

Report of the Ad Hoc Committee on Pacific Yearly Meeting Financial Allocations to Friends Organizations

1. Task of this ad hoc committee

By AS Minute 2014-05, Finance and Ministry & Oversight Committees were asked to form an ad hoc committee to recommend guidelines for determining allocation of donations to Friends organizations. The ad hoc committee was also asked to bring recommendations for Support of Friends Organizations expenditures for the 2014-2015 budget year to the 2015 Representative Committee meeting.

The purpose of the guidelines we have developed is to inform the PYM committee(s) tasked with recommending allocations. These guidelines are also offered to assist organizations in formulating requests, noting that there is currently no clear procedure on how requests should be submitted.

2. Background

The ad hoc committee noted that the concern regarding financial contributions to other organizations has arisen periodically in the life of our Yearly Meeting. We considered this history with particular attention to the minutes approved in 1980 and 1999. Excerpts from relevant prior PYM minutes are attached.

3. Summary of the issues as determined and discussed by the ad hoc committee

a) Should PYM continue to contribute to other organizations?

Although there is no clear unity within the Yearly Meeting, the ad hoc committee has based its discernment on the answer to this question being “yes”.

b) Outreach Budget

The current budget of \$9,000 for allocations to Friends Organizations comes to nearly \$7 per PYM member, (or 12% of the assessment, excluding Youth Program expenses). We note that contributions to Friends Organizations could be left to Quarterly or Monthly Meetings, or to individuals or to some new funding process or mechanism – thus lowering assessments. PYM may wish to revisit the question of whether to allocate a portion of the annual assessments to outreach.

c) Terminology

The ad hoc committee labored with terms like ‘donation’, ‘contribution’, ‘support’, ‘fund’, ‘substantial’, ‘symbolic’, and ‘token’, among others, which invoke many different interpretations and are often used without considered thought as to the intent behind them.

We looked at what PYM’s recent allocations mean in terms of the PYM budget and the organization’s donation income, and noted, for example, that while our largest allocation of \$2,500 for American Friends Service Committee (AFSC) is “substantial” in terms of PYM’s allocations, for the AFSC, this is merely “symbolic”, representing less than 1/100 of 1% of their donation income. Meanwhile, a \$1,000 allocation to Friends House Moscow Support Association would represent about 8% of that organization’s donation income.

4. Conclusions

Pacific Yearly Meeting assessments are levied in order to finance the work of PYM itself. It would then follow that the money received from the assessments and designated for Allocations to Friends Organizations should only be used to support organizations with which PYM is actively engaged.

Determining PYM’s engagement with an organization is subjective, though one may consider such things as oversight by PYM committees, having PYM representatives participating in policy decision-making, frequent reporting to and seeking of guidance from PYM annual sessions by the organization, among others.

We are mindful of the powerful symbolic value that may be attached to both the giving and the receiving of financial support from PYM. On the giving side, there is the moral satisfaction of being associated with an organization that appears to be “doing” something, while for receiving organizations, even modest financial support from the Yearly Meeting can be energizing and inspiring.

However, we have observed that this symbolism can also operate negatively. Friends can feel resentful or alienated from one another when there is disagreement on which organizations are “deserving” or to what degree, and an organization that does not receive financial support may feel neglected or undervalued. We urge that Friends acknowledge the spirit of outreach that motivates this section of the budget, recognizing that the needs will always be far greater than the resources that PYM can reasonably apply.

Charitable giving is a very personal and often idiosyncratic choice. The PYM allocations of support should be kept in perspective and “caring” or “witness” should not be measured by dollars alone.

5. Recommended Guidelines

The ad hoc committee offers the following guidelines for the committee assigned the task of recommending allocations:

- i. Priority consideration for support should be given to Friends organizations of which PYM is a member and/or to which PYM designates representatives who serve on their board. The current list of these organizations is:
 - a. American Friends Service Committee (AFSC)
 - b. Friends World Committee on Consultation, Section of the Americas (FWCC-SoA)
 - c. Friends Committee on National Legislation (FCNL)
 - d. Friends Committee on Legislation of California (FCL-CA)
 - e. Quaker Earthcare Witness (QEW)
 - f. William Penn House, Washington, D.C.
 - g. Friends Bulletin Corporation (publisher of Western Friend)
 - h. Friends Peace Teams
- ii. Special consideration should also be given to:
 - a. Quaker led projects in which PYM members are currently actively engaged, especially those in early stages.
 - b. Established Friends organizations that rely on Yearly Meetings for contributions.
- iii. Further guidance for the committee recommending allocations:
 - a. A one-time gift should not necessarily mean continuing support.
 - b. Organizations should serve the entire Yearly Meeting, not only California.
 - c. Organizations under the care of a Monthly or a Quarterly Meeting should normally look there for support rather than to the Yearly Meeting.
 - d. Requests should be seasoned and supported by a PYM committee.
 - e. Allocations should be reviewed against the guidelines periodically.

Respectfully submitted,
Bronwen Hillman (Mexico City), convener
Claire Gorfinkel (Orange Grove)
George Mills (Palo Alto)

Attachment 1. Excerpts from previous PYM Minutes.

Attachment 2. Support of Friends Organizations Comparative Table.

**Ad Hoc Committee on Pacific Yearly Meeting
Financial Allocations to Friends Organizations**

Recommended Allocations of the “Support of Friends Organizations” (outreach) budget
for the 2014-2015 fiscal year

The following recommendation for allocations is not to be interpreted as considering one organization more worthy than another or as diminishing the important, spirit-led service and work of many PYM Friends and Friends organizations. Rather it is the result of holding each organization against the recommended guidelines. The ad hoc committee acknowledges the good work of the organizations PYM is unable to financially support at this time.

AFSC	\$2,500
FWCC-SoA	\$1,500
FCNL	\$1,500
FCL-CA	\$1,000
QEW	\$500
William Penn House	\$250
Western Friend (<i>elsewhere in budget</i>)	
Friends Peace Teams ⁽¹⁾	\$0
Friends General Conference	\$500
QUNO-NY ⁽²⁾	\$0
Right Sharing of World Resources ⁽³⁾	\$0
Friends House Moscow	\$750
Casa de los Amigos	\$500
Guatemala Scholarship Program ⁽⁴⁾	\$0
El Salvador Project ⁽⁵⁾	\$0
Total	<u>\$9,000</u>

- (1) Although PYM designates a representative to the organization, Friends Peace Teams has not submitted a seasoned request for allocation
- (2) QUNO-New York is a project of the American Friends Service Committee and Friends World Committee for Consultation
- (3) The organization no longer meets the guidelines for allocations
- (4) Under the care of Guatemala and Redwood Forest Monthly Meetings
- (5) Under the care of Palo Alto Monthly Meeting

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Attachment 1.

Previous Pacific Yearly Meeting Minutes regarding financial contributions to Friends organizations considered by the ad hoc committee (excerpts)

1969-14 The criteria for allocation of funds by Pacific Yearly Meeting committees is that the activity is clearly a project of the entire Yearly Meeting or one in which Pacific Yearly Meeting concern predominates. It is assumed that Monthly [and] Quarterly meetings will finance their own activities since subsidizing a local concern would be, in effect, an assessment against the entire Yearly Meeting.

1978

The [Ad Hoc Committee on Contributions and Assessments] asked the Yearly Meeting session to respond directly to the query: Do we or do we not wish to contribute to other Friends organizations? Comments were about equally divided between those who wished to continue financial contributions, and those who favored leaving the responsibilities entirely with the Monthly Meetings.

RepCom 1979

. . .the Ad Hoc Committee on Assessments and Contributions . . . united in the observations that

- 1) There is no consensus in the Yearly Meeting to discontinue the practice of making contributions to Friends organizations.*
- 2) That there is much concern that we not continue making contributions pro forma, but that the contributions budget be prepared in a way which is open to yearly evaluation.*
- 3) That Friends' good order requires a process of seasoning -- items should not surface first on the floor of the Yearly Meeting.*

RepCom 1980

Support of Friends Organizations: Finance Committee solicited Monthly Meetings for recommendations on disbursement of the \$3,000 budgeted expense, for fiscal 1980. There was a wide range of responses from the nineteen of thirty-six Meetings replying. In discussion Finance Committee found the following basic principles helpful to their deliberations:

- 1) National groups which rely on Yearly Meetings for contributions should be supported.*
- 2) A onetime gift should not mean continuing support.*
- 3) Friends groups which are under the care of a Monthly or Quarterly Meeting should look there for support.*
- 4) A Friends group should serve the entire Yearly Meeting, not only California.*
- 5) Gifts should be substantial, not token.*
- 6) Proposals for contributions to a particular Friend organization should be advocated over a period of time, rather than spontaneously made during PYM Plenary sessions.*
- 7) The organization respond[s] to correspondence.*

REP COM 89-23

Representative Committee approved the Finance Committee's proposed revisions to the fiscal year 1989 budget: ...

Some concern was voiced that contributions to Friends organizations have not been increased to offset inflation. The Finance Committee has attempted to avoid increasing our current level of assessments, following last year's increase from \$20 to \$23 per member. This year's budget increase over last year's was only two percent. . . .

*We were reminded that our currently budgeted contributions to Friends organizations other than FWCC are **intended not as substantial gifts but as token support**, a compromise between Friends who advocate such contributions and other Friends who would prefer that no funds raised as PYM assessments be transferred from the Yearly Meeting to other organizations.*

PYM 99-4 *We approved the Right Holding of Year Meeting Subcommittee's five criteria for YM contributions to other Friends' organizations with the insertion of the word "normally" into criterion #4.*

CRITERIA FOR PYM CONTRIBUTIONS TO OTHER FRIENDS ORGANIZATIONS

- 1. Needs of Friends' projects that grow out of PYM work should be given particular consideration, especially in the early stages.*
- 2. Friends' groups which rely on Yearly Meetings for contributions and policy guidance should be considered for support.*
- 3. A one-time gift should not mean continuing support.*
- 4. Friends groups under the care of a Monthly or a Quarterly Meeting should normally look there for support rather than to the Yearly Meeting.*
- 5. Friends groups should normally serve the entire Yearly Meeting, not only California.*

