

Q4 and ANNUAL REPORT FY2025 (Q4 is April - June)

FY25 is July 1, 2024 - June 30, 2025

Summary Quarter 4 Income and Expense vs. Budget:

	<u>Actual Q4</u>	<u>YTD</u>	<u>Budget</u>	<u>YTD % of Budget</u>
Total Income	\$50,352.51	\$177,126.32		
Less PYM Covenant Collected	(\$29,782.50)	(\$116,406.50)		
Less Restricted/ Pass Through Funds*	(\$9,233.00)	(\$18,465.26)		
Net WQM Operating Income	\$11,337.01	\$42,255	\$39,036	108%
Total Expenses	\$125,967.40	\$175,377.85		
Less PYM Covenant Paid Out	(\$116,406.50)	(\$116,406.50)		
Less Restricted / Pass Through Funds*	(\$0)	(\$21,403.60)		
Net WQM Operating Expenses	\$9,560.90	\$37,567	\$39,036	96%
Net Operating Income	\$1,776.11	\$4,687.25		

Notes:

1. For FY25, we received greater income than budgeted, and our expenses were less than budget.
2. Income was 108% of budget, and expenses were 96% of budget. We end the year with a \$4,687 surplus, which the treasurer recommends to be used to replenish our WQ reserves - either the WQ Meeting Reserve Account, or the Historic Properties Reserve account. **Please advise.**
3. Restricted / Pass Through Funds income includes distributions from Friends Fiduciary Corp. (Checks for the June 2025 distribution to London Britain Meeting, Penns Grove Property, Parkersville Property, and Parkersville Bequest were put in the mail on July 10 so the Q4 payout is not reflected above)
4. Restricted / Pass Through Funds expenses also includes payment to TBS for exterior assessment of London Britain Meeting. The funds for this expense came from the WQ Historic Properties Reserve account.
5. **See attached FY26 proposed budget for FY25 actuals, and FY26 proposed budget. Please review and approve.**

Detailed Activity - Western Quarter - Q4

WQ Income	
WQM Covenant Income from Monthly Meetings	\$9,080.50
Citadel Interest Income	\$735.42
FFC General Unrestricted Fund Distribution	\$1,279.51
FFC Distribution for Fallowfield Orthodox Burial Ground	\$241.58
PYM Covenant Income from Monthly Meetings (Note: these are "Pass-Thru" and not part of WQ Budget)	\$29,782.50
FFC Distribution for Restricted Funds (Historic Meetings, William Jackson, John Woolman) - these are "Pass Thru" not part of WQ Budget	\$9,233.00
Total Income	\$50,352.01
WQ Expenses	
Payroll, Tax, Workers Comp Insurance	\$8,123.40
Newsletter, Office expenses	\$534.86
Quarterly Meeting Sessions	\$352.64
Donation to Friends Home elevator campaign	\$500.00
Fallowfield Orthodox Burial Ground Maintenance (mowing)	\$50.00
PYM Covenant sent to PYM (Note: these are "Pass-Thru" and not part of WQ Budget)	\$116,406.50
Total Expenses	\$125,967.40
WQ Net for Q4 (excluding "Pass-Thru" PYM and FFC distributions)	\$1,776.11

Fund Balances available for WQ to use (additional restricted principal balance held at FFC for William Jackson & John Woolman Funds):

Fund	Balance	FY25 Activity
William Jackson Educational Fund	\$5,586.17	FFC distributions to fund of \$1,571.42 in FY25; Total of \$3,900 disbursed in education grants to 6 children in June 2025
John Woolman Traveling Ministers Fund	\$4,343.57	FFC distributions to fund of \$585.99 in FY25; No grants disbursed in FY25
Historic Properties Reserve	\$11,750	\$13,250 paid to TBS for exterior assessment of London Britain Meeting House in FY25
Western Quarterly Meeting Reserve	\$25,000	No activity in FY25

Minute on U. S. attack on Iran

Approved by Hockessin Friends Meeting - Seventh Month 6th, 2025

To Western Quarterly Meeting of the Religious Society of Friends:

The members of Hockessin Friends Meeting feel compelled to express our deep concern over the action willfully taken by the leaders of our country that may be the first step toward another virtually endless war, despite having only recently extricated ourselves from another. As a religious community historically committed to peaceful settlement of global differences **we are obligated to object**. We urge the other Meetings of the Quarter to join us in communicating our repudiation of this military action to Philadelphia Yearly Meeting in the interest of creating a broadened advocacy for peaceful resolution of this still resolvable conflict and in endorsing the vigorous actions of the Friends Committee on National Legislation condemning the government's choice to join, rather than abstain, from combat.

Minute of appreciation for Juneteenth 2025 program

Western Quarter minutes its sincere appreciation for tonya thames taylor's vision, extensive preparation and expert facilitation of the Juneteenth event held at Kendal Crosslands on 22 Sixth Month 2025. She encouraged everyone in the Quarter to read the book ***Bayard Rustin: A Legacy of Protest and Politics***, edited by Michael G. Long. She then designed and prepared all the elements for the event--the flyer, discussion questions, the list of outside articles and videos accompanying the reading guide--which contributed to a large turnout and lively discussion. The book discussion attracted more than 30 people not only from Western Quarter, but also Caln Quarter and Salem Quarter. Friends were enriched by and indebted to tonya for this ministry to our community.

Report of the Friends Home in Kennett for calendar year 2024 for Western Quarterly Meeting.

The mission of the organization continues to guide the board and staff of the Friends Home in Kennett:

Mission Statement: The Friends Home in Kennett is a non-profit organization dedicated to providing quality care in a homelike atmosphere for older men and women of modest means. We encourage independence and we respect the individuality and dignity of all in keeping with the values of the Religious Society of Friends.

Value Statement (added 2023)

Friends Home in Kennett has been home to seniors in our community for over 120 years. The way of living at Friends Home is guided by the Quaker values of simplicity, peace, integrity, community, equality, and stewardship. In these past 5 years, Friends Home of Kennett has expanded on these values by incorporating the Montessori philosophy of adapting our physical and intangible environments to encourage optimal independence for all our residents.

This lifestyle is reflected in our day-to-day operations by including residents with the planning and preparation of meals, developing the social calendar, and finding opportunities for our staff and residents to both benefit and give back to the Kennett Square community. Friends Home has been able to offer our residents numerous opportunities utilizing the community right outside our doors. Friends Home in Kennett strives to maintain an environment for both our staff and residents inspired by the words of Maya Angelo "People will forget what you said but they will never forget how you made them feel."

Board Update:

Two board members, Elaine Amoss (termed out) and Latoya Myers (resigned) since last year's report. The board added 2 new members Erin Parker Miller, Angelo Fontanazz in 2024. The officers remain the same.

The 5-year strategic plan developed in 2022 continues to guide the Friends Home progress and growth. The capital campaign for the Friends Home Elevator was successful and the funding goal was fully met

Capital Improvements

The elevator project construction began in 2023. The funds needed are in place, but we are challenged by the general contractor's schedule. The project is currently not completed. Alternate solutions are being investigated.

The HVAC system is currently being renovated. It is projected to take a full year to complete. The work is divided into 17 3-week phases and has been progressing well. The projected cost is close to \$3,000,000 dollars. Funding sources are being investigated.

The renovation of the art/garden room has been completed and in use. We have artists coming weekly for jewelry making, pottery, wood working, painting and drawing.

Operations:

Staffing

We have had some changes with department heads due to retirement, death and change in careers choice. Currently, I am pleased to report we have a strong management staff, and all department head positions are filled. The clinical staff is intact, and we have eliminated the need for agency staff.

Resident Life

The Friends Home has an integral relationship with the Senior Center, YMCA, Longwood Gardens, Rotary Club, library, Calabrese Performing Arts studio, Yorklyn Center for Creative Arts and several local schools in our community. Our volunteer program was also able to re-open this year. The Friends Home residents were also able to volunteer their time in the community at the local After the Bell program and with the annual backpack contribution program run by the Longwood Rotary.

The Montessori program continues to grow in both interest and implementation. We have presented our program to other Quaker communities and the FSA. Our Gold Certification continues to be delayed due to staff turnover in the Community Life Department. The department is now fully staffed, and the Montessori training is due to begin July 2025.

Finances:

Our average census for Friends Home in 2024 was 37.3 below budgeted census of 38. The average census for Linden Hall was 18.3 which was above budgeted census of 18. Our investment account, valued at \$8,526,457 million at year end, continues to provide support to the Home. The Spending Rule from the Investment Account allows a 3% budgeted spending allocation, which we utilized.

Grants and budgeted funds have also enabled Friends Home to provide financial support to residents, which in 2024 totaled just under \$67,000. We did not have any resident denied assistance in 2024

Goals for 2024 (progress in red)

1. Obtain my AL administrator License as a first step **completed**
2. Pursue HVAC replacement plans **started 3/25**
3. Eliminate use of agency staffing **achieved**
4. Obtain Montessori Certification-**delayed due to staff turnover. Goal resumed formal training 7/2025**

Goals for 2025

1. Obtain Montessori Gold Certification
2. Pursue the feasibility of expanding Friends Home Independent Living (IL)Capacity

3. Pursue viability of converting rooms in the Personal Care (PC) Building to a secure dementia unit
4. Provide training to PC staff to allow for the care and accommodation of residents with minimal to moderate mobility needs
5. Obtain my medication management training certification to ensure Friends Home has at least 2 employees with this certification to ensure our regulatory compliance.

Thank you:

We continue to be thankful for the support and concern of the Monthly Meetings and individuals of Western Quarterly Meeting. Even though Friends Home is no longer owned and managed by Western Quarter, we still benefit from the “care relationship” with the Quarter. Thank you!

**Sincerely,
Christine McDonald, ED**

June 13, 2025

Nikki Mosgrove, clerk
Christie Duncan-Tessmer
Philadelphia Yearly Meeting
1515 Cherry St
Philadelphia, PA 19102

Dear Nikki and Christie,

The following minute is from the April 27, 2025 minutes of Western Quarterly Meeting.

Friends approved the following minute:

Western Quarterly Meeting approves of the spirit-led action of Philadelphia Yearly Meeting and other yearly and monthly meetings in the lawsuit of *Philadelphia Yearly Meeting of the Religious Society of Friends et al. v. U.S. Department of Homeland Security and Kristi Noem*.

Walking cheerfully with you,



Margaret Walton, clerk, Western Quarterly Meeting
Deb Wood, coordinator, Western Quarterly Meeting
MIW dw