2022 Operating Budget Notes

Financial Services Committee (FSC)

Operating Budget Overview

Operating Budget Process

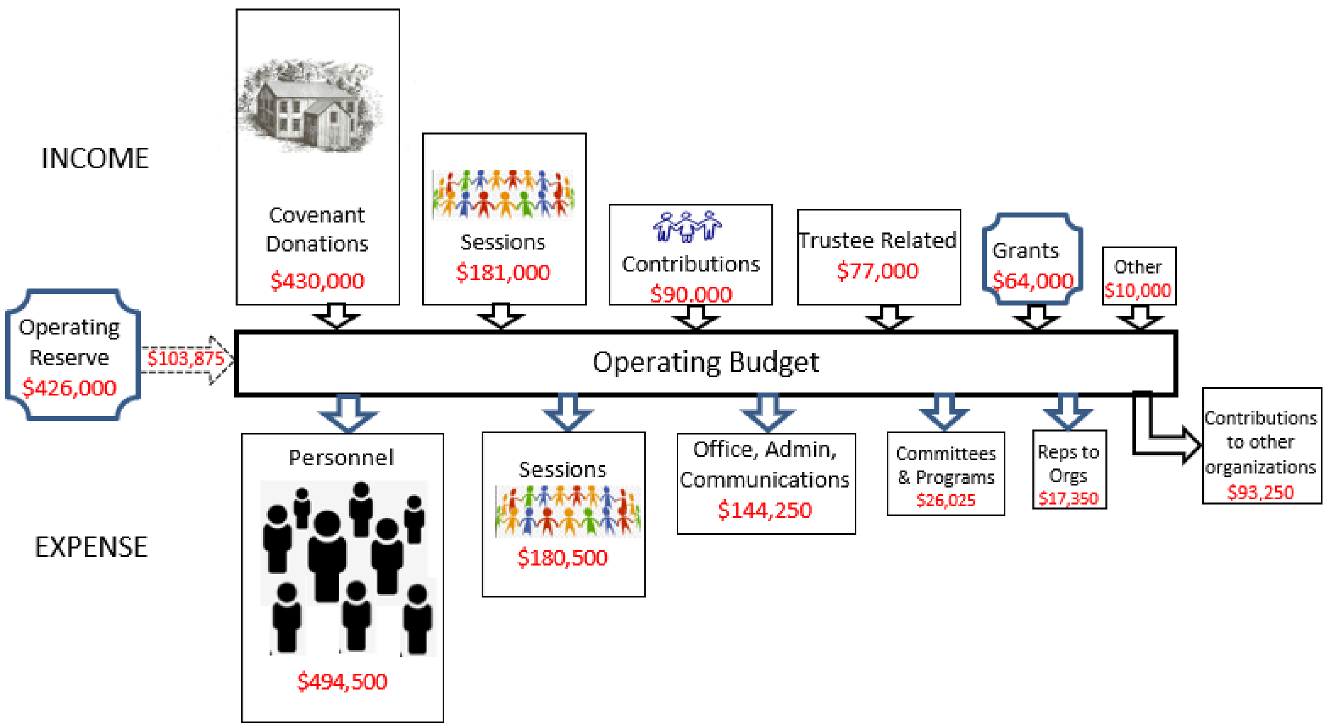
The operating budget is the total amount of money that is planned to be spent in a given year to maintain general operations. It is only one part of the overall financial picture of the Yearly Meeting.

The Financial Services Committee (FSC) is responsible for preparing the operating budget. These are the steps:

- Gather information about projected expenses from Yearly Meeting committees, general secretary and staff, and minutes adopted by the Yearly Meeting.
- Vet the expense requests for rationale and consistency with previous expenses and prepare budget notes to document the expense. The requestor approves the notes; FSC does not judge the request.
- Solicit input on income from monthly meetings, committees, staff, and Trustees.
- Prepare a draft budget and budget notes for review at *Budget Saturday*, a meeting open to all.
- Make changes as necessary given the discussion at *Budget Saturday*.
- Propose the budget at a business meeting during Fall Sessions.

Friends approve the budget OR a process for an interim budget is triggered so that Yearly Meeting functions can continue until a new budget is approved.

Graphic View



2022 Approved Budget	
Total Income	$852,000
Total Expense	$955,875
Surplus/Deficit	($103,875)
Operating Reserve	
Year End 2021 Estimate	$425,957
Year End 2022 Estimate	$322,082

Operating Budget Income

Income	2020 Revised Budget	2020 Actual Year-end	2021 Approved Budget	2022 Approved Budget
Covenant Donations	400,000	440,797	430,000	430,000
Outside Grants	64,000	65,000	64,000	64,000
Contributions - Unrestricted	40,000	38,016	50,000	50,000
Contributions - CYYA		1,230	20,000	20,000
Contributions - ARCH	10,000	20,043	20,000	20,000
Trustee and Fund Distributions	68,900	70,371	68,900	77,000
Mortgage Payments	13,320	13,318	13,320	-
Sessions	17,250	17,975	276,500	181,000
Programs/Other	30,000	20,283	10,000	10,000
Total Income	**$643,470**	**$687,034**	**952,720**	**852,000**

<u>Covenant Donations</u>
Contributions from monthly meetings are the largest income line in the operating budget. Called Covenant Donations as meetings are asked to confirm the contribution for the following year.

<u>Outside Grants</u>
The Yearly Meeting applies for grants and receives funding from other organizations to help support specific areas of operations. The major grant is from the Friends Foundation for the Aging (FFA) and covers a major portion of the operating expenses for the ARCH (Aging Resources, Consultation, and Help) program.

<u>Contributions</u>
In addition to covenant donations from monthly meetings, Friends and Meetings contribute individually. Contributions can be for overall operating expenses or can be designated for ARCH (Aging Resources, Consultation, and Help) staff and programs or for CYYA (children, youth, and young adults) staff and programs.

<u>Trustee Related</u>
The Yearly Meeting Trustees manage the assets of several invested funds. The sources of the funds are bequests and other contributions from Friends and income from the sale of assets no longer needed. Some of the funds are designated for specific uses; others can be used for any purpose. This category includes:

- Distributions from funds that can be used for any purpose or for a purpose consistent with operations.
- Surcharge on all the funds for a fair share of administrative expenses, like bookkeeping and insurance.
- Income from a mortgage from the sale of a laid down Meeting property; discontinued in 2022.

This category also includes a distribution of about $4000 from a New York Quarter invested fund.

<u>Sessions</u>
The Yearly Meeting holds three sessions each year for the body to gather. The income from sessions is generally sufficient to cover the direct costs of sessions.

The 2021 budget assumed the Yearly Meeting would gather in-person; instead, all 2021 meetings were held online. The 2022 budget assumes in-person for spring and summer and online for fall.

<u>Other Income</u>
While sessions are the major gatherings sponsored by the Yearly Meeting, there are several other programs led by staff and committee volunteers. Some of the program expenses are offset by contributions from attendees.

Operating Reserve

The operating reserve is the accumulation of cash from years when the Yearly Meeting has a surplus and the reduction of cash from years when the Yearly Meeting has a deficit. The reserve can be used to make up for a projected deficit in the operating budget.

Operating Budget Expense

Expense	2020 Revised Budget	2020 Actual Year-end	2021 Approved Budget	2022 Approved Budget
Personnel	430,700	432,961	513,000	494,500
Office Support	50,500	41,609	58,000	75,000
Administration	47,770	43,374	52,943	53,000
Publications and Communications	22,500	16,254	16,000	16,250
Sessions	11,200	2,294	267,900	180,500
Contributions to Organizations	88,050	88,050	88,050	93,250
Reps to Organizations	9,650	2,661	17,400	17,350
Committees and Working Groups	24,740	10,246	19,075	20,025
Programs/Other	5,950	332	9,500	6,000
Total Expense	**$691,060**	**637,782**	**1,041,868**	**955,875**
Surplus/Deficit	**($47,590)**	**$49,252**	**($89,148)**	**($103,875)**
Operating Reserve	$47,000		$89,148	$103,875
Year End Operating Reserve		**$385,957**	**$296,809**	**$322,082**

Personnel
This is the major operating expense and includes staff salaries and benefits. The increase in the 2021 budget was related to support for children, youth, and young adults. The 2022 line is lower than the 2021 budget as the total additional funding for children, youth, and young adult programs was shown in this line in the 2021 budget.

Office Support and Administration
This category includes rental for the NYC office, office equipment, bookkeeping service, and insurance.

Publications and Communications
This category includes printed publications, on-line publications, and the Yearly Meeting website.

Sessions
These are the direct expenses associated with conducting sessions; the income from sessions is generally sufficient to cover the direct expenses.

Contributions to Other Organizations
There are three categories of organizations supported in the 2020, 2021, and 2022 operating budgets.

- Related Organizations – Oakwood and Powell House.
- Associations of Quaker Organizations – Friends General Conference (FGC), Friends United Meeting (FUM) and Friends World Committee on Consultation (FWCC).
- Council of Churches organizations: New York State and New Jersey.

For 2022, Witness Coordinating Committee (WCC) requested the addition of three affiliated organizations – American Friends Service Committee (AFSC), Friends Committee on National Legislation (FCNL), and Quaker Earthcare Witness (QEW).

In addition to the contributions to organizations named in the operating budget, contributions to other organizations come from WCC and the committees under the care of WCC, the Lindley Murray trust fund, and other invested funds under the care of the Yearly Meeting trustees.

Support of Named Representatives
This category includes allocations for the expenses of representatives to FGC, FUM, and FWCC.

Committees and Programs
Much of the work of the Yearly Meeting is done by volunteers working within the committee structure. The budget allocations are primarily for modest travel and related expenses. The cost of programs is generally offset by contributions from those attending the programs.

Income

Covenant Donations from Meetings

Contributions from monthly meetings are the largest income line in the operating budget.

In September, each meeting is asked to discern the amount they can contribute the following year and inform the Yearly Meeting of that decision. Less than half of the meetings can provide that information at that time as monthly meeting budgets are typically done later in the year. If the monthly meeting is not able to provide a commitment before fall sessions, a projection based on past donation history is used in formulating the budget. Additional information comes in from meetings as it is available.

In February, the office sends an email to meeting clerks and treasurers with the year-end treasurer reports. For meetings that have not yet provided the amount of the covenant donation, the FSC letter requests that information. The year end 2021 projection is based on the input received from monthly meetings.

2021 Budget	2021 Projected	2022 Budget
430,000	432,500	430,000

Over the past 6 years, most meetings have met their projected contribution; a few contributed more while some contributed less than the full projection. The overall amount has remained relatively steady since 2014 but represents a significant decrease from the receipts prior to 2009.

2008 Actual	2015 Actual	2016 Actual	2017 Actual	2018 Actual	2019 Actual	2020 Actual
478,616	435,070	432,387	434,751	417,339	428,712	440,797

The ability of a meeting to contribute varies widely. For 2020, 58 meetings contributed. About 10% of meetings contributed between $20,000 and $50,000, another 30% were between $5000 and $20,000, while the remaining 60% were less than $5000.

While some meetings are struggling financially, other meetings may be able to increase their donations in 2022. Some meetings and regions have invested funds and other sources of additional income.

Decline in Membership

There has been a significant decline in membership as recorded by the Yearly Meeting office. This has likely affected the ability of monthly meetings to contribute to the Yearly Meeting.

1980 Members	2000 Members	2019 Members
5,668	3,750	2,987

Grants from Outside Organizations

Outside Grants	2017 Actual	2018 Actual	2019 Actual	2020 Actual	2021 YE Proj	2022 Budget
FFA	84,000	69,000	64,000	64,000	64,000	64,000
Shoemaker	27,785	16,000	16,887	-	-	-
Other	5,000	-	-	1,000	10,000	
Total	116,785	85,000	80,887	65,000	74,000	64,000

NYYM applies for grants and receives funding from other organizations to help support specific areas of operations. Over the past several years, NYYM received significant funding from two major grant sources.

- The Friends Foundation for the Aging (FFA) helped fund the start of the ARCH (Aging Resources, Consultation, and Help) program and continues to provide a significant level of annual ongoing support.
- The Thomas H. and Mary Williams Shoemaker Fund focuses on renewing and strengthening the Religious Society of Friends. The multi-year grant helped fund staff support for children and youth as part of an initiative called the Vital Meetings Program. The first installment of $25,000 was received in 2016.
- The 2021 other grant was from a private foundation at the request of an individual.

Contributions from Individuals and Meetings

	2018 Actual	2019 Actual	2020 Actual	2021 Budget	2022 Budget
Contributions - Unrestricted	$64,517	$50,379	$38,016	$50,000	$50,000
ARCH - Aging Concerns	$2,980	$22,685	$20,043	$20,000	$20,000
CYYA - Children, Youth, and Young Adults			$1,230	$20,000	$20,000
	$67,497	**$73,064**	**$59,288**	**$90,000**	**$90,000**
Sessions - Pay-as-Led		$46,362	$17,630		
Sessions - Equalization Fund	$14,513	$2,170	$3,377		
Sharing Fund	$27,058	$25,077	$27,500		
	$41,571	**$73,609**	**$48,507**		
Total Other Contributions	**$109,068**	**$146,673**	**$107,795**		

Annual Operations Funds

In addition to covenant donations from monthly meetings, Friends and Meetings contribute individually.

Unrestricted

These are contributions that support overall operations. Some are recurring contributions received throughout the year; others are received from the end of year annual appeal. The Development Committee is responsible for the programs associated with these contributions.

The 2018 income included a matching grant and a onetime single contribution of $25,000.

Aging Concerns Fund – ARCH (Aging Resources, Consultation, and Help)

These are contributions designated to support the ARCH program. The Aging Concerns fund receives these contributions during the year. At the end of the year, the total operating cost of the aging concerns work is determined. The total cost in excess of grants and distributions to support the aging concerns work and contributions for ARCH products and services is then deducted from the Aging Concerns fund. If the fund balance is not sufficient to cover the excess cost, the remaining cost is covered as a normal operating expense. If the fund balance exceeds the excess cost, the amount over the excess cost remains in the fund.

CYYA Fund – Children, Youth, and Young Adults

The 2021 budget assumes that Friends and meetings will be able to indicate that their contribution is for support of staff and programs in support of children, youth, and young adults. At the end of the year, the total operating cost of the CYYA staff and programs is determined. The same process used for ARCH expenses is used to determine the amount moved to operations.

Other Contributions to Operations

In addition to the three contribution funds:

- Friends contribute to help others attend sessions – this is via the pay-as-led model.
- Some expenses of programs sponsored by committees are partially offset by contributions from attendees.

Contributions to Sharing Fund

Friends and meetings also contribute to the Sharing Fund and to individual witness committees under the care of the Witness Coordinating Committee (WCC). These contributions are not part of the operating budget.

Development Expense

The Development Committee budget supports fund raising appeals for all the contribution funds including the Sharing Fund.

Specific development costs for contributions to the Aging Concerns fund are minimal and come under overall administrative expenses.

An allocation is included in the WCC line in the 2022 operating budget to pay for a specific appeal for the Sharing Fund.

Trustee and Invested Funds Income

Trustees manage the assets of several invested funds. These assets come primarily from gifts and bequests; and from the sale or liquidation of assets no longer used by the Yearly Meeting.

Trustees invest the assets and determine the amount of the distributions from the invested principal. The goal is to maintain steady income for the recipients and preserve the purchasing power of the principal. The 2021 distribution was about 4% of the invested principal.

Trustee Related Income	Actual 2018	Actual 2019	Actual 2020	Budget 2021	Actual 2021	Budget 2022
NYYM Invested Funds Distributions	46,119	46,934	50,310	49,900	53,686	52,000
Administrative Surcharge	7,000	10,000	11,157	15,000	15,000	21,000
Other		15,000	4,706			
	55,426	74,939	66,173	64,900	68,686	73,000
NYQ Lafayette Fund Distribution	2,307	3,005	4,198	4,000		4,000
Total Trustee Related	57,733	77,944	70,371	68,900		77,000
Mortgage Payments	-	13,318	13,320	13,320	13,320	-

<u>Distributions from NYYM Invested Funds</u>

Some funds can be used for any purpose approved by the Yearly Meeting. The distributions from most of these funds and from funds that can be used for a purpose that is consistent with the activities funded by the operating budget are directed to annual operations.

<u>Administrative Surcharge</u>

Trustees designate a portion of the distributions of all the invested funds to pay for the administrative costs of managing the investments: expenses like bookkeeping, audit, and liability insurance. While the actual amount has increased significantly from 2018, the 2022 amount represents the fair value as discerned by the Trustees.

<u>Other Trustee Related Income</u>

The 2019 income included a transfer of $15,000 from the Trustee Reserve to be used to support a consultant documenting operating procedures. The 2020 income was a transfer of the 2019 balance in a fund under the care of the Committee for the Disbursement of the Mosher Fund. The committee was laid down in 2019 and is now a working group under the care of the General Services Coordinating Committee. Distributions from the Mosher invested fund are now directed to operations in support of publications expenses.

<u>NYQ Lafayette Fund</u>

The New York Quarter holds this fund and sends the distribution to NYYM for the training and support of members. There is no application for the distribution – it is typically received in the fourth quarter.

<u>Asset Income</u>

The Asset Income is the mortgage income from the sale of the Stamford-Greenwich meeting property sold in May 2013. The Trustees hold a mortgage until June 1, 2028. At Summer Sessions 2013, the Yearly Meeting approved that the principal be held for investment in a separate fund, the income from the fund be directed to the operating budget, and the mortgage receipts be added to the principal of the fund as they were received. To address an anticipated operating deficit, the Yearly Meeting at Fall Sessions 2018 approved that the mortgage receipts would be directed to operations for three years: 2019, 2020, and 2021. There is no need to continue this as the operating reserve is sufficient to cover any anticipated deficits in 2022.

<u>Drawing Down Principal from Invested Funds</u>

The 2022 operating budget does not include any income from the principal of invested funds.
There are two potential sources:

- The Yearly Meeting can draw down a significant portion of the principal of the funds currently directed to operations. Drawing down principal, however, would proportionally decrease the annual distribution.
- A significant portion of the principal is from the sale of properties and there is no requirement to preserve that portion of the principal. See minute 2019-07-31.

Operating Reserve

The operating reserve is the accumulation of cash from years when the Yearly Meeting had a surplus and the reduction of cash from years when the Yearly Meeting had a deficit. A review of the year-end treasurer reports since 2007 shows that, except for 2015, the Yearly Meeting ended the year with a surplus.

History of Surplus/Deficit

In years prior to 2017, the surplus was understated in the treasurer reports as a portion of the surplus was moved to funds. This practice was discontinued in 2017. The table below shows the actual surplus/deficit.

2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
$13,140	$4,919	$2,565	$626	$19,323	$41,352	$15,925	$11,943	$(10,748)	$36,059

The 2012 surplus was due to an increase of about $18,000 in budgeted covenant donations – one meeting sent the contribution after the books closed for the previous year.
The 2015 deficit was related to the cost overrun of the professional audit; against a budget of $15,000, the Yearly Meeting paid about $43,000 – a budget overrun of about $28,000.
The 2016 surplus was due to transferring about $21,500 from the Young Friends in Residence fund to the operating budget. The fund had been underused for several years.

The table below shows the actual surplus/deficit for the years 2017 to 2020 and the projected amount in the operating reserve at year end 2021.

	2017	2018	2019	2020	YE Proj 2021
Surplus/Deficit	$56,955	($35,195)	$79,250	$49,252	$40,000
YE Reserve	$300,650	$265,456	$336,706	$385,957	$425,957

The 2017 surplus was due to transferring about $10,500 from closed funds to the operating budget as it was determined that the mission of these funds should be in the operating budget. Most of the funds had been underused for several years. The surplus also included about $25,000 related to the suspension of the professional audit.
2018 was not actually a deficit year. The $40,000 deposit to Silver Bay for 2019-21 Summer Sessions will be credited in the last year of the contract so it is a pre-paid expense. Without this deposit, the 2018 year-end would be about $5,000 surplus even with the spring/fall sessions overrun of about $13,000.
The 2019 surplus was primarily due to unbudgeted contributions to the Aging Concerns Fund, an about $8,000 refund check from the medical insurance company, and a $15,000 transfer from the Trustee Reserve to be used to pay a consultant to document the Yearly Meeting operating procedures.
The 2020 surplus was related to the switch to online meetings because of COVID.

Amount Needed for Cash Reserve

Why? As a general guideline, the reserve should be sufficient to cover three months of expenses if a situation arose where there was no additional income during that period. The monthly expenses are about $60,000.

The primary source of operating income, covenant donations from meetings, does not come in evenly while expenses are typically more even. There are other dependable sources of income: the FFA grant comes in before the start of the year; invested fund contributions come in June and December of the current year. Many monthly meetings have a history of quarterly payments.

When? In recent history, the Yearly Meeting has not had a cash flow issue.

What if? The Financial Guidelines Document describes the process for handling the situation.

Expenses

Personnel

	2020		2021	2022
Personnel	Budget	Actual	Budget	Budget
Staff Salaries	347,000	352,669	414,000	370,000
Medical and Retirement Benefits	41,000	44,303	51,000	68,000
Other Wage Related Expenses	34,200	33,644	32,000	37,000
Staff Development	1,000	466	1,000	1,500
Staff Travel	7,500	1,880	15,000	18,000
Total Personnel	**$430,700**	**$432,961**	**$513,000**	**$494,500**

Yearly Meeting Staff

- The *General Secretary* oversees the work of the Yearly Meeting staff, serves on financial services, fundraising, sessions, meetings for discernment, and personnel committees, and provides support to monthly meetings in the areas of leadership, conflict, spiritual gifts, visitation, and more.
  This is a full-time position.

The Yearly Meeting includes the following office staff: (all are part time positions)

- The *Associate Secretary* supervises office staff, manages most office functions and assists the NYYM committees and monthly meetings. This position transitioned to part-time in 2020.
- The *Administrative Associate* maintains the records and handles all the financial transactions.
- The *Communications Director* produces the weekly online newsletter, the printed SPARK newsletter, and other communications about the spirit moving across the Yearly Meeting.
- The *Digital Communications Director* maintains the website and facilitates the use of online tools to support the committees and meetings doing the work of social justice and spiritual renewal.

The Yearly Meeting includes the following staff supporting direct outreach:

- The *ARCH Director*, a full-time position manages the ARCH (Aging Resources, Consultation, and Help) program which supports NYYM Friends through a network of part-time staff paid about 10 hours a month and assisted by several volunteer ARCH Visitors.
- The *CYYA (Children, Youth, and Young Adults) Community Director* is a new full-time position that assumes the responsibilities of the previous part-time Young Adult Field Secretary and adds support for children and youth.

Staff Salaries

Year	Soc Sec COLA	Salary Increase
2017	0.3%	3%
2018	2.0%	2%
2019	2.8%	2%
2020	1.6%	2%
2021	1.3%	2%
2022	5.9%	2-3%

The salary line for 2022 includes the new CYYA Community director position. The 2022 staff salary line is lower than the 2021 budget line as the additional $100,000 funding for children, youth, and young adults in the 2021 budget was all shown in the salary line and not allocated to the other Personnel lines or to the CYYA programs.

The Yearly Meeting strives to provide an annual increase to the salaries of permanent staff to ensure that staff salaries are comparable to salaries for similar responsibilities in other organizations. In 2022, some staff will receive a 2% increase while other staff will receive a 3% increase.

Medical Benefits

In 2020, the cost of medical benefits was offset by an $8,000 refund from the insurance company for excess premiums charged in the past. A $2500 rebate is expected for 2022 and 2023. Overall, cost of medical coverage is up by about 10% in 2022.

Current employees with a job description of 30 hours or more a week, receive 100% coverage for the employee and 50% coverage for a spouse. New employees will not receive spouse coverage.
Employees eligible for Medicare receive a stipend to offset some of their costs.

Retirement Benefits

All permanent employees are eligible for the pension plan; the Yearly Meeting matches up to 5% of employee contributions.

Staff Travel

The 2021 budget assumed that staff travel would resume in 2021 at the previous level. With all 2021 sessions held online, this line will end the 2021 below budget. The 2022 budget assumes travel for spring sessions and summer sessions. The increase from the 2021 budget is to support the travel of the new full time staff member.

Other Wage Related Expenses

This is estimated at 10% of the salary line.

Supplemental Staff Funding

Some of the personnel expenses are offset by grants and designated contributions.

ARCH Funding

ARCH (Aging Resources, Consultation, and Help) expenses are partially offset by an annual grant from the Friends Foundation for the Aging (FFA), by contributions to the Aging Concerns Fund, and by distributions from the Margaret Dietrich Fund, a Yearly Meeting invested fund designated for support of aging concerns. Some income is also received from ARCH programs and publications.

	2019 Actual	2020 Actual	2021 Budget	2022 Budget
Aging Concerns Fund	22,685	20,043	20,000	20,000
FFA Grant	64,000	64,000	64,000	64,000
Margaret Dietrich Fund	4,602	4,573	4,500	5,000
Total Grants and Funds	**$91,287**	**$88,616**	**$88,500**	**$89,000**

At the end of the year, the total operating cost of the aging concerns work is determined. The total cost in excess of grants and distributions to support the aging concerns work and contributions for ARCH products and services is then deducted from the Aging Concerns Fund. If the fund balance is not sufficient to cover the excess cost, the remaining cost is covered as a normal operating expense. If the fund balance exceeds the excess cost, the balance over the excess cost remains in the fund.

CYYA Funding

In the fall of 2020, the Yearly Meeting approved the establishment of a fund to help offset the expenses related to support of children, youth, and young adults. Individuals and meetings can contribute to this fund. At the end of the year, the total operating cost of the CYYA staff and programs is determined. The total cost is then deducted from the CYYA fund. Typically, the fund balance is not sufficient to cover the total cost and the remaining cost is covered as a normal operating expense. If the fund balance were to exceed the total cost, the excess over the total cost would remain in the fund.

	2020 Actual	2021 Budget	2022 Budget
CYYA Fund	1,230	20,000	$20,000

Ministry Funding

Distributions from invested funds restricted for ministry are directed to the operating budget in support of the work of the staff in line with the donors’ intentions. The amount of the distribution is about $3000.
The funds are Jesse Haines, Nathaniel Smith, and Women's.

Administration

These are the expenses related to the office in NYC under a rental agreement with New York Quarter which owns the building. This category also includes insurance and other administrative expenses.

	2020		2021	2022
Administration	**Budget**	**Actual**	**Budget**	**Budget**
Administrative Expenses	13,500	9,597	17,500	16,000
Liability Insurance	11,407	10,806	11,569	12,000
Rent and Utilities - 15th St Office	22,863	22,972	23,874	25,000
Total Administrative	**$47,770**	**$43,374**	**$52,943**	**$53,000**

The Administrative Expenses line includes about $8,000 in credit processing fees related to online contribution expenses. Some of this expense is offset by contributions when donors opt to pay the fees.
The Administrative Expenses line also includes communications infrastructure such as phone, internet, Zoom and web hosting. It also includes postage, office supplies, office volunteer support and miscellaneous expenses associated with running an office.

Office Support

	2020		2021	2022
Office Support	**Budget**	**Actual**	**Budget**	**Budget**
Office Equipment & Support	3,500	3,557	4,000	5,000
Temporary Staff/Consultants	15,000	2,818	22,000	34,000
Bookkeeping Service	32,000	35,233	32,000	36,000
Total Office Support	**$50,500**	**$41,609**	**$58,000**	**$75,000**

The Office Equipment & Support line includes monthly software licenses and related computer equipment.

The Yearly Meeting uses a bookkeeping service to keep the accounts in QuickBooks and create checks. The increased cost in 2022 is related to increased services related to employee payroll management.

Temporary Staff/Consultants

	2022
Temporary Staff/Consultants	**Budget**
Standard Operating Procedures	3,000
Summer Sessions Support	6,000
Children and Family Programs	11,500
Mentorship Program Transition	3,500
Consultant - Document Transition	3,000
Staff Support: Database, Website,	2,000
Consultant - Transition to New Website	5,000
Total Temporary Staff/Consultants	**$34,000**

The individual lines under the Temporary Staff/Consultants category vary as needed from year to year.

- The Standard Operating Procedures consultant was funded by a transfer from the Trustee Reserve Fund in 2019 and the work is still ongoing.
- The Summer Sessions Support line is for planning and running the technology to hold both online and hybrid meetings; hybrid meetings are those where some attendees are in-person and others are online.
- The Children and Family Programs are an expansion of programs:
  - continuing parent support groups similar to program in 2021 with more collaboration;
  - gathering information to understand needs of families and children through meetings and survey;
  - editing a newsletter focused on parents/children.
- The Mentorship Program Transition will provide consistent leadership as the Interim Young Adult Field Secretary leaves and the new Children Youth and Young Adult Community Director begins.
- The Document Transition is to move documents such as Faith & Practice and the Handbook to a more accessible format
- Staff Support is to help staff increase capabilities with the office database and the website.
- The website consultant is for assistance with the upgrade to a simpler and more widely used platform that will simplify the current process of posting to the website.

Publications and Communications

Publications & Communications	2020 Budget	2020 Actual	2021 Budget	2022 Budget
NYYM Publications	17,500	16,254		
SPARK			9,720	9,970
Yearbook			4,700	4,700
Advance Reports			1,100	1,100
Faith & Practice			480	480
ARCH Publications	5,000			
Total Publications & Communications	$22,500	$16,254	$16,000	$16,250

These are the expenses incurred in producing and distributing the SPARK newsletter, the Handbook, the Yearbook, the Advance Reports sent before summer sessions, and Faith and Practice.

This line does not include the cost of the Digital Communications Director or the Communications Director. Those expenses are included in the Personnel section of the budget. The expenses of the Communications Committee are funded from the General Services Committee allocation.

Faith and Practice helps ground us in our faith. Spark and the weekly emails publicize and promote witness activities across the Yearly Meeting. Minutes and reports from NYYM business meetings and committees are distributed via the Advance Reports before summer sessions and the Yearbook compiled after summer sessions. Copies of the Yearbook, sent to every meeting and everyone serving on a committee, includes personal contact information that is not stored on the Yearly Meeting website. The Yearly Meeting website includes digital versions of all publications.
The ARCH publications expense is related to design and printing of documents supporting the ARCH program. These costs are partially offset by contributions for the publications. The additional expense for ARCH publications was funded by a transfer of $5,000 from the balance in a fund under the care of the Committee for the disbursement of the Mosher Fund. The committee was laid down in 2019.

Supplemental Income for Publications
The publications expense is offset by about $4,000 in annual distributions from invested funds under the care of the Yearly Meeting trustees. Starting in 2020, the distributions are directed to the operating budget to cover expenses associated with printing and other communications expenses (Trustee minute - 2019.10.21.5).
This is interpreted as printing and circulating NYYM communications developing and sharing the principles of Quaker faith. The funds are the Henry H Mosher and Edward Underhill funds.

Programs/Other

Income
Some of the program expenses are offset by contributions.
This category also includes contributions for copies of publications like Faith & Practice.

Program/Other Income	2020 Budget	2020 Actual	2021 Budget	2022 Budget
ARCH Programs		$3,131	$1,000	$1,000
Young Adult Programs		$500		
Other Programs/Services	$10,000		$1,500	$1,500
Closed Funds	$5,000	$5,168		
Bequest		$7,567		
Miscellaneous Income	$10,000	$3,916	$7,500	$7,500
Programs/Other Income	**$25,000**	**$20,283**	**$10,000**	**$10,000**

Expense
There are several programs and gatherings led by staff and volunteers.
This category does not include the programs listed under Temporary Staff/Consultants on page .

Program Expense	2020 Budget	2020 Actual	2021 Budget	2022 Budget
ARCH Programs	200	153	200	500
Young Adult Programs	2,000	-	2,000	2,000
Youth Programs	2,000	178	2,000	2,000
Pastor's Conference	1,250	-	1,250	1,250
Miscellaneous Expenses			4,050	250
Total Program/Other Expense	**$5,450**	**$332**	**$9,500**	**$6,000**

Sessions

Sessions	2019 Budget	2019 Actual	2022 Budget		
Summer Sessions Expenses					
Summer Sessions Program	6,000	10,153	6,000		
Junior Yearly Meeting Program	14,245	11,686	15,000		
Bible Study & Worship	950	700	1,000		
Silver Bay Contract: Stays	185,000	227,988	150,000		
	206,195	250,528	172,000		
Summer Sessions Income					
Registration and Contributions	21,000	46,362	30,000	proportional to 2019 actuals	22%
Stays	185,000	214,656	142,000	proportional to 2019 actuals	94%
	206,000	261,018	172,000		
Spring/Fall Sessions	**2019 Budget**	**2019 Actual**	**2022 Budget**		
Program Expense	8,000	12,710	4,000		
Registration & Meals Income	13,500	14,984	9,000	half of 2019 plus 2021 estimated spring sessions	
Committee Expense					
Sessions Committee	2,500	2,414	2,500		
Junior Yearly Meeting Planning	2,000	2,335	2,000		
Committee Expense	$ 4,500	$ 4,749	$ 4,500		
	2019 Budget	**2019 Actual**	**2022 Budget**		
Total Sessions Expense	$218,695	$267,988	$180,500		
Total Sessions Income	$219,500	$276,002	$181,000		

The Yearly Meeting holds three sessions each year for the body to gather: spring weekend, summer week, and fall weekend. For the past several years, summer sessions have been held at the YMCA Silver Bay Association on Lake George. Junior Yearly Meeting (JYM) is the gathering of children and teens at summer sessions.

Because of Covid-19, Spring Sessions 2020 was cancelled, and Summer Sessions 2020 and Fall Sessions 2020 were held as virtual meetings. The 2021 approved budget assumed that Summer Sessions 2021 would be held in person with selected virtual participation and that attendance would be about the same as 2019. Instead, all sessions in 2021 were virtual. For meaningful comparison, the chart above shows the budget and actuals for 2019, the last year of in-person sessions.

The Yearly Meeting had a contract with Silver Bay for 2019 to 2021. Silver Bay waived the contractual obligations for 2020 and 2021 and moved the $40,000 deposit to the 2022 contract.

Through 2023, spring sessions will be hosted by Oakwood Friends School and fall sessions will continue to be virtual; this plan will be reviewed for 2024.

The JYM program line includes volunteer support and supplies for the summer program.

Sessions Income

The income from sessions has generally been sufficient to cover the direct costs of sessions. However, staff time, staff travel, and staff stays are not included in the expenses shown under the Sessions category. The Sessions budget also does not include the cost of temporary staff to handle logistics for summer sessions.

Starting in 2019, the Yearly Meeting assumed responsibility for collecting the income and managing the reservations at Silver Bay. 2019 was the first year the Yearly Meeting implemented pay as led for summer sessions; some paid more than the cost of the accommodations while others paid less. NYYM was able to cover the total cost with the income received.

Committees and Working Groups

	2019		2020		2021	2022
	Budget	Actual	Budget	Actual	Budget	Budget
General Services Coordinating Committee (GSCC)						
Coordinating Committee	300	49	300	-	300	800
NYYM Officers Expense	1,000	-	1,000		1,000	1,000
Aging Concerns Committee	775	-	775	4,852	775	775
Book Table Working Group			500	632	500	500
Development Committee	2,900	2,729	7,500	3,100	5,000	4,000
	$4,975	$2,778	$10,075	$8,584	$7,575	$7,075
Ministry Coordinating Committee (MCC)						
Coordinating Committee	1,000	590	1,000	285	1,000	750
Committee to Revise Faith and Practice	95	-	95	-	-	-
Ministry & Pastoral Care Committee	570	-	500	10	500	500
Powell House Committee	950	1,000	1,000	672	1,000	1,000
Youth Committee	950	98	1,000	-	1,000	1,000
Conflict Transformation Working Group	2,850	863	2,850	206	1,000	1,000
Outreach Working Group	5,000	-	3,000	250	2,500	-
Spiritual Nurture Working Group	1,920	555	1,920	-	1,200	700
Task Group on Racism	950	744	1,000	-	1,000	5,000
	$14,285	$3,850	$12,365	$1,423	$9,200	$9,950
Witness Coordinating Committee (WCC)						
Coordinating Committee	1,500	458	1,500	240	1,500	3,000
Contributions to Others	3,000	3,000				
	$4,500	$3,458	$1,500	$240	$1,500	$3,000
Meeting for Discernment	800	788	800	-	800	-
	$24,560	**$10,874**	**$24,740**	**$10,246**	**$19,075**	**$20,025**

The Yearly Meeting is organized by sections which coordinate the work of related committees and working groups. The allocation for the coordinating committee covers expenses of the coordinating committee and the committees and working groups that do not have a separate budget.

General Services

The GSCC line was increased to support a request from the Communications Committee which does not have a separate line in the operating budget.

The Book Table Working Group is the successor to the Committee for the Disbursement of the Mosher Fund. In addition to managing the book table at summer sessions, the precursor committee had donated books. The working group is currently focused on providing books to incarcerated Friends.

Ministry

The Bible Study leader for summer sessions is selected by MCC but is shown under Sessions expenses.

The increase in the Task Group on Racism line is to provide support for anti-racist training.

Witness

The WCC line in the 2022 operating budget is used to support committee expenses not directly related to specific witness work; for example, to fund expenses for a committee meeting at Powell House.
The WCC line was increased in 2022 to support the Sharing Fund appeal; the 2020 appeal expense was $1,603.

Meeting for Discernment

The winter Meeting for Discernment will be held virtually in 2022, so there are no associated expenses. There are no expenses for the meeting at summer sessions as this is covered under the pay-as-led model.

Contributions to Other Organizations

From Operating Budget

The table below shows the contributions to organizations that are proposed for the 2022 operating budget and the recent history of these contributions.

Contributions to Other Organizations	2018	2019	2020	2021	2022
Organizations Under the Care of NYYM					
Oakwood Friends School	$5,300	$5,300	$5,300	$5,300	$5,300
Powell House	$73,200	$75,700	$75,700	$75,700	$80,000
	$78,500	**$81,000**	**$81,000**	**$81,000**	**$85,300**
Associations of Quaker Meetings					
Friends General Conference (FGC)	$2,500	$2,500	$2,500	$2,500	$2,500
Friends United Meeting (FUM)	$2,500	$2,500	$2,500	$2,500	$2,500
Friends World Committee (FWCC)	$1,000	$1,000	$1,000	$1,000	$1,000
FWCC Section of the Americas	$300	$300	$300	$300	$300
	$6,300	**$6,300**	**$6,300**	**$6,300**	**$6,300**
Council of Churches					
NJ Council of Churches	$300	$225	$250	$250	$250
NYS Council of Churches	$300	$700	$500	$500	$500
	$600	**$925**	**$750**	**$750**	**$750**
Affiliated Organizations					
American Friends Service Committee (AFSC)		$225			$300
Friends Committee on National Legislation (FCNL)	$300	$700			$300
Quaker Earthcare Witness (QEW)	$300				$300
	$600	**$925**			**$900**
Other Named Organizations	$2,400	$1,750			
Total Contributions to Others	**$88,400**	**$90,900**	**$88,050**	**$88,050**	**$93,250**

Contributions From Other Yearly Meeting Related Sources

In addition to the organizations named in the operating budget, contributions to organizations are made from other sources within the Yearly Meeting. The table below shows total contributions made in 2020.

2020 Contributions to Others	Oper-ations	WCC & Witness	Lindley Murray	Other Funds	Total
Friends Organizations	$87,300	$27,374	$23,000	$63,207	$200,881
Other Organizations	$750	$12,034	$4,950	$0	$17,734
	$88,050	**$39,408**	**$27,950**	**$63,207**	**$218,615**
Grants to Monthly/Quarterly Meetings		$13,000		$4,800	$17,800
Scholarships		$8,700	$1,018	$7,480	$17,198
Grants to Individuals/Witness expenses		$4,206		$8,000	$12,206
	$88,050	**$65,314**	**$28,968**	**$83,487**	**$265,819**

Organizations Under the Care of NYYM

Oakwood Friends School

Oakwood Friends School was founded in 1796 by New York Quakers. From the website: *Oakwood Friends School, guided by Quaker principles, educates and strengthens young people for lives of conscience, compassion and accomplishment*.

Oakwood Friends School	2018	2019	2020	2021	2022
Operating Budget	$5,300	$5,300	$5,300	$5,300	$5,300
NYYM Invested Funds	$58,021	$57,600	$53,539	$60,820	$61,000
Witness Committees	$3,200	$2,000	$0		
Lindley Murray	$6,000	$6,000	$6,000	$5,000	
	$72,521	**$70,900**	**$64,839**		

The major portion of the NYYM contributions to Oakwood is from bequests. Other support comes from scholarships designated by Witness committees and from grants from the Lindley Murray fund.

The Yearly Meeting names 13 members of the 25-member board of Oakwood Friends School. There is no allocation in the operating budget for the appointee expenses to attend Oakwood Board meetings.

Powell House

Powell House is the conference and retreat center of NYYM and provides programs for meetings and their members and programs for youth and young adults. These programs foster spiritual growth after the manner of Friends and work to strengthen the application of Friends' testimonies in the world. An important part of this is Powell House service to youth and to young adults. Powell House is critical to our work with these younger F/friends as individual meetings often lack the critical mass to make effective service to these individuals possible. The Powell House facilities are also available for monthly meeting retreats.

Powell House	2015	2016	2017	2018	2019	2020	2021	2022
Operating Budget	66,000	66,000	73,200	73,200	75,700	75,700	75,700	80,000
Invested Funds	10,768	10,678	3,604	3,566	3,540	3,492	3,850	4,000
	76,768	76,678	76,804	76,766	79,240	79,192	79,550	84,000

The NYYM contribution is a major portion of the Powell House operating budget and helps support staff salaries. The increase in the 2022 operating budget contribution is an attempt to address the disparity in comparable value to the 2015 contribution. ($76,500 in 2015 is equivalent to about $89,000 in 2021 dollars.)

In addition to the operating budget and the invested funds, Powell House receives contributions from events at summer sessions and grants from Witness committees and the Lindley Murray trust fund.

Powell House	2018	2019	2020	2021
Witness Committees	$1,900	$0	$1,000	
Lindley Murray	$2,750	$2,550	$2,550	$2,550
Summer Sessions Events	$2,336	$3,803		

The Yearly Meeting names the members of the Powell House committee. The committee budget includes the appointee expenses.

Council of Churches

The Yearly Meeting names representatives to two state Council of Churches organizations: New York and New Jersey. The representatives are under the care of WCC. The contribution represents a proportional contribution.

The contribution in 2018 and 2019 was part of the $3000 WCC Donations to Others line in the operating budget.

State Church Organizations	2018	2019	2020	2021	2022
NJ Council of Churches	$300	$225	$250	$250	$250
NYS Council of Churches	$300	$700	$500	$500	$500
	$600	**$925**	**$750**	**$750**	**$750**

Connecticut and Long Island Council of Churches are other councils in the Yearly Meeting geographic area, but they do not currently have named representatives from NYYM.

Associations of Quaker Meetings (FUM, FGC, FWCC)

NYYM is a member of the following associations of Quaker organizations: Friends United Meeting (FUM), Friends General Conference (FGC), and Friends World Committee on Consultation (FWCC).

> From NYYM Summer Sessions 1973, Minute 57:
> *1. Friends are thankful that we are a united Yearly Meeting affiliated with both Friends General Conference and Friends United Meeting. We remind our constituent meetings and individual Friends that they are all members of both larger organizations, and we urge them to hold both in loving concern.*
>
> *4. The New York Yearly Meeting representatives to Friends General Conference, Friends United Meeting, and Friends World Committee for Consultation are asked to meet together annually to consider New York Yearly Meeting's role in the world family of Friends.*

<u>About FUM</u>

From the website: *Friends United Meeting is composed of 37 Yearly Meetings/Associations and several ministry centers in Africa, the Caribbean, North America, and Palestine. We are a collection of Christ-centered Quakers, embracing thirty-seven Yearly Meetings and Associations, thousands of local gatherings and hundreds of thousands of individuals. Our purpose as Friends United Meeting is clear—we are called to connect the global community of Friends. Together we become a dynamic fellowship that is a vital witness to Christ's abiding presence and love for the most vulnerable. Grounded in Christ, we are called to serve God's creation.*

<u>About FGC</u>

From the website: *FGC is an association of local and regional Quaker organizations primarily in the United States and Canada. Founded in 1900, FGC has grown from a voluntary organization of seven Yearly Meetings, created to hold a "general conference" every other year, to an association of sixteen Yearly Meetings, supplemented with regional groups and individual meetings. FGC continues to sponsor an annual Gathering of Friends.*

<u>About FWCC</u>

From the website: *The Friends World Committee for Consultation fosters fellowship among all the branches of the Religious Society of Friends. In the Americas, the Quaker community extends from the Arctic to the Andes, spanning a rich diversity of regional cultures, beliefs and styles of worship. Answering God's call to universal love, FWCC brings Friends of varying traditions and cultural experiences together in worship, communications and consultation, to express our common heritage and our Quaker message to the world.*

<u>Annual Contributions</u>

Since 2014, the annual contributions to these organizations have been stable. Before 2014, the Yearly Meeting contribution was significantly higher. In 1972, the contribution to FUM and FGC from the operating budget was $6000 each, equivalent to about $35,000 each in 2020 dollars; the 1972 contribution to FWCC was $1500.

	2000	**2005**	**2007**	**2009**	**2013**	**2014**	**2021**	**2022**
Friends General Conference (FGC)	10,000	9,000	8,000	7,000	5,000	2,500	2,500	2,500
Friends United Meeting (FUM)	10,000	9,000	8,000	7,000	5,000	2,500	2,500	2,500
Friends World Committee (FWCC)	4,500	4,500	4,000	3,500	2,000	1,000	1,000	1,000
FWCC Section of the Americas			150	150	150	300	300	300

In addition to the support in the operating budget, FUM receives about $3,500 per year from the distributions of an invested trust fund designated for FUM missions that is under the care of the World Ministries Committee.

Appointees to Associations of Quaker Meetings (FUM, FGC, and FWCC)

The maximum allowable number of representatives is based on the yearly meeting membership.

FUM

The Yearly Meeting names two representatives to the FUM board which meets in Indiana twice a year in triennial years and three times a year in other years. Prior to 2021, the Yearly Meeting named three representatives; current NYYM membership numbers allow two.

FGC

The Yearly Meeting can name up to 12 representatives to the FGC Central Committee; in 2021 there were six representatives. One representative is selected to represent NYYM at FGC Executive Committee, which meets two or three times a year at locations all over the country. Each representative is expected to serve on a subcommittee and attend at least one meeting a year.

The FGC Gathering is held annually; it is a spiritual nurture event. Since no business is conducted, there is no role for a Yearly Meeting representative and no funding is provided in the operating budget for named representatives to attend the event.

FWCC

The Yearly Meeting can name five representatives to FWCC. FWCC organizes its work through four section offices and a world office; NYYM is a member of the Section of the Americas and the Northeast Region of the Section of the Americas (Philadelphia, New York, and New England Yearly Meetings, plus eastern Canada). Named representatives attend the regional, section, and world gatherings.

Regional meetings are held as led; the cost is included in the budget in the year in which the meeting will be held. NYYM is the host for the 2020 regional meeting, but it will be held on-line so costs will be minimal. Section meetings are held every other year and are provided in the provision funds.

Appointee Expense

The table below shows the 2022 estimated travel and related costs to attend the 2022 meetings of associations of Quaker meetings. The table shows the 2022 estimated costs if the meetings are held in-person.

Attend Board/Section Meetings	Named	Average	Meeting	Total
FGC Central Committee	6	$400	1	$2,400
FGC Executive Committee	1	$400	2	$800
FUM Board	2	$450	3	$2,700
FWCC Regional Meeting	5	$360	1	$1,800
				$7,700

The 2022 budget provides the total cost for FGC, FUM, and FWCC appointees for in-person meetings. The budgeted allocation is not used when meetings are held online. While many representatives will pay for their own expenses, budgeting for full costs allows the Yearly Meeting to broaden and diversify representation.

Attend Board/Section Meetings	2019 Actual	2020 Budget	2020 Actual	2021 Budget	2022 Budget
FGC Committees	1,071	2,700	-	5,200	$3,200
FUM Board	3,933	2,700	301	1,800	$2,700
FWCC Regional Meeting	1,161	1,800	360	1,800	$1,800
Total Appointee Budget	**$6,165**	**$7,200**	**$661**	**$8,800**	**$7,700**

Provision for FUM and FWCC Gatherings Not Held Annually

An amount is set aside each year and held in reserve so there is sufficient money to support representatives in the year that the gathering is held. This supports smoother annual budgeting.

While many representatives will pay for their own expenses and consider it a contribution, budgeting for full costs allows the Yearly Meeting to broaden and diversify representation.

FUM Triennial

FUM holds a world-wide meeting every three years. The Yearly Meeting named six representatives to the 2020 triennial scheduled to meet in Kenya. FUM estimated the cost from the US at $3,500 per attendee or a total cost of $21,000. Funding was approved in the 2020 budget to provide for $10,500, half of the total attendee cost.

The 2020 FUM Triennial was cancelled. A zoom triennial was held in the summer of 2021. The next in-person triennial is scheduled for 2023 in Kenya. Although the Yearly Meeting can name up to eight representatives, the 2022 budget assumed six would be named.

FWCC Section of the Americas Gathering

Section meetings are held every other year. The 2021 meeting was a virtual meeting. The next meeting will be in 2023; location not yet named as of November 2021.

FWCC World Gathering

The next gathering is scheduled for 2024 in South Africa. The cost per attendee is about $3,000 for a total cost of $15,000 for 5 attendees. The World Gathering is not held every year; the current plan, according to the FWCC website, is not less than 3 years and not more than 10 years between gatherings. In a year in which there is a World Gathering, the Section of the Americas meeting is not held.

2022 Budget

The table below shows the estimated travel and related costs to attend the gatherings and the expected date and location of the gathering.

Gatherings from Provision Funds	Year	Location	Reps	Per Rep	Total
FUM Triennial Fund	2023	Kenya	6	3,000	18,000
FWCC Section of the Americas	2023	TBD	5	400	2,000
FWCC World Gathering	2024	S Africa	5	3,000	15,000
Total Cost of Attendance					**$35,000**

The table below shows the 2022 budget for the provision funds.

Provision Funds	YE 2020	2021 Budget	YE 2021	2022 Budget	YE 2022		
FUM Triennial Fund	3,540	6,200	3,540	7,250	10,790	18,040	available in 2023
FWCC Section of the Americas	2,598	-	2,598		2,598		
FWCC World Gathering	5,578	2,400	7,978	2,400	10,378	15,178	available in 2024
	$11,716	**$8,600**	**$14,116**	**$9,650**	**$23,766**		

The 2021 provision for the FUM Triennial restored the provision fund to the amount approved in 2020. As the meeting was held online, the 2021 provision was not added to the fund. The 2022 provision will provide full funding for six attendees in 2023 assuming the same budget allocation in 2023.

Assuming the same budget allocation in 2023 and 2024, the 2022 provision for the FWCC World Gathering will have about $15,000 available in the fund for use in 2024. This will cover the total cost for 5 attendees.

There is no need for a 2022 provision for the FWCC Section Gathering as the balance is sufficient to cover the full expenses of 5 attendees.

Need a policy on provisions – one suggestion is a pool for all gatherings not held annually that assumes that at least one third of the attendees will not need full funding, but guarantees that full funding will be available to those who request it even if the total exceeds the amount in the provision fund.

Other Affiliated Organizations

For 2022, Witness Coordinating Committee (WCC) requested that the operating budget provide the contribution to some of the Friends organizations under the care of WCC. Support for these organizations has been inconsistent in the past. Most recently, the 2018 and 2019 budgets included an allocation of $3000 for organizations under the care of WCC and WCC chose the organizations and amount of contribution.

In addition to a named contribution in the operating budget, individual witness committees and the Lindley Murray fund provide support for these and many other organizations.

<u>Criteria to include organizations in the 2022 budget</u>

NYYM as an entity is a constituent member of this affiliate organization, whereby the Yearly Meeting participates in governance, and the governance body includes NYYM representatives (and others).
Nominating brings names forward and the Yearly Meeting itself approves the nominations

<u>About AFSC</u>

From the website: *American Friends Service Committee is a Quaker organization devoted to service, development, and peace programs throughout the world. We work with people and partners worldwide, of all faiths and backgrounds, to meet urgent community needs, challenge injustice, and build peace.*
The Yearly Meeting names representatives to the AFSC board.

American Friends Service Committee (AFSC)	2018	2019	2020	2021	2022
Operating Budget	$0	$225	$0	$0	$300
Witness Committees	$700	$750	$0		
Lindley Murray	$2,500	$1,900	$1,900	$1,900	
	$3,200	**$2,875**	**$1,900**		

<u>About FCNL</u>

From the website: *Founded in 1943 by members of the Religious Society of Friends (Quakers), FCNL fields an expert team of lobbyists on Capitol Hill and works with a grassroots network of tens of thousands of people across the country to advance policies and priorities established by our governing General Committee*.
The Yearly Meeting names representatives to the FCNL board.

Friends Committee on National Legislation (FCNL)	2018	2019	2020	2021	2022
Operating Budget	$300	$700	$0	$0	$300
Witness Committees	$2,700	$750	$500		
Lindley Murray	$2,000	$1,900	$1,900	$2,100	
	$5,000	**$3,350**	**$2,400**		

<u>About QEW</u>

From the website: *Quaker Earthcare Witness (QEW) is the largest network of Friends (Quakers) working on Earthcare today. We work to inspire Spirit-led action toward ecological sustainability and environmental justice*.
The Yearly Meeting names representatives to the QEW board.

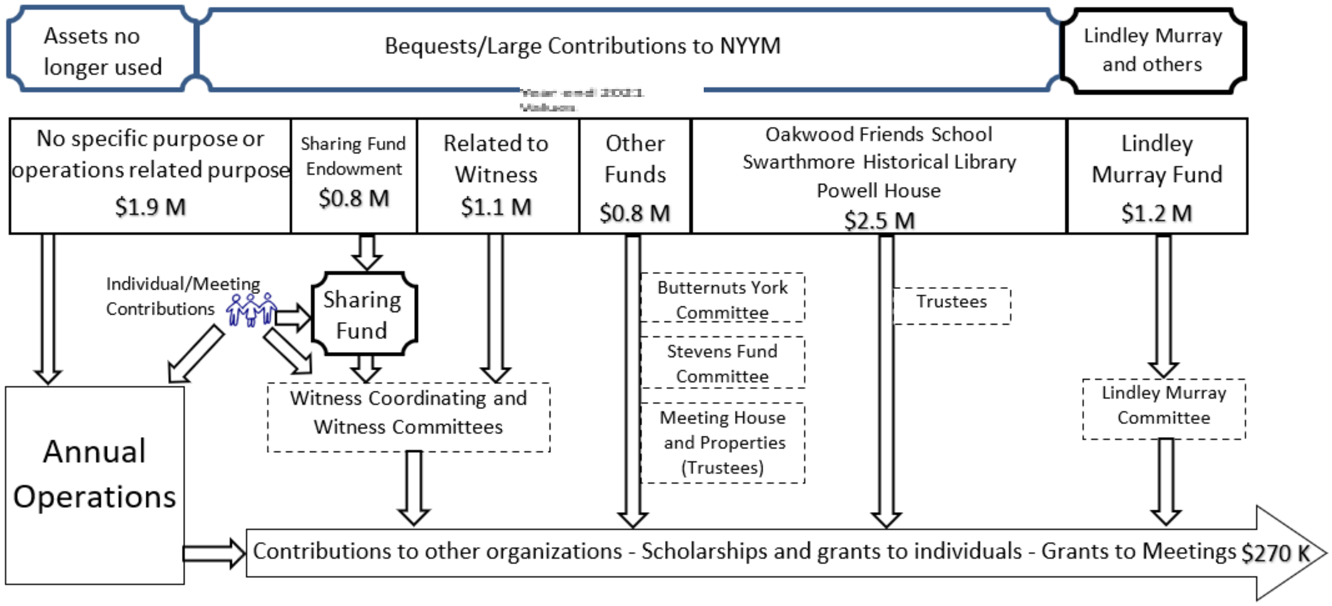
Quaker Earthcare Witness (QEW)	2018	2019	2020	2021	2022
Operating Budget	$300	$0	$0	$0	$300
Witness Committees	$200	$1,750	$500		
Lindley Murray	$0	$0	$0	$0	
	$500	**$1,750**	**$500**		

<u>Other Organizations Under the Care of the Witness Coordinating Committee (WCC)</u>

Several other organizations receive NYYM support that is initiated by WCC and the WCC committees and funded by the Sharing Fund. These organizations will continue to be handled this way pending the development of a comprehensive policy on support of other organizations in the Yearly Meeting operating budget. It is anticipated that this policy will inform the 2023 Yearly Meeting operating budget.

Total NYYM Support of Others

Trustees manage the assets of several funds. The source of the funds are bequests and contributions to the Yearly Meeting, income from the sale of assets such as laid down meetings, and contributions to the Lindley Murray fund. In addition to the distributions from the funds currently directed to operations, other distributions are under the care of various committees.



<u>Sharing Fund Endowment</u>

The Yearly Meeting received a bequest in 2009 and another in 2010, both designated for the Sharing Fund. The contributions were invested in a fund named the Sharing Fund Endowment. The distributions are directed to the Sharing Fund under the care of the Witness Coordinating Committee (WCC). WCC determines the allocations from the Sharing Fund to specific purposes and to the discernment of individual Witness committees.

<u>Specific Witness</u>

These are funds with a donor designation that matches the mission of an individual Witness committee. The distribution is directed to the individual committee.

<u>Other Funds</u>

Mahlon York – The bequest was "for educational or religious purposes" and directed that the Trustees first consider the needs of the meetings of Butternuts Quarter. Butternuts Quarterly Meeting appoints a York Fund Committee to recommend grant recipients to the Trustees.

Stevens – The bequest specified that all income "be applied toward supplying the necessities of life…to worthy ministers, missionaries, or other members of the Yearly Meeting who through age or other disability may be in need." A committee under the care of the Ministry Coordinating Committee recommends the recipients.

Meeting Houses and Properties –This fund was established in 2017 to help meetings with the expense of caring for their properties. Trustees manage the grant process and determine the recipients.

<u>Funds Designated for Others</u>

These funds were left to NYYM for a specific organization or purpose. Oakwood Friends School receives about 85% of the distribution. The Friends Historical Library at Swarthmore receives distributions from funds for "records preservation". Powell House receives a distribution from a fund for "educational purposes".

<u>Lindley Murray Fund</u>

The fund was established in 1836 with the residue of the estate of Lindley Murray. Over a century and a half, several other Friends contributed to the fund. The purposes of the Lindley Murray fund are expansive and include support of Native Americans and Blacks and assistance to the poor "*in any description and in any manner that may be judged proper*."

In 2020, the New York Female Association – a centuries old association founded by women members of New York Monthly Meeting to provide aid to girls and women in need – was declared dormant. The remaining assets of the fund were added to the Lindley Murray fund.