

## **Trustees' training at Woodbrooke, 28 – 30 April 2017.**

Twenty two of us attended this weekend course, a number that was perhaps a bit large. We covered a wide range of topics, and it was a bold attempt to include all aspects of being a trustee. It was aimed at those with little or no experience and strove – on the whole successfully – to demystify the role and to clarify just what's involved.

There were sessions on what Trustees are responsible for; annual reports; annual accounts; sources of help and advice; relationships between trustees/AMs/LMs. We dealt with case studies (anonymised but based on real events that trustees have grappled with) and as ever with Quakers much sharing of anecdotes. Truly, every AM has a different culture!

What have I brought home? Quite a lot.

- Without risking smugness, a feeling that in CAQM our recent process of amalgamation has had the hidden benefit of improving our communication at all levels. We are much more integrated than most as a result. It's a huge blessing.
- One AM gets every trustee present to stand and be identified at AM, so Friends know who they are. Should we do this? Do we need to?
- Some AMs have a policy of ensuring that there is a trustee from every LM appointed, and others ensure that each LM is represented by having trustees appointed as "Link trustee" to LMs that don't.
- Some AMs produce a small (5 page/ A5 format) well illustrated and glossy mini version of the Annual Report to leave as a take home / outreach in meeting houses that are used by many organisations.
- A number of points relating to our Annual Report, which I will raise at the next trustees' meeting.

It seems most AMs do not have a regular reporting system by trustees. Some super-serve, with their own, or link, trustee always giving a full report to the LM after each trustees' meeting. Our regular slot at AM seems good practice.

There were of course horror stories, but not too many. However one matter gave deep pause for thought:

One AM, to "improve communication", has its clerk at every Trustee meeting. Given that best practice is that clerks should not be trustees, (as the AM clerk(s) are key communication links who in the event of friction between the two parts should be able to stand apart from this and help achieve unity,) and that because of the Quaker business method any Friend present is deemed to have taken part in decisions minuted, this was generally felt to be unwise. A very occasional presence might be acceptable but this significantly, if unintentionally, changes the clerk's role. The clerk becomes a trustee.

I would recommend the course to anyone thinking about taking on the role of trustee. One can always learn, so thank you for sending me.

Kath Worrall, 1.v.17.