

Final Report

Permanent Board Working Group to Examine NEYM Clerking Structures & Practices May 2019

Introduction

In response to the charge of our working group, we have done extensive listening. We interviewed many Friends who are currently serving or have served in key clerking and treasurer roles within the last ten years, Friends who have done the work of nominating for these roles, as well as the Yearly Meeting staff who most directly interfaced with these leaders. We have also had some conversations with Friends who declined to serve in these roles as well as partners of those who have served, and have made attempts to find where these conversations are happening in other Yearly Meetings. Throughout this process we listened for common themes and trends that tell a shared story of our current leadership structures and culture, as well as our potential for growth.

In this report, we hope to hold up a mirror that reflects current dynamics as well as offer suggestions for how to move closer towards the healthy, fully inclusive Society that we long for. We acknowledge that some of our recommendations are hardly new but are rather a strong affirmation of work we have already begun. We also recognize that not all of our recommendations are the same size. Some possibilities that we lift up are straightforward, requiring few resources, and we therefore expect that they may be implement-able in the short term; others are aspirational and may take years of sustained effort to fully fund and enact. Although we are well aware that the Yearly Meeting does not have a magic wand, we believe that in order to adequately respond to the gap between our current leadership reality and the vision that we heard our community articulate, we need to operate from a place of possibility, not an assumption of limited resources.

While some individuals may have a particular part to play in implementing new practices due to their formal role, effective change depends upon shared responsibility. Living into the vision of these changes will require sustained corporate effort with participation at many different levels of our Yearly Meeting. We exhort the body to receive these recommendations with an open heart and an eagerness to join many hands in the work of improving our structural, financial, and cultural systems for supporting leadership service.

Overall Takeaways

Things as they now are in New England Yearly Meeting (NEYM)

Our leadership demographic does not fully reflect the diversity of our membership. As many are already aware, the key volunteer leadership roles in NEYM (by which we mean presiding clerk, clerk of Permanent Board (PB), clerk of Ministry and Counsel (M&C), and treasurer) are extremely demanding. They require many gifts and skills as well as a lot of time and flexibility. The dedicated Friends who serve in these roles are motivated by deep love for NEYM and are anchored by deep faith; but, they are also aware that their service is made possible due to their individual financial, household, and work situations. The bigness of our leadership roles – compounded by the lack of support that we give our leaders – greatly limits who can say “yes” to serving in this way.

In our exploration, it became clear that there are three interconnected areas where barriers to leadership emerge:

1. **Structure:** the way we structure roles to accomplish our shared work

2. **Finance:** the way we use our financial resources to support our shared work
3. **Culture:** the way we relate to our shared work and our leaders

To truly eliminate barriers and enable more Friends to serve as leaders, we need to bring a lens that integrates the structural, financial, and cultural changes required.

Structure

Observation

One considerable reason why our leadership roles are so time consuming is that NEYM's internal affairs are huge and complex. We have a tendency towards expanding our internal work. When we see a need or an issue to address, we add work (committees, work groups) without looking at the infrastructure support needed to accomplish this work well, or asking what should be laid down. Even when we ask what should be laid down, we often lack the structural mechanisms to approve these decisions or engage with resource prioritization questions in an efficient manner. We are afraid of change, particularly of letting go of old ministries that have outlived their context and are no longer fruitful or worth the resources they require to maintain. Maintaining outmoded structures is depleting and requires much energy that could be used elsewhere.

Recommendations

- Empower leaders to focus their energy on responding to the current life within NEYM, not maintaining structures that no longer serve us.
- Regularly review existing committees and ministries and only continue them if they are still life-giving.
- When creating new structures and ministries, build in periodic review practices and consider what old practices/structures/ministries are no longer needed.
- Embrace our priorities and celebrate the natural life cycle of ministries.

Observation

There are too many different nominating paths to important leadership positions in our Yearly Meeting (YM). This fractured set of processes sometimes results in the same individual being asked to serve in multiple roles. This structural deficiency in nominating makes it more difficult to share and maintain best practices for recognizing and nurturing gifts that could serve our community.

Recommendation

- Redesign nominating processes in a cohesive, consolidated manner.

Observations

A major weakness of the nominating process is that committees tend to draw from the same pool of "known" people, who tend to be regular participants in NEYM Annual Sessions. Many, or most, of these folks are older, white, and middle or upper middle class. This results in leaders who fit the same demographic. Though the distribution of male/female cis-gender

representation among leaders is not generally a problem, people of color and LGBTQ+ folk, younger adults, and those of lower socioeconomic status are under-represented.

Recommendations

- Continue to seek ways to engage more Friends in the process of naming gifts and nominating, and to build skills in this important work in the body of Friends more widely
- Re-examine the membership structure of Nominating Committee and barriers to participation in the nominating process
- Allocate financial and administrative resources necessary for the success of the Nominating Committee consultations (these consultations which are in the planning phase have the goal of forwarding the shared conversation between Monthly Meetings and the Yearly Meeting about best practices for nominating and raising up Friends' gifts)

Observation

Nominating processes do not consistently seek input from those outside the committee prior to asking a candidate to serve. Some people were asked to serve without the nominators knowing the individual well and later found out that the Friend did not have the appropriate gifts or skills for the role. Failure to solicit input from those who will work closely with the Friend serving in a particular leadership role can be particularly problematic.

Recommendation

- While the nominating process and conversations should be confidential, nominators should seek input from current individuals in leadership (this could include presiding clerk, clerks of M&C and PB, Yearly Meeting secretary), as well as monthly meetings, about Friends who are being considered for leadership roles. A broad view of the candidate's gifts, skills, prior experiences, and leadings, as well as their challenges, should be obtained prior to asking someone to serve in a leadership role.

Observation

There is an art to conversations between a candidate and a nominating member. This art has not always been clearly articulated to Friends serving in nominating roles. Some people reported being told they were "the only candidate," leading to a sense of obligation to say yes. Some people asked to serve in major clerk roles had no significant prior experience as clerks. Corporately, we are currently not consistent in clarifying the expectation that Friends considering significant leadership roles should engage in careful discernment and formal clearness processes before accepting the nomination.

Recommendations

- Create a handbook of "best practices" for nominating committee members to share the wisdom and art of inviting a Friend to service for the Yearly Meeting.

- Nominators should be well-informed and clear about the expectations and job descriptions for clerks and committee members, and should be able to articulate which gifts and skills that are needed.
- In conversations between nominees and nominators, name the gifts seen in the individual being invited to serve, and explain how these gifts are important in the role.
- Require all those considering serving in a major NEYM role to have a formal clearness process. If the Friend's meeting is small or is unable to provide this, the nominating committee should help to identify people willing to serve on the clearness committee. Support in finding this clearness committee should be regarded as "part of the job" of nominating for these leadership roles.

Observation

We do not currently provide much formal training to Friends serving in leadership roles; instead, we depend on leaders to come already equipped with skills or to learn "on the job". Sometimes volunteer leaders do not have technological skills and rely on YM staff or others to perform parts of their work, which requires additional coordination and communication.

Recommendations

- Require participation in a clerking workshop for all new clerks, either within NEYM or a training at Powell House or Pendle Hill. NEYM funds should be fully accessible for this training.
- Develop robust training materials for critical technological skill infrastructure: Google Suite, NEYM website, Zoom, Excel, Expensify, Quickbooks, etc.
- Provide volunteer training in leadership and management areas such as: agenda preparation, volunteer management, project management skills, and clerking
- Continue providing funds for participation in high-quality diversity training such as Beyond Diversity 101.
- Create and distribute simple orientation materials about how things work: how to get reimbursement for travel, how to set up meetings, and other nuts and bolts. Where these materials already exist, offer repeated reminders of their existence. Recognizing that we often nominate leaders who have been in our community for a significant period of time, individuals stepping into leadership may have outdated understandings of "how things are done."

Observation

The path to leadership roles is not always clear.

Recommendation

- Continue to utilize the recording clerk roles as mechanisms for leadership development. Since the gifts needed for recording are distinct, this must not be the only "track" towards leadership.

- Create additional roles for rising leaders such as rising clerk, assistant clerk, assistant treasurer, project leader, etc. The purpose of such roles would not be to further distribute the work of the clerk or treasurer, but to create opportunities for practical leadership development.
- Provide formal mentorship for new clerks and committee members; this mentorship should include explicit solicitation of feedback

Observation

In our leadership, we typically have an “all or nothing” model of service.

Recommendation

- Create more opportunities for people to meaningfully contribute at different levels of time/energy expenditure to cultivate more rising leaders. Developing a practice of soliciting participation in time-bounded projects or inviting people to lead a single workshop could be avenues for this opportunity creation.

Observation

Cultivating and maintaining a shared vision is foundational for effective interfacing between staff and volunteer leaders. When leaders are unclear on the sense of the body they struggle to prioritize. Additionally, administrative tasks (such as scheduling, venue planning, organizing childcare, YM communications) frequently require longer lead time than our volunteer committee structures anticipate, and add a significant component of managerial overhead to our volunteer leadership positions. Our volunteer leaders expressed a wish for more administrative support while recognizing that a barrier to delegating these administrative tasks is that dividing work requires additional communication, coordination, and shared understanding sense of priorities.

Recommendation

- Through the minuting process at Sessions, strive to articulate the body’s on-going sense of our shared vision. This articulation of vision is a guiding framework for volunteer and staff leaders as they prioritize and collaborate.
- Consider a role of “Special Assistant to the Clerk” who could manage some of the recurring administrative tasks that can be done without much additional coordination with the clerk.
- Regularly re-examine administrative staff work priorities to maximize the amount of administrative support available for key leadership functions.

Observation

The interface between staff and volunteer leaders is most stressed when there is ambiguity around responsibilities and accountability structures. This is particularly apparent in the roles of the Treasurer (due to the financial operations/controller aspect of the Treasurer’s responsibility portfolio) and M&C Clerk (due to M&C being involved in programming).

Recommendation

- The expectations for the role of Treasurer should more clearly define the division of labor between the Treasurer and the accounts manager. In particular, we see opportunities to clarify the division of tasks that are frequently associated with a financial controller. There may be opportunities for financial leadership development if there are concrete, project-based tasks that can be delegated to members of finance committee or permanent board. Note: Concurrently with the writing of this report, Finance Committee has approved a new job description for the Treasurer which reflects these suggestions.
- The Yearly Meeting should more clearly articulate expectations for the role of the Treasurer to clarify what is expected from a communications and forecasting standpoint.
- Clarify roles between staff and volunteers related to programming and event planning.
- Establish timelines for major projects that allow for positive staff/volunteer collaboration.

Observation

One reason our leadership roles are so large is that there is an “accountability gap” between the expectations for the clerks/treasurer versus those for committee members and the body as a whole. The different temporal rhythms of involvement in the work of the Yearly Meeting (e.g. members of C&A meeting more frequently than at-large members of M&C or PB who in turn meet more frequently than the general body of Sessions) may reinforce this gap.

Recommendations

- Clarify the gifts needed as well as expectations for contribution for committee service. Nominating Committees seek people with specific relevant experience for committee membership. The calling of the Spirit is important but is not enough if Clerks and Leaders are to be really supported.
- Create accountability and feedback structures for committee members.

Observation

Another structural issue that leads to additional work for clerks is committee membership structure that does not reflect the work that needs to be done. Some Friends serving on committees do not have the necessary gifts, skills, willingness, temperament or ability to do the work of the committee.

The structure and scope of Ministry and Counsel, in particular, make the work unmanageable. Currently M&C’s charge encompasses an enormous range of responsibilities which require different gifts and skill sets (for example: programming and events, religious education, pastoral care, maintaining many ongoing big picture conversations).

Recommendations

- Examine the variety of tasks currently assigned to Ministry and Counsel and explore what structures would best address those needs. Allow for the possibility of distinct and complementary structures to address specific needs (for example: “Pastoral Care Resource Team”).
- Establish guidelines for the membership of and service on M&C which reflect current priorities.
 - We see particular need for clarity regarding the term of service and mechanism for appointment on M&C.
 - Clarify the role of recorded ministers, elders and pastors in relation to M&C.

Observation

In the recent past NEYM has sometimes been unprepared to handle unexpected legal or human resources issues, such as the disposition of the Friends Home, and it has been an extremely time consuming burden on our leadership.

Recommendations

- Identify Friends who are willing to be called upon as a legal resource team for unusual circumstances. This team would serve to provide information and advice on identifying appropriate resources, with awareness of potential conflicts of interest.
- Continue to provide funds to pay a retainer for a lawyer serving as general counsel in order to address legal questions when they arise.
- Continue to allocate resources to the legal contingency fund.

Observation

We require a lot of travel of our leaders, particularly the Treasurer and Presiding Clerk. Some of the travel time currently perceived to be required may be unnecessary.

Recommendations

- Re-examine if both the Treasurer and finance committee Clerk benefit from serving on C&A (note: as of this writing, this is being explored by the Finance Committee).
- Re-examine the amount of travel time currently expected of the Treasurer (note: as of this writing, this is being done by the Finance Committee) as well as the Presiding Clerk.
- Examine whether it is possible to utilize the role of Rising Clerk to decrease the number of meetings the Presiding Clerk is expected to attend.

Observation

Planning for transitions in all major clerk roles, and ensuring that information is not lost in handoffs between clerks, is important. Without intentional communication, we end up “reinventing the wheel” and lose critical information.

Recommendations

- Stagger leadership transitions to ensure overlap of leaders whenever possible.
- Require Friends serving as presiding clerk, rising clerk, clerk of M&C, Treasurer, and Clerk of PB to have a support and accountability committee, as support for the person, but also holding them accountable to the role as service to the Yearly Meeting. Members could include someone who previously served in that role, as well as members of the Friend's home meeting. Nominating support in crafting this committee is important to ensure that it actually happens.
- Volunteer leaders and the committees that they lead should examine the possibility of naming a designated "second" or "shadow". This position should *not* be a co-clerk, but rather an individual who is the go-to person for back-up in cases when the clerk needs to miss a meeting, or if there are specific tasks that can be delegated, particularly in areas of administration, follow-up/volunteer management, and coordinating with YM Staff.

Financial

Observation

Our leadership roles are only possible for individuals with other sources of income, a sufficiently flexible schedule, a reliable car, and access to the internet. We sometimes wait for people to ask for financial assistance rather than providing it up front.

Recommendations

- Review and reorient all volunteers to our travel reimbursement process annually.
- Continually re-examine what travel is actually meaningful (travel may be a particular barrier for people with caregiving responsibilities at home and people who live near the corners of New England).
- Actively and proactively offer all financial support available. This may include providing financial assistance in obtaining transportation, reliable internet, or laptop computer access.
- Examine the possibility of providing a stipend to Friends serving as clerk of Permanent Board, presiding clerk, Treasurer, and clerk of Ministry and Counsel. While we recognize that this recommendation is a large potential commitment of resources, it has the possibility to make service possible for a broader population of individuals than are currently able to bring their gifts to leadership positions for our Yearly Meeting.
- Offer childcare for all committee meetings and communicate clearly about its availability

Cultural

We often commit to big work while underestimating what it will require of us in the long-term. We have a hard time pruning responsibility. We do not easily support leaders in prioritizing and saying "no." We need these leaders to remind us that we (as NEYM) cannot

do everything. Saying no, standing up to weighty Friends, and giving clear loving accountability feedback are critical skills that must be nurtured in our existing and rising leaders. In particular, we should seek to cultivate an awareness that work rises from many places to help developing leaders learn how we expect them to prioritize and prune, rather than allowing the work to continue expanding.

Recommendations

- Make the process of pruning an agenda more visible so that growing leaders can learn how to do this.
- Develop a culture of recognizing that it is healthy when we ask if we have the resources to do what we are proposing.
- Adopt a culture of communicating priorities for the work we expect to do each year; a culture where we respect the “no” of others and don’t judge the success of our leaders by their ability to say “yes” to everything. Push against the “more is better” mentality and trust that prayerful discernment has gone into decisions that lead to a “no.”

Observation

After serving some leaders feel that their service was not recognized and some fade from relationship with NEYM. By presuming that a leader is burnt out, we have a tendency to unintentionally isolate our former leaders. This is a major loss of gifts and skills from our community.

Recommendation

- Perform exit interviews with people in leadership roles. These interviews need to be done promptly and in a loving and appreciative way.
- Ask people who have served how they are led to serve next.
- Adopt a culture of publicly expressing our gratitude for the service of our leaders.

Observation

Leaders do not always feel the support of the body as a whole. Leaders receive “radio silence” or complaints and personal attacks more frequently than constructive feedback. Grappling with complex challenges is scary and taxing. Our leaders often feel alone in their struggles.

Recommendations

- We need a more formal and regular feedback mechanism for people serving in leadership roles. Giving and receiving this feedback is critical for growth on the path of leadership development.
- We need to recognize the connection between the work of undermining white supremacy culture and confronting the culture of conflict avoidance that exacerbates our leaders not feeling the support of the body.
- Every person in a major leadership role should have a Care and Accountability Committee put together by NEYM. These committees should understand the

importance of personal spiritual practice as well as understand enough about the role, the work, and the context of the Yearly Meeting, to support accountability. It is vital that these committees feel empowered to tell the Clerk/Treasurer when they are straying.

- We need to develop a culture that leaders are grown over time—it is not just a matter of giving more tasks to those who are “natural leaders.”
- We need to emphasize, model, and explicitly teach the following skills which support effective leadership:
 - Discernment
 - Clerking
 - Servant leadership
 - Incremental risk taking and experimentation
 - Engaging constructively in conflict that is above and below the surface (note: this is generally not the norm in NEYM)
 - Effective communication
 - Giving and receiving feedback
 - Project management
 - Clear, compelling writing
 - Clear, compelling public speaking
 - Time management
 - Asking for help; delegating; humility

Observations

In our interviews, we were struck by the deep faith and commitment to service from our leaders. Many leaders identified this work as a form of discipleship, requiring both humility and selflessness, that rewards faithful service with joy, unity, love, and connection. Our leaders felt most effective when they had strong personal spiritual practices as well as support and constructive feedback from other leaders (for some, C&A provided this “peer circle”, for others a lack of sufficient accountability feedback was identified). When we have this foundation in our leadership, it allows us to move forward despite struggle, conflict, and uncertainty.

Leaders sometimes feel as though they are expected to do the work of the body or the committees. This may be a root cause of much of the burden placed on our leaders. This is addressable, but it requires deep culture change, commitment from the body, and humility.

Recommendations

- Normalize the expectation that committee service means doing significant “homework” between committee meetings.
- Be clear with all Friends serving on committees about the expectations for service. Expectations should reflect the work that needs to be done.
- Increase cultural norms that expect that people who have not prepared for business, will listen and trust others to do the discernment.

- Be more clear about what we expect of leaders, what we expect of people in other named roles, and what we expect of the membership as a whole. In addition, be clear what the role of the leader is when the committee or body doesn't do what it said it would.

Observation

We have a tendency to be suspicious of things that are not perceived to be already extant in Quaker culture. This can be a sticking point when trying to innovate on what "good management" looks like in a Quaker context.

Recommendation

- Increase willingness to try, embrace and adapt to new leadership practices, including those originating from beyond the Quaker realm.

Conclusion

As Friends in New England, we seek to reduce the barriers to service that currently exist for individuals considering service in our volunteer leadership positions. We are not alone in this hope--our Quaker siblings the world over grapple with these challenges, too.

Addressing barriers to service requires a multidimensional approach. Our structural challenges impede effective leadership. Our financial challenges limit the population that is able to say yes to service. Our culture, especially the aspects of it which are reflections of White Supremacy culture, adds significant burdens to leadership roles which further limits the population able to serve. Only through an integrated approach will we see significant change.

We envision a Society in which our developing leaders are nurtured conscientiously, our current leaders are well supported, and our former leaders continue to be celebrated and involved. While this work is complex and long-term, we have faith that we have what we need to live into our vision.

While some of us have a particular part to play in this work, the changes needed are widespread and we all have something to contribute. We urge you: Do not be overwhelmed. Do not reject ideas that feel too expensive or too hard out of hand. Instead ask: What can we do now? What can we lean into going forward? What role is God asking me to play?

To our great benefit or to our detriment, we are each a living part of our ecosystem of supported leadership. The culture of the yearly meeting can and does change. Are we willing to accept continuing revelation when it comes to our way of organizing, relating to each other, and doing business?