

BYM Budget & Apportionment Meeting

APRIL 13, 2024

10 AM - NOON

LED BY THE STEWARDSHIP & FINANCE COMMITTEE

How do our current financial practices support or fail to support our declaration to be an antiracist community?

Stewardship & Finance Committee

Linda Pardoe, Clerk (Patapsco)

Anne Bacon (Hopewell Centre)

Jim Bell (FMW)

Melanie Gifford (Adelphi)

Karen Hansen-Kuhn (Alexandria)

Andrei Israel (Adelphi)

Aaron Johnson (FMW)

Catherine Nnoka (FMW)

Catherine Tall (Monongalia)

Jim Webner (Stony Run)

Xan Whitt (Roanoke)

Tim Yeaney (Langley Hill)

Ex Officio: Jim Riley, Treasurer (Hopewell Centre)

Terence McCormally, Assistant Treasurer (Herndon)

Yearly Meeting FT Staff as of April, 2024

General Secretary	Sarah Gillooly
Administrative Coordinator	Lucy Azenga
Finance Manager	Harriet Dugan
Youth Programs Manager	Lexi Sunshine Klein
Camp Program Manager	Brian Massey
Camp Property Manager	David Hunter
Catoctin Camp Director	Dyresha Harris
Camp Program Associate	Randy Mattern
Development Director	Nikki Holland
Stride Coordinator	Rachel Carter
Assistant General Secretary	Vacant, on hold

The Work of Stewardship and Finance

Listens

Prepares

- Budget
- Plan of Apportionment

Oversees

- Accounting methods
- Treasurer reports

Informs

- Needs of the Yearly Meeting
- Responsibility to support

Calendar

- Meetings for Listening-- Spring and Fall
- September : Designate Liaisons
- October IM: Set Apportionment Meeting
- November: Apportionment reminders
- January: Send apportionment questionnaire
- March: Apportionment questionnaire due
- April : Apportionment Meetings
- June: Budget and Apportionment Plan to IM
- August: Approval of Budget at Annual Session

BYM Website – S&F page

[https://www.bym-rsf.org/what we do/committees/sandf/](https://www.bym-rsf.org/what%20we%20do/committees/sandf/)

- Latest Operating Budget
- Recent Form 990s
- [Guidelines for Apportionment](#)
- [Apportionment Online Payment Page](#)
- [Apportionment Amounts 2024](#) by Meeting as approved at Annual Session

Apportionment Updates

2023 Goal: \$513,000, Received: \$508,000

2024 Goal: \$552,000

2025 Goal: Still awaiting completed questionnaires

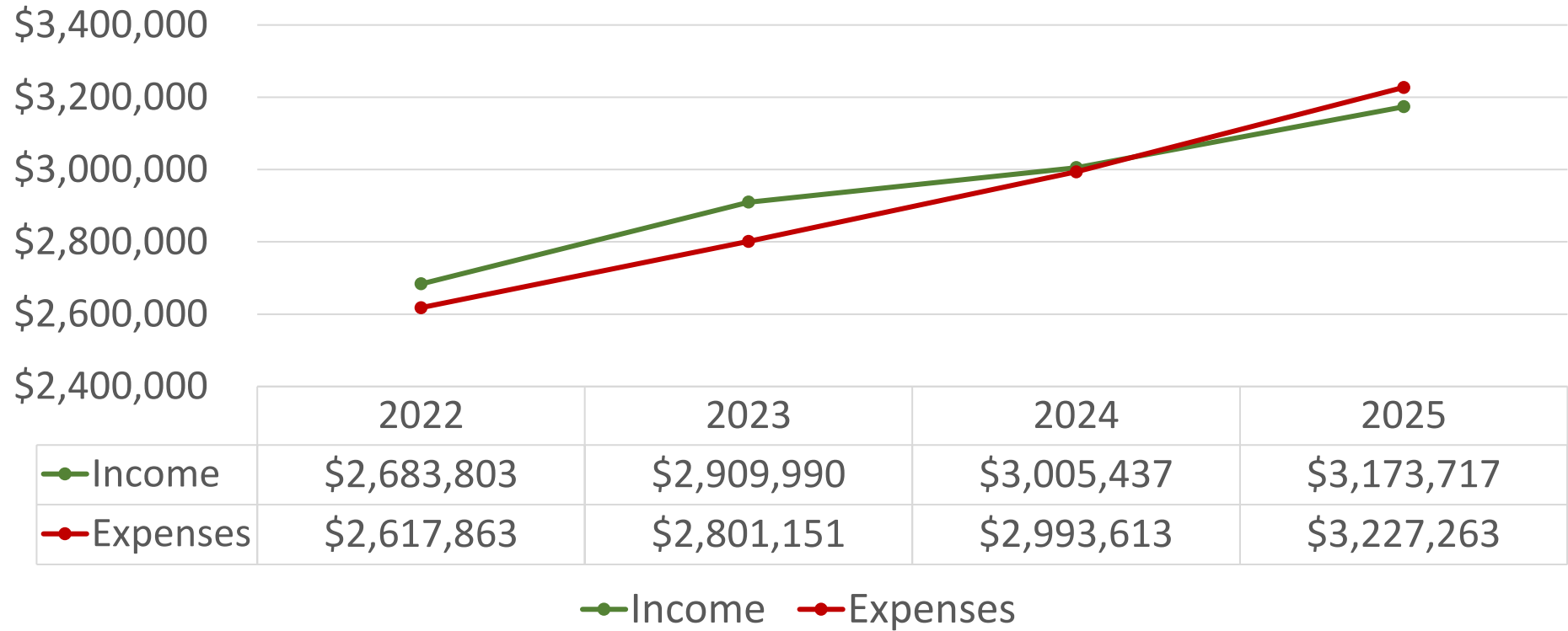
Apportionment Manager: Xan Whitt xanwhitt@gmail.com

- Recommended apportionment is 25% of Meeting income with some income exempt from apportionment
- S&F respects each Meeting's discernment about its apportionment
- See [BYM's Guidelines on Apportionment](#) on S&F web page

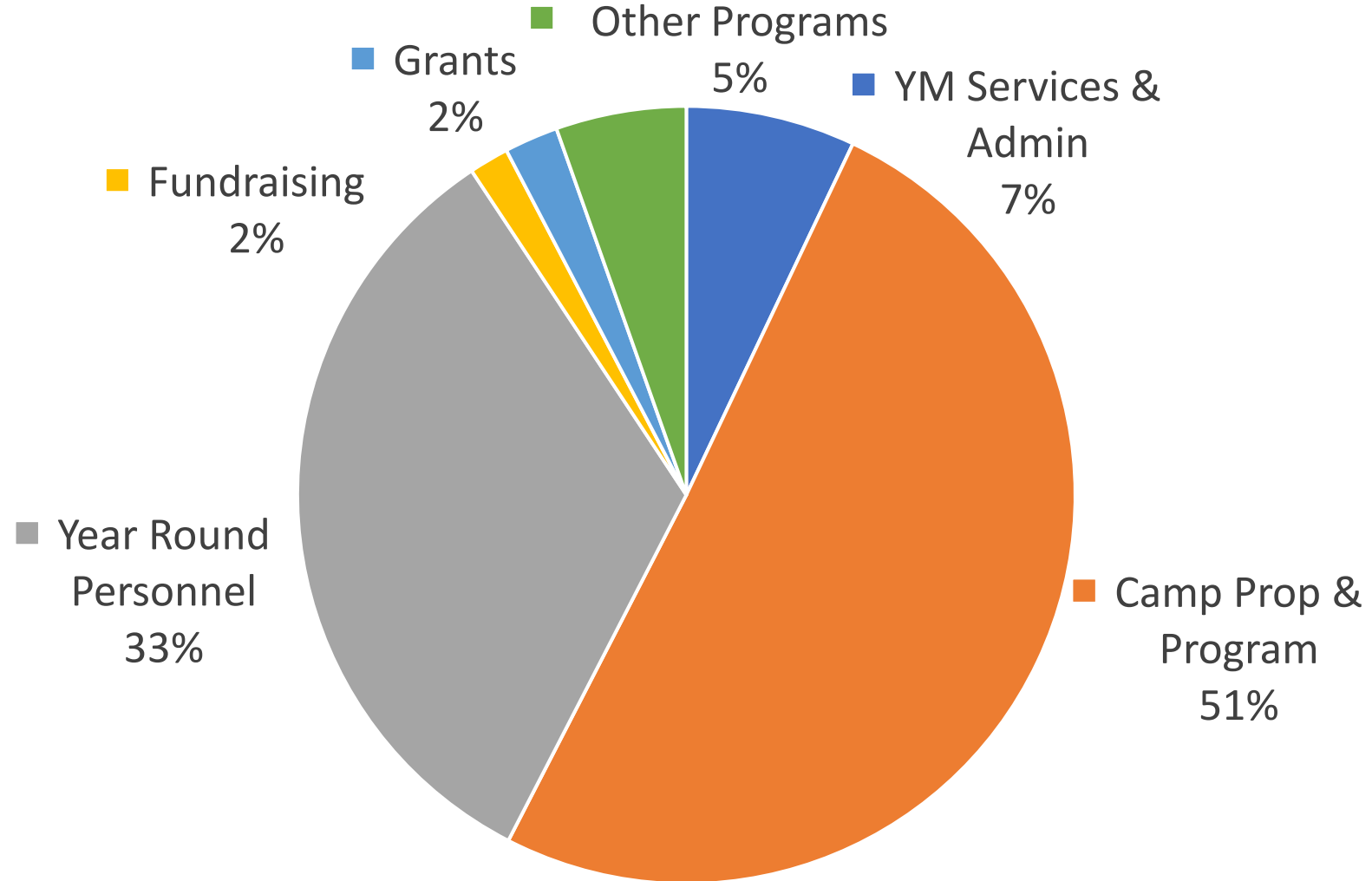
Budget 2025

- ❑ Goal is Balanced Budget (Revenue = Expenses)
- ❑ Current rough draft – deficit
- ❑ S&F may need to ask to lower expenses
- ❑ First draft at June Interim Meeting; Approval at Annual Sessions
- ❑ Committee and Working Group Budget Requests submitted by:
 - Working Group on Racism
 - Reparations Action Working Group
 - Growing Diverse Leadership Committee
 - Indigenous Affairs Committee

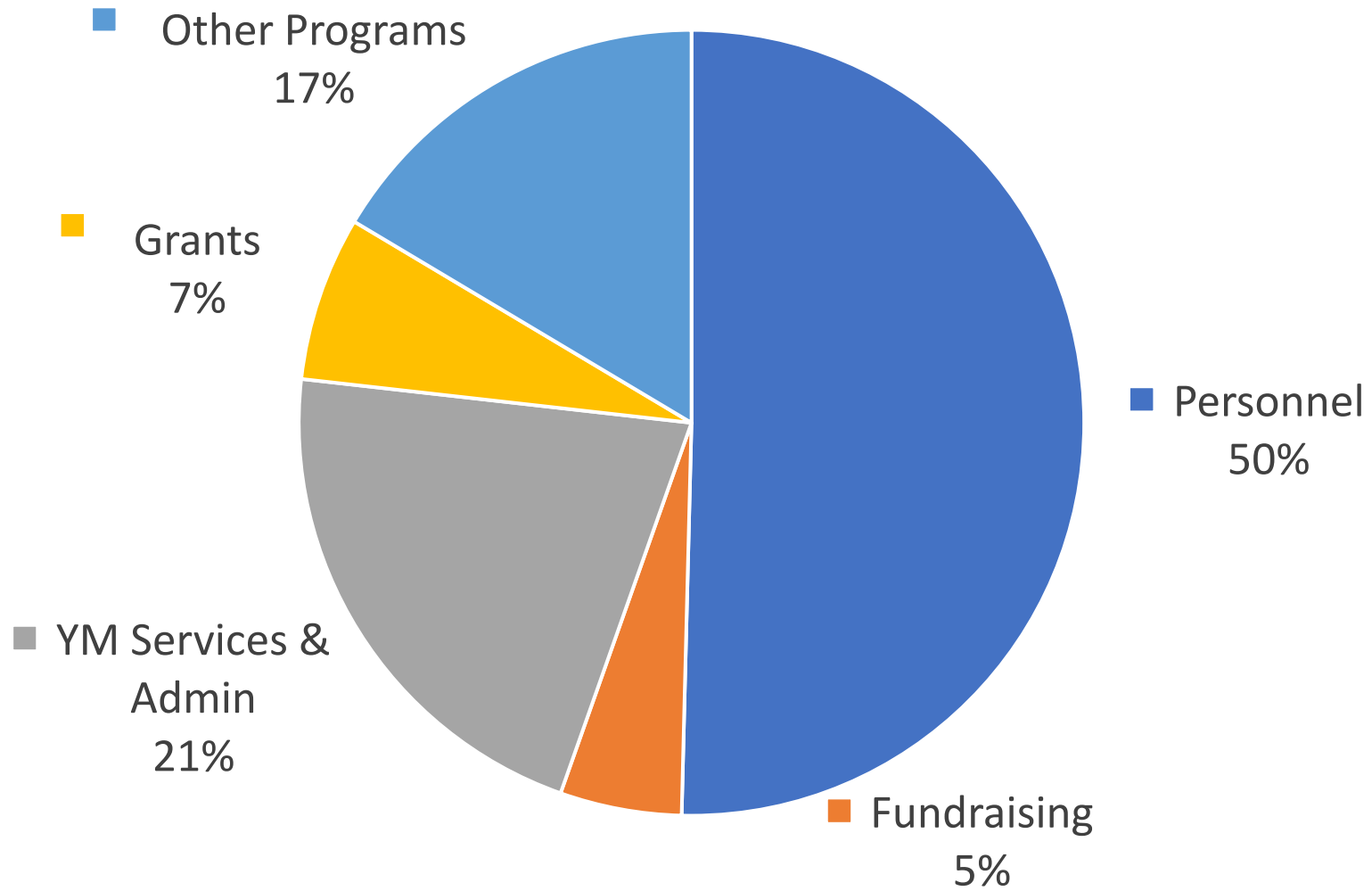
BYM Budget Over Time



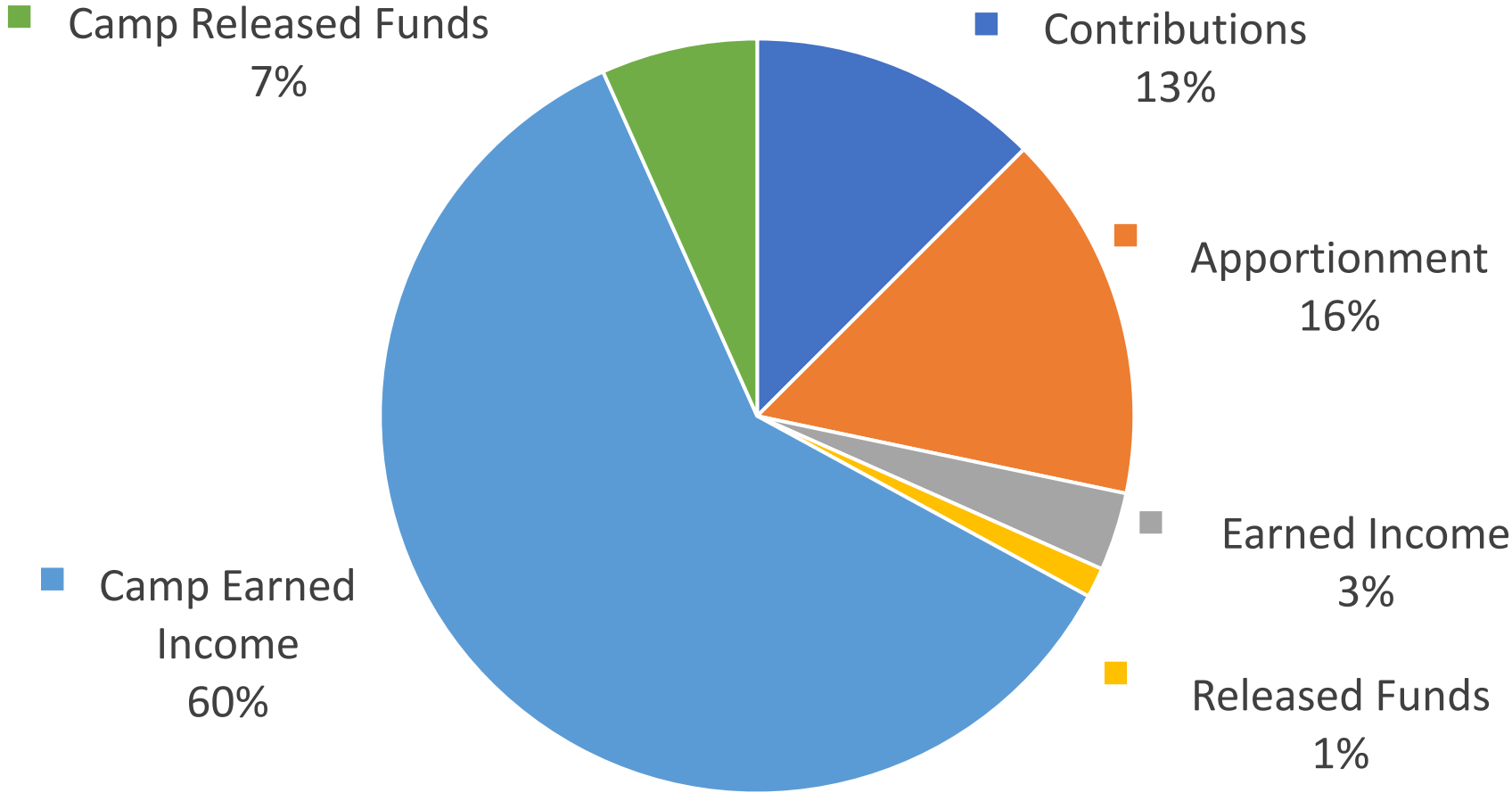
2025 Expenses by Cost Center



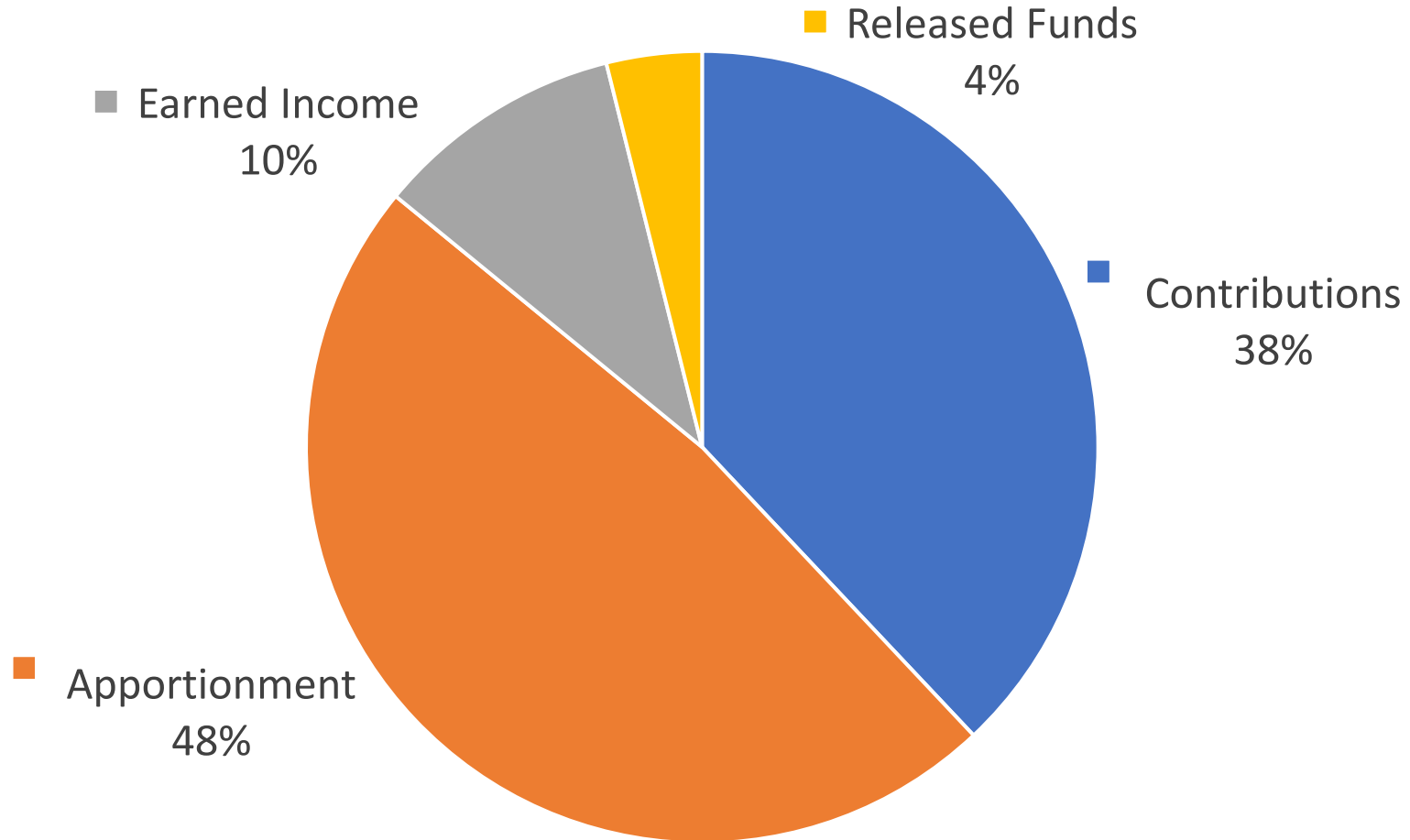
2025 Non-Camp Expenses by Cost Center



2025 Revenue by Type



2025 Non-Camp Revenue by Type



Anti-racism Priorities

BYM has spent about 7% of budget on anti-racism since 2022

2025 Budget = \$246,500 for anti-racism work (7.6% of budget)

Programs include:

- STRIDE program and STRIDE scholarships
- Committee expenses
- Staff Training
- Annual Session Honorariums

Staff Raises and COLAs for 2025

- Supervisory Committee co-clerk Betsy Tobin will discuss

Working Group on Racism Request = \$20,000

1. For trauma healing work for Global Majority Friends.
 - ❑ “Racial trauma healing” involves finding constructive ways to manage emotions of individuals in the global majority that stem from their experiences living in a society (including a religious society) where white people are mostly in charge and where whiteness is regarded as the norm.
2. For experienced facilitators to design and conduct antiracism training for BYM Friends
 - ❑ Training to be adjusted to meet the needs of those being trained
 - ❑ We will be guided by who is willing to be trained rather than specifying prior training that is required for subsequent workshops.

Growing Diverse Leadership = \$14,000

(Includes Reparations Actions WG)

- GDL - \$5000 for YAF gathering— if possible, host this in Fall, 2024; if not, then 2025
- GDL - \$3000 for speaker fees and expenses for Juneteenth celebration/recognition
- RAWG - \$3000 for speaker fees and expenses to hire an expert for guidance and inspiration in Reparations work
- RAWG- \$3000 for training to improve conversations about reparations

Note: RAWG speaker/training may be for all of BYM and beyond, and/or the Working Group

**As appropriate, and if does not limit access, RAWG is glad to ask for donations for events offered to the Yearly Meeting.

Indigenous Affairs Committee = \$14,800

Indigenous Speaker for Annual Session	\$400
Donations to Native program	\$400
Video Project for 1 st Day forums**	\$2,000
Statistical Native Info Update**	\$2,000
Reparations to Pawnee Nation	\$10,000

** 2-year project

Budget Request Guidelines

- 1) Report Working Group budget plans through the committees that care for them.
- 2) Season New Initiatives through Interim meeting before making budget request to S&F Committee.
- 3) Return Unspent Allocated Funds to the general budget – Do not spend at the discretion of the committee/working group.
- 4) Increase the level of specificity in a budget request as the budget process proceeds.
- 5) Show in annual reports how the committee/working group spent its funds.

BYM Contributions to Outside Organizations

BYM contributes to outside orgs for 3 purposes:

- ❖ To support orgs that are enacting Quaker values
- ❖ To influence policy and activity of the organization
- ❖ To identify orgs that we feel are worthy of consideration for individual Friends in their personal giving plans

BYM gives to 4 broad categories of organizations:

- 1) 3 Quaker denominational orgs: Friends General Conference, Friends United Meeting and Friends World Committee for Consultation
- 2) 12 orgs to which we send a representative and contribute a small amount
- 3) 7 Quaker orgs to which we contribute but do not send a rep
- 4) 7 ecumenical orgs with whom we find common cause in some of our work and support for that reason

Proposed Policy on Contributions to Outside Orgs

Current Policy: Grants to outside organizations, including reparations, must be approved by Yearly Meeting.

Proposed: Donate about 5% of expected annual apportionment in the following proportions:

- 35% to FGC
 - 30% to FUM
 - 20% to FWCC
 - 15% of allocated funds will be divided equally among the 26 other orgs
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- In 2024, expected apportionment is \$562,352, so 5% of that makes \$28,118 available for outside orgs

Contribution Policy Moving Forward

Goal: Approve grants and contributions to outside organizations as part of the budget at annual session, as recommended by Stewardship & Finance

S&F will continue to look for ways to effectively donate to outside orgs, including how to select and evaluate the orgs

Queries

What Projects should the Yearly Meeting undertake? What should it lay down?

What Concerns do you have about the way BYM handles its budgeting and finances?

What can the Yearly Meeting do to help Monthly Meetings prosper spiritually and financially?