

## ***Additional Information / Frequently Asked Questions (FAQs)***

Below we offer a review of what Western Quarterly Meeting is doing to support our neighborhood of eleven Monthly Meetings. We answer basic questions about the budgeting process and offer information that might be useful to Meetings as they consider their level of financial support of the Quarter.

### **Programs and Activities of Western Quarter**

Our ability to accomplish the level of activity across the Quarter that is described below is due to the level of staff support that we have had in a ¾ position and our Coordinator's efforts to recruit, nurture and support those Friends who bring interest and effort to these activities.

#### **1. Youth Support**

- Through the efforts of our Coordinator and those who attended a series of meetings in 2013, we are initiating a new endeavor called First Day School Convergences. Friends from each of our Monthly Meetings will converge on one host Monthly Meeting for an hour of collective religious education. The first Convergence is planned for November 16 at West Grove Meeting.
- We organize a program for youth at each Quarterly Meeting session, and we organize events for families and Middle Schoolers in concert with Concord Quarterly Meeting.
- We have begun discussion about reinvigorating a Youth Meeting (a program for High-School-age youth).
- Lastly we coordinate our efforts with Philadelphia Yearly Meeting staff to reduce competition with their events and increase communication about our events.

#### **2. Support for Meeting Programs and Operations**

- Our Coordinator organized a series of gatherings that brought Friends from our community of Meetings together to explore issues of shared concerns. The goal of these “wisdom sharing sessions” is to leverage the experience and expertise already available in our community towards easier and more meaningful service. The following sessions were held:
  - Religious Education Gathering – September 2013
  - Worship and Care – January 2014
  - Property Summit - May 2014
  - Fundraising and Finance – Scheduled for October 4, 2014

There have been subsequent activities and meetings after these events. Additional sessions are currently being explored.

- A list of vendors that Monthly Meetings have used for services in the care of our properties and assets is being developed. This list will be available as a resource to Friends.
- We also offer a growing “Resources” section on our website (which is supported and maintained by our Coordinator) to support volunteers in their administrative responsibilities.

Please email us at [coordinator@westernquarterquakers.org](mailto:coordinator@westernquarterquakers.org) if you have ideas about how we could improve the operational support we offer to constituent meetings.

### **3. Quarterly Meeting Programs**

- The Coordinator supports and coordinates Quarterly Meetings hosted by each of our constituent Meetings on a rotating basis. We provide additional support to our smaller Meetings if and as needed, including developing a pool of “community catalysts” who will make themselves available to help support smaller Meetings. [If you’d like to serve as a community catalyst, email us at [coordinator@westernquarterquakers.org](mailto:coordinator@westernquarterquakers.org).]
- The Coordinator also provides assistance with activities initiated within individual Meetings that are hoped to engage Friends from throughout the Quarter (and beyond). In November of 2013, we supported the organization of a workshop on *Contemplative Spirituality and Worship* at London Grove Meeting. A follow-up workshop is being co-organized for 2015 by London Grove and Kennett Friends Meetings. We also worked with individuals in London Grove Meeting in the planning of a *Tour of Meetings* held July 19 and 20.
- Another program in the planning stages is an International Peace Day program on September 21 (co-sponsored by Kennett Friends Meeting and Western Quarter). Friends from each meeting in the Quarter are invited to participate in the planning. Email us at [coordinator@westernquarterquakers.org](mailto:coordinator@westernquarterquakers.org) if you are interested in joining.

### **4. Outreach and Communications**

- The Coordinator set up and maintains a new website, [westernquarterquakers.org](http://westernquarterquakers.org), to support outreach efforts with a simpler, more professional design. Our Meetings are displayed clearly and attractively with information about their locations and times of worship, and contacts.
- We release a monthly e-newsletter and a quarterly print newsletter sharing stories and events in the life of our neighborhood of Meetings.
- Our website has a blog and a versatile events page so friends can stay up-to-date on our events without having to wait for the next newsletter. Email us at [coordinator@westernquarterquakers.org](mailto:coordinator@westernquarterquakers.org) if you have events or stories to submit.

## **Financial Matters**

### ***Why is it important to support Western Quarter?***

Monthly Meeting support of the Quarter allows us to support the 11 Monthly Meetings with programs, coordination and communications. When you give to the Quarterly Meeting you support everything that is done to support and nurture vibrant Monthly Meetings.

We had a small deficit in FY14 and anticipate a larger deficit in FY15 (ending June 30, 2015). While we are working to find ways to reduce costs, we don’t want to reduce the ways in which we support the life of our local Quaker communities. We are therefore requesting that Monthly Meetings increase their covenant contributions to the Quarterly Meeting to ensure sufficient annual operating costs.

### ***How is Western Quarter funded?***

On an annual basis, each Monthly Meeting makes a contribution (a “Covenant”) to the larger Quaker community (i.e., Western Quarter and PYM).

Monthly Meetings designate some portion of this covenant for Western Quarter and some portion for PYM.<sup>1</sup> Western Quarterly Meeting does not solicit individual contributions but relies entirely upon covenant income from our eleven Monthly Meetings.

### ***What is the “unified budgeting process”?***

The Unified Budgeting Process was initiated in the 1990s as an experiment and approved as a Quarter policy/practice several years later. It is in place only for Monthly Meetings associated with Western Quarterly Meeting.

In our Unified Budgeting Process, Monthly Meetings collect money from their members for their own annual operating budgets, for the Quarterly Meeting’s operating budget, and for the Yearly Meeting’s annual budget. Monies for the Quarter and PYM are forwarded to the Quarter.

Western Quarter keeps its designated portion and forwards the rest to PYM. Monies directed to PYM include funds for both the Covenant (to PYM) and its Annual Fund.

While part of the benefit of the Unified Budget Process was keeping things simpler for Meetings (i.e., fewer financial transactions), its larger intention was to foster a sense of mutual responsibility for one another as a community of Meetings. There was recognition that Meetings varied by size of membership and resources. The goal was that larger Meetings would assume a disproportionate share of the financial costs – i.e., a level of support beyond simple differences in giving arising due to the size of a Meeting. In other words, the goal was that larger more stable Meetings would assume responsibility for smaller, less stable Meetings. There was also hope that this sense of responsibility would extend beyond (mere) finances.

Another aspect of this “unified system” was that the Yearly Meeting was not permitted to solicit the members of WQ’s Monthly Meetings for contributions to its Annual Fund. Since that time, two Meetings - London Grove and Kendal – have invited PYM to solicit its members.

The Unified Budgeting Process is a topic of discussion that we hope Meetings will undertake. Have the goals and intentions been realized? Are they still relevant to us as a Quarter? Do our current practices around budgeting (at both the Meeting and Quarter level) reflect these goals and intentions? Should we (as a Quarter) continue our process of receiving monies from Meetings and forwarding those monies to PYM?

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<sup>1</sup> We have one Meeting in Western Quarter that chooses to provide financial support only to the Quarter.

We recognize that a discussion of this Unified Budgeting Process is a larger conversation that may continue for some time. We are asking Monthly Meetings to increase its support of the Quarter in its next budget year.

***What is the difference between the covenant income that is directed to PYM and PYM's Annual Fund?***

Covenant income is a primary source of income that the Yearly Meeting relies on for its annual operations. Monthly Meetings send a certain amount of money out of their own operating budgets and investment income to the Yearly Meeting. The yearly meeting set a goal for last year of \$1.25 million in covenant income from monthly meetings.

Annual fund income is another source upon which the Yearly Meeting relies on for its annual operations. It conducts an annual fund campaign each year, inviting individual members (and some Meetings) across the Yearly Meeting to make one (or more) contributions. The Yearly Meeting had as a goal to raise \$450,000 for its Annual Fund that ended June 30, 2014.

Two of our 11 Monthly Meetings (Kendal and London Grove) currently participate in PYM's Annual Fund by allowing PYM to solicit its members. Other Meetings receive similar information from PYM but are not solicited in those mailings. *[PYM had indicated that they would like these 9 Meetings to reconsider this restriction.]*

Of the monies that PYM receives from Western Quarter, PYM designates some as Covenant revenue and some as Annual Fund revenue. The history of how this allocation was determined is unknown and cannot be determined. Some Monthly Meetings in the Quarter may have (at some point) designated how much should go towards the Covenant versus the Annual Fund.

***Does PYM set an amount for Monthly Meetings to contribute?***

Philadelphia Yearly Meeting does not set a particular amount for a Meeting to contribute. There is no longer a "quota system" to calculate financial support for PYM. Recently, PYM has simply estimated the percentage increase in its next operating budget and asked Monthly Meetings to increase their covenant by that percentage.

While PYM no longer requests financial support based on a membership, it has continued to use income per capita as an analytical tool. Some may see "Income per capita," or income per active adult member, as an attractive method for arriving at a goal of financial support. Friends should be cautious, however, that this method may be perceived as a continuation of the old quota system. It also doesn't acknowledge the varied capacity for giving that exists in most Meetings.

***How much should we give to the Quarterly and Yearly Meetings?***

Each Monthly Meeting must determine its level of financial support for the Quarter and the Yearly Meeting. Presently, with the exception of Kendal and London Grove Meetings, the Yearly Meeting is not permitted to solicit directly the members of our Monthly Meetings for contributions to the Annual Fund. Therefore, members of Meetings in WQM are asked to be

mindful that their individual contributions support 3 entities - their own Meeting, the Quarter and the Yearly Meeting (with PYM support at a level that includes both Covenant and Annual Fund revenues).

Using “income per capita” as a benchmark, PYM suggests that Meetings begin their calculations with the following information in mind:

Last year, the Yearly Meeting budgeted \$1.25 million for covenant income and this year it has budgeted \$450,000 for annual fund income. Therefore, the total approximate covenant and annual fund income to the Yearly Meeting equals \$1.7 million. This figure divided by the total number of active, adult members of Yearly Meeting (9,486) equals \$180.00 per person.

When you consider the total number of active adult members of Western Quarter (approximately 900 people) in light of the Quarter’s annual operating budget, you can add another \$56.00 to \$180.00.

Meetings in Western Quarter could, therefore, target approximately \$236 per member. London Grove and Kendal Meetings might consider a number less than this figure given their members are invited to participate in the Annual Fund campaign.

Monthly meetings will also need to add their own operating budgets, supplemented by any investment income, to the per capita figures above when determining exactly how much it might request from each of its members.

Please remember that this information is not a formula for support of the Quarter or the Yearly Meeting but a tool to think about what may be comparable to other Meetings.