

**“Scottish Quakers: How do we liberate ourselves to focus on spiritual growth, community building and witness in the world?”**

**Summary Paper of Exercise Completed at GM March 2019**

**For use by LM and AM groups between June GM and November GM 2019**

At GM in March in small groups we looked at Menu for Change to see if there was a sense of preferred options that we could work on together either in LM, AM and or GM. This paper is a summary of our responses.

Part of our minute states,

“We feel strongly that we don’t want to lose sight of this process and discernment. We ask our GM Committee to ensure it comes back to a future GM agenda.”

GM Clerks propose that we ask LMs and AMs to work between June GM and November GM on how to take forward those suggestions for action in this summary paper they find most appropriate for them. We ask that you work together in your LM or AM to bring an action plan from each AM that will be presented at GM in Perth on 16th November. We hope that we can then discern at GM what action needs to be taken by GM.

**There are three sections in this paper:**

1. The main points which came out of the group work
2. Collated responses from the groups
3. Minutes 12 and 15 from GM 9/03/19
4. Menu for change

**1. The main points which came out of the group work, in categories**

**Training for role holders**

- Encourage training for role holders with a budget and a simple attractive bursary system
- Arrange training with neighbouring AMs
- Produce guidance on policies and procedures – especially cyber security and General Data Protection Regulation (GDPR)
- Clarify roles, not just job descriptions but how the job is done, while keeping this fluid.
- Ask local meeting committees to report annually so people can read reports from several years ago and see how others did role.

- To help Friends understand trusteeship, invite them to attend trustees' meetings

### **Support for role holders**

- Encourage Elders and Overseers to feel supported and enabled in their roles
- Role holders get together annually in different groupings, including across a group of AMs, to share ideas and support
- Role holder buddies, with previous holders or across AMs

### **Saving time/ being more efficient**

- Use video conferencing. Provide central support to roll out use of Zoom, with training for everyone, and investment in a standard system.
- Fewer Saturdays taken up with AM and GMs (10 per year)
- Have fewer treasurers, a bookkeeper, a common finance system, electronic banking, and a clear delegation of different types of decisions.
- A comprehensive property management system can be engaged
- Clarify who can decide what, avoid back and forth
- Merge 2 or several AM

### **Core purpose and key roles**

- Consider what is our core purpose, why do we do what we do?
- Focus on gathering and growing new worshippers for the long term.
- Strengthen our opps for community building
- Review Key roles and check we need quite so many trustees/ elders/ overseers
- Change committees: combine, divide, lay down

### **Where we meet**

- Use MH differently.
- Rent out part of the MH
- Meet where the people are.
- Have clusters of LMs and worshipping groups do things together.

## **2. Collated responses from the groups**

The instructions were to:

Using the attached Menu for Change, please complete the following tasks to take positive decisions on action that your LM or AM could adopt.

I have written all the responses from the groups under the questions. I have kept the whole (long!) document attached so that you can look at your leisure/ use it with your Quaker group/ get excited about the options. Again I apologise for asking you to try to tackle this in a couple of hours..... having said that didn't we do well!

1. Pick 5 things from the menu that you feel could be easy steps to take and that look worthwhile, things you would like to set in motion tomorrow if you could.

The numbers preceding each statement are the numbers that they hold on the Menu for Change

6 Strengthen our opps for community building (3 groups)

7 encourage training for role holders

8 Arrange training with neighbouring AMs

9 Encourage Es and Os to feel supported and enabled in their roles (2 groups)

14 Role holders get together annually and share ideas and support

15 Role holders get together across a group of AMs

23 Focus on gathering and growing new worshippers for the long term

28 BIGGEST: video conferencing. Central support to roll out use of Zoom, with training for

everyone, and investment in a standard system (3 groups)

35 Invitation to join trustees' meetings (2 groups)

37 Guidance on policies and procedures – especially cyber security and GDPR (2 groups)

45 Bookkeeping, accounts examiner

63 = passionate plea from a single Quaker in her household : please fewer Saturdays taken up with AM and GMs (10 per year) (3 groups)

67 Use MH differently

New Consider what is our core purpose, why do we do what we do?

New Clarify roles, not just job descriptions but how the job is done, while keeping the how fluid, and ask local meeting committees to report annually so people can read reports from several years ago and see how others did role.

2. Pick 5 more which look more complicated but with a bit of work, you feel, would make your Quakerism more doable, things that you would like to see explored at least.

7 Encourage training for role holders, with a budget and a simple attractive bursary system

10 Review Key roles (please read this one on doc. It's too long to repeat. Same for 11)

11 Review all roles in the AM (2 groups)

13 Role holder buddies, with previous holders or across AMs (2 groups)

16 Clarify who can decide what, avoid back and forth

18 Check we need quite so many trustees/elders/overseers

19 Change committees: combine, divide, lay down, (2 groups)

28 Use tele/video conferencing

41 Have fewer treasurers, a bookkeeper, a common finance system, electronic banking, and clear delegation for different types of decisions

59 A comprehensive property management system can be engaged

61 Meet where the people are (2 groups)

69 Rent out part of the MH

77 Have clusters of LMs and worshipping groups do things together

85 Merge 2 or several AM charities (please read this on doc, too long)

Specific Have meetings elsewhere around Glasgow

A Process : start with the essentials and work up from there. Start with a clean sheet

New Smooth consistent communications between AMs

3. Pick 3 things that you are currently already doing that are different from how things were traditionally done.

24 Focus on the AM as both decision-making and a community of Qs (3 groups)

25 Review how AM business operates: balance of worship, community, concerns, appointments, decisions, learning, food etc.

26 Consider: frequency, timing/day, agenda content, length, style(s), focus, all age, eldership and discipline, inclusion, location, food, practicalities, empowering local meetings to act on political issues, overlaps with trustees etc.... (2 groups)

28 Use tele/video conferences for some meetings/committees: reduces travel & increases

access.

32 Clarify which business is for trustees and which is for AM in session: reduce duplication

= part of 71 Almost all N Scotland AMs are held in hired premises

45-50 Paid staff : sometimes have more, sometimes have less (please read all these on

doc)

54 contractors, provided meet ethical issues (e.g. real wage)

55 A property trust can serve several area meetings, managing buildings and major finances

71 Sell a MH and rent somewhere Someone said " I am so glad we don't have a meeting

house"

+ say to a growing flourishing meeting: Don't get yourself a meeting house

77 Have clusters of local meetings & worshipping groups to do some things together (e.g. community, oversight, membership applications etc).

New Visioning process practicalities, spiritual, community space and social witness – what

does love require of us?

New Make space for chat, finding out about each other. Afterwords. Hill walking.

Ecumenical

4. Are there things that could be better done by two or four area meetings co-operating together, rather than four times separately?

Communication across AMs

Sharing Woodbrooke

Ways of getting Trustees and treasurers together

Electronics

Being visible online

Membership records held centrally?

Things I note from this exercise.

No group went for points 1-4

Most other sections in the Menu had quite a few points chosen.

I feel I need to include the 2 minutes on this issue from GM that add to this in case you would like to see where we were led on the day.

### **3.Minutes 12 and 15 of GM 9/03/19**

Minute. 12

Part One of “Scottish Quakers: How do we liberate ourselves to focus on spiritual growth, community building and witness in the world?”

Paul Parker began his presentation with reading from Advices and Queries no.27 – Live Adventurously. He asked us to consider whether we could see this advice not just for us as individuals but for us as a collective. Can we see it as a challenge?

Can we go carefully but boldly?

Paul reminded us of the discussions and discernments we had had in Perth on 13th September last year. (See documents in advance of today's GM) We had worked out what was important to us and what makes us who we are. In Scotland we have such a strong community with so much to draw on. So much passion.

Paul led us to acknowledge how things are changing both in the wider world and in our own lives. He reminded us of what we had said were the true essentials that we felt we needed to look after. In September we had begun to consider what needs to be done differently and what needs to stay the same. Are the structures that we have working for us doing so in ways that are joyous and adventurous?

Paul spoke of the idea of coppicing. We were led to consider “What is the heartwood of Quakerism? “When we trim back, what new shoots are ready to grow?”

“If I go to walk into the forest, I’d rather it was one where the Light would get in” Paul

During some reflection time we heard from Friends about the joy of service and the importance of learning about each other in the things that are eternal. We heard that meeting together in places that are counter intuitive at the time of the move ends up being just the coppicing that was needed to enable new shoots to flourish.

We are encouraged to open our eyes to different and new opportunities. Young Adult Friends are thriving, and we can learn from them. We hope we can include Woodbrooke in this adventure of learning.

There is more freedom than some of us think to do some things differently. We shouldn’t constrain ourselves by looking too hard for permission.

Can we boldly (yet cautiously) take a Holy opportunity and be purposely expectant?

Are we ready to jump off a cliff and wait for the wind to be beneath our wings?

Minute. 15

Part Two of “Scottish Quakers: How do we liberate ourselves to focus on spiritual growth, community building and witness in the world?”

We are thankful that we have embarked on this exercise over the last few years. We are thankful for today and all that we have experienced. We are clear that we have energy, community, passion and a willingness to Live Adventurously.

We have met in small groups to consider the Menu for Change paper. This document is attached to these minutes.

On feeding back, we realise that a minute at this point cannot gather the detail, so we ask our clerks to work on a summary paper of the findings. This will be circulated as soon as it is ready. We ask that this be shared with local meetings.

We are particularly keen to enable better communication between AMs. We do have a newly constructed Communications Group who are tasked with looking at communication across Scotland. We look forward to hearing from them when they are ready.

We have returned often to the idea of inviting Woodbrooke to work in Scotland with us on spiritual and role holder courses. Indeed, all types of learning and development would be most welcome.

We were moved by the feeling in one group that, although we have been tasked by previous GM minutes to tackle our feelings of overburdened-ness, we need to be careful that we are always approaching these considerations being led by the Spirit.

We feel strongly that we don't want to lose sight of this process and discernment. We ask our GM Committee to ensure it comes back to a future GM agenda.

#### **4. Menu for Change**

Here is a menu of possibilities an area meeting and its local meetings could use, in response to pressures on them and their role holders. Like a menu, you can consider the whole range; you can choose what you want; and you can combine them together. The aim is to liberate Quakers to focus on spiritual growth, community building and witness in the world.

We could:

Static / the same approach

1. Stay just as we are.
2. Stay just as we are – and expect people to try harder, do more, do better etc.
3. Stay as we are, and just change a few small things.
4. Get smaller, and adapt accordingly.

Learning, Understanding, Sharing, Community

5. Strengthen our opportunities for learning, understanding and sharing.
6. Strengthen community building. Examples: Occasions just focused on building community. Fun activities together. Meetings for learning. Combine learning with a meal. Have an annual residential meeting. Host people in our homes. Focus on all age and inclusion. Invite Woodbrooke on the Road for a day. Use resources like 'Becoming Friends', 'All are Welcome', 'Engaging with Families', resources from 'Being Friends Together' etc... (see also Area Meeting below)
7. Encourage training for role holders, with a budget and a simple, attractive bursary system.
8. Arrange training with neighbouring area meetings.

9. Encourage elders and overseers to feel supported and enabled to play their roles.

### People and Roles

10. Review key roles of the AM (clerk, treasurer, clerk to trustees): how to make the role more attractive? Being more collaborative? Working with an assistant? Having a team? Dividing the role based on skills? Rotating? Not being at every meeting? Delegating? Support for specific elements (like IT)? Cover where someone is not confident? Paid support (see later)? Not having to commit to serve for 3 years? etc...

11. Review all roles in the AM, which may free some people for remaining roles. Do we need all these roles? Could some small roles be combined? Could big roles be divided or shared, or supported differently? Could an attender support a role holder who needs to be a member. Do we need quite as many people filling some roles? (e.g. trustees, elders, overseers etc). Are we fitting people into roles, or adapting to people's skills? Are we trying to do too much, spreading ourselves too thinly? etc....

12. Review roles in local meetings, (asking the questions above) which may free some people for other roles.

13. Role holders can have buddies from other area meetings and former role holders.

14. Role holders can get together annually to share ideas and support (eg LM & AM clerks).

15. Role holders can get together across a group of area meetings, to share ideas and support.

16. Clarify who can decide what (delegation), so some things can move forward without involving everyone, avoiding issues moving back and forth between meetings and committees.

17. Try different forms of eldership and oversight (eg a corporate model involving a wider group with fewer formal roles, and mixing more and less experienced Friends).

18. Check you need quite so many trustees / elders / overseers (etc...).

19. Change committees: combine some, or divide some, or lay down a committee and ask one or two Friends to lead and involve people as they need to.

20. Hold some committees jointly across two areas, or across two local meetings.

21. Share some roles across two areas, eg safeguarding, registering officer, archivist etc?

22. Support and encourage worshippers to be active Quakers and role holders, in the medium term.

23. Focus on gathering and growing new worshippers, for the long term.

#### Area Meeting

24. Focus on the area meeting as both a decision-making meeting and a community of Quakers.

25. Review how area meeting business operates: the balance of worship, community, concerns, appointments, decisions, learning, food etc...

26. Consider: frequency, timing/day, agenda content, length, style(s), focus, all age, eldership and discipline, inclusion, location, food, practicalities, empowering local meetings to act on political issues, overlaps with trustees etc....

27. Have a group that meets to do some preparation +/- business between (fewer?) area meetings (eg a committee of clerks, or an area meeting committee open to all). Learn from other AMs....

28. Use tele/video conferences for some meetings/committees: reduces travel & increases access.

29. Actively choose which wider topics/concerns to focus on, and joyfully leave others to others.

30. Take more business at area meeting, and less at local meetings.

31. Take less business at area meeting, and more at local meetings.

#### Trustees

32. Clarify which business is for trustees and which for area meeting in session: reduce duplication.

33. Use trustee sub-groups to focus and divide up the work (eg finance, property, policy).

34. Bring some people who are not trustees onto sub-groups, where they can contribute expertise.

35. Invite visitors to trustee meetings, to enable people to learn what trustees do.

36. Adapt and adopt model policies from BYM, or other AMs, to reduce time re-inventing wheels.

37. Neighbouring trustee bodies can adopt the same policies, to reduce time re-inventing wheels.

38. A group trustee bodies could maximize what they do in common, without structural change.

39. Trustees could be local meeting clerks plus some others (probably only viable if AM has other ways of lightening the load of trustees and clerks, eg a property trust managing buildings).

#### Treasurers and accounts

40. Divide up the Treasurer role (LM or AM). One person does not have to do all of this:

high level financial oversight; bookkeeping; approving payments, management accounts; appeals and collecting; managing delegated budgets.

41. Have fewer Treasurers, a bookkeeper, a common finance system, electronic banking, and clear delegation for different types of decisions.

42. Place a small meeting's finances within a larger meeting's accounts (or the area meeting's).

43. LM does not use money – contributions go to area or another meeting, which pays a few bills.

44. Handle cash collections differently eg charity collections go direct to the charity; cash is banked less frequently, not by the treasurer.

Paying people to do things – just as you pay a cleaner or someone to service the boiler:

45. Bookkeeping, accounts examiner

46. Administrator (eg help for AM clerk, membership records)

47. Managing lettings

48. A property maintenance service or trusted tradespeople

49. Property advice, property transactions, or managing major works

50. A local development worker, a youth worker etc

#### Employees

51. An employee can work across more than one area (eg an administrator).

52. One area meeting or a property trust can employ staff for several area meetings.

53. A warden can have an extended role, eg for AM administration, bookkeeping (if suitable skills).

54. Contractors can be used instead of employees for some roles, reducing some employer risks.

### Managing Property

(See also Paying people to do things, above)

55. A property trust can serve several area meetings, managing buildings and major finances.

56. The remit of a property trust can expand to include maintenance, utilities, lettings, employment etc...

57. Several small property trusts can combine into one, or have the same trustees.

58. Use a system of trusted traders, with one person co-ordinating others.

59. A comprehensive property management service can be engaged, eg for historic buildings.

60. Focus on increasing income from some properties, to pay for other aspects.

### Meetings

61. Open a new meeting which matches where worshippers live, or for a new population.

62. Increase the number of meetings for worship, in the same building on different days/times.

63. Try experimenting with meeting at a different time or place for a set period: see what happens.

64. Lay down a local meeting, and join another (even across AM boundaries!).

65. Recognise a local meeting may in the medium term lay itself down and support this phase.

### Meeting Houses

66. Move a meeting (house) to a more useful place e.g. location, size, upkeep, income...

67. Use a meeting house differently: for a social purpose you are led to, like a haven for retreats and events, or a community centre, or dwellings, or a base for a community organisation.

68. Meet in another room in the meeting house and re-use the space.

69. Rent out part of the meeting house and use the income for a purpose.

70. Sell a meeting house and rent a space in the same building.

71. Sell a meeting house and rent a space in a different building.

72. Meet in people's homes (or in a barn).

#### Meetings, Groupings and Expectations

73. Reduce what must be done by each local meeting, by sharing, grouping, agreeing, deleting.

74. Clarify expectations between area and local meetings, with a memorandum of understanding.

75. Group differently: Pair a larger meeting with a smaller meeting. Have a small worshipping group as satellite of a LM. A worshipping group becomes a LM.

76. Several small LMs become a single LM with several meetings and worshipping groups.

77. Have clusters of local meetings & worshipping groups to do some things together (eg community, oversight, membership applications etc).

#### Structural - Areas and Trustees

(See also Managing Property, Trustees, and Groupings, above)

78. Change the geography of nearby area meetings a little - one or two local meetings switch.

79. Change the geography of nearby area meetings a lot - group local meetings differently.

80. Dissolve an area meeting, with local meetings joining other areas.

81. Divide an area meeting if too large, while retaining some joint activities.

82. Pair up with another area meeting for some business, or for community, or committees, etc.

83. Keep separate AM charities and AMs in session, while a single set of trustees does business across two or more area meetings (with combined trustee meetings or back to back).

84. Merge two or several area meetings completely (charities, trustees, AM in session, roles).

85. Merge two or several AM charities, with a single set of trustees, while continuing to hold AM-style cluster meetings at the previous size, for worship, community, concerns, appointments, some major decisions and some delegated decisions, etc.

Do send more ideas, to Jonathan Carmichael, Simpler Meetings Project  
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