Pacific Yearly Meeting
Communications Committee
Report to Annual Session 2021

SUMMARY PacYM's Communications Committee has continued to nourish the work involved in setting up the PacYM communications database and to develop policies and procedures for its use. We are requesting a budget of $13,510. This does not include the $1,500 that is left in the database project reserve account which we are still expecting to use in the coming year. We also bring forward for a second reading a set of policies that would guide the use of the communications database and derivative files.

Dearly Beloved Friends,

Our year began and ended with two wonderful retreats: the first one virtual, where we got to know each other and affirmed that our primary leading was to further the work of implementing the communications database, and the second one in-person, where we celebrated where we had been led and named each other's spiritual gifts. The overall scope, and labor necessary for this project to succeed has been intimidating at times. We have felt challenged to work consistently and diligently while not losing the guidance of spirit. Searching thousands of cells for an accidental comma put into an email address has proved to be a more challenging meditation than expected. Nevertheless we persist to hold queries of what is the right way forward rather than what is efficient. We were saddened by the unexpected mid-year departure of one of our members after a conflict.

We divided our work into three workgroups with one monthly Zoom call each, in addition to our monthly full committee meeting:
- "Data In," responsible for reaching out to monthly meetings and getting data (Friends' contact, membership, and role information) into the communications database
- "Data Out," responsible for developing and documenting the policies and procedures for how the data would be used
- "Miscellaneous," responsible for posting documents to the website, hiring the IT administrator, implementing G Suite and role based emails, and scanning past Annual Session documents.

Data In group:
As of the time of this report, "Data In" has reached out to all 35 PacYM monthly meetings and invited them to participate in the communications directory project. Fourteen meetings have over 70% of their members included, including eight that have over 90% entered. Two meetings declined to participate. We have encountered some resistance as we have reached out to Meetings about the database project. There seems to be some lack of unity in the larger body about the value of being directly connected as members of a Yearly Meeting, and that is reflected in some of the low participation rates. We have been assisted in our work by Christina Forst and Emma Bishop and are grateful for their help, and have used some of our budgeted funds for help with the work of data entry and cleaning. We have also been documenting our procedures in a directory handbook, so that we retain institutional memory.

Data Out group:
The Data Out group has been working to establish processes and procedures for utilizing the information held in the database. This has involved two foci - one being the creation of directories themselves as outputs from the database, and another being the email distribution lists that will allow those serving on committees or interested in topical groups to interact with each other via email.

Directories
Information will be drawn from the database in spreadsheet (Excel) format. We're currently testing how to get the data from there into a Word template that would be a more traditionally formatted directory document. These would then be posted for access on the PacYM website, on a password-protected page. More information about how this information is being protected is available in the policies being presented (see below).

Distribution Lists
We are currently investigating the best tool to use for email distribution lists for committees and interest groups. Under development is a method of updating such listservs via automatic emails from Salesforce, which would keep group membership up to date. Using Salesforce itself for email list management is not practical, as one has to be signed into Salesforce to use that function, and there is no plan to widely distribute access to Salesforce. While early functional tests have proved promising for this method, we still need to decide on a specific listserv tool to use.

Miscellaneous group:
We have identified and contracted with an IT administrator who begins on July 1. We continue to make incremental improvements to the website and recently completed a comprehensive "staleness survey" which brought many pages up to date. We also installed a "Translate" button, which can provide automatic translation of any page into Spanish. We are continuing to roll out new role-based email accounts to more PacYM committee clerks and officers, so look for them on the "Contact Us" page of the website: https://www.pacificyearlymeeting.org/contact-us.

Draft Policies
The Committee presented four policies for first reading at RepCom 2021:
1. Entering Data on Behalf of Another
2. Information Included in the Salesforce Database
3. Access to Directories Derived from the Salesforce Database
4. Transmission of Directories Derived from the Salesforce Database

We held a lunchtime meeting at RepCom 2021 and solicited feedback. Based on the feedback and our ongoing discernment, we made small changes to the language to make it clearer. We are bringing the revised versions (see below) and ask for approval.

Our budget includes funding for implementing our communication directory-database, website maintenance/upgrades, an information technology consultant and an in-person committee retreat.

Members of our committee include: Lawrence Alderson, Andrea Harman, Allison Kirkegaard, George Mills, and Kate Watkins (Clerk). Sharon Gates (Assistant to the Clerk), Jan Tappan (Historian/Archivist), the IT Administrator, and Keenan Lorenzato (Youth Programs Coordinator) serve ex officio on the committee. DJ Bloom (Statistical Clerk) and Emma Bishop have been participating in the work of the committee; we are grateful for their service.

Policies for second reading: *(approved by ComCom 5-29-21)*

1. Entering Data on Behalf of Another

Being united that Spirit is leading us to develop a comprehensive communications database for the whole yearly meeting (see Minute RC 2020-11), Communications Committee believes that faithfulness to this leading requires each Friend within the Yearly Meeting to participate fully in the database unless that Friend is specifically led otherwise. We both expect full participation from most Friends and support Friends for whom issues of safety mean that they are led to not participate.

When a member of a Monthly Meeting does not provide their information for the database, whether because they have been led not to or because they are unable to input their information themselves, the Communications Committee, guided by spirit and in consultation with the directory manager of the Friend's Monthly Meeting, may enter into the database limited information about them from other sources (e.g., monthly meeting directories):

- Full name
- Primary Monthly Meeting
- Membership status
- Email address (if applicable)
- Phone number (if applicable)

This information will be classified as "Do Not Publish" in the database, meaning that it will not be visible in any directories and only individuals with direct access to the database (a small number of Friends who serve in certain Yearly Meeting roles and who have undergone training to use the database) will be able to see and use the individual's contact information.

2. Information Included in the Salesforce Database

The PacYM Communications Committee, which is responsible for the PacYM Salesforce database, is committed both to simplicity and to providing PacYM officers, committees, and representatives with the information they need to carry out their ministry. As of February 2021, the committee has discerned that the database will store the following information:

- full name*
- year of birth
- pronouns
- racial/ethnic identities
- mailing address
- phone number*
- email address*
- Monthly Meeting or Worship Group*
- membership status*
- roles served in Monthly Meeting
- Do not publish/Do not email/Do not call as separate fields

*designated as required fields

The committee will request that Friends with children (under 18) in their care provide the following information for each child:

- full name
- month and year of birth
- primary monthly meeting or worship group
- name of parent/guardian

Additionally, asks that Friends who sometimes bring children (e.g., grandchildren, children of another Friend) to Quaker gatherings indicate this.

The committee also has clarity on keeping records of current and past committee service for the Yearly Meeting committees, and positions.

3. Access to Directories Derived from the Salesforce Database

Direct access to the Salesforce database will be limited to as few Friends as feasible, and these Friends will be required to undergo Salesforce training before being given access.

Any member or attender of a monthly meeting or worship group within Pacific Yearly Meeting, and any Friend serving on a Pacific Yearly Meeting committee, may view and download the current PacYM directory as a pdf from a password-protected section of the website. The pdf will also be password protected.

Quaker organizations, Friends from other yearly meetings, and individuals with a need to contact Quakers (e.g., a researcher of Quaker history) may contact the PacYM Communications Committee to request directories. Communications Committee will then consider whether the request is in accordance with the paired goals of striving to trust that of God in every person and respecting the privacy needs of each person whose information is published in the directory.

4. Transmission of Directories Derived from the Salesforce Database

Friends are expected to practice respectful stewardship of other Friends' personal information. Accordingly, Friends may not send directories by email. A Friend who wishes to share a directory with another Friend within Pacific Yearly Meeting may:

- instruct them how to download a copy from the PacYM website, or
- print a copy and share it in person or by postal mail.

Friends should not share directories outside of PacYM. If someone outside PacYM needs access to a directory, they should contact the Communications Committee (communicationsclerk@pacificyearlymeeting.org).