

Religious Society of Friends in Aotearoa
Te Hāhi Tūhauwiri
Quaker Education & Testimonies Funds Handbook

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BACKGROUND

The Testimonies Fund (TF) was created by Yearly Meeting 2008 to enable Friends to be creative in putting any of the Quaker testimonies into action in any sphere of life. The testimonies are conventionally summarised as simplicity, peace (and social justice), integrity, community, equality and sustainability (and stewardship). However, that list is only a shorthand for the ways in which Quakers demonstrate in our lives the spiritual and social values we hold.

The original capital for the Fund came from untagged legacies held by Yearly Meeting and surpluses from previous years.

Usually the applicants will be Friends, but requests may also be considered from groups which have at least one Quaker actively involved in the concern. Evidence of support from the local Quaker Meeting is desirable. It is hoped that benefits will flow beyond an individual and into the Quaker and wider community, addressing root causes rather than quick fixes.

Friends are invited to make donations and bequeath legacies specifically to the fund (through the Society of Friends Aotearoa New Zealand Trust Board which holds our funds.)

The Quaker Education Fund (QEF) was established at Yearly Meeting 2010 and distributes resources from a number of sources. These sources are:

- 1) The Margaret Caverhill Bequest.
- 2) The Tessa Malcolm Bequest.
- 3) The Quaker Youth Education Fund.
- 4) QEF General Fund (residual funds from the sale of the NZ Friends School).

All these funds are managed by the Religious Society of Friends Aotearoa New Zealand Trust Board.

The **QETF** Committee draws against and distributes the income generated and/or any capital agreed upon application from Friends and family in Aotearoa New Zealand.

FUNCTION AND DISTRIBUTION CRITERIA

The Testimonies Fund is particularly for projects which focus on problem solving in the society of Aotearoa New Zealand; guided by William Penn's note that true religion doesn't "turn men [or women] out of the world, but enables them to live better in it, and excites their endeavour to mend it."

The Quaker Education Fund supports the education of members, attenders and their family with the purpose of:

1. Spiritual deepening and growth in the Quaker community.
2. Contributing to the life and work of Meetings including Yearly Meeting.
3. Preparing for Quaker witness in the form of service or social action.
4. General learning and development.

QETF makes grants to individual and groups on a planned or as requested basis, and offers two major scholarships – from the [Margaret Caverhill](#) and the [Tessa Malcolm](#) bequests.

Individual grants

Grants have been provided for such diverse reasons as tertiary education fees, seminar fees, purchase of a computer, participation in a Peace gathering, and travel assistance to attend a training course. We focus primarily on the purpose of the application rather than how or what the money will be spent on.

We also recognise a need for resource materials for outreach and in-reach, and children whether requested by a Monthly Meeting, an individual, as a follow-up to a seminar, a concern by a particular Friend or a response to an identified need in a particular region or meeting.

Other possibilities include the purchase of study related materials or funding a mentor for a new project within Quakers.

Group grants

QETF may also support activities organised primarily around a group's needs rather than an individual focus, for example, funding training for the Respect and Safety Committee and a Settlement workshop related to Clerking. QETF has funded a Monthly Meeting's request for a lump sum to upgrade their library, and for costs involved in presenters running a workshop in a smaller, regional meeting.

Other possibilities for which a group might seek funding include helping a person who has been to a specific course to then travel in the Ministry; bringing people from overseas to run workshops at the Settlement and then travel in the Ministry or take the seminar itself on the road; we could provide community workshops on social action. These are some examples.

Regular Quaker educational events

A number of regular Quaker events are funded annually. We have made annual grants to support the Junior Young Friends Camp and the Young Friends activities on the basis that these are important ways for younger Quakers to learn about Quaker life, and Quaker processes. Similarly, we have made an annual grant to the Settlement for costs associated with facilitators who are running workshops at the Settlement.

Other tasks as requested

As part of Yearly Meeting, the QETF Committee may be requested to undertake other activities related to education funding; including consideration of cost effectiveness funding. This might include finding a balance between face to face and online meetings and the balance between digital and print media.

Unspent monies granted.

QETF expects all unspent monies to be returned before the end of the financial year in which it was granted.

[Applications to the QETF committee](#) for grants can be made at any time, but the annual cut off from the Tessa Malcolm and Margaret Caverhill scholarships is 31st October.

MAJOR SCHOLARSHIPS.

The Quaker Education & Testimonies Fund awards three major scholarships.

1. **The Tessa Malcolm Scholarship** (up to \$20,000) is “to provide a supporting scholarship to assist a Young Friend who holds fast to Quaker values through university or other tertiary institution”.

This scholarship was first awarded during 2016 for the academic year beginning 2017.

2. **The Margaret Caverhill Scholarship** (up to \$20,000) provides a substantial scholarship that would enable Quakers and their families to participate in more significant educational experiences than would otherwise be possible. The intention is to offer a large enough scholarship to make possible activities that would not be feasible with smaller grants. The first scholarship was awarded in 2013. There is no upper age limit on the scholarship.

3. **QUNO Summer School Scholarship** provides up to \$5000 to sponsor a Young Friend to attend the two-week annual Quakers United Nations summer school in Geneva.

APPLICATION PROCESSES

Applications for all grants go to the clerk of the committee using:

clerk@qetf.quakers.nz

Grants up to \$5,000 can be applied for at any time. These will be considered either in the next upcoming meeting or dealt with via emails and appropriately minuted.

Applications must be supported by a letter or email from the applicant’s Monthly Meeting or Worship Group, usually through their Pastoral Care Committee, or two referees who are not related to the applicant. For Young Friends, this support correspondence may be from the Young Friends Clerk, or the committee of their local meeting, whichever is easiest to organise.

Larger applications will require detailed information about the purpose of the grant and should be accompanied by a letter of support from the Clerk of the person’s Monthly Meeting.

Applications for the Margaret Caverhill and the Tessa Malcolm Scholarships close on the 31st October each year. They are advertised through Yearly Meeting Clerk’s letter and through the Aotearoa Friends Newsletter and the Quaker website.

Applications for these larger scholarships require more information. More specific Application form details for the Margaret Caverhill Scholarship are included in [Appendix 1](#) (page 7) and for the Tessa Malcolm Scholarship in [Appendix 2](#) (page 8).

THE QETF COMMITTEE

It is a YM committee comprising four plus members; one being the Clerk, and one being the Financial Administrator. Each serves up to two terms. Terms are now for three years.

The QETF Committee follows established Quaker process for discernment, keeping our testimonies paramount. Provisions of large and small grants may be discerned through online meetings and email communication. Scholarship applications will when practical be discerned via kanohi ki te kanohi (face-to-face) meetings with hearts and minds prepared, information sharing and worship for discernment.

The QETF Committee expects to meet face to face each November. We include in the budget an appropriate amount annually for reimbursement of Quaker Education & Testimonies Funds Committee members' actual and reasonable expenses related to the above process.

Communication and decision making within the Quaker Education & Testimonies Funds Committee is often conducted by email. Major decisions regarding process, budget, future development and aspirations are made at the kanohi ki te kanohi weekend gathering.

An annual report is prepared associated with Documents in Advance for Yearly Meeting. This report is prepared by the Clerk with input by the QETF committee members. All members of the committee have an opportunity to contribute to the report in draft.

The Committee Clerk attends Yearly Meeting in Session to speak for the QETF Committee. If unable to attend, another member of the committee will be chosen to speak on the committee's behalf.

FINANCE

The Quaker Education & Testimonies Funds Committee is a disbursement body. It works in association with the Religious Society of Friends Aotearoa New Zealand Trust Board, which has responsibility for the investment and management of the capital funds.

In November each year a budget is prepared. QETF notifies the Trust Board with regard to the funds needed to meet that budget. Regular communication between the Trust Board and the QETF Financial Administrator ensures that we do not accumulate too much in our ready access account but that sufficient funds are available for us to do our work.

The annual budget includes provision for small grants, large grants, the named scholarships and expenses associated with any planned meetings of the Quaker Education & Testimonies Funds Committee.

The YM Treasurer works in partnership with QETF to maintain the accuracy of QETF funds available. The YM Treasurer maintains the bank account for annual expenditure and income related to the QETF budget. The YM Treasurer disperses grant payments to the recipients.

GUIDING POLICY STATEMENTS

Whanganui seminar attendance

For selected seminars participants may claim 50% of registration and accommodation costs for one seminar per person per annum. See also the travel section below.

The WEST Settlement may apply for additional funding for one seminar a year.

Young Friends funding

We agree to the proposal from Yearly Meeting Clerks that a request from a Young Friend for funding may be accompanied either by a letter from Young Friends Clerk or by a minute from their business meeting. We do not see the need for additional documentation from another active Friend. Young Friends may alternatively call on a letter of support from their local Monthly Meeting if this is easier.

Travel funding

There is a range of ways that travel may be supported financially. Some Aotearoa New Zealand Quaker events (such as Yearly Meeting and Summer Gathering) already have established travel equalisation/funding schemes. QETF's expectation is that individuals seeking help with travel will have initially contacted their Monthly Meeting overseers or pastoral care committee; they can apply to QETF to seek additional financial assistance should they consider it be required/needed.

Appendix One: The Margaret Caverhill Scholarship

This scholarship is valued at up to \$20,000. It is made available through the generosity of the late Margaret Caverhill whose bequest to the Society of Friends was to be used to support Friends to participate in both Quaker and general education.

The Quaker Education & Testimonies Funds Committee has, supported by Yearly Meeting, identified the value in providing on a regular basis a substantial scholarship that would enable Quakers, and their families, to participate in more significant educational experiences than would otherwise be possible.

The intention is to offer a large enough scholarship to make possible activities that would not be feasible with smaller grants. Depending on the number and size of requests, we hope to offer the scholarship every year.

Without limiting the types of applications Friends might make; we imagine the scholarship could be used to support

- a significant amount of time spent at somewhere like Woodbrooke, Pendle Hill, or Silver Wattle
- under or postgraduate education, both in Aotearoa New Zealand or overseas,
- a deliberate period of service or study,
- or something else entirely, with a Quaker or spiritual connection, you have dreamed of doing

Applicants are expected to have been regularly involved in Quaker Worship Groups and/or Meetings and active participants in Quaker community activities such as Settlement workshops, Young Friends' camps, Summer Gatherings, or Yearly Meeting activities.

Most applicants will be supported by their pastoral care committee or others within Quakers who know of their plan and its relevance for the individual. We will expect applicants to be able to identify reasons why they wish to embark on this study (be they personal, professional, or spiritual) and how they might share the outcomes of their chosen study and report on their experiences.

We encourage Friends to think about ways in which this scholarship could enhance their own learning, learning of family members or others within the Quaker community who they could encourage to consider applying.

There is no upper age limit on applications for the scholarship.

The closing date each year for applications is the 31st October.

Appendix Two: The Tessa Malcolm Scholarship

This scholarship is made available under the terms of a generous bequest from Tessa Malcolm. The scholarship may be for as much as \$20,000 but could be more or less depending on what the study is. We may award more than one scholarship.

The Tessa Malcolm scholarship is “to provide a supporting scholarship to assist a Young Friend who holds fast to Quaker values through university or other tertiary institution”.

This scholarship was first awarded in 2016 for the academic year beginning 2017.

QETF accepts applications for full or part time study, to start or complete a qualification, within a single or across multiple years. Applications may be for fees, course costs, or living expenses. The study may be practical, professional, undergraduate, postgraduate, or research based.

Applicants will be 35 or under and have been involved in Quaker worship groups or meetings and /or active participants in Quaker activities such as Young Friends’ camps, Summer Gatherings, or Yearly Meetings Committees.

Applicants will be supported by their pastoral care committee or others within Quakers who know of their study plans and its relevance for the individual.

The closing date each year for applications is the 31st October.

Appendix Three: Application process for Applicants

The Quaker Education & Testimonies Funds Committee needs a range of information or documentation from the applicant, from the Monthly Meeting or Worship Group, and any organisation in which the applicant wishes to enrol or participate:

About the Applicant:

- Who they are, and where they are from.
- Involvement with Quakers; be that through family, Meeting or Worship Group, or particular activities such as committees, camps or gatherings.
- Examples that might show how you “hold fast to Quaker values”.
- How this study might help or demonstrate Quaker values.
- With whom the Applicant has discussed plans to help decide on the project.

About planned study:

- What, where, when and why.
- How it will help the applicant’s Quaker faith and practice, or your life as a Quaker.
- Possible length of enrolment, whether full or part time, and if part time how part time.
- The probable time frame, any particular stages that to be completed before a next stage.
- If possible, provide QETF with a course or programme brochure or web page.
- Whether there is confirmation of meeting any entry criteria, or acceptance into the particular study, or any conditions to be met before going ahead.
- If there is a plan to set up any supervision or oversight during the scholarship.
- How will the project accessed?
- What might be the results or outcomes?
- When the applicant will be able to share their experiences with, or report on, the study to other Quakers or communities.

About the funding:

- How much money in total is needed?
- How much the applicant or others are able to contribute?
- Detail of student loans or other allowances, grants or scholarships applied for or might come from other places.
- How much is required from the QETF scholarship and the breakdown for fees, course costs, or living expenses?
- How this grant will make a difference to whether you do the study or not?
- The date by which to know if the application has succeeded, and the difference this will make to whether the project goes ahead or not.
- If successful, will the whole grant be needed up front or paid in stages e.g., for each year of study or after earlier stages have been completed?



Please provide **a letter from your pastoral care committee**, or Monthly Meeting, Meeting Clerk, or from two Quaker referees who are not related to you, supporting your application.

Send the information to: clerk@qetf.quakers.nz with the Form below.

Quaker Education & Testimonies Funds

Request For Funding

Please send with relevant documentation to the clerk@qetf.quakers.nz

Your name	<input type="text"/>
Your Meeting for Worship	<input type="text"/>
Your email contact	<input type="text"/>
Your telephone contact	<input type="text"/>
REASON FOR FUNDING  <i>Please attach evidence of support from your Worship Group, Monthly Meeting or Spiritual & Pastoral Care Committee, or (where relevant) the non-Quaker groups or organisation which has at least one committed Quaker actively involved in the project.</i>	<input type="text"/>
The date and place of the event or project?	<input type="text"/>
How much is being requested? <i>Please break down the total into travel, fees, etc.</i>  <i>Please also attach/forward receipts or invoices as soon as and when appropriate.</i> <small>(We need these for an audit trail and for the Charity Commission.)</small>	<input type="text"/>
May QETF share reports on the use of the funds with the wider Quaker community?	Yes / No
May we also share your name?	Yes / No
YOUR BANK ACCOUNT DETAILS: <ul style="list-style-type: none"> ● Account name ● Account number 	<input type="text"/>
CHECK FUNDS THAT MIGHT APPLY (OPTIONAL) The budget allocation for this request <input type="checkbox"/> Young Friends' Camp <input type="checkbox"/> Junior Young Friends' Camp <input type="checkbox"/> Junior Young Friends' co-ordinator <input type="checkbox"/> WEST Facilitators <input type="checkbox"/> Settlement 50% funded seminars <input type="checkbox"/> Regional seminars/workshops	<input type="checkbox"/> The Testimonies Fund <input type="checkbox"/> The Tessa Malcolm Scholarship <input type="checkbox"/> The Margaret Caverhill Scholarship <input type="checkbox"/> The QUNO Scholarship (\$5,000) <input type="checkbox"/> Small Grants Fund (\$5,000) <input type="checkbox"/> Large Grants Fund (\$10,000) <input type="checkbox"/> Travelling in the Ministry

Appendix Four: Committee Members and Job Descriptions

- A. Current members of QETF and appointment periods (July 2025)
- B. Job Description for QETF committee members
- C. Job Description for the QETF clerk.

A. CURRENT MEMBERS OF QETF

- Adrian Skelton: (Palmerston North MM) 2nd Term to YM 2026
- Liz Remmerswaal: (Palmerston North MM) 2nd Term to YM 2026
- Jameson Brown: Website (Wellington MM) 1st Term to 1/9/27
- Esther Cowley-Malcolm: (Mid-North Island MM) 2nd Term to YM 2028
- Andrea O’Hagan: Financial Administration (Mid-North Island MM) 2nd Term to 30/5/2029
- Alan Greenslade-Hibbert: Clerk (Wellington MM) 2nd Term to 30/5/2029

B. Committee Members: Job Description (August 2025)

Role

The Quaker Education & Testimonies Funds Committee makes grants, large and small, to Quaker and related groups and individuals in accordance with a range of criteria as required by the bequests made and/or those established by the Yearly Meeting and the Committee.

The Quaker Education Fund makes grants through the Margaret Caverhill and Tessa Malcolm and other bequests for education, and the residual funds from the sale of the NZ Friends School, primarily to support the education of members, attenders and their children who are actively involved in Quaker life with the purpose of fostering spiritual growth, contributing to community life, preparing for Quaker service or social action and for general learning and development. In addition, it distributes large and small grants from other resources under its purview that hold an educational benefit.

Regular Quaker educational events are also funded annually to such as Junior Young Friends Camp, Young Friends activities as these are important ways for younger Quakers to learn about Quaker life and Quaker processes. Similarly, there has been an annual grant to the Settlement for costs associated with facilitators who are running seminars and workshops at the Settlement and also support as needed for those attending.

The Testimonies Fund enables Friends to put our religious and social testimonies into action. Usually applicants will be Friends, but requests will also be considered from groups or organisations which have at least one Quaker actively involved in the concern. The Committee is particularly interested in projects which focus on problem solving in Aotearoa New Zealand,

The Committee is guided by the Quaker Education & Testimonies Funds Handbook and the Quaker Handbook.

Responsibilities

- To review the applications for funding and to assess the extent to which individuals' or groups' project proposals are congruent with the established criteria.
- To carry out tasks as distributed by the Committee itself in its meetings which may include communicating with applicants, maintaining records, setting budgets and keeping financial records, and communicating with the Religious Society of Friends Aotearoa New Zealand Trust Board which holds and manages the funds that the Quaker Education & Testimonies Funds Committee distributes.
- To communicate the purpose of the Funds and the criteria and the application process to Quakers through Yearly Meeting, Monthly Meetings and Quaker publications.
- To encourage reports where appropriate from beneficiaries about how grants are dispersed.
- To ensure appropriate information is up to date and edited on the website.
- To report annually to Yearly Meeting through Documents in Advance.

Preferred knowledge, skills, abilities and experience

- Knowledge of Quakers throughout Aotearoa/New Zealand
- An understanding of Quaker Discernment processes.
- Competence with emails and online communication.
- Some experience in resource distribution, sticking to a budget and understanding implications of fiscal responsibility.

Conflicts of Interest

When a conflict of interest arises, committee members will stand aside and that will be recorded.

Expected Time Required

Members can expect to provide an average of between 1 to 3 hours per month. These hours do not occur equally throughout the year; there are bursts of work when meetings are convened with advance preparation and follow up work.

Length of appointment

The committee consists of at least 4 members. The term is for a period of 3 years with the possibility of further terms.

C. Committee Clerk: Job Description (June 2025)

The QETF Committee clerk's responsibility is to receive all correspondence and enquiries from within and outside the Quaker network. The Clerk is entrusted to give advice, consider, deal with, reply, sift, ask questions, require that applications are complete when not so, ask for further information, and tidy the funding requests before seeking opinions and approval or rejection from the rest of the QETF Committee.

The Clerk provides a streamlining process that brings well-formed applications or requests to the other committee members and allows them the space and time to focus on their discernment and consideration necessary for QETF funding applications.

In addition, the Clerk deals with general administration and supports matters relating to the several funds the Trust Board holds for QETF. (The current TB Treasurer is Robin Watts). These include:

- QETF General (previously QEF General)
- The Testimonies Fund
- The Margaret Caverhill Bequest
- The Tessa Malcolm Bequest (limited to ages 35 or under, and for tertiary education).
- The Quaker Youth Education Fund

This will entail various communication, such as with:

- Young Friends
- The Children and Young People's Support Committee
- The Engaging Young Friends Committee (The Clerk is currently a member of that committee with a QETF brief as to funding).
- YM Nominations Committee
- Trust Board Treasurer
- YM Treasurer
- YM Clerk (especially in relation to the annual QETF Report and responses in White Papers).
- Applicants

The Clerk will seek specific support and help from committee members with responsibility for:

- Financial administration, tracking, and reporting from applicants (currently Andrea O'Hagan)
- Google Docs, Website updates, Handbook updates, corrections, and advertising (currently Jameson Brown)

Internal policy matters, protocols and future planning are contributed to and agreed by the whole QETF Committee.

Each year the Clerk will write a report, approved by the QETF Committee, for publication in Documents in Advance prior to Yearly Meeting in Session. The committee then addresses any issues raised in the subsequent White Papers.

Each year the Clerk will assist in arranging a weekend Meeting for Business in person at a time and location agreed by the committee.

QETF Application process.

The Clerk receives funding applications for grants from the various funds (see above) to which QETF has resource.

Applications may be immediately rejected if they are outside the QETF remit. The Clerk replies to the applicant as appropriate. Spam etc. is deleted. Where a request for funding is unclear as to whether it should be considered at all, advice will be sought from the other QETF committee members.

Inapplicable applications may be:

- from overseas (recent examples - Rwanda, Eire, Burundi, The Democratic Republic of the Congo, Kenya)
- not from a Quaker (Member, Attender, or family of)
- not from an organisation with Quaker involvement
- spam, a scam or a phishing exercise.

Once an application is suitable for consideration i.e. on the correct Request Form with required supporting minutes and/or letters (from Monthly Meetings, Pastoral Care Committees, Worship Groups, or relevant Friends) and tidied, it will be circulated to the QETF Committee as a whole.

The QETF committee usually deals with smaller requests by email. Larger requests may be considered by online meetings. These consultations and discussions are initiated and organised by the Clerk; the latter with an agenda. Minutes are recorded and where not containing confidential information will be uploaded to the Quaker website.

November 2025