTANCE FOR FRIENDS AND ATTENDERS:

- Susanna Cole & Others Trust (SCT)
- Friends Housing Bursary Trust (*maintenance, repairs, care fees for retired and disabled Friends in need*).
- CEQ Old Peoples' Fund Trust (*parent body of Oak Tree House*)
- Glenthorne Quaker Centre
- Overseers' Relief Funds
- Percy Bartlett Trust
- Pollard and Dickson Trust
- Quaker Schools (*Note: the Education Committee is now stood down; enquiries regarding bursaries should be made to the schools concerned*)
- Soothern & Craner Educational Foundation
- William Gunn's Charity
- Woodbrooke Quaker Study Centre (*re. attendance on courses*)

FOR DETAILS ON THESE & OTHER TRUSTS see: 'CEQ: The Overseers' Handbook - A guide to sources of help and assistance' (rev. December 2014). Many more trusts are listed in the Directory of Quaker and Quaker Related Grant Making Trusts, pub. by Quaker Communications (*not Bookshop*) at Friends House, 173 Euston Rd., London NW1 2BJ. Friends are specifically requested not to disseminate information from the Directory outside Quaker circles.

Ted Raybould
CEQ General Fund Treasurer

7th March 2018