

To: Permanent Board Members and Visitors

From: Susan Davies, Permanent Board Clerk

RE: Comments on the REVISED AGENDA and the work of February 10 NEYM Permanent Board Meeting

Date: February 9, 2024

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Dear Friends,

The agenda for the February 10 Permanent Board meeting is very full, yet with clear and open hearts we trust that our real and vital Work will be revealed and moved forward. I know there is great interest in the report from the Three Rivers Visiting Committee, and in Permanent Board's work for the Salem Quarter to discern Three Rivers readiness for monthly meeting status. The Visiting Committee report is posted in Advance Documents, and it is on the PB agenda for the afternoon. I ask Friends to understand that the primary responsibility of Permanent Board, as the governing body for NEYM between Sessions, must prioritize carrying out the governance work of the YM. Three Rivers discernment falls in a very full agenda. **In case there is insufficient time for settled discernment, Coordinating and Advisory has proposed that the evening of Tuesday March 19<sup>th</sup> be reserved for a Called PB meeting, open to visitors.**

I would like to begin the Three Rivers agenda item on Saturday by testing PB readiness for approval of Three River's monthly meeting status. If concerns are expressed and time constraints impinge on settled discernment on Saturday, then we will defer the discernment to a Called meeting on the evening of March 19<sup>th</sup>, 2024.

Regarding the conduct of Permanent Board meetings, the Board welcomes and benefits from the broad involvement and prayerful presence of Friends at PB meetings. Visitors have traditionally been welcomed, and they have traditionally been respectful of the work of the Board on behalf of NEYM. I would like to remind all Friends that attending PB meetings in a secular posture of issue-based pressuring or lobbying is contrary to Friends practice of corporate discernment and disrupts the ability of the gathered Body to discern how we are called by the Spirit to carry out our work in the world. In this endeavor we all need each other, and each other's encouragement, invitation, and hopeful expectation of faithful, Spirit-led listening, whether we carry the same concerns as another or not.

REVISED 9 February 2024, Permanent Board Clerk

**REVISED Agenda**  
**NEYM Permanent Board**  
**February 10, 2024**  
**Zoom-only**

- Worship
- Roll Call of PB members and Visitors
- PB clerk's announcements and comments
- **Approval** of 1/25 PB Called mtg minutes
- **Approval** of 12/9 PB mtg minutes
- **Accept**- Report from NEYM Ministry and Counsel Clerk, Carl Williams
- **For Discernment, possible approval**- Report from the Visiting Committee to Three Rivers worship group
  - if no clearness discernment will be deferred to a Called meeting on March 19, 2024
- Report from Coordinating and Advisory Committee, Rebecca Leuchak, Presiding clerk
  - **Approve** Charge to Financial Contributions wg
  - **Approve** C&A application for grants >\$10k
  - **Accept** report and **Affirm direction** from Conflict Response group
    - **Approve** appointment of Alysia Parkes to Conflict Response group
- **Approve** charge to Sessions Visioning Phase 2 Working Group
- **Approve** charge to the Site Search Working Group.
- **Accept** the Treasurer's financial summary report for 2023, Robert Murray, Past Treasurer
- Informational update re: 2024 budget outcome, Frederick Martin, Accounts Manager
- **Accept** the 2025 budget preliminary report
  - FY 2025 budget - Questions & Feedback
- **Approve** one Nominating Committee nomination to Youth Ministries
- **Approve** two PB clerk nominations to Noticing Patterns
- **Affirm direction**- Legacy Grant 10 year Review recommendations - verbal summary, request for feedback, send comments to: Legacy Grant 10 Year Review wg

- Written-only reports in Advance Documents of on-going work,
  - Recommendation of a consultant for Anti-Racism consultation work
    - Affirm direction- recommended contractor chosen-Anti-Racism Consultation, investigate fit for contractual agreement
  - Israel Palestine wg
  - Quaker Indian Boarding School Research Group
  - Report and notes of Debrief of Noticings of the December 9 PB meeting
  - Report from representative to FGC
  - Proposal from interfaith group for North Fairfield Meetinghouse

**Minutes  
Called NEYM Permanent Board Meeting  
Held over Zoom video conference  
January 25, 2024**

**PB 24-1 Opening**

The Permanent Board met on Zoom in a called meeting for the purpose of strengthening our human relationships and capacity for collective spiritual discernment and to also consider actions for maintaining essential Yearly Meeting activities while allowing the Yearly Meeting Secretary an extended bereavement leave.

**PB 24-2 Roll Call**

The roll was recorded from the Zoom attenders list:

Susan Davies, PB Clerk, Fran Lightsom, Recording Clerk Pro-Tem, Kimberly Allen, Jean-Marie Barch, Thomas Brenner, Deana Chase, Jacqui Clark, Marian Dalton, Darcy Drayton, Scot Drysdale, Christopher Gant, Sarah Gant, Beth Hansen, Roger Vincent Jasaitis, Rebecca Leuchak, Edward Mair, Leslie Manning, Frederick Martin, Anna Radocchia, Alison Randall, Carole Rein, Elizabeth Reuthe, John Reuthe, Martha Schowpe, Newell Isbel Shinn, Jacqueline Stillwell, Ken Stockbridge, Eleanor Warnock, Diane Weinholtz, Donn Weinholtz, Carl Williams, Morgan Wilson, Elizabeth Wooten, Mary Zwirner

PB clerk invited guests: Jean-Marie Barch, Ken Stockbridge, and Jacqui Clark

**PB 24-3 Appointment of a Recording Clerk pro tem**

Friends **approved** the service of Fran Lightsom as Recording Clerk pro tem for the business this evening.

**PB 24-4 Waiving 10 day notice of Agenda**

Friends **approved** waiving the requirement of 10 days notice of the detailed agenda for this called meeting, in consideration that Faith and Practice requirements are advisory, we need to respond to an emergency situation, and this meeting has an attendance of 34 which is much more than the quorum.

**PB 24-5 Bereavement Leave Planning**

Friends **approved** the following recommended minute on Bereavement Leave Planning, after verifying that this is the same assignment of responsibilities that was used during the Secretary's sabbatical. Friends expressed concern for supporting Yearly Meeting staff as they redirect their efforts to accept the weight of these responsibilities.

Bereavement Leave Planning

The Permanent Board appoints Nia Thomas (Northampton, MA, Friends Meeting) and Sarah Gant (Beacon Hill, MA, Friends Meeting) to temporarily assume and share the responsibilities of the Secretary during Noah Merrill's Bereavement Leave.

Nia Thomas will serve with the temporary title of Acting Secretary for Programs and Administration, with primary responsibility and oversight for program and staff supervision, hiring, communications, finances, and development. Sarah Gant will serve

as Acting Secretary for Pastoral Care and Governance, with primary responsibility and oversight for care for local meetings and the pastoral needs of Friends, legal matters, policy, and institutional governance.

Both Nia and Sarah will serve as members of Coordinating & Advisory Committee during this period, will meet regularly together for mutual support and coordination, and will participate in meetings of the Permanent Board.

In support of this work, Nia Thomas and Sarah Gant are authorized to be added as additional signers, as needed, for bank accounts of New England Yearly Meeting of Friends, effective immediately. To this end, their names should also be added to the bank resolutions minute for fiscal year 2024.

Further details, priorities, and plans will be clarified in the coming months, in consultation with the Coordinating & Advisory Committee, the Yearly Meeting staff, Noah, as appropriate and necessary, and other partners as needed.

Friends are holding Noah with love and tenderness as he carries the weighty needs and responsibilities of his family, and as he attends to his personal grief.

#### **PB 24-6 Payment of Yearly Meeting Secretary's Salary**

Friends **approved** asking the Coordinating & Advisory Committee to act in consultation with Yearly Meeting Staff to ensure that the Yearly Meeting Secretary's salary is paid through February 10 and that Nia and Sarah are compensated for their extra responsibilities through February 10. In addition, Friends request a concrete proposal for funding these expenses for consideration at the February 10 Permanent Board meeting.

#### **PB 24-7 Policy on Personal Leave and Comp Time**

In discussion, Friends received information about the personal leave and comp time allowed in NEYM Personnel Policy, and that policy's need for revision. Friends received information that Noah's salary is included in the Yearly Meeting budget, but additional compensation for Nia and Sarah is not, and the remaining financial reserves are not great. Friends received information about initial inquiries into the possibility of funding these expenses with grants from Obadiah Brown's Benevolent Fund and the Legacy Gift fund, if these proposals are approved by Permanent Board. Friends requested more information about the amount of funding that is needed and expressed concern about the indefinite period of time that the funding would cover. Friends suggested other sources of funding. Friends spoke for financial responsibility and for loving care of each other including Yearly Meeting staff. Permanent Board members were encouraged to send their questions about funding to Marian Dalton, [treasurer@neym.org](mailto:treasurer@neym.org).

#### **PB 24-8 Closing**

Meeting adjourned at 9 PM.

**Draft Minutes  
Permanent Board  
Mt Toby Friends Meeting  
December 9, 2023**

**23-58 Welcome and Gratitude**

Susan Davies (Vassalboro), clerk of the Permanent Board, thanked Mt Toby Friends for preparing a welcome to us. This included setting up the technology for our meeting and preparing the coffee and food for those of us meeting in person.

**23-59 Roll Call**

Willa Taber (Fresh Pond), Recording Clerk for Permanent Board, read the roll.

**Bold is present in the room. Underline is present on Zoom.**

**Susan Davies** (PB clerk), **Willa Taber** (PB Recording clerk), Deana Chase, Darcy Drayton, **Martin Forsythe**, **Christopher Gant**, Ian Harrington, **Newell Isbell Shinn**, **Roger Jasaitis**, **Carolyne Lamar Jordan**, **Meg Klepack**, **Frances Lightsom**, Edward Mair, Anna Radocchia, Bob O'Connor, Allison Randall, John Reuthe, Martha Schwope, **Leisa Stamm**, **Eleanor Warnock**, Diane Weinholtz, Donn Weinholtz, Morgan Wilson, **Kathleen Wooten**, Mary Zwirner, Leslie Manning

**Ex-officio members**

Scot Drysdale (Finance clerk), **Sarah Gant** (Clerk, Meeting Accompaniment Committee), **Rebecca Leuchak** (Presiding Clerk), **Noah Merrill** (YM Secretary), Robert Murray (YM Treasurer), Elizabeth Reuthe (YM Secretary Supervisor), Carl Williams (Clerk of Ministry and Counsel)

**Regrets**

Kimberly Allen, Thomas Brenner, Elizabeth Hansen, Christopher McCandless, Carole Rein, Jackie Stillwell (Clerk of Nominating Committee)

**Visitors**

**Nia Thomas**, **Peter Blood-Patterson**, **Nicola Metcalf**, **Honor Woodrow**, **John Ridgeway**, **Jennie Isbel Shinn**, **Sadie Forsythe**, **Andrew Grant**, **Mey Hasbrook**, **Kathy Olson**. **David Coletta**, **Kristina Keefe-Perry**, **Nan Davies**, Katie Bond, Melody Brazo, Marian Dalton, Melissa Foster, Phebe McCosker, Polly Atwood, Pamela Tierrien, Fran Brokaw, Elizabeth Hacala, Michelle Wright, Janet Hough

**23-60 Embodiment Exercise**

Continuing our practice of supporting the work of being gathered in our individual bodies into the corporate body, Jennie Isbell Shinn (Mt Toby) led us in some exercises to share a framework for grounding and techniques for anchoring into the present moment in order to be more fully present with our full selves. She asked us, "What helps you to be more present to Spirit in meeting? What conditions free you to tend to the leadings of the Spirit?" She then

asked, “How can this body support you being available to the Spirit? How can you support others in this body to be available to Spirit?” She introduced us to sensory anchors to help us bring ourselves back to our bodies and to focus in the moment. These included noticing the space between our fingers, noticing the back of our bodies, noticing our feelings and noticing our thoughts. Where are you when you are not in our body? Are you in the future, in the past, or in a story that does not relate to what is happening to you now? She ended by reminding us that we are practicing to be a beloved community.

### **23-61 Permanent Board Clerk’s opening comments**

Susan Davies, Permanent Board clerk, started by responding to some questions that came to her about the inclusion of travel minutes in the advance documents. Leslie Manning (Durham), the former Permanent Board clerk, was faithful in checking in with people who traveled in the ministry as released by the Permanent Board. Including the minutes is a way to be faithful to the reporting back of the travels in the ministry that they have undertaken. There were various other documents that are not part of the work which we are undertaking today but which may be of interest to members or may relate to work that will come to us in future meetings, including the interim report from the Three Rivers Visiting Committee and the memorial minute for Richard Regen.

Susan also reported that, on her own initiative and with the support of the Coordinating and Advisory Committee (C&A) she called a closed meeting of the Permanent Board, held over Zoom on November 27, 2023, for the purpose of strengthening relationships among Permanent Board members. No corporate discernment or Board approvals took place at the meeting. Rather, the meeting was an opportunity to recognize the Permanent Board’s role in ensuring the accountability of the Coordinating and Advisory Committee to the Permanent Board and the Yearly Meeting, and to lift up Permanent Board members’ responsibility to care for the entire body of Friends in NEYM. The dialogue was fruitful, direct and open. She expects continuing the dialogue will contribute to improving our relationships, and the functioning of the Board, as it seeks to be faithful to the charge it has been given by New England Yearly Meeting.

### **23-62 Approval of Minute 23-36**

Minute 23-36 (Recommendation from July 15, 2023, Listening Session for Salem Quarter, for Three Rivers Worship Group) from the August 5, 2023, Permanent Board Meeting was not approved with the rest of the minutes at our September 30, 2023, meeting. A revised minute, here attached, was brought back for approval.

**Friends approved the revised minute. All of the minutes from the August 5 Permanent Board Meeting have now been approved.**

### **23-63 Approval of Minute 23-39**

Minute 23-39, Concern for Youth and Youth Ministries, from our August 9 Permanent Board Meeting was not approved at our September 30, 2023, meeting. A revised version of this minute is attached.

**Friends approved the revised minute. All of the minutes from the August 9 Permanent Board Meeting have now been approved.**

### **23-64 Minutes from September 30 Permanent Board Minutes**

The minutes from the September 30 Permanent Board Meeting, here attached, were presented.

**The minutes of the September 30, 2023, Permanent Board Meeting were approved.**

### **23-65 Presiding Clerk's report**

Rebecca Leuchak (Providence), NEYM Presiding Clerk, reported that she worked with Hisham Awartani, one of the students shot in Burlington, and this has touched her deeply. Another of the students in her department also took their life. This has been a tough time for her.

She is excited and hopeful about new initiatives that are rising in the Coordinating and Advisory Committee but are not yet ready to come forward.

She attended the Friends General Conference Central Committee annual gathering at Pendle Hill in October and learned much more about that organization. She also attends Legacy Gift meetings and meetings of the Notice Patterns of Oppression and Faithfulness and Right Relations Working groups.

### **23-66 Report from the Coordinating and Advisory Committee**

Rebecca Leuchak presented the report from the Coordinating and Advisory Committee, here attached.

Kathleen Wooten (Lawrence) and Leisa Stamm (Hartford) have volunteered to start the work of setting the priorities for NEYM contributions to outside organizations but they have not been given a specific charge. C&A hopes to bring a charge for that group in February. C&A also would welcome other people to join in this work.

### **23-67 Developing an Ongoing Capacity and Practice of Consultation and Reflection on Youth Ministries**

Nia Thomas (Northampton), Yearly Meeting Program Director, presented a proposal for developing a practice of regular, cyclical reviews of Youth Ministries work, here attached.

She sees these consultations happening over a 3-year cycle. The Youth Ministries Committee has been inactive because it has not been properly peopled. She hopes that in February the Nominating Committee will bring back a full slate for the committee and that this reconstituted committee will bring a timeline for the consultation to us in May.



**Proposal:** *That the Youth Ministries Committee (which is composed of NEYM's Youth Ministries staff and six volunteer members) undertake consistent, robust, creative, and widely consultative listening to inform youth ministry decisions and to provide more transparency, accountability, and support for our youth ministries.*

*Rather than seek to address these issues "once and for all," we are imagining a cyclical process, regularly returning to essential questions to continually improve and build resilience in our youth ministries. Taking place every 1 to 3 years, this consultative cycle may take multiple forms of engagement (written reports, online or in-person gatherings, calls to local meetings and individual youth ministers, focus groups, etc.), but should be grounded in the questions below and should culminate in a periodic report shared with the wider Yearly Meeting for comment and ongoing conversation. Insights from these reports would then inform funding priorities, staffing responsibilities, and other important discernment of New England Friends.*

*Reflection questions for youth ministers, interested youth, and parents to respond to at least annually:*

- *What recent stories related to youth ministry should the wider Yearly Meeting hear?*
- *Based on your recent experiences, what challenges and possibilities do you see related to the following:*
  - *Current and emerging models of youth ministry*
  - *The spiritual condition of youth, families, and youth ministers*
  - *Quaker faith formation*
  - *Outreach to youth and families*
- *What new experiments seem ripe to try in the above areas? What current work do you sense should be deprioritized or set aside?*
- *What do you see as current indicators of the health of the path we are on in regards to youth ministry?*
- *What resources, relationships, and connections seem most vital to this ministry at this time?*
- *Is there any support needed to sustain this ministry that is not currently being provided?*

*Today, we ask that the Permanent Board approve that the Youth Ministries Committee be tasked with leading ongoing, cyclical consultation regarding youth ministry, consistent with the description above. While the particular forms of consultation may change from year to year, the Youth Ministries Committee shall report to the Yearly Meeting as part of each consultation cycle.*

**Friends approved this proposal**

### **23-68 Charge to the Conflict Response Group**

*The Coordinating and Advisory Committee considers the way forward as a two-step process. First is the discerning of the charge of a working group on strengthening capacities for response to conflict rising in the life and work of the Yearly Meeting. That*

*task requires a small group of Friends working in collaboration with the clerks of the Coordinating and Advisory Committee, Ministry and Counsel, and the Permanent Board. Many Friends across our meeting have been consulted for their perspectives and wisdom on this matter and two Friends have felt led to engage in this work, a third Friend is in discernment about serving.*

*Darcy Drayton is a long-time member of our Yearly Meeting and a career-long educator. She served for many years on the Yearly Meeting Committee on Racial, Social, and Economic Justice.*

*Melody Brazo, serving on the Noticing Patterns Working Group, is also a long-time member of the Yearly Meeting and also an educator, who coordinated, for 20 years, an inclusion program in the Cambridge public schools.*

**Friends approved Darcy Drayton and Melody Brazo to serve on the working group to discern the charge of a Conflict Response group.**

### **23-69 Noticing Patterns Debrief**

Newell Isbell Shinn (Mt. Toby) and Polly Atwood (FMC) reported on the October 18, 2023, Noticing practices debrief for our September meeting. The written report is attached.

Some of the learnings and questions from the debrief are:

- People will experience the same event differently.
- We bring our own history and experience to the same event.
- What do we do with the noticings? Where do we go with them?

We need to continue to hold this practice and to let it change us

### **23-70 Yearly Meeting Secretary's report**

Noah Merrill (Putney), NEYM General Secretary, said that he appreciates hearing people asking how they can improve our time together. He then spoke to his written report, here attached.

All members of the Permanent Board will be invited soon to make phone calls thanking our Give Monthly donors for their contributions to the YM. All members of the Permanent Board are encouraged to accept this invitation. If everyone makes a few calls, none will be overly burdened.

Noah reported that two people from Maine with strong relationships in the regional Jewish and interfaith community have expressed tentative interest in assuming ownership of the North Fairfield meetinghouse (which has long been vacant while we sought future uses for the property) and transforming it into a multifaith community center for the region. Initial explorations are underway to see if this is a viable option.

He hopes and expects to be able to devote more time to resolving the legal status and future of the North Fairfield and South Pittsfield properties in the new year and hopes to have more

to report in February. Any decision would be brought to the Permanent Board for discernment and approval.

### **23-70.1 Budget Funding Priorities for FY2025**

As many Friends are aware, the Funding Priorities process of the Yearly Meeting charges Coordinating & Advisory with bringing forward, each fall, recommended funding priorities to guide the Finance Committee in the preparation of the coming year's budget. Our practice is that these priorities are approved by the Permanent Board; the final proposed budget is approved by Annual Sessions.

This is a time of uncertainty, in our finances as in other ways. The last two fiscal years have ended with deficits; despite responsive attention to needed changes, the Yearly Meeting is still feeling the effects of the disruptions caused by the pandemic and more. While recent fundraising efforts have been promising, aided by Friends newly energized to support the work of the Yearly Meeting, we still have work to do to rebuild a more robust financial position.

Several discernment processes are ongoing that may have financial implications for the Yearly Meeting (Sessions visioning and design, youth ministries, financial contributions to other organizations, and more). In recommending funding priorities this year, C&A feels it is important to take care not to get ahead of other ongoing discernment that may have financial implications.

Coordinating & Advisory is aware that, when Permanent Board approved (PB Minute 21-43) a commitment to paying honoraria to Friends serving in key volunteer leadership roles, there was a commitment to review and revisit this experiment after three years, beginning in the spring/summer of 2024. While this review may not be among the Board's most urgent priorities or within the Yearly Meeting's capacity this spring, C&A hopes the Permanent Board will give this review and reflection attention in a timely way, both to help us learn from this experiment, and to clarify whether this budget commitment of approximately \$15,000 dollars annually will continue.

In light of the above, the Coordinating & Advisory Committee recommends that, for the FY2025 budget process, the Permanent Board approve maintaining existing spending levels as much as possible, with particular attention to sustaining staffing at current levels, adjusted for inflation, health care, and other changes consistent with our policies.

**Friends approved these budget priorities for FY2025.**

### **23-71 Financial Contribution Discernment**

The Finance Committee has had trouble deciding on the proper balance of giving to other Friends organizations. The Permanent Board has already decided that it is not the work of the Finance Committee to decide how that money is distributed. We lack a shared understanding of what principles and shared understandings underlie our decisions on what organizations we should support and what the relative allocation of the funds would be. Are our

contributions a manifestation of a relationship? Are they an expression of our values? Are they a way to do good in the world?

In May, 2021, Permanent Board approved (Minute 21-42) creation of a working group to help establish guidelines and a more spirit-led understanding of our intention behind the donations that we make. This working group reported back to the April, 2022, Permanent Board meeting (Minute 22-26) recommending that the Finance Committee prepare a budget with a total amount for contributions to other Friends organizations and that Permanent Board be responsible for allocating those funds among the other organizations and that the working group be laid down. The Permanent Board did not approve the specific recommendation but it did lay down the working group with the understanding that the Board should continue work on this concern and requested that the Presiding Clerk consider making a spacious time for deep reflection on the concern for how we use our financial resources.

In May 2023, (Minute 23-22) Finance Committee recommended that, because of our financial condition, no contributions be made to any outside Quaker organizations in the FY 2024 budget. At that time the Permanent Board clerk announced that they have sent invitations to many people to serve on a working group to propose a process and criteria to guide the Yearly Meeting's decisions about contributions, with the goal to develop such guidance prior to the September 2023 Permanent Board meeting. So far Kathleen Wooten and Liesa Stamm have volunteered to work on this working group. Coordinating and Advisory will work with Kathleen Wooten and Liesa Stamm to create a specific charge for this working group. They intend to bring a charge to the working group to the February meeting of the Permanent Board.

**Friends approved the direction of this work.**

## **23-72 Legacy Gift Committee**

### **2024 Legacy Gift Review**

Mary Link (Mt Toby) , co-clerk of the Legacy Gift Committee and co-convenor of the 2024 Legacy Review Committee, reported on the process of the 10-year review of the Legacy Gift experiment. One overall result of the Legacy funds is that they have helped some individuals and meetings to feel more connected to NEYM, especially smaller meetings that previously were not certain about what they got from NEYM. Another unforeseen benefit to meetings has been learning about testing and supporting ministry and spiritual leadings. Some meetings learned about clearness committees, or ministry care committees, when a member applied for and received Legacy funding. One small meeting thought that they might need to sell the meeting house when the roof needed replacing but felt the encouragement from NEYM via a Legacy grant and were able to successfully raise the rest of the funds

The 2024 Legacy Review committee has been working for about 1½ years. It is composed of Mary Link, Legacy co-clerk, Fritz Weiss (Portland) as former Presiding Clerk, Bob Murray (Beacon Hill) as NEYM Treasurer, and Suzanna Schell (Beacon Hill) as former Legacy co-clerk and one who helped with the original process and design of the Legacy Gift funds.

The Review Committee has so far prepared a brief history of the funds, a financial summary, and various other data. It is working on writing up the impacts to date. So far 40 of the 62 meetings in NEYM have been touched by Legacy funding. The remaining 22 meetings generally are very small meetings who may yet appl. In addition, over 20 other Friends' entities including Friends Schools, Friends Camp, Woolman Hill, Beacon Hill Friends House, Quaker Voluntary Service, and NEYM committees have received grants

Their goal is to include input from as many Friends as possible. They have sent out a survey to the NEYM meetings list and grantees list. The November and December NEYM newsletters have included a survey link and invited all Friends to fill out the survey. They have received only about 20 responses so far. Everyone is encouraged to respond to the survey and to ask their meetings and other Friends to do so as well. So far nearly all survey respondents have said they want Legacy Gift to continue, with 2 saying maybe/that they needed more info.

The Review Committee is exploring the idea of holding a workshop with a focus on "Holy Abundance: Creating a Gospel Economy" among NEYM Friends. They are currently planning this for March. The welcome collaboration with others who we heard during the meeting are clearly also exploring this overarching theme. Stay tuned.

The work of Legacy Gift Committee itself has grown, honoring the experience it has developed by adding the Bodine-Rustin Fund, and taking on administration of Salem Quarterly Meeting funds while they are on sabbatical. The Legacy Gift Committee will likely need more support to carry out the extra work.

The 2024 Legacy Review committee plans to bring a first draft of its report and recommendations to the February Permanent Board meeting for review and feedback. The final report is expected to be brought to Sessions this summer.

### **Bodine-Rustin Fund**

Mary Link continued in her role as co-clerk of the Legacy Gift Committee to report on the work of the Bodine-Rustin Fund. This is the second year of the fund. The Permanent Board and the Legacy Gift Committee share the administration of the Bodine-Rustin Fund. Grantees do not apply for grants but rather Friends make suggestions of LGBTQ+ related groups to distribute the funds to. These are annual suggestions so that if someone suggested an organization last year, they would need to recommend them again this year. So far this year the fund has not received any suggestions. The posted deadline for that is December 15, but they will accept them after that. Kristina Keefe-Perry is the FUM representative to the subcommittee that reviews the suggestions, along with two members of the Legacy Gift Committee. That subcommittee reviews the organizations and makes a proposal to the full committee for which ones to fund and funding amounts, which then goes to PB for final approval. Our goal is to bring funding recommendations to the Permanent Board for the February meeting.

Last year's contributions included a group in the Northeast Kingdom that put on their first pride parade and Uganda Safe Transport.

### **23-73 Travel to Cuba YM**

Susan Davies reported on the recommendation of the Puente de Amigos Committee for travel to Cuba. The report on the approved delegation and the report of the clearness committee for travel to Cuba are both attached.

*The Puente de Amigos Committee is pleased to support the leadings of Robert Watt of Providence Meeting and Christel Jorgensen of Cambridge Meeting to travel to Cuba to attend Cuba Yearly Meeting and immediately after that to facilitate a third Alternatives to Violence training in February 2024. Robert will leave on February 22, 2024 and return on February 29. Christel will leave on February 21 and return on the 29th.*

**Friends approved this recommendation.**

### **23-74 Travel Minute for Andrew Grant**

Friends received a travel minute, here attached, endorsed by Mt Toby Meeting and Connecticut Valley Quarterly Meeting for Andrew Grant (Mt Toby) to travel outside the Yearly Meeting with a concern for healing relations with North American Indigenous people, with a particular focus on repair of the ongoing harms of the boarding school era when Quakers participated in the separation and assimilation of Indigenous children.

**Friends approved endorsing this minute.**

### **23-75 Nominating Committee**

Beth Hansen (Westerly) brought forward the report from the Nominating Committee here attached.

### **NEYM Treasurer**

The Nominating Committee recommends Marian Dalton (Brunswick) to serve as New England Yearly Meeting Treasurer for a term starting on December 9, 2023. Marian's husband, Robb Spivey, is currently serving as the Friends Camp Assistant Treasurer and is therefore a check-signer. Robb would be released from being a check-signer before Marian would be added as a signer on NEYM accounts.

**Friends approved this nomination.**

### **FWCC Representatives**

Since Briana Halliwell is Susan Davies' daughter, Rebecca Leuchek clerked the following approval.

**Friends approved Anna Lindo, Framingham Meeting, and Briana Halliwell, Vassalboro Meeting, to be representatives to the Friends World Committee for Consultation, with terms ending in 2027, and to be delegates to the August 2024 FWCC Plenary.**

### **23-76 Report on Anti Racism Consultative Working Group**

Kristina Keefe-Perry (Fresh Pond/Three Rivers) presented a report on the progress of the Antiracism Consultation Working Group. This Group was created at the November 2021 meeting of the Permanent Board (Minute PB 21-104). Although the full scope of the work was unclear, the Board was clear that the planning and implementation work should move forward and that professional expertise was needed. The clerk of the Permanent Board and the clerk of the Nominating Committee were authorized to appoint a working group having the needed expertise and experience to refine and articulate a more specific charge, set priorities for next steps, and bring the results back to the Permanent Board.

The first part of the work was to finalize the charge of this working group. This charge was finalized in May of 2022.

The intended outcome of the consultative process is to bring to the Permanent Board a framework and recommendations—a “roadmap”—for how the Yearly Meeting can concretely: 1) bring the perspectives and insights offered by antiracist theory and practice into the Yearly Meeting’s discernment and action as an institution, and 2) support and encourage local Friends meetings (monthly and quarterly) across our region, as they are led, to bring the perspectives and insights offered by antiracist theory and practice into their discernment and actions as worshipping communities, and into the discernment and actions of Friends as a regional corporate body.

Those appointed to the Antiracism Consultation Working Group were: Melody Brazo (Fresh Pond), Nia Thomas (Northampton), LVM Shelton (Plainfield), Morgan Wilson (Framingham), Becky Jones (Northampton, as a prayerful presence), Noah Merrill (Putney), and Kristina Keefe-Perry (Fresh Pond/Three Rivers). Leslie Manning, the Clerk of the Permanent Board at that time was named clerk.

One of the most significant pieces of work the working group has done was to develop a Request for Proposals in our work of selecting a consultant.

Kristina read a part of that RFP:

*New England Yearly Meeting of Friends (NEYM), an organization of Quakers in the northeastern United States, seeks a consultant to guide us in a process for becoming a more anti-racist organization.*

*We seek to develop a multi-year plan for action, a roadmap that can be used at all levels of the organization: including local monthly meetings and worship groups, the quarterly and yearly meetings in which they are nested, and the committees and individuals that are part of each of these communities.*

*We seek common goals, language, and processes that will guide us in living into our intention to challenge and dismantle white supremacy in ourselves and in our faith communities*

The specific outcomes outlined in the RFP were:

- *NEYM is seeking consultation to work with Yearly Meeting leadership, staff and the Permanent Board to help us develop a process for living into our commitment to becoming an antiracist faith community.*
- *We seek to develop a multi-year plan for action, a roadmap that can be used throughout the organization through the development of common goals, language, and processes that will guide us in living into our intention to challenge and dismantle white supremacy in ourselves and in our faith community.*
- *We seek a process that is consistent with Quaker theology and practice. We hope to partner with consultants in our developing practices, in ways that further a commitment to and articulation of antiracism in ways that are authentic, relevant, and rooted in our faith tradition.*
- *We know that this work will involve digging into the spiritual roots of racism and white supremacy that underlie some of our traditions and practices. We cannot cling so tightly to tradition—for tradition's sake—that it hinders our antiracist goals. We may need strategies that help us to let go of beloved historical understandings and practices. This will include responding to harm, as it arises, and addressing resistance.*

The working group has solicited more than a handful of consultants. It has interviewed one of those and has hopes to interview another. The work has moved more slowly than the working group had imagined or wanted. However, the working group feels that it has moved at just the right pace.

The scope of this work is delicate and complex. It is intertwined with and colored, at this time, by what Program Director Nia Thomas noted in their last meeting is a “trust deficit” that exists in the yearly meeting. They have labored and wondered if addressing that is impeding their work. They have concluded that, while it is not specifically their work, it is clear that it is deeply related to the work that is before them. They are hopeful that when it is right it will move to the next stage.

With a break for Sessions and the transition in Permanent Board clerks, the group's work slowed over the summer and early fall. They are looking forward to appointing an ongoing convener and setting a regular meeting schedule. The next piece of work in front of the working group is to interview the second consultant, select one, and begin the work of faithful collaboration.

### **23-77 Nomination to the NEYM Naming Committee**

Susan Davies presented the report on her nominations to service to the Yearly Meeting, here attached.

**Friends approved the nomination of Darcy Drayton (Souhegan) to serve on the Naming Committee.**

### **23-78 Minute of Exercise**



This meeting had a much different spirit and feel than our September 30 meeting. Discussions were more focused on the immediate issues at hand and less on personalities or larger patterns of behavior. Many people attributed this change in part to the conversation that was started at our called meeting on November 27. Other factors contributing to this change may also be that there were no controversial items on the agenda, or that people were on their best behavior. While this was a good start, we still have more work to do on the conflicts affecting us and the yearly meeting at large.

We started with embodiment exercises that encouraged us to be aware of our bodies as a grounding for our decision-making. Even with this, we found ourselves revisiting a decision after we had made it. We need to learn to trust our discomfort, and give it a voice. Sometimes just saying, "Something about this decision makes me uncomfortable but I am not sure what it is," can give the body a chance to pause and find together what is amiss.

February 10, 2024

To: Permanent Board  
From: Carl Williams, clerk of Ministry and Counsel

An update on our worshipful exploration and experimenting in providing better responsiveness to the worshipping communities in New England Yearly Meeting:

First a little history:

- In May 2019 Permanent Board heard a report that the scope and current structure of M&C made their work “unmanageable.” They recommended an exploration of what structures would meet our needs, allowing for the possibility of distinct and complementary structures.
- At sessions 2020, the existing structure was set aside in order to explore in prayer where there was life and in what direction we were being called, though there remains some concern among some Friends around this decision.
- Jeremiah Dickinson (Dover) led the exploration for two years. Friends involved with M&C were interviewed in depth, and there were several virtual gatherings over the year to explore the nature of ministry. The report summarizing this work is here: [Ministry & Spiritual Life: Report & Recs for Sessions 2022\\_rev post PB 7 1 2022](#)
- The Meeting Accompaniment Group, a nominated group with a charge approved by Sessions, was formed in the fall of 2022 and has met regularly since that time. It has responded to requests for accompaniment from more than 30 local meetings. Sarah Gant (Beacon Hill) clerks this group, and can be reached at [accompaniment@neym.org](mailto:accompaniment@neym.org).
- A worship coordinator during sessions has focused on providing opportunities (?) to hold the body in prayer. Kristina Keefe-Perry (Fresh Pond) has served our yearly meeting in the role.
- A Spiritual Life Listening Group was also created at Sessions 2022 to explore ways of supporting the places where life is growing amongst us.
- Permanent Board approved my service as clerk in February 2023.

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Much of my time during the past year has been spent in prayerful listening concerns and hopes of Friends as well as in implementing the recommendations from the above reports. Several Friends have reached out to me; there are others I’ve reached out to. At the close of each business meeting during sessions, I set aside time to be available to explore with Friends who carried a burden or concern. In our yearly meeting community I’ve spoken to folks who are angry, folks who are in conflict, and folks who joyfully celebrate.

The State of Society Reports are valuable sources of learning where the challenges are and where life is in our worshiping communities. Last June we held the first Meeting for Listening both in person, hosted by Concord (New Hampshire) Monthly Meeting, and remotely with many Friends Zooming in from Midcoast (Maine) and West Falmouth (Massachusetts) meetinghouses, and individually from several locations via Zoom. In worship, worship-sharing, in fellowship, and large and small group conversation, Friends considered the state of society and statistical reports received from local meetings around the yearly meeting, and together listened for the themes emerging from these reflections. I leaned heavily on the work of Nia Thomas (Northampton, Program Director) and Sarah Gant (Beacon Hill, clerk of the Accompaniment Group) and they ensured the success of the day. I hope to once again respond individually to the State of Society Reports as they come into the yearly meeting office. This year's Meeting for Listening is scheduled for June 1, 2024 (mark your calendars!)

Over the past few months the yearly meeting Prayer List has been revitalized—an opportunity to hold the challenges of Friends across the yearly meeting in the Light as well as celebrate our joys. It is a moderated list and I hope that it continues to grow as more Friends sign up for it.

I've been invited to attend Accompaniment's monthly meetings, and they have been both inspiring and invaluable in understanding the broader themes and issues meetings in New England are facing. I'd recommend that in the future, the clerk of Ministry and Counsel sit on this committee *ex officio*.

I also look forward to a revitalized sharing of Friends experiences of traveling in the yearly meeting—whether under a specific ministry or just because a Friend happened to be in the neighborhood on a Sunday morning. Jay O'Hara (Portland) has been a support, sharing thoughts and offering a hand in this endeavor.

The Spiritual Life Listening Group meets regularly—mostly on Zoom—to explore ways to listen and support. One of the things we've been holding is ways to effectively hold the whole yearly meeting in prayer. For a time we seriously considered a day of worship for that purpose. It was an exciting possibility but as we considered, we came to the realization that our yearly meeting calendar is already crowded with gatherings: there's the Meeting Care day in the fall, and the Meeting for Listening in the spring. There are continuing opportunities for gathering under a concern for the nurture of Friends called to gospel ministry hosted by Friends Brian Drayton (Souhegan) and Noah Merrill (Putney). And there is a growing, organic series of day-long extended worship around the yearly meeting, arising out of the leadings and experiences of Friends Michael Wajda (Bennington) and Jean Rosenberg (Middlebury). It seemed adding to that schedule at the present time would be foolhardy. We are currently considering other ways of holding the yearly meeting in prayer.

We've also begun exploring ways of supporting Friends' gifts of ministry within the yearly meeting, in both upholding and celebrating their gifts caring for ministers carrying travel minutes.

I'm also happy to share that last weekend, Falmouth Quarter united with Durham Monthly Meeting's recording Leslie Manning's gifts in ministry. Their minute reads:

**24/1 #1** Friends approved recording Leslie Manning's gifts of ministry ...

In approving this recording of Leslie's gifts in ministry, we recognized that Falmouth quarter affirms that these gifts are our shared responsibility. We must pay attention (love is attention!), we must continue to be open to being transformed by Leslie's ministry, and we must recognize when it is done. We must also, as a whole quarter, pay attention to Durham Meeting in order to ensure that it is acting as the spiritual incubator and shepherd that the ministry needs.

Friends witnessed to their experience of Leslie's ministry and presence and her articulation of the Truth among Friends in New England. We were cautioned not to mistake Leslie's eloquence as her gift, but instead to hold to the recognition that her gift is being present where she is led, and sharing the hard won Truth that we are all beloved.

It was noted that the recognition and support of ministry among us speaks to the spiritual vitality of Durham Meeting and of Falmouth Quarter. This act is a profound act of trust, openness to God and an expression of the wisdom that our testimony of equality does not imply that we are all the same.           –Falmouth Quarter Minutes, January 27, 2024

If there is any part of this report you'd like to explore or, if there are other things on your heart, don't hesitate to contact me at [mc-clerk@neym.org](mailto:mc-clerk@neym.org)

In the faith the nurtures and challenges–

Carl Williams  
Clerk, Ministry & Counsel

**Final Report:**  
**Salem Quarter Visiting Committee to Three Rivers Worship Group**  
Appointed by the NEYM Permanent Board upon request of Fresh Pond Meeting  
February 4, 2023

## **A. Our Recommendation**

Fulfilling our charge from the Permanent Board (Aug 2023) and following the process outlined in the revised Faith & Practice (p. 219-21) **the Visiting Committee recommends that the Three Rivers Worship Group be recognized and welcomed as a Monthly Meeting of Salem Quarter.**

In worshiping and visiting with Three Rivers over the last few months, we encountered a spiritual community with a degree of clarity and intentionality around how they want to be in community together that goes far beyond that of many long-established meetings.

Attendees testified to being warmly welcomed, accepted in all their vulnerability, and held in hope of healing. Others spoke of the experience of all learning and growing spiritually.

The documentation of their foundational principles, both spiritual and organizational, is extensive. Most importantly, we have witnessed a community that holds each other in loving accountability, naming and openly discussing harms that have come to pass in their midst, so that all may understand what happened and learn from it.

Three Rivers is, indeed, very different from other Meetings *and* is still very Quaker.

We see Three Rivers uniquely poised to engage with important frontiers of modern Quakerism, as:

- A largely online Meeting as part of a Quarterly Meeting defined by geography
- A Meeting that explicitly identifies with a marginalized group, in this case Queer, as part of Quarterly and Yearly Meetings with histories of privilege
- A Meeting that explicitly identifies as Christian, as part of Quarterly and Yearly Meetings with broad theological references
- A Meeting that explicitly identifies as Queer and Christian, as part of a Yearly Meeting that maintains membership in both Friends United Meeting and Friends General Conference.

## **B. Engagement with Three Rivers and Fresh Pond Meeting**

We started worshiping with Three Rivers in August of 2023, and worshiped with them regularly throughout the fall of 2023, attending Thursday morning worship and Sunday evening Vespers. During this time, the Clerks of Fresh Pond invited us to visit, to share worship and hear about their experience nurturing and accompanying Three Rivers over the past several years.

During our visit with Fresh Pond Meeting, we learned about the early days of Three Rivers, starting

with Kristina Keefe-Perry attending a church planting seminar in Chicago. Kristina seasoned her leading to start a new congregation with her care and accountability committee, eventually leading to the creation of the Quaker Dinner Church. As part of that work, Kristina applied for and received a grant from the Legacy Gift Fund, which is held and administered by the Fresh Pond Finance committee. When the pandemic hit in the spring of 2020, eating dinner together was no longer possible, and Quaker Dinner Church evolved into the online gathering known today as Three Rivers.

- Fresh Pond Meeting appointed an Accompaniment Committee for the Three Rivers Worship Group in January of 2022.
- In April of 2023 the Accompaniment Committee brought a recommendation to Fresh Pond Meeting for Business that Three Rivers was ready to take on Monthly Meeting status.
- Fresh Pond Meeting agreed, and minuted the approval of this recommendation.

### **Our Experience of Worship with Three Rivers**

Attendees are greeted personally as they join Zoom. Our time together started with an invitation to acknowledge the original people and watersheds of the varied locations where folks are joining from. Worship time most often included 3 main parts, though the order of each part varied from week to week, and not every week included every part.

#### **1. Small group time in breakout rooms**

- To share prayer requests or anything that is on people's hearts.
- To offer pastoral care in a 1:1 setting

#### **2. Prepared message**

- A designated speaker offered ministry. This part is often recorded and could be posted on the Meeting's website.

#### **3. Silent, waiting worship (all together)**

As we shared worship with this group over time, it became clear to us that this format offers spiritual nourishment on an individual and collective level. Attendees have space to share their condition and be heard with openness and tenderness in a small group setting. Those who come with pastoral care needs have an avenue to seek out solace and support. The speakers who deliver the prepared messages season their offering with other Friends in advance, resulting in powerful messages that still linger with us to this day. Silent, waiting worship was at times largely silent, and at times rich with interconnected messages. We witnessed God at work while worshipping with these Friends.

Vespers is a shorter Sunday night gathering (half an hour) with a simple format: open with music, waiting worship, close with music. It is usually a small gathering, and worship is often largely silent. It is a lovely spiritual refresher as we wrap up one week and head into another.

Essential features of the Three Rivers community include:

- A commitment to accessibility

- A commitment to using structures and language designed to hold and care for all attenders
- Willingness to name when things go awry, to own mistakes that are made, and to seek understanding as a community so that similar mistakes can be avoided in the future. ● The identification as Queer and Christian encompasses welcome to all, whether Friends identify as Queer, or Christian, or neither.
- Grounding in Salem Quarter and New England Yearly meeting, including the embrace of NEYM's Faith & Practice

## **C. Three events held as part of our work**

### **1. Question and Answer Session for Salem Quarter and Permanent Board members**

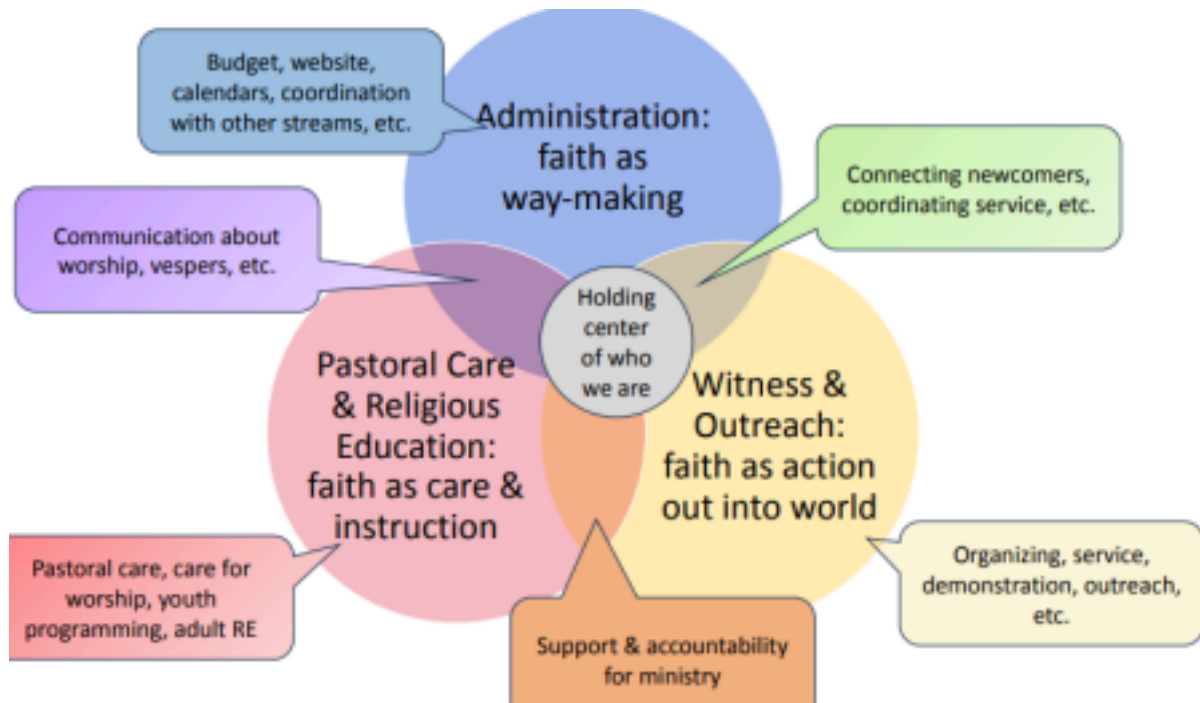
The Visiting Committee held a question-and-answer session on January 14<sup>th</sup>, to help the wider community of Friends to get to know Three Rivers better. As part of that process, we requested that questions be sent to us ahead of time. We received about 12 to 15 emails raising questions and concerns.

We identified several important issues both from the emails and from our explorations during the course of the fall, which we included in our discernment and in the questions that were presented as part of the Q&A session.

The themes included:

- Three Rivers' relationship to Salem Quarter and NEYM, including adherence to NEYM's Faith & Practice
  - Three Rivers is grounded in Salem Quarter, and as such will be a part of New England Yearly Meeting.
  - Three Rivers embraces the Faith and Practice of New England Yearly Meeting.
- Membership in Three Rivers
  - Three Rivers will follow the membership practices set forth in NEYM's Faith and Practice.
  - Friends who are members of other meetings may choose to worship with Three Rivers at any time. Three Rivers holds worship on Thursday mornings, so there is no time conflict with Sunday morning meetings.
  - Membership is understood to be a commitment to a single meeting.
- Financial management and oversight
  - The finances of Three Rivers are currently under the care of Fresh Pond Meeting's Finance Committee and Treasurer.
  - When Three Rivers becomes a Monthly Meeting they will appoint their own Finance Committee & Treasurer, as is the practice among Friends.
- How Three Rivers will hold the collective work of the Meeting in the manner of Friends ○ Three Rivers envisions holding their work in 3 main categories, as depicted in this

diagram. As with all work of Friends, the gathered Body will discern the specifics as their work unfolds.



- How meeting primarily via Zoom works in Three Rivers
  - See “Our Experience of worship with Three Rivers”
  - The Zoom format makes Three Rivers accessible without the constraints of geography.
  - The Zoom format is particularly valuable for those who don’t live near a Friends Meeting, and for those who have challenges attending in-person meetings due to health or mobility.
  - Queer people across the country have access to spiritual support within Three Rivers, at a time when the Queer and Trans communities are under increasing attack.
- Care and accountability within Three Rivers
  - Friends shared personal anecdotes of times when they were held in loving accountability by the community, and how the experience was one of growth and nurturing.
  - The visiting committee witnessed a moment of community accountability, in response to a guest speaker having a difficult experience on the day she joined the meeting. It was a nuanced discussion of the events, with care to note and understand what happened, including patterns of oppression, good intentions, and harm caused.

Our understanding of our task, based upon our reading of Faith & Practice and tested in shared discernment among a wider group of Friends, is with evaluating how the Spirit is moving among Friends, and whether, as a body, Three Rivers is ready to take on the responsibilities associated with the life of a Friends Meeting held in good order.



Several friends who wrote to us expressed misgivings about one person who is active in Three Rivers. We were surprised and dismayed by such a strong focus on one individual. We understand that the people who expressed misgivings hold those concerns sincerely. At the same time, we are clear that Friends hold the life of the meeting as a body, transcending the individual.

In our introduction to the Q&A session, we mentioned that people wrote to us with questions and concerns about one individual. We stated that during our question-and-answer session we would stay focused on Three Rivers as a spiritual community.

## **2. Formal Listening session with the Three Rivers community**

On January 18<sup>th</sup> we held a formal listening session with the Three Rivers community. We posed these questions:

- What is important for you to say about your relationship with the Three Rivers Worship Group?
- What do you want to receive from the Three Rivers Worship Group? Give to the Three Rivers Worship Group?
- What do you see as the next important work of Three Rivers?
- The responses included:
  - A celebration of spiritual grounding
  - Appreciation for the rich quantity and depth of water metaphors
  - Gratitude for the part Three Rivers played in supporting one Friend's gender transition.
  - The idea of hands as the metaphor for doing God's work
  - A feeling of coming home
  - Concerns about the possibility for rigid structures to impede growth, coupled with a commitment to responsive planning and structures
  - Appreciation of supportive eldering
  - Wonderings about the possibility of some Friends feeling threatened by Three Rivers
    - And, repeatedly, thanks and celebration for the presence of the Three Rivers

On January 28<sup>th</sup> we held another listening session, offered on a Sunday night to coincide with Vespers.

People noted:

- I can bring my whole self to Three Rivers
- Three Rivers is open to our vulnerabilities and to our healing.
- It's about the music.
- Sunday nights are a wonderful option for those who can't make worship on Thursday mornings.
- Appreciation for Kristina's ministry, including reliability, work to find the music,

- mentions of good experiences with Quaker Dinner Church
- Comfort in hearing and using Christian language, free to be who we are: Queer.

## D. Additional Recommendations

During our work as a Visiting Committee to the Three Rivers Worship Group, we encountered issues within NEYM that, though not part of our charge, impacted our work and posed considerable challenges. We believe that Spirit-led work on these long-standing, painful issues offer opportunities for the future of New England Yearly Meeting and modern Quakerism.

1. Our work discerning the readiness of a worship group to become a meeting became embroiled with fears, rumors, and allegations surrounding one person. We found ourselves in the untenable situation of being asked to somehow litigate or mediate these fears and accusations in the context of evaluating Three Rivers.

- This made our work incredibly more difficult, time-consuming, and stressful. • It was a grave injustice to the Friend in question to share doubts, questions, and accusations with us rather than directly with her or her care and accountability committee.
- It is unfair to the Three Rivers community to assume that a whole body of Friends would be unable to conduct their business in good order, and that they would be manipulated by one Friend.

We ask that Friends grapple with interpersonal conflict as it arises, in an open and transparent way. Gospel Order asks that we bring fears and accusations directly to the individual in question, rather than speaking of them to others in their absence. Rumors and allegations spoken *about* a person but not *to* that person are anathema to integrity and community.

2. The lack of clarity around how to proceed while Salem Quarter is on Sabbath resulted in a great deal of focus on “correct process” as a top priority, ignoring the lived experience and discernment of Fresh Pond Meeting as they walked with Three Rivers in their spiritual journey over the course of several years. Pointed questions about what *could* go wrong came at the expense of all that had *already* gone right to bring a new Meeting before us for consideration.

We ask Friends to first be led by the movement of the Spirit when discerning good process, and to strive for open, authentic, communication balancing love and truth. Multiple Friends commented to us about the dissonance they experienced at the contrast between the open communication held and modeled by the *programs* of the Yearly Meeting (especially Young Adult Friends) and the methods of communication observed during Permanent Board Meetings.

Useful links:

[Faith and Practice: Establishing a Monthly Meeting](#)

[Documentation of Fresh Pond Recommendation that Three Rivers Worship Group become a Monthly Meeting](#)

[Three Rivers Values Circles](#)

[What does “Ministry” Mean at Three Rivers? \(audio also available\)](#)

[What does “Under the Care” Mean at Three Rivers? \(audio also available\)](#) [What does “Membership” Mean at Three Rivers?](#)

Submitted by Ellen Neelands, Mary Zwirner & Regina McCarthy

Dear members of NEYM Permanent Board,

Fresh Pond Monthly Meeting reaffirms our corporate discernment and continued support for the leading that the Three Rivers worship group ought to become a monthly meeting. Given your approaching discernment, we want to offer our present understanding, so that you might have our current perspective as you labor with how to proceed.

The Three Rivers Accompaniment Committee, appointed by Fresh Pond Monthly Meeting in December 2021, has fostered a strong connection between our Meeting and the Three Rivers community. All members of this committee regularly worship with Three Rivers, ensuring a deep understanding and sense of their corporate spiritual journey. After the appointment of NEYM's Visiting Committee, the Accompaniment Committee was on a brief hiatus, but it has now reconvened, meeting twice in the past two months. It is our expectation that the committee will continue for the foreseeable future, serving as a bridge and source of mutual support between Fresh Pond and Three Rivers. The committee's insights and questions have been seasoned by our Meeting for Business on numerous occasions, allowing us the clarity to share the following three points.

First, we have considered the financial implications of the transition of Three Rivers to a monthly meeting. Our Assistant Treasurer has provided a comprehensive overview, ensuring both our confidence in the right ordering of the financials so far *and* our readiness to support Three Rivers as they get set up with accounts and begin to separate their finances from ours.

Second, it is important that you know that our relationship with Three Rivers extends beyond mere logistical support. The energy and dedication that Three Rivers brings to its ministry have revitalized aspects of our own meeting, inspiring us to explore new ways of worship and community engagement. We find that our connection is enlivening. We intend to maintain and deepen this dynamic and spiritually enriching partnership.

Third, *Faith and Practice* says that preparative meetings "develop in order to meet the particular spiritual needs" of Friends, and we see that this is precisely what Three Rivers is doing. We find that the level of care and ministry Three Rivers offers is a clear response to unmet needs within our communities, particularly in its welcome to Queer people and to its transparency around its Christian rootedness and semi-programmed worship. Our observations and experience of the ministries growing in Three Rivers strengthens our belief in their capacity and readiness to become a monthly meeting.

Fresh Pond Monthly Meeting has discerned and remains convinced that it is rightly ordered for Three Rivers to become a monthly meeting. We request that the NEYM Permanent Board acknowledge and affirm the authenticity of this leading and establish Three Rivers as a new monthly meeting on behalf of Salem Quarter thereby allowing this manifestation of Spirit to enrich the wider Quaker community.

We look forward to the growth and deepening of the Three Rivers community as they embark on this new chapter of their spiritual journey, joining us in Salem Quarterly Meeting and New England Yearly Meeting.

In the Light,

David Coletta  
Mary Hopkins  
Jay Weber  
Co-Clerks, Fresh Pond Monthly Meeting

Approved by Fresh Pond Monthly Meeting for Business  
4 February 2024

**Coordinating and Advisory Committee**  
**Report to New England Yearly Meeting Permanent Board**  
**February 10, 2024**

**Our committee charge:**

The Coordinating and Advisory Committee (C&A) shepherds the work of the Yearly Meeting in alignment with the core purpose and priorities articulated by the Yearly Meeting, and advises and coordinates the various committees, quarterly meeting leadership, staff, and other initiatives within the Yearly Meeting. The members of this committee hold a particular responsibility to build a culture of inclusive and sustainable leadership development. C&A is responsible for supervising and evaluating the work of the Yearly Meeting Secretary.

C&A is accountable to Permanent Board and to Sessions and coordinates the work of Yearly Meeting committees striving to prevent duplication of effort and facilitate efficiency and effectiveness in the work of the Yearly Meeting. With a goal of ensuring alignment with Yearly Meeting priorities, C&A regularly reviews each committee's Purpose, Procedure, and Composition and works in consultation with the Committee in this task.

We are a group of Friends serving the Yearly Meeting who work collaboratively to support each individual member's role and responsibilities within the Yearly Meeting, to foster their spiritual gifts and strengths for that work, to foster creativity of approaches, and to enhance decision-making, all towards the goal of improving overall efficiency and effectiveness in the stewardship of our Yearly Meeting community. As a group we also provide the space for gathered reflection, consultation and discernment around matters of concern within each individual committee member's sphere of responsibilities.

**An update on our work:**

Since the last regularly scheduled meeting of the Permanent Board in December held at Mt. Toby Monthly Meeting, we gathered for our annual mid-winter retreat at Thanksgiving Farm in Vassalboro, Maine, with gratitude to Elizabeth and John Reuthe (Vassalboro MM) for their gracious hospitality. Through this in-person interaction and cooperation, we have built trust and strong working relationships, ensured close communication, and we continue to build a Spirit-grounded and positive work environment. We are committed to supporting and encouraging the on-going work of spiritual transformation happening in many different ways across our Yearly Meeting.

**Request for action from Permanent Board:**

**At the December 9, 2023 Permanent Board meeting, minute PB 23-66 notes that Coordinating and Advisory proposed to bring a recommendation of a charge for the Contributions Criteria Working Group for the February 10, 2024 Permanent Board meeting.**

**Coordinating and Advisory has done this work and submits the recommendation as a separate advance document for the Permanent Board's consideration, complete with: rationale, background, definition of membership, supervision, measures of success, and timeline.**

**Coordinating and Advisory Committee asks for discernment and approval of this charge.**

Some other areas of Yearly Meeting activity that we have considered in the past months include:

- Ongoing support for the Nominating Committee, both strengthening the team, grounding, and in reducing burdens to its function.
- Implementing and shepherding recommendations for Spiritual Life, Ministry & Eldership.
- Encouraging establishment of a process to determine funding for other Quaker groups out of our Yearly Meeting's annual budget.
- Supporting the Yearly Meeting programming that nurtures local meetings and meeting leaders in Clerking, Recording Clerking, Nominating & Naming Gifts, Stewardship, Pastoral Care, and more.
- Continuing encouragement of the Faith and Practice Revision Committee in its work.
- Encouragement of the work of the Meeting Accompaniment Group which supports monthly and quarterly meetings.
- Supporting the Ministry and Counsel clerk and planning for initiatives in Pastoral Care and attention to ministry across the Yearly Meeting.
- Supporting the Legacy Gift Fund Committee's review.
- Supporting the concerns of the Earth Care Witness Friends and their discernment for effective structures for the work.
- Shepherding the creation and development of the Youth Ministries Committee and supporting the staffing structures that are key to the programming for Youth within your Yearly Meeting.
- Holding tender care for the work of the Noticing Patterns of Faithfulness and Oppression Working Group and for the work of the Response to Conflict Working Group.

With all of the above engaging us, we have met several more times since the retreat of January out of immediate necessity. It was immediately after that retreat that we learned of the challenges that Noah Merrill, our Yearly Meeting Secretary, and his family are facing. Coordinating and Advisory, in its role of oversight for Noah's position, focused on solutions to staffing and maintenance of Yearly Meeting activities while also providing compassionate response to the needs of our dedicated employee. Our perspective is that this is an important moment to realize that prioritization is needed. To ask ourselves as a Yearly Meeting, what is essential, to discern what things can be shifted, paused, or laid down. We ask "Is this the opportunity to slow down enough to allow something new – new forms, new ways of being in the world – to open as possibilities?"

Coordinating and Advisory Committee members, individually and corporately, in the discernment that engages us and the work that we do, bear witness to the fullness of the experiences of the community that is New England Yearly Meeting Friends and to the challenges of these times we are living in. We are

keenly aware of the concerns of Friends that have been and continue to be raised about many issues both internal to the Society of Friends and in the wider world. We hold all Friends of our Yearly Meeting community in deep care and concern. We are keenly aware that ours is a community that yearns to achieve transformation to a better, more loving, more just, more compassionate world. That we, as a religious society, are striving to reach a place where we all share in absolute acceptance and belonging. With that deeply held hunger, we are undeniably a large and beautifully diverse body with Friends' urgent longing to live more fully into beloved community expressed in passionate and sometimes diverse ways. Coordinating and Advisory Committee is listening and holding the conditions of all Friends in our hearts. Each bright Light is held in love, each voice is heard with respect, each individual is an invaluable expression of the Divine.

Inevitably with great passions and leadings and urgency experienced among us, there is bound to be chafing. And in the recent past we have seen much of this. Yet we ere if we assume that those with whom we share fundamental values, who care as deeply as we do, who are like us in striving to stay faithful to Spirit, are somehow our adversary. Division is not the way forward. Cooperation, working with, subsuming ego to the will of the Divine, and listening with hearts open to all truths, must be the way forward.

In our work together and in our individual personal commitments to serving this Yearly Meeting in our Coordinating and Advisory Committee roles, we are witness to how many Friends in New England are living into the Spirit. We are grateful for the support, feedback, guidance and prayer we have received throughout these months. We recognize that it is Divine Spirit that guides and provides the foundation upon which together we are all building our beloved community.

In all of the above, we serve with joy and love and commitment to the nurture of our Yearly Meeting.

Rebecca Leuchak  
Presiding clerk

On behalf of Coordinating and Advisory Committee: Marian Dalton (Yearly Meeting Treasurer), Susan Davies (Permanent Board Clerk), Scot Drysdale (Finance Committee Clerk), Sarah Gant (Meeting Accompaniment Group Clerk), Noah Merrill (Yearly Meeting Secretary), Elizabeth Reuthe (Supervisor of the Yearly Meeting Secretary), Jackie Stillwell (Nominating Committee Clerk), Nia Thomas (Yearly Meeting Acting Secretary for Program and Administration), Carl Williams (Ministry and Counsel Clerk)

**To: Permanent Board**  
**From: Coordinating and Advisory Committee**  
**Date: February 2, 2024**  
**RE: Proposed Charge: Contributions Criteria Working Group**

**Reason for Establishment:**

The purpose of the Contributions Criteria Working Group is to establish simple criteria to be used by the yearly meeting each year to choose organizations – if any – for financial contributions from NEYM. The criteria will align with the [minuted core purposes](#) and priorities of NEYM and take into consideration what rises during regular discernment of the [Funding Priorities Process](#) and [Meeting for Listening](#).

Once the criteria are established and approved by Permanent Board, the working group will transition its work to applying the criteria and naming how to distribute the annual total budgeted amount designated by Finance Committee for an initial trial period of two years. This initial period is designed both to test the usefulness of the criteria and to consider what body might best hold the ongoing listening and periodic review of the criteria and distribution of yearly meeting contributions.

**Background:**

At the December 9, 2023 Permanent Board meeting, minute PB 23-66 notes that Coordinating and Advisory proposed to bring a recommendation of a charge for the Contributions Criteria Working Group for the February 10, 2024 Permanent Board meeting.

Permanent Board established the Financial Contributions Working Group which [reported](#) on its work at the April 2, 2022 meeting of Permanent Board (PB 22-26). The report raised additional questions and recommended that Finance Committee determine, annually, the total budget amount – if any – for contributions to outside organizations. Permanent Board approved this approach ([PB Minutes](#) from April 2, 2022).

Finance Committee had asked Permanent Board at its May 15, 2021 meeting to create a financial contributions working group ( [PB minutes of May 15, 2021](#) PB 21-42) . Specifically, the Finance Committee sought guidance regarding:

1. Is financial support of FGC, FUM and FWCC part of the living ministry of NEYM? Is level funding of FGC, FUM and FWCC appropriate? What criteria should be used to make these large gifts?



2. What active role is NEYM playing in each of these organizations? Would support of these organizations be more meaningfully done at a monthly meeting or personal level?
3. Are the nominal donations to outside organizations meaningful for NEYM? What criteria should the Committee use to determine which organizations to include for such gifts?

Finance Committee is clear that **how** that amount is allocated is outside the scope of its work.

**Membership:** Three individuals with a concern for standards of financial practice, understanding of the purpose and work of the Yearly Meeting within New England and beyond, ability and willingness to consult with Friends across the Yearly Meeting as needed, skill at distilling complex ideas into concise and clear language.

**Responsibilities:** To consult broadly, as is useful. To establish simple criteria for the vetting of candidate recipients of NEYM contributions. For the 2 year trial period, to determine the distribution of contributions, i.e., of the amount that Finance Committee names for contributions, what organizations will get what amount. To make recommendations for what ongoing body might best hold the final process for listening and periodic review (e.g., every 3 to 5 years) of the decision process for distribution of yearly meeting contributions.

**Guidance about Working Group Timelines:** To bring a progress report to affirm or modify this charge by May 2024; to bring an interim report of initial recommendations to Permanent Board for review and input by *December 2024*. To make recommendations regarding implementation of the decision process for a *two year trial period*, to set annual distribution of NEYM contributions, To *periodically* bring suggested changes to Permanent Board for approval. To bring a final recommendations to Permanent Board for an ongoing structure for this body *at the end of the two-year trial period*.

**Guidance for framing criteria, from Coordinating and Advisory:**

1. Consultation with Friends throughout the YM will be an important aid to the development of widely accepted criteria
2. The criteria to prioritize NEYM contributions should align with the [minuted priorities and core purposes](#) of NEYM.
3. The criteria should take into account the differing values that inform Friends' prioritization of different organizations, and the nature of the relationship between NEYM and the organization.
4. The working group should review and thoughtfully consider the recommendations of the 2022 Financial Contributions working group as set forth in minute PB

22-26 and the working group's report in advance documents for the April 2, 2022 PB meeting. For example, the following queries:

- a. "What does it mean to be a member of these other organizations?"
- b. "How can Friends flexibly respond to needs in the world?"
- c. "What percent of our budget do we give away?"
- d. "Who do we feel called to give it to?"
- e. "Who are 'we' that are the people doing the giving? Are there Friends and neighbors close at hand who desperately need our help?"

**Supervision:** Under the care of Permanent Board, and in consultation with the clerk of Finance Committee.

**Measures of Success:**

1. A consultative process that creates space for perspectives to be considered including from Friends of different generations, Friends who hold concern for NEYM's financial health, and Friends who hold a concern for NEYM's relationship to other Quaker organizations.
2. A written report, in consultation with the Finance Committee, offering clear and actionable guidance, approved by Permanent Board.
3. Overseeing ongoing consultation and listening for a period of two years to test the usefulness of the proposed criteria, setting annual distribution of NEYM contributions during the trial period, and for discernment around what body of Friends, with what qualifications, might be called to this work for an extended period of time.

**Initial, vetted recommendations for decision criteria to Permanent Board:** December 2024

**Date projected to complete work:** May 2026

**Process for laying down:** By Permanent Board following completion of Measures of Success.

**Request for Approval of Funding Applications to the Legacy Gift Fund and the Obadiah Brown  
Benevolent Fund to financially support Acting Co-Secretary roles for Nia Thomas, New England Yearly  
Meeting Program Director, and Sarah Gant (Beacon Hill MM).  
Submitted by the Coordinating and Advisory Committee to the Permanent Board Committee  
February 10, 2024**

“If one member suffers, all suffer together; if one member is honored, all rejoice together.” (ESV)

In First Corinthians 12:26, Paul expresses an essential principle of community, that its parts should have equal concern for each other, that the body should have care for each individual.

Our Yearly Meeting has in the past expressed its care for the condition of our dedicated employees by striving to grant family leaves for members of the staff who have needed them. Our practice has been to support staff members by allowing for flexibility in how staff use their paid time off, allowing them to consult with their supervisors to consider both responsibilities to the Yearly Meeting as well as personal/family needs. In these situations, the Yearly Meeting takes into consideration the amount of comp time that a staff member has accrued in jobs that extend beyond the nine-to-five/Monday to Friday work week. As in these earlier practices of compassionate parameters for leave time, we are now faced with a need that is clear and compelling.

Friends are reminded that the Yearly Meeting’s secretary holds the responsibility to serve our Yearly Meeting. Our New England Yearly Meeting staffing structure designates the supervision and oversight of the Yearly Meeting Secretary as a responsibility of the Coordinating and Advisory Committee (C&A) with operational direction and guidance provided by a member of that committee as designated by the committee. The guidance and support it provides to the Yearly Meeting Secretary, and the supervision and evaluation of the work of the Yearly Meeting Secretary, are carried out with the intention of responding to the needs of the Yearly Meeting. The Yearly Meeting Secretary is required to report to and be accountable to the New England Yearly Meeting of Friends as represented by the Coordinating and Advisory Committee.

In late January, our Yearly Meeting Secretary, Noah Merrill, experienced a personal event of such extraordinary seriousness and deep concern, that we all are called to respond with love and support and to think beyond the strict bounds of bereavement leave.

Noah has requested, and Coordinating and Advisory Committee has granted him, a period of compassionate family leave until April 1, 2024. We expect Noah may be able to continue to engage in a consultative role to some degree during this time. Members of NEYM staff and C&A are in contact with him as he finds it manageable. He plans to begin to resume his duties after that period. We are aware that this is not a situation explicitly covered by our personnel manual, however guidance on both leaves of absence and work overloads have been considered in this decision. We note that the ongoing work to revise those employment guidelines should include lessons learned from early leave arrangements and this particular situation.

Understanding the need for timely and creative response to the situation and holding our beloved community in healing Light, the Coordinating and Advisory Committee has worked closely with our New England Yearly Meeting staff to ensure that we may continue the essential activities of the Yearly Meeting during the time that Noah Merrill is on leave for these extraordinary personal reasons.

We proposed the staffing model that was used for the period of Noah's sabbatical leave in the fall of 2021 with Nia Thomas, Program Director, and Sarah Gant, currently the clerk of the Accompaniment Group, dividing the key functions of the Yearly Meeting Secretary between them. Permanent Board approved this arrangement in the called meeting of January 25<sup>th</sup>.

**We further propose the remuneration model of that same sabbatical period, with Nia Thomas receiving a supplement to her salary for the period of extra duties, and Sarah Gant receiving a stipend for taking up other aspects of the secretary's work. While Noah's salary during the time of leave will continue to be paid out of our existing Yearly Meeting budget, our intention, with Permanent Board's approval, is to apply for funding for Nia and Sarah from two grant awarding bodies, the Legacy Gift Fund and the Obadiah Brown Benevolent Fund. Both have been contacted for verification of the fit of this extraordinary need to the mission of these bodies and both have affirmed that an application for this purpose would be acceptable.**

Coordinating and Advisory Committee's intention is to make sure that our solutions in financing these personnel needs be budget neutral. We do not wish to conflate this one-time extraordinary need with our very different longer term financial development efforts to raise funds in overall support of New England Yearly Meeting. We do not recommend the creation of a situation-based emergency campaign for fundraising directed to quarterly or monthly meetings or to individual Friends.

Submitted by Rebecca Leuchak, Clerk  
Coordinating and Advisory Committee

## **NEYM Conflict Response Working Group Report to Permanent Board February 10, 2024**

### **From NEYM Annual Sessions Minute 2023:42**

*Faithfulness demands that we lean in, rather than avoid the hardship of facing conflict. This is an opportunity for healing, learning, deepening, and transformation of relationships. But it demands structure, support, and tender care that is lacking within our body at this time.*

*We need to transform conflict at every level of our body. In particular, we hear that there is a call for a clear structure or path that supports a healthy response to conflicts when they arise outside the structure of the monthly meeting. Friends heard a clear request for this concern to be taken up.*

### **From the September 30, 2023 Permanent Board Minutes**

*[...]Permanent Board charges the Coordinating & Advisory Committee, in consultation with Nominating Committee...to bring forward...a working group on strengthening capacities for response to conflict rising in the life and work of the Yearly Meeting and to make recommendations to Permanent Board for further discernment and action.*

The Conflict Response Working Group has met twice (1/6/24 and 1/19/23). Our first step has been to get to know each other. Conflict cannot be addressed without an established relationship of trust, and that requires actual lived experience. We have seen in our personal relationships (and in this Yearly Meeting) that our good intentions are not enough to shield others from the impact of our actions. In our desire to delineate a process that will serve the Yearly Meeting we need to be sure that we include time and methods for faithful trust-building among Friends, who may begin from a place of trust in God but not necessarily in each other. So we have spent considerable time in our first meetings talking about the spiritual underpinnings of our work together and about the need to clearly define the terms we are using (conflict, safety, engagement, compromise) so that we can speak plainly with one another.

We have found ourselves drawn to queries as a way to explore our own and each others' experience and understanding. We carry a simultaneous awareness of the urgent need for a process of responding to conflict in the Yearly Meeting and the pitfalls of providing a quick fix that will only yield superficial results while leaving the underlying issues to fester.

In seeking to be a transparent, we have chosen to offer a work-in-progress report and to include the following queries, which we have used to guide our work together and which we offer for your discernment as well:

- What is our common spiritual ground? How can we foster grounding in Spirit?
- What do we define conflict?
- How do we find a common ground to engage with each other to work through conflict? How do we test our personal understandings and identify where the disconnects are?

- Do we know if there is cultural agreement about conflict among all partners who are engaged?
- What do we mean by safety? How do we build safety and trust with each other? How do we call to mind for ourselves, and call each other into, that larger place of safety that is available to accompany us, in which the Spirit holds all differences with love and care?
- How do we balance the spiritual needs of the community with the spiritual needs of individuals?
- How do our traditional practices of loving eldering fit into responding to conflict in the twenty-first century?

We hope that you will spend time with these queries in your individual reflections and in your prayer and conversation with other Friends. We look forward to receiving your feedback and, with Spirit's guidance, to bringing a draft process for responding to conflict to the next Permanent Board meeting in May.

We also note that although we have a variety of life experiences and we each bring a deep desire to be faithful in this work, we are similar in many ways that inform our imaginations and our abilities to hear and interpret Spirit's call. We want to share that a number of Friends who were invited into this work were unable to accept the invitation at this time, and we are committed to continue seeking friends who can bring their gifts and vision to this work. In this spirit we would like to request that Permanent Board approve the addition of Alycia Parkes (Friends Meeting at Cambridge), who brings a sincere desire to nurture healthy processes for responding to conflict and who has experience in conflict mediation.

Faithfully,  
Melody Brazo

Conflict Response Working Group Members:

Carl Williams, Clerk of NEYM M&C (Plainfield Monthly Meeting)

Darcy Drayton (Souhegan Monthly Meeting)

Melody Brazo (Fresh Pond Monthly Meeting)

Rebecca Leuchak, NEYM Presiding Clerk (Providence Monthly Meeting)

Susan Davies, Clerk of NEYM Permanent Board (Vassalboro Friends Meeting)

## Charge: Sessions 2025+ Visioning Working Group

### Reason for Establishment:

This working group will conduct consultation and listening among Friends in New England in order to inform a more clarified vision and priorities for future Annual Sessions, consistent with Phase II of the [Sessions Visioning and Design](#) plan.

### Membership: (e.g., number of members, qualities sought in members):

Three or four Friends, all with a care and appreciation for Quakers in New England. These Friends should carry a variety of personal experiences in connection with New England Yearly Meeting and its Annual Sessions. These Friends should be carrying gifts and skill in: listening beneath the words (including when listening to youth voices), gathering and synthesizing many perspectives, writing clearly and collaboratively, understanding of group dynamics, ability to follow through and meet deadlines.

The Office Manager will convene this group and offer administrative support as needed. The Program Director will serve as a resource for the Phase II process, providing guidance on best practices related to consultation design and implementation as helpful. Other Sessions planners and staff will be available for consultation as needed.

### Responsibilities:

1. With any needed support from the Program Director, design a consultative process which engages a large variety of perspectives from Friends in New England, including Friends across the life span, across the geographic region, and with varying levels of participation in Sessions.
2. With administrative support from the Office Manager, facilitate and compile notes during the consultative conversations conducted according to the consultative process design. The focus of this facilitated listening process is to understand and affirm why the Yearly Meeting holds Annual Sessions, to clarify what Friends hope that NEYM Sessions accomplishes, now and in the future, and to gather guidance on how to prioritize in the face of limited resources;
3. To solicit, review, and analyze survey responses gathering reflection from additional New England Friends;
4. To write a report capturing a simple, usable articulation of the purpose of Sessions including how this purpose relates to and builds upon the overall purpose and priorities of NEYM. This report should also include insights and recommendations (including areas requiring further attention) regarding the key issues in the [Phase I report](#).
5. To share a brief progress update for the May 11th Permanent Board meeting.
6. To share a draft report to Sessions Planning Leadership, Coordinating & Advisory, and Consultation Conversation participants for comment by July 1.

7. To bring the final report to the Permanent Board in mid-July for affirmation, and further guidance to inform Phase III of this process.
8. To share the final report at Sessions 2024.

**Supervision:** (e.g., whom or which body, nature of relationship)

Under the care of Permanent Board, and in consultation with the Yearly Meeting Secretary<sup>1</sup> and the Program Director.

**Measures of Success:**

1. Active listening and engagement in the consultative process used to bring together needed perspectives on Annual Sessions purpose and its relationship to the wider Yearly Meeting.
2. The consultative process is implemented in such a way that it helps to “pave the way” for healthy, necessary, and Spirit-led changes; participating Friends grow in their ability to be participants in on-going discernment and experimentation regarding Sessions, listening together for how God is calling our Yearly Meeting at this time.
3. A written report articulating the purpose for Annual Sessions and its relationship to the wider Yearly Meeting, to serve as guidance to the planning team for Phase III. This report may also include unresolved “big picture” questions requiring further attention.
4. Report findings and reflections are clear enough to help Sessions Planners and the wider Yearly Meeting set priorities and make decisions regarding Sessions for the year 2025 and beyond.

**Date projected to complete work:** August 2, 2024

**Process for laying down:**

Once the shape of Sessions is defined and a location is identified, the working group would be thanked for their work during 2024 Annual Sessions. Although the working group would lay down the bulk of their work at the conclusion of 2024 Sessions, they may be called upon to season the Phase III work of turning the “what Sessions is” work into the “How do we do it?” work. The working group would lay down its work at the conclusion of Phase III.

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<sup>1</sup> Or the Acting Yearly Meeting Secretaries depending on the timeline.



# Proposal, Timeline, and Working Group Charge for Sessions Site Search in 2025+

Elizabeth Hacala, Events Coordinator (events@neym.org)

January 2024

With a contract for 2024 signed with Castleton University and that planning process underway, it is time to turn our attention to the space needs for 2025 Sessions and beyond. Since a conversation about the shape and priorities of Sessions is happening in parallel with the site search, the first phase of the search will focus on gathering as much data for possible sites as we can rather than focusing on a targeting list from the get go.

Even though we are having listening sessions and conversations about the shape of Sessions, most of the physical needs of the gathering are unlikely to change significantly. We will still likely need dorms for people to stay in, a place for meals, large gathering spaces for group discernment, locations for youth programs, and spaces for small group gatherings.

In order to determine what spaces could host Sessions, the site search will take place in three phases:

## **Phase 1 January - April: Survey and data collection**

Based on the work of the prior search in 2019 the Events Coordinator, Elizabeth Hacala, will compile a list of the various universities and other locations that were identified as potential sites. In addition she will send a form and request for information to schools that seem less promising at first but we might have overlooked.

## **Phase 2, May – June:**

The Events Coordinator assembles the list of sites with the strengths and weaknesses of each including their available dates for Sessions. Identify a short list of sites that match the needs of the visioning process and work with a team of Friends with particular gifts around Sessions to help finalize the list. Among these Friends would be those people who participated in the prior site search which was paused due to the pandemic.

Depending on the state of the visioning, there may be initial site visits at this time.

## **Phase 3, July Final recommendation for 2025 site:**

Confirm that all the sites identified in Phase 2 will work with the needs identified during the visioning process. Determine if any sites need a second visit and collect detailed financial details for Sessions at that site. Initiate a draft contract with the top choice so we can bring a clear proposal with costs, benefits, and any drawbacks to both Permanent Board and ultimately Sessions.

## Sessions Site Search Working Group Charge

**Reason for Establishment and Charge/Purpose:** This working group will work with the Yearly Meeting staff to identify possible sites for future Annual Sessions per the *Annual Sessions Visioning and Design* plan approved by Permanent Board.

**Membership:** (e.g., number of members, qualities sought in members): The working group will consist of at least three and no more than seven Friends, with an ideal membership of five Friends and the Events Coordinator of the Yearly Meeting.

In order to best represent the community, we want a breadth of life skills, experiences and backgrounds represented on the search committee. This is particularly important because the selection process will have to consider pedestrian concerns like, “Are there enough dorm rooms?”, to questions of “Is this space conducive to the work we need to do?”, to the ethereal yet important, “Will this space foster a feeling of community?”

Friends in this group should have had involvement with Sessions in the past, either working or attending, and have the flexibility to visit a small number of sites during regular business hours. The members of the 2019 Site Selection group will be invited to return.

**Responsibilities:** To review and visit potential sites for Sessions for 2025 and beyond. As the discernment in the visioning process takes shape, they will use that discernment to determine the best locations to recommend.

**Supervision:** The working group will coordinate with the Events Coordinator and ultimately reports to the Yearly Meeting Secretary.

**Reporting:** Updates on the process will be supplied to the Permanent Board at each meeting. The Events Coordinator will be responsible for providing a written summary of activities.

**Measures of Success:** A recommendation for Permanent Board and Sessions to approve for Sessions 2025 and beyond.

**Date projected to complete work:** July 15, 2024

**Process for laying down:** Assuming a location is identified, and a contract drafted and approved, the working group would be thanked for their work during 2024 Annual Sessions and the working group would lay down its work at the conclusion of that Sessions.

January 4, 2024

Dear Friends,

I am pleased to present the financial reports for Fiscal Year 2023 (October 1, 2022 to September 30, 2023). These reports are also available on the Yearly Meeting's website in the section Who We Are/How We're Doing/Financial Statements.

FY2023 was another challenging year for the Yearly Meeting. The Budget vs. Actual Summary shows a Net Income of \$-63,027.57 before internal transfers and \$-35,177.71 after. (\$30,000 of the transfers were planned and budgeted.)

Please note the report Statement of Activities - All Funds to see the details of transfers to and from other funds.

The Permanently Restricted Funds report shows that a small increase in our pooled (invested) funds of 5.4% (\$30,490.68) due to the increasing value of our investments under the care of the Board of Managers.

Operating Reserves report shows that, as of the end of the fiscal year, the sum of Working Capital plus the Quasi-Endowment was 5.4% of the expense budget, far below the policy set by the Finance Committee "to have an operating reserve equal to one quarter of the annual budget (3 months) at the beginning of each fiscal year." (That Operating Reserve level was 29.4% in FY21 and 12.8% in FY22.) While this is a dangerously low level, the Yearly Meeting is not in financial peril.

In the Board Designated and Revolving Fund Report, line Total 3600 Board Designated Funds shows Board Designated Funds to equal \$1,145,470.07. While these funds are currently treated as reserved for specific purposes, the Permanent Board has the option of reallocating them to address current financial needs, if needed.

The Monthly Meeting Donations report shows the derivation of line 4020 in the Budget versus Actual report.

I remain optimistic about the mission and value of the Yearly Meeting and I ask you to join me in building and protecting the Yearly Meeting for future generations of Quakers in New England.

Robert Murray, Former Treasurer

**NEYM**  
**FY2023 Operating Budget vs Actuals Summary**  
**October 2022 - September 2023**

	<b>Actual</b>	<b>Budget</b>	<b>Over/ (Under) Budget</b>	<b>% of Budget</b>
<b>Income</b>				
4010 Individual Contributions	197,008.76	230,225.00	(33,216.24)	85.57%
4020 Monthly Meeting Contributions	348,667.91	373,000.00	(24,332.09)	93.48%
4025 Unallocated Income (Return of Excess Premium)	33,451.27	31,000.00	2,451.27	107.91%
4050 Interest and Dividend Income	7,760.85	12,000.00	(4,239.15)	64.67%
4070 Books & Other Sales Income	11,638.37	17,000.00	(5,361.63)	68.46%
4077 Consulting Fee Contribution	900.00		900.00	
4080 Retreat Program Fees	25,711.65	47,000.00	(21,288.35)	54.71%
4085 Sessions Program Fees	158,157.17	227,400.00	(69,242.83)	69.55%
4090 Change in Fair Market Value	3,225.27		3,225.27	
4099 Net Assets Released To/From *		30,000.00		
<b>Total Income</b>	<b>786,521.25</b>	<b>967,625.00</b>	<b>(181,103.75)</b>	<b>81.28%</b>
<b>Expenses</b>				
5000 Staff	462,753.53	493,684.00	(30,930.47)	93.73%
5100 General & Administration	109,826.83	93,615.00	16,211.83	117.32%
5300 Travel & Conferences	30,898.58	35,300.00	(4,401.42)	87.53%
6000 Programs	193,219.61	284,300.00	(91,080.39)	67.96%
6140 Books & Other Sales Expense	10,043.41	14,500.00	(4,456.59)	69.26%
6200 Support of Other Organizations	42,806.86	45,975.00	(3,168.14)	93.11%
<b>Total Expenses</b>	<b>849,548.82</b>	<b>967,374.00</b>	<b>(117,825.18)</b>	<b>87.82%</b>
<b>Net Operating Income</b>	<b>(63,027.57)</b>	<b>251.00</b>	<b>(63,278.57)</b>	
<b>Transfers In/Out</b>				
9940 Other Income - Transfers from other funds *	36,638.89		36,638.89	
9950 Other Expense - Transfer to other funds	8,789.03		8,789.03	
<b>Net Transfers In/Out</b>	<b>27,849.86</b>		<b>27,849.86</b>	
<b>Net Income</b>	<b>(35,177.71)</b>	<b>251.00</b>	<b>(35,428.71)</b>	

\* For use of net assets, see 9940 Other Income, due to a change in bookkeeping practice.

Total income when including \$30,000 use of net assets is \$151,103.75 under budget.

% of budgeted total income when including \$30,000 use of net assets is 84.38%

**NEYM**  
**FY2023 Operating Budget vs Actuals Detail**  
**October 2022 - September 2023**

	<u>Actual</u>	<u>Budget</u>	<u>Over/ (Under) Budget</u>	<u>% of Budget</u>
<b>Income</b>				
4010 Individual Contributions	197,008.76	230,225.00	(33,216.24)	85.57%
4020 Monthly Meeting Contributions	348,667.91	373,000.00	(24,332.09)	93.48%
4025 Unallocated Income	33,451.27	31,000.00	2,451.27	107.91%
4050 Interest and Dividend Income	7,760.85	12,000.00	(4,239.15)	64.67%
4070 Books & Other Sales Income		17,000.00	(17,000.00)	0.00%
4072 Sales - Books	11,638.37		11,638.37	
<b>Total 4070 Books &amp; Other Sales Income</b>	<b>11,638.37</b>	<b>17,000.00</b>	<b>(5,361.63)</b>	<b>68.46%</b>
4077 Consulting Fee Contribution	900.00		900.00	
4080 Retreat Program Fees	25,711.65	47,000.00	(21,288.35)	54.71%
4085 Sessions Program Fees	158,157.17	227,400.00	(69,242.83)	69.55%
4090 Change in Fair Market Value	3,225.27		3,225.27	
4099 Net Assets Released To/From *		30,000.00		
<b>Total Income</b>	<b>786,521.25</b>	<b>967,625.00</b>	<b>(181,103.75)</b>	<b>81.28%</b>
<b>Expenses</b>				
<b>5000 Staff</b>				
5010 Salaries & Wages	351,738.85	378,053.00	(26,314.15)	93.04%
5020 Payroll Taxes	25,950.61	27,392.00	(1,441.39)	94.74%
<b>5030 Benefits</b>				
5033 Health Benefits	48,051.00	45,123.00	2,928.00	106.49%
5035 Retirements	34,829.84	35,806.00	(976.16)	97.27%
5040 Disability	1,116.36	1,100.00	16.36	101.49%
5045 Workers' Compensation	596.00	760.00	(164.00)	78.42%
5050 Spiritual Retreats				
5060 Staff Development		1,200.00	(1,200.00)	0.00%
	470.87	4,250.00	(3,779.13)	11.08%
<b>Total 5030 Benefits</b>	<b>85,064.07</b>	<b>88,239.00</b>	<b>(3,174.93)</b>	<b>96.40%</b>
<b>Total 5000 Staff</b>	<b>462,753.53</b>	<b>493,684.00</b>	<b>(30,930.47)</b>	<b>93.73%</b>
<b>5100 General &amp; Administration</b>				
<b>5110 Administration</b>				
5120 Bank Expense	8,395.84	7,000.00	1,395.84	119.94%
5130 Contracted Services	25,402.50	22,000.00	3,402.50	115.47%
5140 Legal Services	2,500.00	2,500.00	0.00	100.00%
5145 Infrastructure	5,000.00	5,000.00	0.00	100.00%
5150 Liability Insurance				
	6,388.12	5,250.00	1,138.12	121.68%
5160 Payroll Service	5,624.16	5,500.00	124.16	102.26%
5180 Rent	9,589.50	9,350.00	239.50	102.56%
5190 Misc. Expense	717.96		717.96	
<b>Total 5110 Administration</b>	<b>63,618.08</b>	<b>56,600.00</b>	<b>7,018.08</b>	<b>112.40%</b>

**NEYM**  
**FY2023 Operating Budget vs Actuals Detail**  
**October 2022 - September 2023**

	<u>Actual</u>	<u>Budget</u>	<u>Over/ (Under) Budget</u>	<u>% of Budget</u>
<b>5200 Office</b>				
5220 Cleaning Services	220.00	265.00	(45.00)	83.02%
5230 Maint - Equip & Hardware	10.51	1,250.00	(1,239.49)	0.84%
5240 Postage	3,186.90	3,750.00	(563.10)	84.98%
5250 Office Equipment	1,993.27	3,250.00	(1,256.73)	61.33%
5260 Office Supplies	1,702.70	2,500.00	(797.30)	68.11%
5270 Printing & Copying	13,724.28	14,500.00	(775.72)	94.65%
5280 Software & Updates	22,232.77	7,000.00	15,232.77	317.61%
5290 Telephone	3,006.01	4,500.00	(1,493.99)	66.80%
5295 Misc. Office	132.31		132.31	
<b>Total 5200 Office</b>	<b>46,208.75</b>	<b>37,015.00</b>	<b>9,193.75</b>	<b>124.84%</b>
<b>Total 5100 General &amp; Administration</b>	<b>109,826.83</b>	<b>93,615.00</b>	<b>16,211.83</b>	<b>117.32%</b>
<b>5300 Travel &amp; Conferences</b>				
5310 Travel - Committee	1,278.60	3,000.00	(1,721.40)	42.62%
5320 Travel - Clerk	3,027.86	4,500.00	(1,472.14)	67.29%
5330 Travel - Programs	5,792.90	3,700.00	2,092.90	156.56%
5335 Travel - Representatives Travel	13,421.87	6,700.00	6,721.87	200.33%
5350 Travel - Staff	7,377.35	17,000.00	(9,622.65)	43.40%
5360 Travel - Ministries		400.00	(400.00)	0.00%
<b>Total 5300 Travel &amp; Conferences</b>	<b>30,898.58</b>	<b>35,300.00</b>	<b>(4,401.42)</b>	<b>87.53%</b>
<b>6000 Programs</b>				
6110 Sessions Room & Board	126,566.25	192,950.00	(66,383.75)	65.60%
6112 Retreats - Room & Board				
6114 Room Rental	8,632.35	13,550.00	(4,917.65)	63.71%
6150 Food Expense	13,161.07	15,930.00	(2,768.93)	82.62%
<b>Total 6112 Retreats - Room &amp; Board</b>	<b>21,793.42</b>	<b>29,480.00</b>	<b>(7,686.58)</b>	<b>73.93%</b>
6125 Program Expenses				
6105 Honoraria - Speakers/Wkshp Ldrs	15,672.00	22,000.00	(6,328.00)	71.24%
6107 Honoraria - Volunteer Leadership	11,250.00	15,000.00	(3,750.00)	75.00%
6115 Equipment Rental	6,637.09	6,000.00	637.09	110.62%
6121 Supplies and Other Expenses	4,966.76	7,300.00	(2,333.24)	68.04%
6165 Pre-Sessions Expense	1,524.82	1,000.00	524.82	152.48%
<b>Total 6125 Program Expenses</b>	<b>40,050.67</b>	<b>51,300.00</b>	<b>(11,249.33)</b>	<b>78.07%</b>
6130 Committee Expenses - General	1,632.27	6,350.00	(4,717.73)	25.71%
6134 Childcare	297.00	2,000.00	(1,703.00)	14.85%
<b>Total 6130 Committee Expenses - General</b>	<b>1,929.27</b>	<b>8,350.00</b>	<b>(6,420.73)</b>	<b>23.11%</b>
6160 Program Support				
6163 Friends Camp	2,880.00	2,220.00	660.00	129.73%
<b>Total 6160 Program Support</b>	<b>2,880.00</b>	<b>2,220.00</b>	<b>660.00</b>	<b>129.73%</b>
<b>Total 6000 Programs</b>	<b>193,219.61</b>	<b>284,300.00</b>	<b>(91,080.39)</b>	<b>67.96%</b>

**NEYM**  
**FY2023 Operating Budget vs Actuals Detail**  
**October 2022 - September 2023**

	<u>Actual</u>	<u>Budget</u>	<u>Over/ (Under) Budget</u>	<u>% of Budget</u>
<b>6140 Books &amp; Other Sales Expense</b>				
<b>6142 Books</b>	2,696.87	14,500.00	(11,803.13)	18.60%
<b>6145 Other Items for Sale</b>	1,126.41		1,126.41	
<b>6147 Consignment Sales</b>	6,220.13		6,220.13	
<b>Total 6140 Books &amp; Other Sales Expense</b>	<b>10,043.41</b>	<b>14,500.00</b>	<b>(4,456.59)</b>	<b>69.26%</b>
<b>6200 Support of Other Organizations</b>				
<b>6310 FGC</b>	13,075.00	13,075.00	0.00	100.00%
<b>6320 FUM</b>	10,924.86	13,075.00	(2,150.14)	83.56%
<b>6325 FWCC</b>	13,075.00	13,075.00	0.00	100.00%
<b>6330 Friends' Organizations</b>				
<b>6328 Ramallah Friends School</b>	100.00	100.00	0.00	100.00%
<b>6335 AFSC</b>	300.00	300.00	0.00	100.00%
<b>6340 FCNL</b>	750.00	750.00	0.00	100.00%
<b>6345 QEW</b>	300.00	300.00	0.00	100.00%
<b>6350 Friends Peace Teams</b>	100.00	100.00	0.00	100.00%
<b>6355 FWCC 3rd World Travel</b>	500.00	500.00	0.00	100.00%
<b>6360 QUNO</b>	200.00	200.00	0.00	100.00%
<b>6362 Quaker Voluntary Service</b>	100.00	100.00	0.00	100.00%
<b>Total 6330 Friends' Organizations</b>	<b>2,350.00</b>	<b>2,350.00</b>	<b>0.00</b>	<b>100.00%</b>
<b>6590 Ecumenical Organizations</b>				
<b>6592 State Councils of Churches</b>	2,982.00	4,000.00	(1,018.00)	74.55%
<b>6594 Natl Council of Churches</b>	150.00	150.00	0.00	100.00%
<b>6596 NE Ecumenical Network</b>	150.00	150.00	0.00	100.00%
<b>6598 World Council of Churches</b>	100.00	100.00	0.00	100.00%
<b>Total 6590 Ecumenical Organizations</b>	<b>3,382.00</b>	<b>4,400.00</b>	<b>(1,018.00)</b>	<b>76.86%</b>
<b>Total 6200 Support of Other Organizations</b>	<b>42,806.86</b>	<b>45,975.00</b>	<b>(3,168.14)</b>	<b>93.11%</b>
<b>Total Expenses</b>	<b>849,548.82</b>	<b>967,374.00</b>	<b>(117,825.18)</b>	<b>87.82%</b>
<b>Net Operating Income</b>	<b>(63,027.57)</b>	<b>251.00</b>	<b>(63,278.57)</b>	
<b>Transfers In/Out</b>				
<b>9940 Other Income - Transfers from other funds *</b>	36,638.89		36,638.89	
<b>9950 Other Expense - Transfer to other funds</b>	8,789.03		8,789.03	
<b>Net Transfers In/Out</b>	<b>27,849.86</b>		<b>27,849.86</b>	
<b>Net Income</b>	<b>(35,177.71)</b>	<b>251.00</b>	<b>(35,428.71)</b>	

\* For use of net assets, see 9940 Other Income, due to a change in bookkeeping practice.

Total income when including \$30,000 use of net assets is \$151,103.75 under budget.

% of budgeted total income when including \$30,000 use of net assets is 84.38%

**NEYM**  
**Statement of Activities - All Funds**  
**October 2022 - September 2023**

	<u>Operating</u>	<u>Total Non- Operating</u>	<u>Total</u>
<b>Income</b>			
4010 Individual Contributions	197,008.76	27,528.00	224,536.76
4020 Monthly Meeting Contributions	348,667.91	10,876.00	359,543.91
4025 Unallocated Income (Return of Excess Premium)	33,451.27		33,451.27
4030 Organizations Contributions	0.00	10,071.90	10,071.90
4050 Interest and Dividend Income	7,760.85	71,494.13	79,254.98
4070 Books & Other Sales Income	11,638.37		11,638.37
4077 Consulting Fee Contribution	900.00		900.00
4080 Retreat Program Fees	25,711.65	28,479.00	54,190.65
4085 Sessions Program Fees	158,157.17		158,157.17
4090 Change in Fair Market Value	3,225.27	90,854.99	94,080.26
4099 Net Assets Released To/From			4
<b>Total Income</b>	<b><u>786,521.25</u></b>	<b><u>239,304.02</u></b>	<b><u>1,025,825.27</u></b>
<b>Gross Profit</b>			
<b>Expenses</b>			
5000 Staff	462,753.53	23,569.22	486,322.75
5100 General & Administration	109,826.83	17,651.44	127,478.27
5300 Travel & Conferences	30,898.58	2,343.18	33,241.76
6000 Programs	193,219.61	59,923.20	11 253,142.81
6140 Books & Other Sales Expense	10,043.41		10,043.41
6200 Support of Other Organizations	42,806.86	62,214.20	105,021.06
<b>Total Expenses</b>	<b><u>849,548.82</u></b>	<b><u>165,701.24</u></b>	<b><u>1,015,250.06</u></b>
<b>Net Operating Income</b>	<b><u>(63,027.57)</u></b>	<b><u>73,602.78</u></b>	<b><u>10,575.21</u></b>
<b>Other Income</b>			
<b>9940 Other Income - Transfers from other funds</b>			
<i>(See explanation in Notes below)</i>			
		5,000.00	5
		2,500.00	6
		2,150.14	10
		1,200.00	11
	10,000.00	3,000.00	12
	20,000.00	3,233.71	13
	6,638.89	0.47	14
<b>9940 Other Income - Transfers from other funds Total</b>	<b><u>36,638.89</u></b>	<b><u>17,084.32</u></b>	<b><u>4 53,723.21</u></b>
<b>Total Other Income</b>	<b><u>36,638.89</u></b>	<b><u>17,084.32</u></b>	<b><u>53,723.21</u></b>



## Other Expenses

### 9950 Other Expense - Transfer to other funds

(See explanation in Notes below)

		34,556.00	1
		196.72	2
		6,959.47	3
		10,000.00	7
		20,000.00	8
		3,000.00	12
	2,150.14	3,233.71	13
	6,638.89	0.47	14
<b>9950 Other Expense - Transfer to other funds Total</b>	<b>8,789.03</b>	<b>77,946.37</b>	<b>86,735.40</b>
<b>Total Other Expenses</b>	<b>8,789.03</b>	<b>77,946.37</b>	<b>86,735.40</b>
<b>Net Other Income</b>	<b>27,849.86</b>	<b>(60,862.05)</b>	<b>(33,012.19)</b>
<b>Net Income</b>	<b>(35,177.71)</b>	<b>12,740.73</b>	<b>(22,436.98)</b>

## Notes

1. Transfer Pay-As-Led/Equalization Fund donations from individuals & meetings to Operating to support Sessions attendance
2. Transfer income from West Falmouth Prep Mtg Fund as donation to Operating
3. Transfer income from Endowment & Quasi-Endowment Funds to Operating
4. For use of net assets, see 9940 Other Income, due to a change in bookkeeping practice.
5. Transfer budgeted amount from Operating to Infrastructure Revolving Fund
6. Transfer budgeted amount from Operating to Legal Services Revolving Fund
7. Support volunteer leadership stipends from reserves per PB Minute 21-43 May 2021
8. Increase staff support for local meetings and ministers, per PB 21-89, from reserves per FY23 budget
9. Friends Camp portion of FMHG return of excess premium - sent to Camp
10. Redirect local meeting contributions budgeted for FUM into Bodine-Rustin Fund
11. Grant for Nurturing Faithfulness program to publish interviews (from Legacy Fund to Continuing Projects Revolving Fund)
12. Transfer grant for Nurturing Faithfulness into Nurturing Faithfulness Continuing Projects
13. Quasi-Endowment had negative cash balance after Funds Recalculation; transfer from Working Capital to zero out.
14. Adjust Prejudice & Poverty Fund to zero; transfer \$0.47 to Bodine-Rustin Fund

**NEYM**  
**Balance Sheet**  
As of September 30, 2023

	<u>As of Sep 30, 2023</u>	<u>As of Sep 30, 2022 (PY)</u>	<u>Change</u>	<u>% Change</u>
<b>ASSETS</b>				
<b>Current Assets</b>				
<b>Bank Accounts</b>				
<b>1000 Checking Accounts</b>				
1010 Santander Checking	137,586.68	184,267.04	(46,680.36)	-25.33%
1015 Everence Fed Credit Union Checking	4,740.49	15,564.86	(10,824.37)	-69.54%
1040 Petty Cash	2,862.00	2,646.54	215.46	8.14%
<b>Total 1000 Checking Accounts</b>	<b>145,189.17</b>	<b>202,478.44</b>	<b>(57,289.27)</b>	<b>-28.29%</b>
<b>1020 Money Market Accounts</b>				
1029 Everence Fed Credit Union SHARE Savings	608.09	32,141.41	(31,533.32)	-98.11%
<b>Total 1020 Money Market Accounts</b>	<b>608.09</b>	<b>32,141.41</b>	<b>(31,533.32)</b>	<b>-98.11%</b>
<b>Total 1050 Certificates of Deposits</b>	0.00	0.00	0.00	
<b>Total Bank Accounts</b>	<b>145,797.26</b>	<b>234,619.85</b>	<b>(88,822.59)</b>	<b>-37.86%</b>
<b>Accounts Receivable</b>				
<b>1200 Accounts Receivable</b>				
<b>Total Accounts Receivable</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Other Current Assets</b>				
1075 Pooled Funds	1,660,663.94	1,605,398.59	55,265.35	3.44%
1100 Accrued Receivables	1,050.00		1,050.00	
1110 Due to/from Friends Camp			-	
1112 Camp Disability	(1.17)	21.74	(22.91)	-105.38%
1113 Camp Health Ins	689.51	679.66	9.85	1.45%
1114 Camp - Retirement	798.49	648.62	149.87	23.11%
1115 Camp Loan				
<b>Total 1110 Due to/from Friends Camp</b>	<b>1,486.83</b>	<b>1,350.02</b>	<b>136.81</b>	<b>10.13%</b>
1150 Prepaid Expenses	6,897.22	490.40	6,406.82	1306.45%
1190 Misc due to/from				
1499 Undeposited Funds				
<b>Total Other Current Assets</b>	<b>1,670,097.99</b>	<b>1,607,239.01</b>	<b>62,858.98</b>	<b>3.91%</b>
<b>Total Current Assets</b>	<b>1,815,895.25</b>	<b>1,841,858.86</b>	<b>(25,963.61)</b>	<b>-1.41%</b>
<b>TOTAL ASSETS</b>	<b>1,815,895.25</b>	<b>1,841,858.86</b>	<b>(25,963.61)</b>	<b>-1.41%</b>

**NEYM**  
**Balance Sheet**  
As of September 30, 2023

	As of Sep 30, 2023	As of Sep 30, 2022 (PY)	Change	% Change
<b>LIABILITIES AND EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
<b>Total Accounts Payable</b>				
<b>Credit Cards</b>				
2005 Credit Card Elan St Marys	3,859.89	4,812.20	(952.31)	-19.79%
<b>Total Credit Cards</b>	3,859.89	4,812.20	(952.31)	-19.79%
<b>Other Current Liabilities</b>				
2010 Accrued Liabilities	76.60	76.60	0.00	0.00%
2110 Federal Taxes	0.00	0.00	0.00	
2120 State Taxes	(39.94)	416.04	(455.98)	-109.60%
2150 Health Insurance Premium	601.21	358.37	242.84	67.76%
2155 Sect 125 Employee Withholding	(721.82)	1,739.36	(2,461.18)	-141.50%
2160 403B Retirement	320.26	220.26	100.00	45.40%
2170 BSB SBA PPP loan	0.00	0.00	0.00	
2171 BSB SBA PPP loan 2nd Draw	0.00	0.00	0.00	
<b>Total Other Current Liabilities</b>	236.31	2,810.63	(2,574.32)	-91.59%
<b>Total Current Liabilities</b>	4,096.20	7,622.83	(3,526.63)	-46.26%
<b>Total Liabilities</b>	4,096.20	7,622.83	(3,526.63)	-46.26%
<b>Equity</b>				
3500 Working Capital	(13,766.52)	(84,630.29)	70,863.77	83.73%
<b>Total 3600 Board Designated Funds</b>	1,145,470.07	1,196,445.42	(50,975.35)	-4.26%
<b>Total 3700 Revolving Accounts</b>	119,675.99	181,911.64	(62,235.65)	-34.21%
<b>Total 3800 Permanently Restricted Funds</b>	595,597.22	565,106.54	30,490.68	5.40%
3900 Retained Earnings	0.00	0.00	0.00	
<b>Net Income</b>	(35,177.71)	(24,597.28)	(10,580.43)	-43.01%
<b>Total Equity</b>	1,811,799.05	1,834,236.03	(22,436.98)	-1.22%
<b>TOTAL LIABILITIES AND EQUITY</b>	1,815,895.25	1,841,858.86	(25,963.61)	-1.41%

## FY2023 Meeting Contributions

	General Fund	Equalization	Total
<b>Connecticut Valley Quarterly Meeting</b>			
Hartford Monthly Meeting	22,000.00		22,000.00
Middletown Monthly Meeting	11,285.17		11,285.17
Mount Toby Monthly Meeting	33,155.00		33,155.00
New Haven Friends Meeting	8,715.00		8,715.00
New London Friends Meeting	500.00		500.00
Northampton Friends Meeting	6,909.00	532.00	7,441.00
Storrs Friends Meeting	3,000.00		3,000.00
<b>Subtotal</b>	<b>85,564.17</b>	<b>532.00</b>	<b>86,096.17</b>
<b>Dover Quarterly Meeting</b>			
Concord Monthly Meeting	6,549.68	314.00	6,863.68
Dover Monthly Meeting	5,300.00		5,300.00
Gonic Monthly Meeting	369.60		369.60
North Sandwich Friends Meeting	400.00		400.00
Weare Monthly Meeting	1,500.00		1,500.00
West Epping Preparative Meeting	1,000.00		1,000.00
<b>Subtotal</b>	<b>15,119.28</b>	<b>314.00</b>	<b>15,433.28</b>
<b>Falmouth Quarterly Meeting</b>			
Brunswick Friends Meeting	1,100.00		1,100.00
Durham Monthly Meeting	4,950.00		4,950.00
Portland Friends Meeting	16,000.00		16,000.00
Southern Maine Friends Meeting	400.00	25.00	425.00
<b>Subtotal</b>	<b>22,450.00</b>	<b>25.00</b>	<b>22,475.00</b>
<b>Northwest Quarterly Meeting</b>			
Bennington Monthly Meeting	2,000.00		2,000.00
Burlington Monthly Meeting	5,550.00	1,050.00	6,600.00
Hanover Friends Meeting	22,357.00		22,357.00
Middlebury Friends Meeting	3,200.00	400.00	3,600.00
Monadnock Quaker Meeting	4,640.00	200.00	4,840.00
Northeast Kingdom Quaker Meeting	500.00		500.00
Putney Friends Meeting	6,000.00		6,000.00
South Starksboro Monthly Meeting	350.00		350.00
Wilderness Friends Meeting	400.00		400.00
<b>Subtotal</b>	<b>44,997.00</b>	<b>1,650.00</b>	<b>46,647.00</b>
<b>Salem Quarterly Meeting</b>			
Amesbury Monthly Meeting	2,525.00		2,525.00
Beacon Hill Friends Meeting	10,237.00	1,357.00	11,594.00
Framingham Friends Meeting	10,000.00	800.00	10,800.00
Fresh Pond Monthly Meeting	11,500.00	300.00	11,800.00
Friends Meeting at Cambridge	53,015.00	1,000.00	54,015.00
North Shore Friends Meeting	3,000.00	100.00	3,100.00
Wellesley Monthly Meeting	21,655.74		21,655.74
<b>Subtotal</b>	<b>111,932.74</b>	<b>3,557.00</b>	<b>115,489.74</b>
<b>Sandwich Quarterly Meeting</b>			
Allen's Neck Monthly Meeting	2,460.00		2,460.00
Dartmouth at Smith Neck Monthly Meeting	1,000.00		1,000.00
New Bedford Monthly Meeting	1,200.00		1,200.00
Sandwich Monthly Meeting	100.00	100.00	200.00

West Falmouth Preparative Meeting	5,296.72	200.00	5,496.72
Westport Monthly Meeting	6,000.00	1,500.00	7,500.00
Yarmouth Preparative Meeting	2,000.00	150.00	2,150.00
<b>Subtotal</b>	<b>18,056.72</b>	<b>1,950.00</b>	<b>20,006.72</b>
<b>Southeast Quarterly Meeting</b>			
Providence Monthly Meeting	20,000.00	500.00	20,500.00
Westerly Monthly Meeting	3,000.00		3,000.00
Worcester Friends Meeting	6,620.00		6,620.00
<b>Subtotal</b>	<b>29,620.00</b>	<b>500.00</b>	<b>30,120.00</b>
<b>Vassalboro Quarterly Meeting</b>			
Acadia Monthly Meeting	1,300.00		1,300.00
Belfast Area Friends Meeting	200.00		200.00
Eggemoggin Reach Monthly Mtg	150.00	50.00	200.00
Farmington Monthly Meeting	900.00		900.00
Narramissic Valley Monthly Meeting	100.00		100.00
Orono Monthly Meeting	250.00		250.00
Vassalboro Friends Meeting	7,000.00		7,000.00
Winthrop Center Friends Church	2,400.00	50.00	2,450.00
<b>Subtotal</b>	<b>12,300.00</b>	<b>100.00</b>	<b>12,400.00</b>
<b>Total All Quarters</b>	<b>340,039.91</b>	<b>8,628.00</b>	<b>348,667.91</b>

**NEYM**  
**FY2023 Committee Budgets vs Actuals**  
**October 2022 - September 2023**

	<u>Actual</u>	<u>Budget</u>	<u>Remaining</u>
315 C&A		500.00	500.00
320 F&P Rev		1,050.00	1,050.00
325 FGC		100.00	100.00
328 Finance		100.00	100.00
330 FUM		100.00	100.00
335 FWCC		100.00	100.00
340 M&C		100.00	100.00
350 Puente	1,500.00	1,500.00	0.00
355 RSE&J		1,500.00	1,500.00
360 Youth Ministries Committee		500.00	500.00
370 Earthcare Ministry Comm		100.00	100.00
390 Other Committees	132.27	700.00	567.73
<b>TOTAL</b>	<b><u>1,632.27</u></b>	<b><u>6,350.00</u></b>	<b><u>4,717.73</u></b>

**Note**

390 "Other Committees" = Permanent Board & Nominating Committees. Expenses in FY23 were for PB working groups on Friends Camp and Noticing Patterns of Oppression and Faithfulness.

## NEYM FY2023 Continuing Projects

<i>Project</i>	Stone of Hope	RSEJ Book Project 2017	Friends Foundation for Aging Grants (SAGE & ARCH)	FWCC-NE Godly Play 2016	Quakers Advocating Justice for Palestine	Quaker Outreach 2015 grant	Printing of Interim Faith & Practice	OBBF Youth Retreat Handbook
<b>Income</b>	<b>918.00</b>	<b>250.62</b>	<b>10,853.96</b>	<b>194.53</b>	<b>867.88</b>	<b>4,022.96</b>	<b>1,423.60</b>	<b>1,527.50</b>
4030 Organizations Contributions			5,000.00					
4080 Retreat Program Fees								
4099 Net Assets Released To/From								
<b>Total Income</b>			5,000.00					
<b>Expense</b>								
5010 Salaries & Wages			10,799.62					
5020 Payroll Taxes			559.94					
5120 Bank Expense								
5130 Contracted Services								
5240 Postage								
5250 Office Equipment								
5270 Printing & Copying			152.48					
5280 Software & Updates								
5330 Travel - Programs								
5350 Travel - Staff			513.74					
6105 Honoraria - Speakers/Wkshp Ldrs								
6112 Retreats - Room & Board								
6114 Room Rental								
6121 Supplies and Other Expenses			84.00	194.53				
6330 Support of Other Orgs: Friends Orgs			1,500.00					
9950 Other Expense - Transfer to other funds								
<b>Total Expense</b>			<b>13,609.78</b>	<b>194.53</b>				
<b>Net of Income and Expense FY2023</b>			<b>(8,609.78)</b>	<b>(194.53)</b>				
<b>Ending Balance (Sept 30, 2023)</b>	<b>918.00</b>	<b>250.62</b>	<b>2,244.18</b>	<b>-</b>	<b>867.88</b>	<b>4,022.96</b>	<b>1,423.60</b>	<b>1,527.50</b>

## NEYM FY2023 Continuing Projects

<i>Project</i>	Partners in Spirit Program	Nurturing Faith & Faithfulness	Shoemaker Fund Grant	Archives Transition Processing	Nurturing Faithfulness Program	Growing Edges Youth Programs Initiatives	Continuing Projects Totals
<b>Income</b>	<b>1,044.94</b>	<b>3,000.00</b>	<b>22,937.59</b>	<b>2,495.00</b>	<b>55,857.29</b>	<b>6,306.23</b>	<b>111,700.10</b>
4030 Organizations Contributions					2,000.00		7,000.00
4080 Retreat Program Fees					28,479.00		28,479.00
4099 Net Assets Released To/From					4,200.00		4,200.00
<b>Total Income</b>					34,679.00		39,679.00
<b>Expense</b>							
5010 Salaries & Wages			7,561.33			3,780.67	22,141.62
5020 Payroll Taxes			578.43			289.23	1,427.60
5120 Bank Expense					576.53		576.53
5130 Contracted Services					1,515.00		1,515.00
5240 Postage			119.52				119.52
5250 Office Equipment					1,000.00		1,000.00
5270 Printing & Copying						1,416.23	1,568.71
5280 Software & Updates					1,032.75		1,032.75
5330 Travel - Programs					829.44		829.44
5350 Travel - Staff							513.74
6105 Honoraria - Speakers/Wkshp Ldrs					32,175.00		32,175.00
6112 Retreats - Room & Board					25,560.00		25,560.00
6114 Room Rental					400.00		400.00
6121 Supplies and Other Expenses					287.68		566.21
6330 Support of Other Orgs: Friends Orgs							1,500.00
9950 Other Expense - Transfer to other funds		3,000.00					3,000.00
<b>Total Expense</b>		<b>3,000.00</b>	<b>8,259.28</b>		<b>63,376.40</b>	<b>5,486.13</b>	<b>93,926.12</b>
<b>Net of Income and Expense FY2023</b>		<b>(3,000.00)</b>	<b>(8,259.28)</b>		<b>(28,697.40)</b>	<b>(5,486.13)</b>	<b>(54,247.12)</b>
<b>Ending Balance (Sept 30, 2023)</b>	<b>1,044.94</b>	<b>-</b>	<b>14,678.31</b>	<b>2,495.00</b>	<b>27,159.89</b>	<b>820.10</b>	<b>57,452.98</b>



## Board-Designated and Revolving Funds

Capital	Balance Sep 30, 2022	Funds Recalculation & End-of- Year Adjustments	Balance after Recalculation Oct 1, 2022*	Investment Income	Change in Fair Market Value	Other Income	Expenses	Net Change 10/1/22-9/30/23	Balance Sep 30, 2023
<b>3500 Working Capital</b>									
3500 Working Capital Total	(84,630.29)	104,097.48	19,467.19				33,233.71	(33,233.71)	(13,766.52)
3900 Retained Earnings + Net Income **	(24,597.28)	24,597.28					35,177.71	(35,177.71)	(35,177.71)
<b>Total (9/30/2022 = Working Capital Oct 1 FY2023)</b>	<b>(109,227.57)</b>	<b>128,694.76</b>	<b>19,467.19</b>			<b>(0.00)</b>	<b>68,411.42</b>	<b>(68,411.42)</b>	<b>(48,944.23)</b>
<b>3600 Board Designated Funds</b>									
3620 Faith & Practice Revision	55,475.94	(75.23)	55,400.71	2,219.88	2,814.34			5,034.22	60,434.93
3650 Quasi-Endowment (Investments)	229,831.96	(137,036.44)	92,795.52	4,372.88	5,543.89	3,233.71	4,372.88	8,777.60	101,573.12
3681 NEYM Future Fund	0.00	732.31	732.31					0.00	732.31
3682 NEYM Ministry Fund	911,137.52	2,427.71	913,565.23	39,626.46	50,238.02		20,700.00	69,164.48	982,729.71
<b>Total 3600 Board Designated Funds</b>	<b>1,196,445.42</b>	<b>(133,951.65)</b>	<b>1,062,493.77</b>	<b>46,219.22</b>	<b>58,596.25</b>	<b>3,233.71</b>	<b>25,072.88</b>	<b>82,976.30</b>	<b>1,145,470.07</b>
<b>3700 Revolving Accounts</b>									
3705 Archives	2,934.60		2,934.60				1,540.00	(1,540.00)	1,394.60
3707 Accounting Services	19,700.00		19,700.00					0.00	19,700.00
3708 Infrastructure	136.50		136.50			5,000.00	4,120.00	880.00	1,016.50
3709 Legal Services	1,597.34		1,597.34			2,500.00	3,588.89	(1,088.89)	508.45
3710 Equalization			0.00			34,556.00	34,556.00	0.00	0.00
3711 Equalization - Restricted			0.00					0.00	0.00
3712 FUM Intervisitation	1,259.15		1,259.15					0.00	1,259.15
3713 FUM Earmarked Donations (per 2009-54)								0.00	0.00
3715 Peaceworker	1,784.36		1,784.36					0.00	1,784.36
3716 Bodine-Rustin Fund	5,047.40		5,047.40			4,136.51	4,272.05	(135.54)	4,911.86
3720 Prejudice & Poverty	0.47		0.47				0.47	(0.47)	0.00
3725 Puente de Amigos	16,500.74		16,500.74			3,147.46	9,251.09	(6,103.63)	10,397.11
3730 Sufferings - Restricted			0.00					0.00	0.00
3732 Sufferings - Unrestricted	18,158.62		18,158.62					0.00	18,158.62
3755 Student Loan			0.00					0.00	0.00
3760 Young Friends Travel	3,092.36		3,092.36					0.00	3,092.36
3775 Continuing Projects	111,700.10		111,700.10			39,679.00	93,926.12	(54,247.12)	57,452.98
<b>Total 3700 Revolving Accounts</b>	<b>181,911.64</b>		<b>181,911.64</b>			<b>89,018.97</b>	<b>151,254.62</b>	<b>(62,235.65)</b>	<b>119,675.99</b>

\* Results of Funds Recalculation project approved by PB 2/11/23; permanently restricted funds invested in the Pooled Funds were also recalculated.

\*\* The current year Operating Net Income, shown on the Balance Sheet and the Statement of Activities, is transferred to Working Capital at the start of the next fiscal year.

The funds recalculation results incorporate this step.

## Permanently Restricted Funds

Fund	Balance Sep 30, 2022	Balance after Recalculation* Oct 1, 2022	Unavailable* Oct 1, 2022	Remaining Available from FY2022 *	Expenses	Investment and Other Income **	Change in Fair Market Value	Unavailable Sept 30, 2023	Remaining Available Sept 30, 2023	Balance Sep 30, 2023
3802 Endowment Fund	52,391.54	54,076.02	53,945.96	130.06	2,586.59	2,456.53	3,114.37	57,060.33	0.00	57,060.33
3804 Alice Needham	17,999.80	17,905.82	17,916.08	(10.26)	807.58	817.84	1,034.32	18,950.40	0.00	18,950.40
3806 Amy S. Hayden	59,310.84	59,205.32	59,222.50	(17.18)	2,679.64	2,696.81	3,418.99	62,641.49	0.00	62,641.49
3808 Anna M. Brown	37,927.17	39,397.22	39,282.59	114.63	1,903.44	1,788.81	2,267.83	41,550.42	0.00	41,550.42
3810 Freedmen's	144,305.13	151,989.59	141,795.68	10,193.91	16,650.84	8,456.94	8,186.05	149,981.73	2,000.00	151,981.73
3812 FUM Foreign Missions	48,512.24	48,255.58	48,283.54	(27.96)	2,170.73	2,198.69	2,787.47	51,071.01	0.00	51,071.01
3814 FUM Home & Foreign	6,792.12	6,706.24	6,714.23	(7.99)	297.76	305.75	387.62	7,101.85	0.00	7,101.85
3816 FUM Ramallah	61,340.85	61,017.00	61,052.29	(35.29)	2,744.85	2,780.13	3,524.63	64,576.92	0.00	64,576.92
3824 Mosher Book & Tract	86,545.54	81,805.02	77,710.09	4,094.93	2,480.89	3,538.68	4,486.30	82,196.39	5,152.70	87,349.09
3826 Phillips/Purington/Hawkes	26,127.83	25,878.21	25,902.38	(24.17)	1,155.36	1,179.52	1,495.38	27,397.76	0.00	27,397.76
3828 Pittsfield/Varney	10,899.20	11,006.31	10,107.21	899.10	0.00	460.25	583.50	10,690.71	1,359.35	12,050.06
3830 Susan B. Kirby	8,531.58	8,731.32	8,716.23	15.09	412.00	396.91	503.20	9,219.43	0.00	9,219.43
3832 West Falmouth Prep Mtg	4,422.70	4,389.78	4,393.11	(3.33)	196.72	200.05	253.62	4,646.73	0.00	4,646.73
<b>Total 3800 Permanently Restricted Funds</b>	<b>565,106.54</b>	<b>570,363.43</b>	<b>555,041.89</b>	<b>14,973.87</b>	<b>34,086.40</b>	<b>27,276.91</b>	<b>32,043.28</b>	<b>587,085.17</b>	<b>8,512.05</b>	<b>595,597.22</b>

\* Results of Funds Recalculation project approved by PB 2/11/23; board-designated & unrestricted funds invested in the Pooled Funds were also recalculated.

\*\* Available amounts for FY2023 were each fund's investment income from the Pooled Funds plus any remaining Available from FY2022.

Investment Income (formerly called Interest & Dividends) was 4% of a 3-year average of the total value of each fund, calculated on the Board of Managers' fiscal year ending March 31st.

Reinvestment of unused Available amounts stopped at the end of FY2020.

Freedmen's Fund income includes \$2000 from a returned check.

# Operating Reserves<sup>1</sup>

	Funds							Balance Sep 30, 2023
	Balance Sep 30, 2022	Recalculation <sup>2</sup> & End-of-Year Adjustments	Investment Income	Change in Fair Market Value	Other Income	Expenses	Net Change	
<b>Capital</b>								
3500 Working Capital	(84,630.29)	104,097.48	0.00	0.00	0.00	33,233.71	(33,233.71)	(13,766.52)
3900 Retained Earnings + Net Income	(24,597.28)	24,597.28	0.00	0.00		35,177.71	(35,177.71)	(35,177.71)
<b>Total (9/30/2022 = Working Capital Oct 1 FY2023)</b>	<b>(109,227.57)</b>	128,694.76	0.00	0.00	0.00	<b>68,411.42</b>	<b>(68,411.42)</b>	<b>(48,944.23)</b>
<b>3600 Board Designated Funds</b>								
3650 Quasi-Endowment (Investments)	229,831.96	(137,036.44)	4,372.88	5,543.89	3,233.71	4,372.88	8,777.60	101,573.12
<b>Total Operating Reserves</b>	<b>120,604.39</b>	<b>(8,341.68)</b>	<b>4,372.88</b>	<b>5,543.89</b>	<b>3,233.71</b>	<b>72,784.30</b>	<b>(59,633.82)</b>	<b>52,628.89</b>
<b>Total Expense Budget 2023</b>								<b>967,374.00</b>
<b>Total Operating Reserves as Percent of Expense Budget<sup>2</sup></b>								<b>5.4%</b>

**Notes**

1. Operating Reserves are composed of Working Capital plus Quasi-Endowment.
2. Results of Funds Recalculation project approved by PB 2/11/23; board-designated & unrestricted funds invested in the Pooled Funds were also recalculated.
3. Per Section 2.3.1 of the Financial Handbook, "It is the Finance Committee's policy to have an operating reserve equal to one quarter of the annual budget (3 months) at the beginning of each fiscal year." The reserve amount on Sept. 30, 2023 fell below this amount.

## Commentary on the preliminary FY 25 Budget

To put this budget in context, note that Bob Murray reported that at the end of FY 23 our reserves were 5.4% of expenses (\$30,490.68). The target is 25%. He also notes that NEYM is not near bankruptcy. The Permanent Board can re-designate board-designated funds (e.g. funds set aside for the Nurturing Faithfulness project or a small portion of the legacy gift fund) if NEYM has a deficit larger than our reserves, but the Finance Committee very much wants to avoid this.

The accompanying preliminary budget for FY 25 is for all practical purposes balanced (\$390 deficit on an almost \$900,000 budget). However, to accomplish this:

- 1) For a second year we, the Finance Committee, budgeted \$0 for Support of Other Organizations
- 2) We assumed a \$30,000 increase in individual contributions over what we received in FY 23. There are reasons for making this optimistic assumption. There is an active grassroots fundraising effort going on this year that is hoping to raise enough to give us a surplus in FY 24, three quarters of which would go to support of other organizations and one quarter of which would go towards reserves. Also, several donors have approached Noah and Frederick to discuss making major gifts. We are only a quarter of the way into FY 24, so should have a better idea in May and a still better idea in August when the budget is presented to Sessions of how realistic this assumption is.
- 3) We funded line 5070, which supports the Executive Secretary's future sabbaticals, at a token amount of \$100, rather than a seventh of what we need to fund a sabbatical.
- 4) This budget does nothing to increase our reserves.

On the other hand, in trying to meet the guidelines set by Permanent board:

- 1) We continued staffing at the current levels and added the cost-of-living adjustment that the Personnel Manual says that we should "strive to provide".
- 2) We continued to budget \$15,000 for honoraria for five time-consuming volunteer positions (Yearly Meeting Clerk, Clerk of the Permanent Board, Treasurer, Clerk of Ministry and Counsel, and Clerk of the Nominating Committee). This appears in line 6107. It is our understanding that the Yearly Meeting is scheduled to evaluate the effectiveness of these honoraria this year. It is possible that this line will be removed before the budget comes to Sessions.
- 3) We budgeted \$2,880 to pay for the accreditation of Friends Camp (line 6163). We can approach Friends Camp to discuss their taking on all or part of this fee if Permanent Board wants us to do so.

In short, we want to do more than our current income allows. The solutions are either to increase income through development efforts or to find things that we have been doing that we are willing to stop doing. The first solution is more appealing, if it can be done. If not, we need to grapple with the painful question of what we are willing to reduce or do without.

**New England Yearly Meeting**  
**FY2025 Operating (Non-Camp) Budget Proposed**  
draft 1/26/2024 - for PB 2/10/2024

Category	Actuals	FY2023	Budgets	FY2023	FY2024	Δ FY24 to FY25 Budgets	FY2025 Proposed Budget	Notes
	FY2019	Actuals	FY19 Budget	Budget	Budget			
<b>Income</b>								
4010 Individual Contributions Total	210,194	197,009	212,000	230,225	223,000	5,000	228,000	
4020 Monthly Meeting Contributions Total	333,257	348,668	373,000	373,000	342,000	3,000	345,000	
4025 Unallocated Income		33,451		31,000	0	-	0	
4030 Organizations Contributions	1		0	0	0	-	0	
4050 Interest and Dividend Income	9,303	7,761	4,000	12,000	12,000	(1,000)	11,000	2
4070 Books & Other Sales Income	20,077	11,638	16,000	17,000	10,500	-	10,500	
4077 Consulting Fee Contribution		900						
4080 Retreat Program Fees	44,618	25,712	50,000	47,000	37,500	-	37,500	
4085 Sessions Program Fees	202,936	158,157	185,000	227,400	249,475	(34,580)	214,895	1
4090 Change in Fair Market Value	960	3,225	0	0	0	-	0	
4099 Net Assets Released To/From	660	0	8,500	30,000	5,000	(5,000)	0	3
<b>Total Income</b>	<b>822,005</b>	<b>786,521</b>	<b>848,500</b>	<b>967,625</b>	<b>879,475</b>	<b>(32,580)</b>	<b>\$ 846,895</b>	
<b>Expenses</b>								
Total 5000 Staff	379,198	462,754	363,915	493,684	503,842	11,844	\$ 515,686	4
Total 5100 General & Administration	89,142	109,827	133,511	93,615	87,449	-	\$ 87,449	
Total 5300 Travel & Conferences	32,007	30,899	36,000	35,300	22,300	-	\$ 22,300	
Total 6000 Programs	243,348	193,220	259,020	284,300	256,012	(42,162)	\$ 213,850	
Total 6140 Books & Other Sales Expense	17,447	10,043	14,500	14,500	8,000	-	\$ 8,000	
Total 6200-6590 Support of Other Organizations	43,471	42,807	45,975	45,975	0	-	\$ 0	
Total 6600 Publications	3,522		4,000	0	0	-		
<b>Total Expenses</b>	<b>808,137</b>	<b>849,549</b>	<b>856,921</b>	<b>967,374</b>	<b>877,603</b>	<b>(120,089)</b>	<b>\$ 847,285</b>	
<b>Net Operating Income</b>	<b>13,868</b>	<b>(63,028)</b>	<b>-8,421</b>	<b>251</b>	<b>1,872</b>	<b>(641)</b>	<b>(390)</b>	
<b>Other Income</b>								
9940 Other Income - Transfers from other funds	32,072.22	36,639						
<b>Total Other Income</b>	<b>32,072.22</b>	<b>36,639</b>						
<b>Other Expenses</b>								
9950 Other Expense - Transfer to other funds		8,789						
<b>Total Other Expenses</b>		<b>8,789</b>						
<b>Net Other Income</b>	<b>32,072.22</b>	<b>27,850</b>						
<b>Net Income</b>	<b>45,940.46</b>	<b>(35,178)</b>						

- Sessions registration fee income: assumptions: 8% fee increase over 2024; 450 attenders (2023 was 419; increase of 31); seven people move to Traditional fee from Low Income; three people move to Complete Cost from Traditional; room usage roughly similar to 2023
- Sessions costs: increase 3.5% 2024+2025 135,569.95
- income from Quasi-Endowment declined \$4000 after Q-E balance reduced by Funds Recalculation; and, with 4.5% interest rates on new money market account, expecting \$2500-\$3000 of new interest income depending on cash-flow management
- No use of reserves in 4090 Net Assets Released to/from. The \$5000 for FY23 was per PB minute about Volunteer Leadership honoraria
- Staff salary/wage increase by cost-of-living-adjustment (COLA) of 2.3%, CPI for New England region December 2023. (Should use Boston January CPI when available after BLS posts on Feb 13th.)
- Recent previous COLAs have been: FY24 6.1%, FY23 6.3%, FY22 0.5%, FY21 2.22%
- Health insurance: rates actually went *down* 8.12% from 2023 to 2024; number of staff family members insured has gone up.

**New England Yearly Meeting**  
**FY2025 Operating (Non-Camp) Budget Proposed**  
 version of 1/26/2024 - for PB 2/10/2024

Category	Actuals	FY2023	Budgets	FY2023	FY2024	Δ FY24 to FY25 Budgets	FY2025 Proposed Budget	Notes	
	FY2019	Actuals	FY19 Budget	Budget	Budget				
<b>Income</b>									
4010 Individual Contributions									
General Fund Contributions	188,088	171,080.76	191,000	204,225	198,000	3,000	201,000	1	
Equalization Contributions	22,106	25,928.00	21,000	26,000	25,000	2,000	27,000		
Other Contributions			0	0	0	-			
4010 Individual Contributions Total	210,194	197,008.76	212,000	230,225	223,000	5,000	228,000		
4020 Monthly Meeting Contributions									
General Fund Contributions	317,286	340,040.41	350,000	350,000	333,000	3,000	336,000	1	
Equalization Contributions	15,971	8,627.50	23,000	23,000	9,000	-	9,000		
Other Contributions			0	0	0	-			
4020 Monthly Meeting Contributions Total	333,257	348,667.91	373,000	373,000	342,000	3,000	345,000		
4025 Unallocated Income		33,451.27		31,000	0	-	0.00		
4030 Organizations Contributions	1		0	0	0	-	0.00	2	
4050 Interest and Dividend Income	9,303	7,760.85	4,000	12,000	12,000	(1,000)	11,000		
4070 Books & Other Items Sales Income							10,500.00		
4072+4075 Sales - Books + Other Items	20,077	11,638.37	16,000			-	0.00		
4070 Books & Other Sales Income	20,077	11,638.37	16,000	17,000	10,500	-	10,500		
4077 Consulting Fee Contribution		900.00							
4080 Retreat Program Fees	44,618	25,711.65	50,000	47,000	37,500	-	37,500.00		
4085 Sessions Program Fees	202,936	158,157.17	185,000	227,400	249,475	(34,580)	214,895.00	1	
4090 Change in Fair Market Value	960	3,225.27	0	0	0	-	0.00		
4099 Net Assets Released To/From	660	0.00	8,500	30,000	5,000	(5,000)	0	3	
<b>Total Income</b>	<b>822,005</b>	<b>786,521.25</b>	<b>848,500</b>	<b>967,625</b>	<b>879,475</b>	<b>(32,580)</b>	<b>\$ 846,895.00</b>		
<b>Expenses</b>									
5000 Staff									
5010 Salaries & Wages	284,515	351,738.85	267,426	378,053	380,988	8,070	389,058.00	4	
5020 Payroll Taxes	21,100	25,950.61	20,511	27,392	29,146	617	29,763.00		
5030 Benefits									
5033 Health Benefits	39,036	48,051.00	41,785	45,123	49,199	2,597	51,796.00		
5035 Retirements	30,106	34,829.84	26,743	35,806	38,099	807	38,906.00		
5040 Disability	1,402	1,116.36	1,800	1,100	1,100	(87)	1,013.00		
5045 Workers' Compensation	812	596.00	700	760	760	(160)	600.00		
5050 Spiritual Retreats			1,200	1,200	1,200	-	1,200.00		
5060 Staff Development	2,228	470.87	3,750	4,250	3,250	-	3,250.00		
5070 Sabbatical & Paid Leave					100	-	100.00		
Total 5030 Benefits	73,584	85,064.07	75,978	88,239	93,708	3,157	\$ 96,865.00		
Total 5000 Staff	379,198	462,753.53	363,915	493,684	503,842	11,844	\$ 515,686.00		
5100 General & Administration									
5110 Administration									
5120 Bank Expense	7,280	8,395.84	6,000	7,000	7,000	-	7,000.00		
5130 Contracted Services	18,702	25,402.50	60,396	22,000	18,000	-	18,000.00		
5135 Accounting Services	4,000		4,000	0	0	-	0.00		
5140 Legal Services	7,771	2,500.00	7,750	2,500	2,500	-	2,500.00		
5145 Infrastructure		5,000.00		5,000	0	-	0.00		
5150 Liability Insurance	4,071	6,388.12	4,000	5,250	5,250	-	5,250.00		
5160 Payroll Service	5,229	5,624.16	4,500	5,500	5,500	-	5,500.00		
5170 Recruiting Expense			500	0	0	-	0.00		
5180 Rent	9,350	9,589.50	9,350	9,350	9,350	-	9,350.00		
5190 Misc. Expense	488	717.96	0	0	0	-	0.00		
Total 5110 Administration	56,890	63,618.08	96,496	56,600	47,600	-	\$ 47,600.00		
5200 Office									
5220 Archives Office Expenses			0	0	0	-	0.00		
5220 Cleaning Services	264	220.00	265	265	299	-	299.00		
5230 Maint - Equip & Hardware	0	10.51	1,250	1,250	500	-	500.00		
5240 Postage	3,218	3,186.90	3,750	3,750	3,750	-	3,750.00		
5250 Office Equipment	331	1,993.27	3,250	3,250	1,500	-	1,500.00		
5260 Office Supplies	1,376	1,702.70	2,500	2,500	1,600	-	1,600.00		
5270 Printing & Copying	14,614	13,724.28	14,500	14,500	9,500	-	9,500.00		
5280 Software & Updates	9,128	22,232.77	7,000	7,000	19,000	-	19,000.00		
5290 Telephone	3,179	3,006.01	4,500	4,500	3,700	-	3,700.00		
5295 Misc. Office	142	132.31	0	0	0	-	0.00		
Total 5200 Office	32,252	46,208.75	37,015	37,015	39,849	-	\$ 39,849.00		
<b>Total 5100 General &amp; Administration</b>	<b>89,142</b>	<b>109,826.83</b>	<b>133,511</b>	<b>93,615</b>	<b>87,449</b>	<b>-</b>	<b>\$ 87,449.00</b>		

Category	FY2019 Actuals	FY2023 Actuals	FY2019 Budget	FY2023 Budget	FY2024 Budget		FY2025 Proposed Budget	Notes
<b>5300 Travel &amp; Conferences</b>								
5310 Travel - Committee	7,217	1,278.60	3,000	3,000	1,400	-	1,400.00	
5320 Travel - Clerk	3,552	3,027.86	5,000	4,500	2,500	-	2,500.00	
5330 Travel - Programs	1,460	5,792.90	4,600	3,700	3,100	1,000	4,100.00	
5335 Travel - Representatives Travel	4,746	13,421.87	5,000	6,700	2,000	-	2,000.00	
5350 Travel - Staff	15,032	7,377.35	18,000	17,000	12,900	(1,000)	11,900.00	
5360 Travel - Ministries			400	400	400	-	400.00	
<b>Total 5300 Travel &amp; Conferences</b>	<b>32,007</b>	<b>30,898.58</b>	<b>36,000</b>	<b>35,300</b>	<b>22,300</b>	<b>-</b>	<b>\$ 22,300.00</b>	
<b>6000 Programs</b>								
6110 Sessions Room & Board	173,649	126,566.25	170,000	192,950	169,442	(33,872)	135,570.00	1
6112 Retreats - Room & Board						-		
6114 Room Rental	17,625	8,632.35	20,000	13,550	10,000	-	10,000.00	
6150 Food Expense	15,130	13,161.07	18,000	15,930	10,000	-	10,000.00	
<b>Total 6112 Retreats - Room &amp; Board</b>	<b>32,754</b>	<b>21,793.42</b>	<b>38,000</b>	<b>29,480</b>	<b>20,000</b>	<b>-</b>	<b>\$ 20,000.00</b>	
6125 Program Expenses								
6105 Honoraria - Speakers/Wkshp Ldrs	15,814	15,672.00	16,500	22,000	24,000	(3,000)	21,000.00	
6107 Honoraria - Volunteer Leadership		11,250.00		15,000	15,000	-	15,000.00	3
6115 Equipment Rental	5,412	6,637.09	6,000	6,000	6,500	-	6,500.00	
6121 Supplies and Other Expenses	5,078	4,966.76	9,300	7,300	9,000	(4,000)	5,000.00	
6165 Pre-Sessions Expense	1,406	1,524.82	1,000	1,000	1,500	-	1,500.00	
<b>Total 6125 Program Expenses</b>	<b>27,710</b>	<b>40,050.67</b>	<b>32,800</b>	<b>51,300</b>	<b>56,000</b>	<b>(7,000)</b>	<b>\$ 49,000.00</b>	
6130 Committee Expenses - General	5,838	1,632.27	11,700	6,350	6,350	(1,950)	4,400.00	
6134 Childcare	788	297.00	2,000	2,000	2,000	-	2,000.00	
6137 Committee Day Expenses			500	0	0	-	0.00	
<b>Total 6130 Committee Expenses - General</b>	<b>6,626</b>	<b>1,929.27</b>	<b>14,200</b>	<b>8,350</b>	<b>8,350</b>	<b>(1,950)</b>	<b>\$ 6,400.00</b>	
6160 Program Support								
6163 Friends Camp	2,309	2,880.00	2,220	2,220	2,220	660	2,880.00	
6167 Religious Education & Outreach	300		1,800	0	0	-	0.00	
<b>Total 6160 Program Support</b>	<b>2,609</b>	<b>2,880.00</b>	<b>4,020</b>	<b>2,220</b>	<b>2,220</b>	<b>660</b>	<b>\$ 2,880.00</b>	
<b>Total 6000 Programs</b>	<b>243,348</b>	<b>193,219.61</b>	<b>259,020</b>	<b>284,300</b>	<b>256,012</b>	<b>(42,162)</b>	<b>\$ 213,850.00</b>	
6140 Books & Other Sales Expense			0	0	0	-		
6142 Books	10,068	2,696.87	14,500	14,500	8,000	-	8,000.00	
6145 Other Items for Sale	1,650	1,126.41	0	0	0	-	0.00	
6147 Consignment Sales	5,730	6,220.13	0	0	0	-	0.00	
<b>Total 6140 Books &amp; Other Sales Expense</b>	<b>17,447</b>	<b>10,043.41</b>	<b>14,500</b>	<b>14,500</b>	<b>8,000</b>	<b>-</b>	<b>\$ 8,000.00</b>	
6200 Support of Other Organizations								
<b>Total 6200-6590 Support of Other Organizations</b>	<b>43,471</b>	<b>42,806.86</b>	<b>45,975</b>	<b>45,975</b>	<b>0</b>	<b>-</b>	<b>\$ 0.00</b>	
6600 Publications								
<b>Total 6600 Publications</b>	<b>3,522</b>		<b>4,000</b>	<b>0</b>	<b>0</b>	<b>-</b>		
<b>Total Expenses</b>	<b>808,137</b>	<b>849,548.82</b>	<b>856,921</b>	<b>967,374</b>	<b>877,603</b>	<b>(120,089)</b>	<b>\$ 847,285.00</b>	
<b>Net Operating Income</b>	<b>13,868</b>	<b>(63,027.57)</b>	<b>-8,421</b>	<b>251</b>	<b>1,872</b>	<b>(641)</b>	<b>(390.00)</b>	
<b>Other Income</b>								
9940 Other Income - Transfers from other funds	32,072.22	36,638.89						
<b>Total Other Income</b>	<b>32,072.22</b>	<b>36,638.89</b>					<b>-</b>	
<b>Other Expenses</b>								
9950 Other Expense - Transfer to other funds		8,789.03						
<b>Total Other Expenses</b>		<b>8,789.03</b>					<b>-</b>	
<b>Net Other Income</b>	<b>32,072.22</b>	<b>27,849.86</b>					<b>-</b>	
<b>Net Income</b>	<b>45,940.46</b>	<b>(35,177.71)</b>					<b>(390.00)</b>	

- Sessions registration fee income: assumptions: 8% fee increase over 2024; 450 attenders (2023 was 419; increase of 31); seven people move to Traditional fee from Low Income; three people move to Complete Cost from Traditional; room usage roughly similar to 2023
- Sessions costs: increase 3.5% 2024+2025 135,569.95
- income from Quasi-Endowment declined \$4000 after Q-E balance reduced by Funds Recalculation; and, with 4.5% interest rates on new money market account, expecting \$2500-\$3000 of new interest income depending on cash-flow management
- No use of reserves in 4090 Net Assets Released to/from. The \$5000 for FY23 was per PB minute about Volunteer Leadership honoraria
- Staff salary/wage increase by cost-of-living-adjustment (COLA) of 2.3%, CPI for New England region December 2023. (Should use Boston January CPI when available after BLS posts on Feb 13th.)
- Recent previous COLAs have been: FY24 6.1%, FY23 6.3%, FY22 0.5%, FY21 2.22%
- Health insurance: rates actually went *down* 8.12% from 2023 to 2024; number of staff family members insured has gone up.

## **NEYM Nominating Committee Report to Permanent Board**

2 February 2024

Nominating Committee now meets twice a month because there is a large amount of work under our care and only 7 worker bees embracing the work. The sub-committees also meet regularly. There are currently 8 openings on the committee, so if you or someone you know is called to serve, please let me or Jeremiah Dickinson, Clerk of the Naming Committee know. We are eager to have more Friends join us in this exciting endeavor.

Our current work includes, but is not limited to:

- Developing an online slate so everyone throughout the yearly meeting can easily see who is serving and what opportunities are currently available
- Defining Airtable descriptors so nominators now and in the future can search and discover the gifts and experiences of Friends who might be called to serve
- Exit interviews, gratitude and recognition of Friends who serve
- Shepherding all positions and committees for healthy functionality
- Calling Friends to get to know them, and discerning Friends to serve

A question that has been with us for a while, and arose most recently when two Friends serving on NEYM committees resigned from their local monthly Meetings is: *When is membership in Religious Society of Friends required to participate on an NEYM committee or leadership position? Why? What are relevant levels of connection – member, active attender, history of participation?* In the Purposes, Procedures and Composition (PP&C) of committees, membership in a monthly Meeting is not specifically mentioned.

The Nominating Committee has generally assumed that membership is necessary for some positions - the Presiding Clerk, members of Coordinating & Advisory, Permanent Board, and Faith & Practice Revision, but perhaps not others. We do reference checks on all nominees, and recognize that monthly meetings approach membership in varying ways. Some members are out of contact for years; they may have moved to another Meeting or ceased to attend any Meeting. Regular attenders essential to the heart of a Meeting may not yet have become members. Some people are very active in Friends Camp, youth retreats, Friends education and/or annual sessions but not closely connected to a local monthly Meeting. We would welcome your thoughts about this.

For your consideration now –

### **Youth Ministries Committee**

#### Description:

The Youth Ministries Committee serves to regularly engage in on-going listening across the Quaker youth ministries “landscape” in New England. Based on their listening, the Committee regularly identifies both the growing edges of quaker youth ministry in New England and current needs related to the spiritual development of Quaker children, youth, and families. In all of its offerings, NEYM strives to listen deeply and respond thoughtfully and prayerfully to how we can best foster the spiritual development of youth amid current social, cultural, and



economic conditions. [Link](#) to the complete PP&C. Permanent Board added a specific charge to this work in December 2023: to undertake consistent, robust, creative, and widely consultative listening to inform youth ministry decisions and to provide more transparency, accountability, and support for our youth ministries.

Current Situation:

The revised Purposes, Procedures & Composition were approved in August 2023. At present, there are two seasoned members, one new member, and three vacancies. Discernment for a committee clerk and additional members is underway. Because the committee has been on pause for the past year, the start-up and embracing of newly redefined PP&C will require distinct gifts, skills and energy. One of our overarching goals is to encourage rising leadership in choosing a mixture of seasoned and new committee members.

Gifts and Skills Desired:

- Committee should reflect the diversity within the Yearly Meeting
- Pastoral care for children and families
- Skills and experience with youth programs and youth work, including program evaluation and planning
- Familiarity with NEYM retreat programs
- Good listening, openness, creative, responsible, spiritually grounded

*First Reading\*:*

**Youth Ministries - Newt Barletta, Framingham Meeting, to begin immediately, class 2025**

Newt is a 16-year-old sophomore attending Lincoln-Sudbury high school. Newt's spiritual communities have been primarily Friends Camp and NEYM Young Friends. They attend retreats regularly and would like to serve on the Youth Ministries Committee in order to give back to the YF community, which has provided recognition and belonging. Their family is not Quaker, however they fully support their interest and participation in Quakerism, including occasional attendance at Framingham Meeting.

Newt is very grateful and wishes everyone could experience the kind of community they have among Friends. They served on the Young Friends Planning Committee when Maggie Fiore was gone and demonstrated excellent skills thinking about the big picture of the retreat programs and how they relate to Friends Camp and monthly meetings. Newt responded in a responsible and timely way with all nominating committee communications. References describe them as being curious, responsive, and insightful.

The above *First Reading* will come forward for *Second Reading* and hopefully approval at the Permanent Board meeting on 10 February. Please contact me with affirmations, questions, or concerns immediately so follow-up can be done prior to that meeting.

Faithfully,  
Jacqueline Stillwell (Monadnock)  
Clerk, NEYM Nominating Committee  
(603)933-2608 or [jacqueline.stillwell@gmail.com](mailto:jacqueline.stillwell@gmail.com)

Nominating Committee members: Sara Smith (Concord), Anna Lindo (Framingham), Beth Hanson (Westerly), Chris Gant (Beacon Hill), Tim Lamm (Worcester), Kathy Malin (Smithfield), Martha Schwope (Wellesley)

\* The process for approving nominations by Permanent Board during the year is to send *first readings* in this written report a week or so in advance of the Permanent Board meeting. Any concerns, questions or affirmations should be communicated immediately to the Nominating Committee clerk. The clerk will follow-up with a nominee to share concerns without naming who brought them forward. The focus will be on the concerns and how they may be addressed. Depending on the outcome of this exchange, the nominee will either be brought forward for second reading, or withdrawn from the nomination. Depending on the situation, there may be a brief mention of the concerns and response.

To: NEYM Permanent Board

From: Susan Davies, Permanent Board Clerk

Subject: First Reading of Permanent Board Clerk's recommendations for service on Noticing Patterns wg, for PB approval on February 10, 2024

Date: February 2, 2024,

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This Advance Document constitutes the **First Reading** of two names recommended by the clerk of Permanent Board for service on the **Noticing Patterns of Oppression and Faithfulness workgroup**.

**Please bring any concerns or affirmations as soon as possible, to Susan Davies, PB clerk, so they are received prior to the February 10<sup>th</sup> Permanent Board meeting: [pbclerk@neym.org](mailto:pbclerk@neym.org) <sup>1</sup>**

**Background on the Noticing Patterns wg (NPwg):**

The NPwg's original charge from Sessions 2018, YM Minute 2018-53:

. . . "to identify people to observe, name, and reflect back to NEYM members and constituents, long-standing patterns and practices that result in our complicity in oppression, patterns that to differing degrees are seen and unseen by and across the body of NEYM."

**And an excerpt from the NPwg report to Permanent Board in December 2021:**

*"Our hope is that a loving practice of noticing patterns of oppression and faithfulness will become an active and persistent feature of the life of all of NEYM's meetings, committees, and programs. To make that vision manifest, NPwg continues to seek and develop a wider circle of people who can engage with and facilitate groups in all parts of NEYM, inviting in those who are ready to join us now. We also want to create ways for many to grow their capacity to support this outreach and in-reach work."*

**First Reading;** for service on the **Noticing Patterns of Oppression and Faithfulness workgroup**, for PB Approval on February 10, 2024,

**Celadry Humphries, Northampton Friends Meeting**

Celadry (Cal) has had a lifelong association with NEYM. She practices a ministry of inclusion and welcome of LGBTQ+ people through her work at the Smith College theatre technology department, in the Latin Social Dance community (Salsa), and in a Queer Choir, in western Massachusetts. Cal brings her life experience as a young adult who understands the subtleties of

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<sup>1</sup> The process for approving working group members by Permanent Board is to send first readings in a written report a week or so in advance of the Permanent Board meeting. Any concerns, questions or affirmations should be communicated immediately to the Permanent Board Clerk. The Clerk will follow-up with a nominee to share concerns without naming who brought them forward. The focus will be on the concerns and how they may be addressed. Depending on the outcome of this exchange, the nominee will either be brought forward for second reading at the PB meeting or withdrawn from the nomination. Under some circumstances there may be a brief mention of the concerns and the response.

what it takes for people to feel welcome, included, seen, and heard. She brings gifts of spiritual depth, insight, and skilled and respectful communication.

**Christine Hansen, Burlington Friends Meeting**

Chris Hansen brings gifts developed out of her life experience with, and as an advocate for, those living with mental health challenges. In her professional life she is co-director of an international human rights organization dedicated to bringing people together for peer support, as an alternative to institutional or psychiatric-dominated interventions. Through her advocacy and peer support work she has learned to practice the kind of engagement that can build relationships and raise awareness of harm. She brings gifts of awareness and understanding of people who are often marginalized, and long experience working constructively within existing structures to shift harmful patterns.

## **2024 - First Draft proposal for Legacy Gift funds received from sale of the New England Friends Home after initial ten years of experience**

### **Brief summary update on report and proposals from the 2024 Legacy Review Committee for Permanent Board Feb 10, 2024 meeting:**

**Introduction:** The working group preparing these recommendations are bringing this proposal to Permanent Board after two years of work. We've received feedback, advice and questions from over 50 meetings and grantees. During this process we've heard overwhelming affirmation of the impact of the funds distributed by the Legacy Gift Fund Committee. We've heard Friends' experience of these funds prompting and nurturing a deeper understanding and practice of noticing, discerning, holding accountable and supporting leadings of the Spirit and ministry among New England Friends. We've heard that Meetings' understanding of ministry and the support for ministry has grown and that the holy abundance and generosity modeled in these grants is a first step in decolonizing our relationship to money. We've also noted that during the 10 years of the Legacy Funds experiment, a few grants have been made in support of nurturing relationships with Indigenous people and doing research, NEYM has issued the apology letter to Indigenous Communities, and has begun researching NEYM's historic support of Indian Boarding Schools. We've been reminded that these funds come from the sale of stolen land. We want to embrace this opportunity to move beyond these funds being a gift from the past to the future to their being an on-going commitment to Quakerism in the present and the future. In this review we also had another opportunity to grapple with a question raised in 2014: "How can we be a Church with money in our pocket?" How can we use all our resources to be God's people in the world.

#### **Basic Proposals outline:**

We are working with approximately \$980,000 in principal.

1. **Continue the Legacy Gift Funds.** Survey responses show positive impacts, overwhelming appreciation for the funds, and desire for them to continue to be a resource available to enable witness and ministry among us.
2. **Make some adjustments to various aspects of the funds.** See section below under "AND."
3. **Divide the available money (the principal) into three parts:**
  - **40% to go into a new reparations/ restorative actions and relationships fund.** Since the funds came from the sale of stolen land, it is now time for directing some of the funds in this way. The new fund would not be under the Legacy Gift Committee, rather a different group, with guidelines to be developed. Some ideas: it might include the possibility of being a reparations multiplier - adding to local reparation efforts such as Landback and Language Reclamation programs. The people and process for making the decisions with this fund will need to be figured out. Reaching out to existing Indigenous led organizations across New England who we have been developing relationships with will be helpful in figuring out how to do this.\* (see list of some examples below)

- **Reinfuse the Futures Fund:** Use some amount (up to \$200,000) from the principal to refill the Futures Fund (to be again spent down). This Fund was very successful and we have found from temporarily restoring this fund with Salem Quarter's money while Salem Qtr is on sabbatical, that there is still a need for funds, especially to help with meetings' infrastructure projects, primarily for reducing carbon footprints, and for small meetings struggling to maintain their buildings.
- **The remainder (estimate of \$400,000) continues as the Witness & Ministry Fund.** Perhaps increasing the percentage rate from 4% to 6% for annual draw to faithfully nurture the ministry and witness among us into the future. Also create a mechanism to adjust the percentage or toggle points with the principal within the next 10 years.

AND:

a.) **Paid Administrative Support for the Legacy Funds.** The administrative workload currently carried by the Legacy Committee Co-clerks is not sustainable, and makes it challenging to find new Friends to serve. We propose adding paid staff support or stipends for co-clerks.

b.) **Building a "resource library" of people and other resources available to help develop NEYM's capacity to be a "Ministry Incubator."** For example, developing resources for mentoring, networking, supporting meetings in supporting emergent ministry, sharing social media expertise, etc. Grants made with the Futures Funds and the W&M fund would include an invitation to access these incubation resources. A small amount of the Funds would be made available to pay for staff support or stipends for developing this resource library - gathering resource info and making it available in a way that will be used. And for Maintaining it, which may be minimal.

c.) Commit to **building stronger relationships with other sources of funds** that support ministry and building projects (e.g. the Lyman Fund, Obadiah Brown Fund, The PYM Meetinghouse Fund) (Note – Obadiah Brown trustees report that they have a similar thought and they might fund a planning / coordination conference to get this started.)

d.) **Strengthen the time-sensitive grant capacity** so that we are able to be nimble and flexible when opportunities to support shared witness occur.

e.) **Create a way for the fund to be replenished** – we propose that ways be opened for the funds to be added to. For example, allowing the Legacy gift committee to do limited targeted development (like Puente does), accept bequests, or offer pay as led workshops with surplus going into the W&M fund.

f.) **Rename Legacy Gift fund** to something more forward looking. Taking the focus off the legacy from the past sale of NE Friends Home, focusing instead on nurturing the seeds of spirit as we go forward.

g.) **Regular review** of these assumptions and commitments every 10? Years.

## **Brief history & Background:**

The Legacy Gift Funds were created 10 years ago from the sale of the New England Friends Home in 2012 - to support the witness and ministry of Friends in New England. The discernment in 2014 restricted a portion of the funds for 10 years. Faithful to our commitment to revisiting this discernment in 2024, we bring the following report and proposals for consideration this year.

In 2014 we approved the following statement of purpose:

*Guided by our living testimonies, we seek to strengthen our Witness through the funding of public and released ministry, with attention to Racism and Climate Change, and to nurture our beloved community through the support of education, outreach, released ministry and meetinghouse projects. Our hope is that the Legacy Funds will serve as potent seeds to help Friends answer God's call in our time and to strengthen the new life that is already rising up in our yearly meeting.*

Over these 10 years the fruits of the funds established in 2014 have been rich, powerful and many. Lots of individual Friends, most of our Meetings, and many other Friends' entities have benefited from these funds supporting witness, ministry and facility improvements. It has been a great blessing to witness and be able to nurture the movement of the spirit among us. A summary and a slide show of recipients of grants is on the legacy gift web page, along with overall information, guidelines and funding priorities. <https://neym.org/committees/legacy-gift>

Over the years, Legacy's work has expanded to meet additional needs in recognition of the successful work of the committee. This includes taking on administering the new Bodine-Rustin Fund and shepherding Salem Quarter's funds while they are on sabbatical (applying their funds to re-infuse the Futures Fund). Other changes and developments have also evolved: key ones being the establishment of a process for making Time Sensitive Grants, and NEYM approving the roll-over of W&M funds from year to year, thus making more funds available in support of witness and ministry among us.

## **Finance Overview:**

At the start, in Fiscal Year 2014, at the request of Sessions, as recommended by the Legacy Discernment Committee, \$100,000 of the proceeds were given to Friends Camp to retire a mortgage. Investment income of \$18,391 in FY2014, and \$25,000 in FY2015 was transferred to the NEYM Operating budget. In addition \$25,000 was designated in 2018 to create a new Fund for Sufferings.

The remaining proceeds, with accumulated earnings, were used to create two funds - the NEYM Future Fund (\$470,975.46) and the NEYM Witness and Ministries Fund (\$750,000.00). The Future Fund, and all accumulated earnings, was intended to be spent down, while the Witness and Ministries Fund was set up as a quasi-endowment fund that only spent the annual earnings. Both funds were invested with the Board of Managers.

Since inception, the Future Fund gave out grants totaling \$541,953 which was exhausted as intended, in 2020. The Witness & Ministry fund has given out grants totaling \$164,049 from annual investment earnings as of December 2023. As of September 2023, the Witness & Ministry Fund had an invested balance of \$982,730.

## **Process for this review and recommendations**

The 2024 Review team formed in August 2021, comprised of Suzanna Schell (Beacon Hill, first clerk of Legacy), Fritz Weiss (Portland, former Presiding Clerk), Bob Murray (Beacon Hill, then NEYM Treasurer), and Mary Link (Mt Toby, current Legacy co-clerk). We have met regularly since the fall of 2021, reviewed the history and original charge, collected data (such as the number and range of grants that have been made & financials), and updated the slide show of grant impact.

We sought input widely from meetings, grant recipients and the YM community, using surveys that were sent directly to meeting contacts, grantees, and via outreach in the NEYM newsletter for several months. **We received 52 responses.** We have compiled the responses, and reflected on how well Legacy has responded to its charge and spiritual goals.

We reviewed the history of grants made and the impact of these grants. The almost universal response is positive, both of the impact of the grants and the process of the grantmaking.

We considered the specifics of the Legacy funding along with the wider impacts, and also reflected on ways the Yearly Meeting has grown and priorities that have evolved or emerged since 2014.

We also re-read the original responses from the 2014 discernment that led to the formation of the legacy gift program.

We reviewed the financial history and other data, total amounts granted, growth of the funds available, and the number and types of grants and grantees during the first ten years. Financial overview is above, and a brief overview of grantees is below.

## **Assessment**

We've been asked, "How have we done towards meeting our original goals?"

The Legacy Gift Program was an experiment in faithfulness. We did not try to emulate more mainstream foundation processes with "measurable goals" or so-called "deliverables." We set out to use the proceeds from the sale of the New England Friends Home as one way to answer God's call in our time. We created a funding program to support the ministry of New England Friends with certain priorities minuted by NEYM Sessions and guided by the movement of the spirit.

We have been responsive to the movement of the spirit among us and to priorities identified by Sessions such as the 2013 minute refuting the Doctrine of Discovery and the 2022 minute calling for NEYM to research our involvement in and support of the Federal Indian Boarding School Project in the 19th century, and support of Dover Meeting's Sanctuary ministry.

We have surveyed grantees and Friends across NEYM to understand the impact of the funds. We do have data available if that is desired and plan to include more of it, along with examples of survey responses, in our final report.

The Legacy Funds have strengthened Friends' processes for supporting ministry such as clearness and support/accountability committees and financial oversight through monthly meetings or Friends' organizations. Our workshops have shared successful ways to carry out these practices and we hear that our work has deepened the support of ministry across NEYM.



Responses to our survey from around the Yearly Meeting, reports from grantees, stories and experiences tell us that we succeeded in this endeavor.

The ministry supported by Legacy has been far ranging and meaningful. For example, at a recent Zoom meeting of the Quaker Indigenous Boarding Schools working group – convened by grant recipient Andrew Grant as part of the NEYM's response to the Friends' Peace Team's minute approved by Sessions in 2022 – attendees included Friends from Alaska, Texas, Colorado, Washington, DC as well as a number of Friends from NEYM who are past or current grantees. Other grant recipients have traveled to Cuba, Africa, Europe and other parts of the US in faithfulness to their leadings.

### **Meetings & Other Organizations that have Received Legacy Grants**

As of December 2023, of the 62 monthly meetings, 40 have been involved in a LGC grant (either as a meeting or in supporting the witness or ministry of individuals), over half of them in more than one grant application. The remaining 22 meetings are mostly smaller meetings. Approximately 25 other Friends related groups and organizations (like Friends Schools, Camp, Woolman Hill, etc) have also been involved in grants, many of them more than once.

14 of 20 meetings in Massachusetts received grants  
4 of 6 in Connecticut  
3 of 3 in RI  
5 of 8 in Vermont  
7 of 9 in NH  
7 of 16 in Maine

**Closing - and what we need from PB:** The question before us now is whether and how to continue this experiment in Holy Abundance. At this time we ask Permanent Board for feedback on how this looks, anything else that should be included, and **especially reflections on our draft proposals** - so that we can add, edit and further season the report and proposals to bring back to PB in May in preparation for presentation to Sessions in August. We are grateful for your review and guidance.

**Contacts for feedback:** Mary Link [maryclink@gmail.com](mailto:maryclink@gmail.com), Fritz Weiss [rossvall.weiss@gmail.com](mailto:rossvall.weiss@gmail.com), and Suzanna Schell [suzanna.schell@gmail.com](mailto:suzanna.schell@gmail.com) Thank you!

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\* For example: Four Directions Development Corporation; Native Land Conservancy in Mashpee (Gail on board) and other land back organizations, Oketeau in Ashfield, Massachusetts, NAICOB in Boston, Wabanaki Reach, and others in other NEYM areas. Funds could go to Massachusetts/greater Boston area organizations as that is where land was, or more widely across NE or beyond. Funds would likely be disbursed over a period of time.

## **AntiRacism Consultation Working Group Report**

**Melody Brazo (Fresh Pond), Kristina Keefe-Perry (Fresh Pond/3 Rivers)**

**February 10, 2024**

### **Report on progress of AntiRacism Consultation Working Group and a recommendation for the consideration by the Permanent Board.**

At the last PB meeting, Kristina Keefe-Perry shared our charge and reported on the history and goals of the working group. Today we bring you a recommendation for a consultant who we believe could lead the Yearly Meeting in the work of dismantling racism, to which God has called us.

#### History:

In July 2021 PB approved, the recommendation of the working group for a Yearly Meeting consultation to bring in voices that have been missing in racial dialogue and healing in the Yearly Meeting thus far. The full scope of the work before the Yearly Meeting was unknown. It was recognized that defining the work, and doing the work would likely need to occur in different phases.

The first part of the work was creating the charge for this working group. This Charge was finalized in May of 2022.

Those appointed to the AntiRacism Consultation Working Group (ARCWG) are: Melody Brazo (Fresh Pond), Nia Thomas (Northampton), LVM Shelton (Plainfield), Morgan Wilson (Framingham), Becky Jones (Northampton, as a prayerful presence), Noah Merrill (Putney), and Kristina Keefe-Perry (Fresh Pond/Three Rivers).

Leslie Manning, the Clerk of the Permanent Board, served as clerk.

***The intended outcome of the consultative process is to bring to the Permanent Board a framework and recommendations—a “roadmap”—for how the Yearly Meeting can concretely: 1) bring the perspectives and insights offered by antiracist theory and practice into the Yearly Meeting’s discernment and action as an institution, and 2) support and encourage local Friends meetings (monthly and quarterly) across our***

***region, as they are led, to bring the perspectives and insights offered by antiracist theory and practice into their discernment and actions as worshiping communities, and into the discernment and actions of Friends as a regional corporate body....”***

The work then developed in two phases: First, to develop a *Request For Proposals* in our work of selecting a consultant. Then, soliciting proposals and interviewing interested candidates.

In the RFP, the working group sought:

- Consultation to work with Yearly Meeting leadership, staff and the Permanent Board to help us develop a process for living into our commitment to becoming an antiracist faith community.
- We seek to develop a multi-year plan for action, a roadmap that can be used throughout the organization through the development of common goals, language, and processes that will guide us in living into our intention to challenge and dismantle white supremacy in ourselves and in our faith community.
- We seek a process that is consistent with Quaker theology and practice. We hope to partner with consultants in our developing practices, in ways that further a commitment to and articulation of antiracism in ways that are authentic, relevant, and rooted in our faith tradition.
- We know that this work will involve digging into the spiritual roots of racism and white supremacy that underlie some of our traditions and practices. We cannot cling so tightly to tradition—for tradition’s sake—that it hinders our antiracist goals. We may need strategies that help us to let go of beloved historical understandings and practices. This will include responding to harm, as it arises, and addressing resistance.

The ARCWG solicited several consultants. We engaged in a group interview with two of them.

On December 13, 2023 we met with Melvin Bray - from Collabirynth Consulting.

“Melvin Bray is principal consultant of Collabirynth, LLC. Bray has extensive experience

and training in equity/diversity/inclusion (across multiple social identities), collaborative problem-solving, innovation strategy, community organizing, curriculum/program development, discovery learning and sustainability. He has been the recipient of numerous awards, including an EMMY® (NATAS) for outstanding communications skill. Through Collabyrinth, Bray helps communities of goodwill design better systems and structures, policies and practices, that transform persistently inequitable outcomes into equitable ones. Martin Luther King, jr, famously referred to such a transformation as “beloved community”. The design-based collaborative problem-solving and discovery learning processes of Collabyrinth’s work arouse solidarity, cultivate transformation and help persons of goodwill make progress together.”

The ARCWG was enthusiastic about the time spent with Melvin. We experienced connection around shared goals and trust in skills and understanding during the interview, encouragement around his knowledge of Quakers, and his admission that there is still more to know; his own grounding in faith and experience working with faith communities, and his deep listening skills as evidenced in our time together. We were also encouraged by the multidisciplinary approach Collabiryth has taken in its work. We felt excitement about the commitment he brings to this work (beyond his commitment to antiracism) that is rooted in his own faith, and his commitment to innovation and transformation. It feels like his awareness of Quakers, combined with his sense of what is transpiring in communities of faith in this country at this time, brings a fullness to the work that he might do with us.

**Recommendation:**

**The AntiRacism Consultation Working Group recommends that we engage the services of Melvin Bray and Collabyrinth. Funds have been previously allocated for this work but the next step is to ascertain how closely that amount aligns with the work that NEYM and Melvin Bray negotiate to attain YM goals. The ARCWG is recommending that the Acting Secretary, in consultation with the representatives from the ARCWG, engage in “next step” conversations with Melvin Bray to explore the scope of tasks, timeline, required NEYM human resources, and contractual costs to achieve our stated goals, relative to the estimated, budgeted amount. We believe that we would be able to acquire additional funding for this work if that becomes necessary.**

## Key Issues for Sessions Visioning and Design for 2025+

**Background:** Permanent Board approved the 2025+ Sessions Visioning & Design Process in its September 30, 2023, meeting (Minute PB23-52). That proposal outlined three phases of a process to develop a new approach to Annual Sessions:

- **Phase 1: Informational report** providing an executive summary based on Sessions debriefing conversations, identifying key issues, challenges, and dynamics involved in planning and implementing Annual Sessions.
- Phase 2: Wide consultation and listening (with particular emphasis on the hopes and responses arising from, and supportive of local meetings); analysis of responses, implications and feasibility; and recommendations for Sessions design to Permanent Board to guide development of final proposal. Working group with key involvement of Sessions Planning Clerk, Sessions planners.
- Phase 3: Clarifying and improving recommendations, identifying needed resources, and developing a plan for implementation following Sessions 2024. Working group with key involvement of Sessions Planning Clerk, Sessions planners.

**The report below is the Phase 1 informational report on key issues.**

The key issues for Sessions fall into four broad categories:

1. What is the purpose of Sessions?
2. Who do we hope will attend Sessions? Why?
3. What infrastructure and resources do we need to achieve our purpose?
4. How do we prepare for and hold corporate discernment during Sessions?

The central issue that encompasses all of this is the lack of clear unity of primary purpose within the Yearly Meeting for Sessions, leading to conflict in expectations and priorities between business meetings, adult programming, youth programs, social/informal time, worship, and other activities. This results in time pressures, competing commitments, unrealistic expectations, and frustrations every year.

These conversations about the future of Sessions are happening within a broader context of cultural changes. Other similar yearly meetings, denominational conferences, and comparable events are already pivoting/have moved away from the form that Sessions continues to use. NEYM Sessions has been in some ways insulated from the constraints that contribute to these wider trends because many New England Friends are especially loyal and dedicated, and because so many Friends have contributed their time to provide such a high quality experience for years. The

tremendous efforts of these dedicated Friends is likely only a stopgap, or slowing of the felt impact of realities outside the scope of our control. In order to be good stewards of our Yearly Meeting, this is a time we must ask these underlying and unresolved questions.

Each section below details the key issues for each category in more detail.

## What is the purpose of Sessions?

*What is the primary purpose of Sessions? What must happen at Sessions? How does that purpose relate to the wider purpose of the Yearly Meeting?*

- **Competing commitments:** Without clarity of purpose, Friends come to Sessions with different understandings and, often, high expectations for services in regards to the purpose they understand to be primary. With increasing demands across all aspects of Sessions and without the clarity of purpose required to effectively prioritize, staff often are held responsible when results don't meet expectations. This creates an untenable situation, trying to meet competing demands with finite resources.
- **Use of limited time:** What do we currently do at Sessions that could reasonably be done elsewhere?
- **Impact on culture:** Because we lack consistent messaging around the primary purpose of Sessions, attendees greatly vary in their understanding of their role as a participant. Some view Session as something being done *for* them instead of *with* them. How do we move away from this "customer/staff" mindset and towards an understanding of ourselves as one community of shared responsibility and care?

## Who do we hope will attend Sessions? Why?

*Given the identified purpose of Sessions, who do we hope will be there?*

- **Demographic challenges:** Currently the majority of Sessions attenders are 65+ and the social and economic conditions that allowed them to participate as younger Friends are different from what many working-age Friends and youth experience today. How can we shape Sessions to allow more participation from the younger demographic so they have the same opportunity for decades-long participation at Annual Session? If we do not make a change to a model that is more accessible to people with limited time off of work, how will that affect the long-term sustainability of Sessions?

## The infrastructure and resources needed for Sessions

- **Volunteer Recruitment:** We currently experience many challenges with recruitment for the 100+ roles required to offer Sessions in its current form. More help is now needed, and fewer people are now willing and able to serve. There are very high expectations and ideas about how things should go in regard to many aspects of Sessions, but recruiting for the roles necessary to offer Sessions has been an increasing concern requiring more time and effort each year. Changing availability to serve is not easily or wholly remedied by internal action. For example, providing stipends to youth staffers might help somewhat but cannot address the widespread cultural trend of lower participation by young people in religious activities.
- **Facilities Requirements:** There are a limited number of facilities that can offer the level of accommodation many Sessions attendees need and/or have come to expect. Costs increase as universities move more in the direction of summer programming and other uses of their space, which make a weeklong rental of the whole campus less appealing to colleges. Our group includes those with varied accessibility requirements, which further limits the number of sites that are viable. Current college campus facilities are not sufficient for many more Friends needing assistance with mobility, air conditioning, elevators, etc.
- **Financial Risk:** Sessions needs to have a large number of attenders in order for the overall finances to have a manageable subsidy from overall operating funds. Scaling attendance fees to fit a smaller group (fewer than 400 or so) results in a significantly higher cost per person, which would be prohibitive for many. How much could realistically be subsidized by meetings, and how much would they support being used for this purpose? How does the purpose of Session inform decisions about what investments/financial risks are appropriate?
- **Resource footprint:** How much of the resources of the Yearly Meeting is it appropriate to invest in Sessions? Currently, there is a large investment of resources for five days of activities (~23% of overall staff time for the year is spent on Sessions, close to a quarter; compare with 2% of this cost for Meeting Care Day, only slightly more for Living Faith). Are Friends comfortable with the trade-offs and opportunity costs this level of investment requires? If we expended fewer resources on Sessions, what would you have us do instead to strengthen our local meetings and the practice of Friends faith in New England?

## Corporate Discernment

- **Participation and preparation:** What preparation is needed to meaningfully include a wide array of Friends in discernment regarding complex issues? Given that Yearly Meeting discernment is often a years-long process, how can we overcome the challenges that come

with frequent rotation of volunteer leadership roles, such as the presiding clerk, and the associated learning curves?

- **Staying open to Spirit during a tightly scheduled event:** While Friends yearn to be guided by “God’s time,” the complexities of Sessions’ current model result in a tight schedule. Corporate discernment, large-group spiritual formation programming (speakers, teaching), and hybrid worship require greater planning and scripting of activities, which is resource and time intensive, and can reduce the spaciousness and flexibility to be open to the Spirit. This is exacerbated by the tight schedule during Sessions which requires decisions be made further in advance and little space to react to things that arise during Sessions.
- **A small proportion of New England Friends in business meeting:** Whereas some perceive those attending Sessions as “the Yearly Meeting,” in reality, only a small fraction of Quakers in New England currently participate in Sessions. As a result, the concerns and perspectives of those who can attend Sessions are often disproportionately heard. Would a more decentralized approach to discernment and engagement diminish this privileging of Sessions attenders and allow for greater inclusion and participation of more Friends across New England?
- **Disagreements regarding corporate discernment:** Among Friends, there are differing understandings of what level of detail and what kinds of discernment are helpfully undertaken by the corporate body gathered at Sessions. What sorts of organizational governance decisions should be made with hundreds of people? What matters might truly lend themselves to discernment as part of Sessions and what might it be more helpful to have handled by committees, the Permanent Board, or in other more distributed seasoning processes?

*As we hold these many questions and challenging realities, what do we sense is God's invitation for us at this time?*

Submitted by,

NiaDwynwen Thomas  
Acting Secretary for Programs & Administration  
Program Director  
nia@neym.org

Elizabeth Hacala  
Events Coordinator  
events@neym.org



# 2025+ Sessions Visioning & Design

Revised Appendix : Timeline of Key Milestones – as of 1 February 2024

The full original document is [linked here](#).

	Sessions 2024 preparations	Longer-term visioning & design	Site Search
September 2023	Update to PB re: '24 location <i>(complete)</i>	Proposal for process overall, and detail for Phase 1 approved	
October 2023	<i>Theme and Speakers begin by EOM (complete)</i>		
November 2023			
December 2023	Permanent board (12/9)  <i>Speaker and theme Finalized (in process)</i>		Initial draft of the site search.
January 2024		Update and revise planning and design to reflect current timeline and YM Secretary's bereavement leave.	Site search proposal and working group charge draft circulated for feedback.
February 2024	Permanent Board (2/10)	Report back from Phase 1 including key issues.  Proposal and charge for Phase 2 Visioning Consultation Working Group to PB for approval	Proposal and charge presented to Permanent Board.

	<b>Sessions 2024 preparations</b>	<b>Longer-term visioning &amp; design</b>	<b>Site Search</b>
March 2024	<i>Plenary and BHH speakers announced</i>	Approval of Nominations for Visioning Consultation Working Group (called meeting of PB);  Phase II begins	Continued compilation of the list of sites.
April 2024	<i>Invitation to Sessions materials due</i>	Consultative processes led by Working Group underway;  Youth staff map out implications of different Sessions models  Listeners/working group members and sessions planners, and staff work together to sketch out trade-offs/implications of potential recommendations	Finalizing a list of sites.  Recruiting WG members  WG membership presented to C&A for feedback.
May 2024	<i>Updates to the YM website and RegFox registration set up.</i>  Permanent Board (5/11)	Phase II preliminary finding report seeking PB affirmation;  Initial proposed charge for Phase 3 to PB for input.	Create a list of criteria with input from WG members.
June 2024	<i>Sessions 2024 Registration launches 6/1</i>	Continued consultation as needed.	Site visits for top choices.
July 2024		Final report on the findings of Phase 2.  Approval of Phase 3 plan/charge	Final site recommendation to PB.

	<b>Sessions 2024 preparations</b>	<b>Longer-term visioning &amp; design</b>	<b>Site Search</b>
		Development of a proposal to implement approved recommendations from Phase 2	
August 2024		Progress update provided to Sessions 2024 including the results of Phase 2 and an outline of Phase 3 goals and timeline.  Approval of Phase 3 plan/charge	Final site recommendation to Sessions
September 2024	Sessions 2024 Debrief Meeting	Phase 3 begins	Potential input from WG on final vision and design
October 2024		Update on Phase 3 to fall Permanent Board meeting.	Working group thanked and laid down
November	Initial Sessions Planning Meeting	Planning for Sessions 2025 begins, guided by approved recommendations	

## Report to Permanent Board from the Israel-Palestine Resource Group

February 2, 2024

The Israel-Palestine Resource Group is under the care of the Permanent Board and is to be reviewed in 2024. Since our formation in 2021, members Chris Jorgensen and Skip Schiel of Friends Meeting at Cambridge, Mimi Marstaller and Leslie Manning of Durham and Molly Cornell of Sandwich have met regularly, at least ten times per year, and offer a Resource Page, <https://neym.org/israel-palestine-resources-engagement>, a book discussion, several workshops and recorded programs for interested parties from New England and beyond, which have been well received.

We have also offered to be resources for monthly or quarterly meetings, but have had no requests. Rather than wait to be asked, we decided to go ahead and offer the programming we heard Friends needed, and have had success with such offerings, including a workshop at Sessions, 2023 featuring Lauren Brownlee of Friends Committee on National Legislation and a special invitation to Young Friends to engage on the topic, consistent with our charge to “shepherd and support”. We hope to offer another workshop at the upcoming Living Faith Gathering in April.

The need for this resource group continues, and we remain deeply committed to the work of connecting our various Minutes with opportunities for learning, engaging and Spirit-led action. From 2017 onward, our Yearly Meeting has committed to:

### Yearly Meeting Minute 2017-46

The Religious Society of Friends (Quakers) testimony on peace, justice, and nonviolence is based in our experience of the divine in all of creation and within all persons. Thus, we are deeply troubled by the suffering and injustice caused by the Israeli/Palestinian conflict and we are concerned that our government perpetuates that violence by continuing to send billions of dollars of military aid to the region.

We call upon our nation to:

- Cease sending United States military aid and selling weapons to the entire Middle East.
- Continue diplomatic efforts with all parties and remain in dialogue even with those who have acted violently.
- Join the international court system and accept its jurisdiction. We call upon all nations to:
  - Work with the United Nations Security Council to end military aid and arms sales from all outside countries to all parties in this conflict.
  - Support the United Nations efforts to bring justice, peace, security, and reconciliation to all parties in the conflict.
  - Take measures to assure that international laws are applied universally. We call upon all individuals and communities to:
    - Support and learn from the many organizations that bring Israelis and Palestinians together for justice and peacemaking.

- Examine how anti-Semitism, Islamophobia, racism, and privilege affect our understanding of the conflict.

In 2019, the Yearly Meeting in Sessions affirmed this minute. Minute 2019-46 reads in part: “Northwest Quarter also asks us to request that monthly meetings and quarterly meetings consider whether they have lived into this minute, particularly as it applies to Gaza and the West Bank.”

In 2023, we endorsed the work of the American Friends Service Committee’s “No Way To Treat A Child” campaign. With the recent International Court of Justice preliminary decision on genocide and the on-going federal lawsuits about war crimes, as well as debates about the continued funding to Israel, there remains a clear need for discernment and engagement. For further context, please review the recent statement from our Presiding Clerk and General Secretary, found here: <https://neym.org/news/2023/11/statement-conflict-israel-palestine>

In the Light,

Leslie Manning, Convenor  
Durham MM and Three Rivers WG

## *Interim Report of the NEYM Quaker Indigenous Boarding Schools Research Group<sup>1</sup>*

*Friends from New England were deeply involved at every stage and at all levels of federal Indian policy. Their involvement can be described in three categories: personnel, financial & material support, and advocacy. Their participation peaked during the Grant administration (1869-1877) but began long before, and continued long after. The Tribes and schools associated with the Quapaw and Sac & Fox Agencies in Indian Territory were the primary focus of New England Friends. In this report, we offer some resources and history, ending with where we are in the research now.*

### **Whose stories are these to tell?**

For us to attempt to write about NEYM's role in the forced assimilation of Indigenous people without first hearing from those who were the objects of that effort would be to participate in the attempted erasure of Indians and Indian-ness. It is not our place to describe what these children experienced. American Indians have been telling their own stories for a long time. Here are a few suggestions of books by Native American authors about the Indian Boarding Schools and the generational trauma that followed.

- Zitkála-Šá (Red Bird). *American Indian Stories*. West Margin Press, 1921, 2021.  
<https://digital.library.upenn.edu/women/zitkala-sa/stories/stories.html>
- Lomawaima, K. Tsianina. *They Called It Prairie Light: The Story of Chilocco Indian School*. Lincoln, NE: University of Nebraska Press, 1995.
- Lajimodiere, Denise K. *Stringing Rosaries: The History, The Unforgivable, The Healing of Northern Plains Boarding School Survivors*. Fargo, ND: North Dakota State University Press, 2019.
- White Hawk, Sandy. *A Child of the Indian Race: A Story of Return*. St Paul, MN Minnesota Historical Society Press, 2022.
- Novels by Louise Erdrich

We also recommend these media sources, which center Indigenous voices expressing the need for truth-telling to heal the ongoing, intergenerational trauma from the US & Canadian schools

- *Dawnland* - about Maine's Truth and Reconciliation Commission available to rent at <https://upstanderproject.org/individual>
- *Home From School: The Children of Carlisle*  
<https://www.youtube.com/watch?v=zHHVrLRy1oE>
- *The dark legacy of Canada's residential schools, where thousands of children died* excerpt from 60 Minutes report: [https://www.youtube.com/watch?v=J1CfRdEd\\_PI](https://www.youtube.com/watch?v=J1CfRdEd_PI)

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<sup>1</sup> Established by the Permanent Board, in August, 2022, implementing NEYM Sessions Minute 2022-36: "Friends also asked the Permanent Board to begin the process of researching New England Quakers' involvement with Indian Boarding Schools, and to do this in consultation with the Archives Committee and the Right Relationship Resource Group. We recognize that this research may happen in stages, may require funding from sources other than our operating budget, and may benefit from widespread input from around the Yearly Meeting. It is hoped that the Permanent Board may report back on progress and findings at Annual Sessions 2023." The research group includes Janet Hough (Cobscook), Betsy Cazden (Providence), Andrew Grant (Mt. Toby), Gordon Bugbee (Beacon Hill), Emily Neumann (Cambridge), Evan McManamy (Providence), Merrill Kohlhofer (North Shore), Andy Grannell (Portland).

& *Canada's Unmarked Graves*; Sharswood 60 Minutes (full Episode from which the above was extracted) <https://www.youtube.com/watch?v=z4XE6-1lonw>

### **A few words of explanation & a reminder**

Regarding terminology – Naming the peoples that inhabited this continent before Europeans conquered and colonized it is fraught. The modern descendants of those inhabitants hold a variety of views on this. Following the preference of many Native peoples, when possible, we will refer to nations, tribes, and bands by the English version of the name they use for themselves. When referring to a collective group, we will use Indigenous, Indian, and Native more or less interchangeably.<sup>2</sup> Our intention is to be respectful and inclusive, two things that do not always yield the same result.

A reminder – This committee of New England Yearly Meeting, was prompted by the decades-long request by NABS that religious denominations account for their roles in establishing and running Indian Boarding Schools. We see a report from NEYM to NABS as the next step in a journey that began with the Yearly Meeting's repudiation of the Doctrine of Discovery<sup>3</sup> followed by NEYM's Letter of Apology to Native Americans<sup>4</sup> approved in 2021.

### **President Grant's "Quaker" Indian Peace Policy**

In January of 1868, President-Elect Grant was visited by two delegations of Friends, one Hicksite and one Orthodox. They carried the same message, the wars against the Indians must stop. If you appoint men like ourselves, pious, upright, financially experienced, to the important posts of Agents and Teachers in the Indian Service you will be able to root out the corruption and inefficiency that is rampant, and you will be able to pacify the Tribes. Quaker elders like Thomas Wistar (Philadelphia YM) and Benjamin Hallowell (Baltimore YM) believed that Friends' long history of peaceful relations with Native Peoples and their more recent experience helping formerly enslaved people made them well suited to help Indian people.

President Grant, through his Commissioner of Indian Affairs, Eli Parker (Seneca), took up this proposal and assigned the supervision of many Tribes and Bands to the major Protestant religious denominations.<sup>5</sup> Quakers from New England were among the first to be appointed to positions of authority. From the beginning, Indian Agents had education, "christianization" and assimilation as part of their mandates. To advise him in enacting his "Peace Policy," Grant created a Board of Indian Commissioners. New York Quaker Vincent Colyer was appointed in 1869 as the first Secretary to the Board. John D Lang, from Vassalboro Meeting in Maine, was appointed in 1870 and served until his death in 1879. There was at least one Quaker Commissioner on the Board from its beginning through 1933<sup>6</sup>

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<sup>2</sup> We recognize that these words ring differently in Canadian ears. We mean no disrespect.

<sup>3</sup> Repudiating the Doctrine of Discovery NEYM Session Minute 2013-52 <https://neym.org/minute-repudiating-doctrine-discovery>

<sup>4</sup> NEYM Letter of Apology to Native Americans <https://neym.org/sites/default/files/2021-10/approved%20Apology%20with%20note.pdf>

<sup>5</sup> Congregationalists (ABCFM) and (AMA), Presbyterians, Episcopalians, Methodists, Baptists, Reformed Church, Orthodox Friends, Hicksite Friends, Unitarians, and Mennonites. Roman Catholics were added later.

<sup>6</sup> Vincent Colyer (NYYM) 1869-72, John D. Lang (NEYM) 1870-79, B. Rush Roberts (Baltimore) 1874-80, Albert Smiley (NEYM 1879-1912, Daniel Smiley (NEYM) 1912-30, George Vaux Jr (PYM) 1906-27, Mary Vaux Wolcott (PYM) 1927-33.

Native leaders traveled to Washington to address Congress and the President. They spoke to friendly gatherings in large eastern cities like New York and Boston. They had ready access to the Commissioners who traveled extensively in Indian Country and served as special commissioners for various negotiations. While the Commissioners' reports show they thought the Tribes had very reasonable complaints, they believed, like most of their contemporaries, that the only solution was assimilation and citizenship.

Orthodox Friends were assigned to manage the Central Superintendency, which encompassed the state of Kansas and the large tract of land designated by the government as Indian Territory (now the state of Oklahoma). Hicksite Friends were assigned to the Northern Superintendency. There were no Hicksite meetings in New England at that time, so our research is focused on the activities of Orthodox Friends in the Central Superintendency.

The Orthodox yearly meetings, including the Gurneyite New England Yearly Meeting and the Orthodox Philadelphia Yearly Meeting Indian Committee, formed the Associated Executive Committee of Friends for Indian Affairs (AEC) to carry out this work. Enoch Hoag was named Superintendent of the Central Superintendency. Taking up his post in 1869, Hoag was a prominent member of Iowa Yearly Meeting who was born in and retained strong ties to Sandwich, NH. Dr. William Nicholson born in North Carolina and educated at the Friends Boarding School in Providence became the first general agent for the AEC and later served as the government-appointed head of the Central Superintendency.

Of the ten Agencies within the Central Superintendency, the Quapaw Agency, and later the Sac & Fox Agency, came under the particular care of New England Yearly Meeting. NEYM provided both personnel and material and financial support. Asa and Emmeline Tuttle went out from Dover NH meeting to the Quapaw Agency in 1869. Asa was the Agent, and both he and Emmeline were teachers. NEYM appointed representatives to the AEC. The share of the AEC budget apportioned to NEYM was included in the yearly meeting's annual budget. In addition, significant funds for the agencies and missions under NEYM's care were raised by "subscription" and administered by the Committee on Western Indians. Later, funds were also raised and administered by the Women's Foreign Missionary Society of the Yearly Meeting of Friends for New England, precursor of today's United Society of Friends Women International.

In their reports and at meetings of the Board of Indian Commissioners, John Lang and other Quakers spoke out against white encroachment on Tribal lands. They argued that children and adults needed to learn to read and write in English so they would be able to defend themselves against fraud and encroachment. They denigrated indigenous cultures and life-ways, which they considered "uncivilized." They bemoaned the continuing influence of the traditional ways of parents on students at the on-reservation day-schools, and supported the boarding school movement. Quaker schools adopted policies aimed at erasing native languages and beliefs, forced the cutting of hair and wearing of "civilized clothing," and Friends advocated for boarding schools to remove children from their parents and tribal elders. These policies brought about deep and ongoing harms, and are now seen as cultural genocide.

The election of Hayes in 1876 brought changes to the appointment of some Indian Agents, as government funded positions were managed by local political cronies. In addition, there was a shift in emphasis towards large, government-funded and managed, off-reservation schools, starting with the Carlisle Indian



Industrial School in 1878. By 1885 four more schools had been established.<sup>7</sup> Highly regarded Friends like Benjamin Coppock extended the influence of Quakers. Coppock was the first federal superintendent of schools for the Cherokee Nation. He went on to be the Superintendent of White's Indiana Manual Labor Institute (funded and managed by Quakers), and later the Chilocco Indian School.

The peak participation of Orthodox Friends as government agents and teachers lasted only ten years. In 1879, the AEC were told that the prior arrangement was no longer in effect, and their nominations would no longer be honored. Unable to ensure the work would be done as they thought it should be, the AEC surrendered to the President all responsibility for the civil administration of Indian affairs. Over the next several years, some of the Quaker Agency schools were transferred to other denominations. Individual Friends continued to be employed as teachers at government schools, but they were not under the organizational supervision of Friends.

The focus of New England Friends and the AEC shifted to Mission work, including schools, which continued well into the 20th century. We end this report with just a few early examples. In 1888, Mary B. Sherman (Rhode Island MM) joined Quaker Elizabeth Test as a teacher at the Kickapoo and Iowa Missions, paid by the New England Women's Foreign Missionary Society. Lina Lunt (Durham MM) followed in 1890. From 1894-1900, children's, young people's, and women's auxiliaries from around New England raised over \$5,275 to support Elizabeth Test and Lina B. Lunt in their work at the Kickapoo Mission.

### **What more and what's next?**

Part of the work of the NEYM Quaker Indigenous Boarding School research group is to help New England Friends recognize, understand, and reflect on our yearly meeting's support of the assimilationist policies of the United States in the late nineteenth and early twentieth centuries and to take responsibility for the harms caused by our actions. Our Quaker forebears engaged in this work collectively, with multiple yearly meetings working together. In our work today, we are similarly collaborating with a loose network of Quakers from around the country who are engaged in similar research about their yearly meetings' past involvement and current responses. Along with Paula Palmer (Boulder), Andrew Grant (Mt Toby) has been instrumental in shepherding weekly online sessions for collaboration between Friends.

In our May report, we will lay out the involvement of Friends from New England in detail in the three categories of personnel, financial & material support, and advocacy. Thus far, we have not found the kind of records from individual schools that are of the greatest interest to NABS — student rosters, enrollment cards, progress reports, and burials. We have not yet been able to develop rich narratives of the Quaker-operated schools and their personnel. NABS is eager for these information gaps to be filled. This month, Gordon Bugbee (Beacon Hill) is visiting the National Archives in Ft Worth TX and the Oklahoma Historical Society to look for school records. He will be joined in Oklahoma by Suzanna Schell (Beacon Hill). They plan to spend time in what were the Sac & Fox and Quapaw Agencies familiarizing themselves with the land, and, whenever possible, connecting with the tribes most affected by the actions of Quaker agents, teachers, and missionaries.

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<sup>7</sup> These were: the Chilocco Indian School, in Indian Territory; the Indian Industrial School at Genoa, in Nebraska; the Haskell Institute, in Kansas; the Chemawa Indian School, in Oregon; and the Albuquerque Indian School, in New Mexico Territory.

## Additional Resources

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- Blackhawk, Ned. *The Rediscovery of America: Native Peoples and the Unmaking of U.S. History*. New Haven: Yale University Press, 2023, Chapter 10: “Taking Children and Treaty Lands.”
- Dunbar-Ortiz, Roxanne. *An Indigenous Peoples' History of the United States*. Boston: Beacon Press, 2014
- Federal Indian Boarding School Initiative Investigative Report  
[https://www.bia.gov/sites/default/files/dup/inline-files/bsi\\_investigative\\_report\\_may\\_2022\\_508.pdf](https://www.bia.gov/sites/default/files/dup/inline-files/bsi_investigative_report_may_2022_508.pdf)
- Kimmerer, Robin Wall. *Braiding Sweetgrass: Indigenous Wisdom, Scientific Knowledge and the Teachings of Plants*. Minneapolis: Milkweed Editions, 2013.
- National Native American Boarding School Healing Coalition <https://boardingschoolhealing.org/>
- Nielsen, Marianne O. and Barbara M. Heather. *Finding Right Relations: Quakers, Native Americans, and Settler Colonialism*. University of Arizona Press, 2022.
- Palmer, Paula. “Quaker Indian Boarding Schools: Facing Our History and Ourselves,” *Friends' Journal*, October 1, 2016.
- The Quaker Indigenous Boarding Schools: Facing Our History and Ourselves* A slide presentation by Paula Palmer, Gail Melix, and Andrew Grant, recorded on November 15, 2022 <https://bhfh.org/the-quaker-indigenous-boarding-schools-facing-our-history-and-ourselves/>
- Toward Right Relationship with Native Peoples <https://friendspeacetteams.org/trr/>

## **Debrief of 12/9/23 Permanent Board Meeting, Conducted on 12/13/23 Via Zoom**

**Present:** Polly Attwood, Deana Chase, Susan Davies, Melissa Foster, Janet Hough, Jennie Isbell Shinn, Newell Isbell Shinn, Meg Klepack, Rebecca Leuchak, Fran Lightsom, Allison Randall, Carole Rein, Martha Schwope, Liesa Stamm, Willa Taber, Pamela Terrien, Eleanor Warnock, Donn Weinholtz, Kathleen Wooten.

### ***Spirit of the meeting***

Several friends noticed that the December meeting felt energetically and spiritually very different from the September meeting. Less cantankerous. Less stuck. The called Permanent Board Meeting was named as very valuable, a part of helping to clear the air. Having enough time in the agenda, space to discuss, and fewer controversial items also helped.

*The first thing I'd like to notice was how much better the spirit was than the one in September.*

*I found it was a very energizing meeting and a wonderful contrast from the one in Portland from which I left feeling very distressed and disturbed.*

*The agenda was structured to allow plenty of time to discuss things that came up.*

*I was very pleased. It made me feel pleased that I'm on permanent board.*

*I noticed both the secretary and presiding clerk reports were long and presented some clerking challenges. I wonder if they could be shortened or split into separate items for action or information?*

### ***Bodies***

Folks noticed both individual attention to embodied experience and a corporate sense of being a body together and how that influenced the spirit of the meeting.

*I noticed we need more practice of embodiment. The exercises are good, but we need to do more work to incorporate that into the meeting.*

*A nomination we approved, then people started feeling not right in their bodies and we went back and changed it.*

*In the last few years, we've had many more attenders to permanent board who are not on the committee, and more people who are taking part in the discernment. I wonder, is that a different dynamic? Is that something that shifts responsibility to a broader group than just the members who are serving on the committee?*

### ***Minute of Exercise***

The minute of exercise was held up as another aspect of the energetic shift felt in the meeting.

*One of the things I noticed and I'm reflecting now, was how the body as a whole received the minute of exercise, which was a new thing, or an only recently done again thing. How someone stood to speak in a way that could have been seen as wordsmithing, out of a concern to be more specific about some things. And the clerk's inviting others to share their experience, thoughts, impressions of the minute of exercise enabled people to hear differing perspectives from one another. That pausing or making space for people to pause and voice their reactions, their noticing, was listened to deeply by the members of permanent board.*

*That opened for people the spirit of faithfully taking that in and was something that was very different from when a minute is written and read for the first time and people say, "this has to be in it because this was my perspective, or that has to be in it because that was my perspective." I think there was a corporate sense of the September meeting getting off track because even if not everyone spoke, people's minds were going in that direction, which was sparked perhaps by how people spoke early on.*

### **Faithfulness**

The clerking, care of the hybrid nature of the gathering, persistence in continuing to show up, and willingness to be changed were all named as patterns of faithfulness.

*I would say our clerk assisted us to stay focused and not get distracted, to move through the few potentially contentious statements.*

*I noticed a pattern of faithfulness in taking care of the people on zoom. The clerk would ask "can you hear me" sometimes people speaking would say "can you hear me", having Janet as a shepherd was wonderful. We were well taken care of.*

*I think there was faithfulness in making the space for people to voice their different, not perspectives, but their different experiences of the moment.*

*The pattern that clearly spoke to me at this past permanent board meeting was one of faithfulness of continually showing up. I was amazed by the number of friends I've seen at sessions over the years and at permanent board over the years and deeply impressed that people continue to show up and to strive to get things right.*

### **Discernment**

Folks noted aspects of the joint discernment carried out at the December meeting.

*We need to trust our inner discomfort, honor it by giving it voice. Don't just sit there stewing in it but speak it. It was a shared discomfort.*

*I was glad when a friend asked us to clarify what we were doing, creating a committee to address conflict or create the charge for such a group. Until she spoke, I wasn't aware that there had been that confusion.*

### ***Patterns of Oppression Playing Out in Individual and Group Identities***

Folks had multiple experiences and responses related to the pattern of a white male in previous meetings showing up and engaging in ways that reflect dominant culture patterns of oppression.

*I wonder about one of the patterns of oppression that was directly named in the September 30<sup>th</sup> meeting and in the minute of exercise. That pattern of emblematic speaking out of a dominant culture voice was present in the December meeting but was very silent. The absence of that dominating pattern seemed to have freed other voices. There was a lower level of anxiety and dysregulation in the room as a whole.*

*Speaking for right now and not just Saturday. I'm very sad that we have trouble hearing spirit through white male bodies and it triggers some of us. And I look forward to the day when we can be truly inclusive without being triggered by any kind of voice from any kind of body.*

*You cannot label an entire class based on the actions of individuals. I think there are some white males in the yearly meeting that do not trigger people in the same ways that others do. We need to notice that and recognize that not every individual is being a representative of their social identity group. If we were talking about black people that way, we'd be screaming about it.*

*There are ways in which we carry individual and group identities, and some of these group identities connect with societal power. When a white male stands consistently expecting to be heard, feeling free to interrupt, to persist when asked to stop, sometimes talking through others, that pattern of behavior associates to those patterns of dominant culture and is harmful.*

*Individual / group tension is challenging. In September Kristina invited the group back again to notice this pattern that had happened earlier in that meeting, and repeatedly across multiple meetings and clerks and involved more than one person. She noticed the ways in which there were patterns of behavior that were exerting power in the meeting that were dominating and felt unfair. We do these patterns. We are conditioned into holding and repeating these patterns. We need to help each other look at these patterns.*

*This process of sorting out, of seeing, when we name patterns is uncomfortable, because it feels like we are singling out people, attacking people, when we are really trying to see and lift up a pattern. It isn't comfortable. It just isn't. It isn't about morality or about people being good or bad. When the pattern is lifted up, can we pause in a way*

*that honors everybody, can we slow down? That's part of what this space is. A place to return and come back to and reflect.*

A friend used the term two-spirit to refer to a non-indigenous person and another friend noted:

*I hope this is taken gently the way it is spoken. There are Wabanaki and other people who feel that what two-spirit means to them is indigenous only. There are other terms for that experience in non-indigenous bodies, we need to find another word. We need to find another word that Friends can use for that.*

**Report on Friends General Conference (FGC) for Permanent Board of New England YM  
Submitted February 3, 2024  
by Carolyn Hilles-Pilant (Friends Meeting at Cambridge); NEYM representative to FGC**

Since my written and spoken report for Sessions 2023, I have attended both the October Central Committee meeting of FGC at Pendle Hill and the Executive Committee meeting on February 3 via Zoom. It was wonderful for me to be joined at Pendle Hill by our Presiding Clerk, Rebecca Leuchak. Chelle Riendeau (Wellesley) was also in attendance and while there, very unfortunately, fell and broke the top of her humerus bone. She was in a great deal of pain. She tells me the bone has healed and that physical therapy is gradually bringing her back to where she started.

**This report highlights a brief sampling what I think are FGC topics likely of interest to NEYM.**

**The Headline for New England Yearly Meeting is that the Long-Range Planning Committee for the Gathering is recommending the University of Vermont as the site for FGC's 2026 Gathering.**

The Site Committee reported that it has been making attempts since November but not been successful in forming a line of communication with NEYM leadership. The Presiding Clerk shared that NEYM was asked two years ago to be a site for a Gathering but asked FGC to postpone that proposal, which it has done.

The Site Committee reported that they have been in touch with Burlington Meeting and found enthusiasm for having a Gathering there. Executive Committee decided that connection with YM leadership is urgent before approving the site in Vermont. The site decision needs to be made soon in order to secure the reservation of the university. Barry Crossno, FGC General Secretary, will be doing outreach to NEYM leadership before proceeding. Philadelphia YM has hosted many Gatherings and has advice on balancing Sessions needs and a Gathering within the yearly meeting, if that would be helpful to NEYM.

It is my sincere hope that FGC Gathering happens in New England in 2026, believing that it will speak to and deepen the spiritual condition of our membership and strengthen our connection with Friends General Conference. I hope lines of communication open soon, and that way is open for a Gathering here in 2026.

**Other Gathering updates, ad related programming:**

- June 30–July 6 2024 Gathering at Haverford College. (“Rooted in Story”)—planning is well underway. The Bible Hour speaker and plenary speakers are in place and there will soon be an announcement of those names; I’m sure I’ll make errors if I try to create the list here. There will be 54 workshops and a sampler of 4 topics. Many of those workshops show a response to the ‘story’ theme. There will be a celebration of George Fox’s 400<sup>th</sup> birthday. A subcommittee is forming opportunities for field trips to historical Philadelphia including sites featuring African-American history. An Art, dance and music subcommittee is a new experiment to feature music, folk dance, singing and visual art. There will be a form for submitting any kind of artwork or presentation. Children and junior gatherings have been large and exciting in the past; they are hoping for an energized group of people who might be interested with working with junior gathering or the high school programs. Please mention this to Friends you think might be interested in this work.

- Sponsorships for Gatherings begins in 2024; they will be AFSC and FCNL, donating about \$8,000 towards the costs related to plenary speakers and I'm not sure what else.
- Ohio was chosen as the site for the 2025 YAY (Young Adult and Young Friends) Gathering, but Ohio has just passed an anti-transgender legislation so the Site Committee is looking elsewhere, including Michigan and Illinois.
- Many like me who were planning to attend the 2023 Gathering in Oregon decided not to attend when it was announced that masking would be required throughout (difficult for me with my hearing loss). There are varying reports over the impact of masking requirements on attendance. The expense in getting to the west coast location was also a barrier for many. The result was a lower attendance than projected. Survey responses by those who did attend were overwhelmingly positive.
- The Changing Times Conference, held online a few weeks ago, had 180 attenders. This four-day program is one of several that arose out of the Gathering Anew project, envisioning experimental new ways and forms for FGC to bring Friends together. The sessions dealt with several topics on how the Society is changing—"the water we swim in" today. The Sunday plenary was a panel of Young Adult Friends talking about their concerns and aspirations for the Society; 143 attended that, which is great. The success of the conference suggests that there is an appetite for what FGC was originally founded in 1900 to do -- gather and discuss topics of importance to the Religious Society of Friends. The next online conferences is Encountering Spirit. It is also clear that there is a need for forums to discuss topic outside the Religious Society of Friends itself—topics of broader society such as climate change and social justice.

## Finances

- ***From the Treasurer's Report to Central Committee:*** "The budget shows what we thought would happen. Contributions came to 97% of the budgeted amount. We lost money on the Gathering due to the low attendance. We had to draw more money from our investments than we had planned. We're doing ok, but we're spending more than we would like... The budget planned for us to draw \$280,287 beyond the designated sustainable amount out of investments. We ended up taking an additional \$62,832 beyond what we planned to draw from investments."
- From the (somewhat heated "searching discussion" of the) **Finance Committee's report and recommendations) at Central Committee:** There was the predictable divide between Friends who found this situation alarming and those who thought we were rich and should be giving more to immediate needs in the world. One Young Adult Friend was recorded as out of unity with a minute approving forming a 5-Year Plan and creating working groups to evaluate programs and governance reform. (From the tactful minutes: "*we have significant disunity on what constitutes good stewardship...*" and "*We have experienced strong but paradoxically diverse promptings of the Divine Spirit...*")
- **The Campaign** has met its monetary goal and is announcing March 31 as the close of the campaign. As of this writing, they have raised \$2,461,850.00 from 210 donors. Some of this money has already been received, and some will be collected over the coming years as pledges are fulfilled. In addition, we know that there are a few yearly meetings still contemplating what level of financial investment is possible for them in these times. So we may receive some further investments in FGC's fiscal health over the coming months. Reaching this monetary goal allows FGC to: 1) fully fund the \$1,000,000 conferences endowment in support of the Gathering; 2) fully fund the salaries of limited-term employees in support of the Ministry on Racism; 3) Connecting and Communicating; 4) Young Adult and Youth Ministries; 5) Religious Education and Spiritual Deepening.



**Publications:** most notably, there is now a large-print version of *Worship in Song*.

**FGC General Secretary Barry Crossno and Next Year's NEYM Sessions:** In a conversation with Barry Crossno after our Sessions, he told me he is planning to visit NEYM Sessions in 2024. I hope that happens and that he is given a reasonable amount of time on the agenda if so. He is an inspiring speaker who can raise up and articulate the work of Friends General Conference.

A few notes from the General Secretary's Report to Executive Committee:

- As always, Barry Crossno spoke to Executive Committee about the growth of the Religious Society of Friends, a named part of FGC's vision. The Gathering, for more than a century, has been the bedrock of FGC because it has helped fulfill the needs and aspirations of thousands of Friends. As a result it has done amazing things for FGC because it is a program that operates at a large scale. It has had the cascading benefit of attracting large numbers of new Friends to Quakerism, and volunteers and donors to FGC. It has been a virtuous circle of engaging Friends and transformed lives.
- While the numbers of Friends has held steady recently, we are, according to an FWCC study, entering a period of time where unaffiliated and affiliated meetings are starting to shrink. We are typically seeing fewer people in our meetings. It's harder to fill committee slots, harder to find clerks. Is FGC as an organization bringing good news? There has been a major shift. It used to be that someone disaffected from their spiritual tradition looked for another. That is less true now. They may be spiritual but no longer looking for organized religion. We need to be visible as an option to seekers. Barry believes it is time to return to a separate budget line and committee structure for Outreach. In surveys, Friends continue to make outreach their number 1 priority.
- **Identity issues:** FGC is asking itself if it is an association of yearly meetings and affiliated meetings, or an organization that serves yearly meetings and affiliated meetings. It seems that we may be the latter. The Friends General Conference name is opaque for new people. Is there a need for a name that is more transparent to people who may be interested in Quakerism?

**In Memoriam:** Finally, in a session at Central Committee devoted to remembering Friends associated with FGC who died in the previous year, I was surprised to hear Eden Grace's name (Eden was an FUM observer at an FGC Gathering.) I wasn't the only Friend who spoke about her life and its impact on the Religious Society of Friends. How I miss her.

***FGC's Vision Statement** (adopted 2014) We envision a vital and growing Religious Society of Friends—a faith that deepens spiritually, welcomes newcomers, builds supportive and inclusive community, and provides loving service and witness in the world. Through Friends General Conference, we see Quakers led by the Spirit joining together in ministry to offer services that help Friends, meetings, and seekers explore, deepen, connect, serve and witness within the context of our living faith.*



# A Proposal for Revitalization & Stewardship of the North Fairfield Friends Meeting House

Dr. Sonja K. Birthisel & Rabbi Benjamin Gorelick  
As Representatives for Mifneh L'Kedushah

Presented to the New England Yearly Meeting Permanent Board  
February 2024

## Executive Summary

The purpose of this proposal is to build relationships and prompt dialogue as we continue exploring with the New England Yearly Meeting (NEYM), the exciting possibility of stewarding the North Fairfield Friends Meeting House into the future.

The historic space, established in 1784, is located in central Maine, and has largely been vacant since it was laid down in 2017.

We - Dr. Sonja Birthisel and Rabbi Ben Gorelick - are an energetic young duo of faith leaders, seeking a home for our emerging collaborative project, **Nvolution**. The mission of Nvolution is:

- To give space, place, and opportunity for the next generation of multi-faith spiritual leadership to emerge and be supported.
- Become an incubator and hub for community-led spiritual and religious projects that are welcoming to all people in central Maine and beyond.
- Approach our work with a philosophy of flexibility and emergence, sensing and responding as the spirit moves in our world today.

We are excited to continue conversations with NEYM about your hopes and dreams for future use of the North Fairfield Friends Meeting House, and mutually addressing logistical and due-diligence questions that arise along the way.

## How Did We Get Here?

In late August, 2023, I (Sonja) was sharing breakfast with my friend, Joey LeBlanc, when his phone rang. “Hi Joey, it’s your mother. I’m talking to Barb from The Historical Society about the old Quaker Meeting House just down the road. Here, I’ll put you on speakerphone...”

(Joey was raised less than a mile from the North Fairfield Friends Meeting House, where his family still live today, proprietors of the aptly named “Quaker Hill Disc Golf Course.”)

“Oh, hi Barb!” Joey replied. “How can I help?”

“Well, as you know, the Meeting House was laid down a few years ago, and is still looking for new owners. We thought about it for the Historical Society but it didn’t make sense. We’re afraid it’ll get sold to out-of-state real-estate developers or something horrible. Do you know any nonprofits or good community people who’d be interested in bringing an old building back to life?”

Joey looked me in the eye across the table and burst out laughing. He mouthed the words “you guys want an old Quaker Meeting House, right?” at me. Also laughing, I nodded vigorously and whispered back “Almost definitely. Let me call Ben and double check!”

He gathered himself. “I might know some people.”

And that was how Rabbi Ben and I learned about the North Fairfield Friends Meeting House.

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I met Rabbi Benjamin Gorelick in August 2020, in the depths of the pandemic. I had just started in my role as Director of the Wilson Center for Spiritual Exploration and Multifaith Dialogue, an Orono-based nonprofit closely affiliated with the University of Maine. Rabbi Ben was on his way out of Maine to begin congregational work in Denver, Colorado - but our paths briefly crossed.

In those few weeks, we became fast friends who delighted in deep conversation, challenging each other over questions of spirituality, religion, and ways of bringing G-d to life in this world. We enjoyed exploring what might be possible if we were willing to put in the work to continue collaborating. We stayed in touch.

Three and a half years later, that exploration has proved to be among the more consequential of our lives; Rabbi Ben moved back to Maine this fall and is spending the year as Rabbi-in-Residence at the Wilson Center, where I’m finishing a four-year tenure as Director. Together, we are: developing a multi-faith curriculum centered around transcendent practices and experiences that deepen our connection with self, community, and God; facilitating student and community creation of spiritual services and programming; providing spiritual care and guidance to our communities; and continuing to explore together and challenge each other in many beautiful ways.

For some time now, we've also dreamed about what might be possible in our collaboration with a space to truly bring our creative spiritual vision to life.

Enter stage left: The North Fairfield Friends Meeting House.

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A few weeks after that fateful breakfast with Joey, Holly Weidner gave Rabbi Ben and me a tour of the North Fairfield Friends Meeting House, and we fell in love. The wheels have been turning ever since, and this document is the to-this-moment culmination of that process.

## **Assumptions**

We thought it might be helpful to start with a few assumptions we're operating under, based on conversations we've had with various parties to date. Please know that we're not attached to any of these assumptions; we understand that this is a conversation meant to follow the flow of divine will and we welcome further information, ideas, and feelings as they come.

Things we think are true:

- The North Fairfield Friends Meeting House was laid down in 2017. The following year, it was occupied briefly, but has sat empty since 2019. In the interim, the Vassalboro Quarterly Meeting has kept up the building, making sure it is winterized, that the lawn remains mowed in the summer, the building stays free of leaks and pests, etc.
- In 2020 and into 2021, the Quarterly Meeting had serious discussions with the local Historical Society about donating the building and whatever fixtures remained inside, for use by the community. However, those discussions petered out, and the Historical Society is no longer interested in taking on the building and associated property.
- In 2022, the NEYM took on responsibility for finding a new caretaker for the building, one that would steward it into the future, in a way that is aligned with the spiritual mission housed within over the past 250 years.
- NEYM's ultimate goal is to donate the building, remaining fixtures, and attached cemetery property to an organization that is mission-aligned, has a sound financial plan, and will bring a strong sense of community and purpose to the space once again.
- There are several unknowns about the building and grounds at this time, including the age and condition of the roof, the condition of the plumbing, septic, and electrical systems, and whether there is PFAS contamination in the soil and/or groundwater.
- There is mutual interest in an ownership transfer whereby we become the new stewards of the North Fairfield Friends Meeting House.

We further think that a timeline for decision-making about such a transfer could be as follows:

- September 2023: Register interest in the building and have a tour of the facility.

- October 2023: Send a formal letter-of-interest to representatives of the Vassalboro Quarterly Meeting and NEYM, noting our interest in exploring future stewardship of the North Fairfield Friends Meeting House.
- Mid-December 2023: Meet with Noah Merrill and Susan Davies for preliminary conversation about mutual hopes, dreams, and desires for the community space, early-stage vetting, and discussion of next steps.
- Late January 2024: Meet again with Noah and Susan to complete a written proposal for presentation to the Permanent Board the following month.
- February 10, 2024: Present this proposal to the New England Yearly Meeting's Permanent Board. Allow space for mutual introductions, further discussion of mutual hopes and dreams for stewardship, establish due-diligence steps/processes, and outline next steps. The goal would be to have enough of an agreement in place following this meeting that Rabbi Ben and Sonja could approach potential fundraising partners, community/program partners, building contractors, etc., to have substantive discussions with parties about the future of the space.
- End of February 2024: Have the building inspected by a licensed contractor, have the water and soil tested (especially for PFAS), and get a firm idea of deferred and normal-operating maintenance costs.
- End of February 2024: Receive from the NEYM a list of questions or other items related to desired due-diligence on behalf of the Quarterly and Yearly Meetings.
- February-April 2024: NEYM conducts necessary due-diligence with regard to the building itself, internally. For example, who are the legal signatories for the building, soliciting any Quaker community feedback necessary, etc.
- Late April 2024: We present to the NEYM a final, written proposal for ownership transfer, outlining in detail financial statements, an action plan for building community within the space, and answering any due-diligence questions raised over the past few months.
- May 11, 2024: Final presentation to the Permanent Board for final discussion and voting.
- Late May, 2024: Transfer of stewardship of the North Fairfield Meeting House.

Please note that this schedule is not meant to be binding in any way; we believe this process should move at the speed of relationship, and no faster. Our hope in outlining the timeline above is simply to check our current operating assumptions and facilitate ongoing communication about what is possible and feels aligned to all parties involved.

### **Who We Are**

In a nutshell, we are a duo of faith leaders, following our respective calls to ministry into new and serendipitous territory. We have attached our CVs as background to this proposal, highlighting details about our individual training, skills, and accomplishments to date. We have also summarized especially pertinent information briefly in the bios below:



Dr. Sonja Birthisel is an ELCA Lutheran, who currently attends the Church of Universal Fellowship in Orono, ME. Her academic background is in Ecology and Environmental Sciences, with expertise in climate change adaptation and mitigation in agricultural systems.

While teaching at the University of Maine during the early days of COVID-19, she felt deeply called to re-focus her energy toward tending to the spiritual wellbeing of her (suddenly remote, and terrified!) students. She was contemplating seminary when she heard the news that the Wilson Center for Spiritual Exploration and Multifaith Dialogue was hiring a new Director. It was the perfect next-step.

As Director, Sonja has doubled the Wilson Center's weekly program offerings, while consistently exceeding her Board's fundraising expectations in order to close sizable budget deficits. She has achieved this organically, by building great relationships with students, Board members, alumni, and friends, and by creating a feeling of organizational momentum and a culture of community empowerment.

She is additionally an activist and community organizer, variously working on campaigns for climate justice, workers rights, and Indigenous sovereignty. She is a duly elected member of the Orono Town Council and serves on several nonprofit Boards.



Rabbi Benjamin Gorelick was raised Modern Orthodox Jewish in an intentional community in northern New Mexico. While his educational background is in engineering, his professional life has been spent in education. He spent 11 years as the President of a 4-year college, where he primarily focused on the creation and integration of human-centered liberal arts education training and assessment practices into his and other technical colleges. Today, the curriculum he developed is used in industries ranging from mountain guiding to commercial aviation to NASA.

More recently, he is the founder of Mifneh L'Kedushah, a school of transcendent exploration for Jewish youth, with programs running at ten locations across the US. He has also served as congregational Rabbi for The Sacred Tribe, a Denver-based synagogue grounded in Kabbalah, Jewish mysticism.

Today, he is the Rabbi-in-Residence at the Wilson Center for Spiritual Exploration and Multifaith Dialogue, where he is concurrently designing a curriculum for and leading a year-long coming-of-age program, aiming to create space for college students to grow as fully expressed and spiritually connected people in the space of community.

His portfolio includes designing many innovative events and experiences to explore spirituality through art and embodiment practices, leading or creating multiple seven and eight figure organizations, and expanding ideas of what is possible in education.

## **Our Core Philosophy**

Though we understand the world through the lenses of different religious traditions, our collaborative work is motivated by a strong foundation of shared philosophical and theological principles, including a shared commitment to building connections across lines of division.

**What is G-d?** We believe in an expansive concept of the divine, that is present within, between, and beyond us – that is to say that the relationships we nurture with self, community, and G-d are all facets of the same holy and wondrous divine. We know G-d through the magic of photosynthesis, the rising action of yeast as we bake bread, and the connective mystery we feel unequivocally as love. We know G-d through personal and communal practice, through prayer-in-our-hearts, and at scales from the quantum to the infinite.

**Your Life is Your Prayer.** Judaism demands our fullest self-expression, given freely within community, as a moral imperative. Scripture tells us to pray without ceasing. How does one do this? By aligning our creation – that which we bring to life in this world - with our thoughts, our deepest feelings, and divine will.

Further, in Jewish practice there is the idea that “your prayer is incomplete if it’s offered alone.” That is, it’s not enough to retreat into oneself, to pray and seek enlightenment on one’s own; it is our purpose to be deeply in connection with one another, spiritually, emotionally, physically - wholly. Jesus’ words highlighting that the greatest commandments of all are to love G-d with our whole heart and to love our neighbors as we love ourselves likewise makes unavoidable this ethos of heart-centered engagement with the world.

**The Reformation Continues.** Martin Luther didn’t mean to start a revolution; he simply did the thing his “bound conscience” demanded he do when faced with the injustices and hypocrisies of his time. He came to understand, as is shared in the roots of Quaker tradition, that much of the structure and dogma of our religious traditions is culturally constructed, and does little to build our unique, unmediated individual and communal connection to the divine. We, inspired by Luther’s life and by Kabbalah, see ourselves within a timeless stream of transformation and re-creation. We seek, as the spirit moves, to practice stripping away those layers that have come to separate and divide us, that we might better return us to the heart of our scriptures and together draw closer to G-d.

## **A New Vision for the North Fairfield Friends Meeting House**

Together, we are seeking a space to serve as home for an emerging collaborative project. The working title of this initiative is *Nvolution* - a word connoting the artistic and spiritual process through which divine inspiration flows through into manifest creation. Our mission, as best we understand it presently, is:

- To give space, place, and opportunity for the next generation of multi-faith spiritual leadership to emerge and be supported.
- Become a hub and incubator for community-led spiritual and religious projects that are welcoming to all people in central Maine and beyond.
- Approach this work with a philosophy of flexibility and emergence, sensing and responding as the spirit moves in our world today.

The North Fairfield Friends Meeting House would be the perfect home for this project: it has lived for more than two centuries as a nexus of G-d energy and teems with potential for spiritual expansion; it is centrally located to our already existing communities and families; it is close enough to Portland and Boston so as to make destination travel possible, is “just right sized” for the sort of spiritual and artistic exploration we envision.

We understand that addressing deferred maintenance and undertaking some renovation of the space would be necessary to bring the building back to life and equip it for future use, and we are prepared to fundraise for and take ownership over this transition process.

Our ask is that, if you feel inspired by our vision and potential as new stewards, you offer the as-is facility to us as a gift or for nominal cost (e.g., \$1) in order to set us up for success as we undertake the ambitious work of revitalizing the building. We further ask that any covenant created as part of an ownership transfer process grant us freedom to continue imagining and evolving what this project will become, in accordance with our mission.

Through this process and into the future, it is our hope and intent to maintain good relationships with those who have been connected to this space over its centuries-long history. We would especially hold with reverence and care the responsibility of maintaining the cemetery, and seek to include families and loved ones of the deceased in conversation and decision-making regarding its upkeep.

### **Logistics & Draft Budget**

We are both affiliated with an existing religious nonprofit, Mifneh L’Kedushah, which would act as the formal entity to take formal ownership over the North Fairfield Friends Meeting House in event of a stewardship transfer. Mifneh is governed by a five-person multi-faith Board of Directors consisting of Dr. Sonja Birthisel (President), Ariel Peterson (VP), Jack Leopold (Secretary), Amy Bliss (Treasurer) and Rabbi Benjamin Gorelick (Spiritual Leader / Director).



For the purposes of this exploratory proposal, we have drafted a three-year budget for Nvolution, which would operate as a d.b.a. within Mifneh's existing framework. This budget is broken into major *Income* and *Expense* categories, below. To the extent possible, with our existing knowledge, we have sought to realistically account for all that is needed to adequately resource this undertaking, and considered how our time, skills, and connections might best be leveraged to make the project financially viable.

We expect most of our first year would be spent in three ways: (1) maintenance and renovation projects, (2) engaging in the interpersonal work of making connections toward future tenancy and partnerships, and (3) building out our programming portfolio and bringing that to life.

Then, in our second and third years, we anticipate launching a full lineup of programs and space-rental opportunities, such that by the end of year three we would be at full operational capacity.

**Draft Budget for Nvolution FY24/25 - FY26/27 (Assuming FY Begins May 2024)**

***Income***

	<b>FY24/25</b>	<b>FY25/26</b>	<b>FY26/27</b>
Angel Investment Loan	150,000		
Donations	25,000	30,000	40,000
Grants	20,000	50,000	50,000
In-Kind Donations	50,000	20,000	15,000
Rental	20,000	50,000	75,000
Fundraising	25,000	30,000	30,000
Programming	10,000	40,000	60,000
<b>Totals</b>	<b>300,000</b>	<b>220,000</b>	<b>270,000</b>

***Notes on Income:*** We envision our first year focusing on building/grounds revitalization and capacity-building, laying the foundation for important revenue streams in years to come.

In years two-three (FY25/26 and FY 26/27) we anticipate our donor base, rental income, and programming will grow to become increasingly established and dependable sources of revenue supporting the organization in the longer-term.

At this stage, we anticipate taking a \$150,000 angel loan to cover the cost of building materials and contractor-required work, noted in the expenses byline below. We have assumed a good deal of community help in the process of revitalizing the building, listed in the “in-kind donations” line, above. Given that our friend networks include many skilled tradespeople and we have strong experience mobilizing “work parties,” we think these numbers are well within the bounds of realistic.

With regard to programming, we expect that a religious education pilot being developed from within Mifneh’s educational portfolio could rent and regularly use the building for courses, spiritual gatherings, and the like, serving as an “anchor tenant” and providing a stable ongoing source of revenue. Due to the expected timing of building maintenance work, we don’t anticipate being able to offer the school space in the first year, but do anticipate this would launch in FY25/26. This accounts for the large leap in rental income we are assuming between years one and two.

The rest of the numbers flow as you might expect, and we welcome feedback and clarifying questions on any other assumptions we have made herein.

**Expense**

	<b>FY24/25</b>	<b>FY25/26</b>	<b>FY26/27</b>
Deferred Maintenance, Repairs, & Improvements	100,000	25,000	5,000
Staff Payroll	50,000	75,000	100,000
Payroll Taxes	7,650	11,475	15,300
Workers Comp Insurance	1,000	1,550	2,100
Contract Services	5,000	8,000	8,000
In-Kind Labor	50,000	20,000	15,000
Non-Personnel Expenses	5,000	20,000	25,000
Utilities	15,000	17,500	20,000
Property & Liability Insurance	3,800	3,950	4,200
Programming	1,000	10,000	25,000
Marketing	5,000	5,000	5,000
Community Relations	1,500	1,500	1,500
Consulting	6,000	6,000	6,000
Loan Repayment		15,000	15,000
<b>Totals</b>	<b>250,950</b>	<b>219,975</b>	<b>247,100</b>

**Notes on Expenses:** In the coming months, with your approval, we'll ask a series of building inspectors and contractors to look at the Meeting House and give us a better idea of deferred maintenance needs / costs, and renovations we may wish to complete (e.g., upgrading the bathrooms and kitchen), which will allow us to better solidify the FY24/25 numbers.

As the building improvement projects slow down after year one, we anticipate a corresponding decrease in direct (mostly material) expenses related to the building, although we continue to anticipate in-kind contributions (skilled friends and volunteers helping with projects) to remain an important aspect of operations for some time. Most other items flow as we think you might imagine, and again, we welcome feedback and clarifying questions.

<b>Running P&amp;L (Savings)</b>	<b>49,050</b>	<b>49,075</b>	<b>71,975</b>
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## **Conclusions & Thanks**

We hope that this document addresses many of your initial questions about who we are, and paints a picture of the future we could create for the North Fairfield Friends Meeting House and the surrounding central Maine community that this space served for over 200 years.

We are deeply grateful for the process of discernment that has accompanied our interest in the Meeting House to date. Our conversations with NEYM representatives and with each other have helped crystalize a vision for our emerging collaborative project, Nvolution, that feels, to us, alive, powerful, and spiritually engaged.

We are excited to collaborate and explore with you, and to continue conversations on questions both spiritual and logistical. How does our vision align with your dreams for future stewardship of the North Fairfield Friends Meeting House? What about this proposal is unclear or gives you pause? What do you find inspiring? What sparks your curiosity? What do you wish we'd thought to include?

We look forward with hope and gratitude toward ongoing dialogue and mutual discernment around future stewardship of the North Fairfield Friends Meeting House.

*-Dr. Sonja K. Birthisel & Rabbi Benjamin Gorelick*

## Education

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### University of Maine

PhD, 2018 | Ecology and Environmental Sciences | 3.98 GPA | Phi Kappa Phi  
Dissertation: Multi-Tactic Ecological Weed Management in a Changing Climate

MS, 2013 | Ecology and Environmental Sciences | 4.00 GPA

Thesis: Sources of Variability in Agronomic Weed Seed Predation: Time, Space, Habitat, and Hyperpredation

### Luther College

BA, 2010 | Biology, Mathematics minor | 3.77 GPA | Phi Beta Kappa

## Research Experience

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### Faculty Associate

2020-Present, University of Maine

- Coordinated a multi-state working group on tarping and soil solarization for weed management
- Supervised student research on life cycle analyses of agricultural plastics and soil microplastics
- Served as a Special Projects Assistant studying natural climate solutions with the Daigneault Lab

### Contract Scientist

Spring-Summer 2022, State of Maine

- Conducted an issue analysis and co-authored a scientific and technical report on behalf of the Maine Department of Agriculture, Conservation and Forestry (DACF) and the Department of Inland Fisheries and Wildlife (DIFW) as per LD 937.

### Postdoctoral Research Associate

2019-2020, University of Maine (Daigneault Lab)

- Estimated the mitigation potential of natural climate solutions for the state of Maine
- Conducted farmer focus groups to understand barriers to adoption of soil health building practices
- Studied farmer 'mental models' and decision-making related to climate change in order to design tailored and effective outreach materials

### Graduate Research Assistant

2015-2018, University of Maine (Gallandt Lab)

- Conducted stakeholder-driven field and laboratory research testing soil solarization and tarping for control of agronomic weeds, and investigated impacts of these practices on soil ecology
- Conducted on-farm surveys to identify weeds that are currently rare in Maine but could become increasingly problematic in a changing climate
- Created an educational computer game, WEEDucator, to teach beginning farmers about ecological weed management through interactive animations and simulation modeling
- Conducted a systematic review of the literature on ecological weed management and climate change

2011-2013, University of Maine (Gallandt Lab)

- Conducted on-farm field research to measure sources of variability in agronomic weed seed predation

### Laboratory Assistant

Summer 2008, CAPE Technologies

- Ran protocols to test levels of dioxin in environmental samples; conducted R&D to streamline protocols

## Publications

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A.J. Chase, M.S. Erich, I.J. Fernandez, & **S.K. Birthisel** (2023). Evaluating the loss-on-ignition method to monitor changes in agricultural soil organic carbon over time.

**S.K. Birthisel**, R.S. Clements, & E.R. Gallandt (2021). Review: How will climate change impact the 'many little hammers' of ecological weed management? *Weed Research*.

R. Clements, **S.K. Birthisel**, A. Daigneault, E. Gallandt, D. Johnson, T. Wentworth, & M.T. Niles (2021). Climate change in the context of whole-farming systems: opportunities for improved outreach. *Climatic Change* 166 (40).

**S.K. Birthisel**, B.A. Eastman, A.R. Soucy, M. Paul, R.S. Clements, A. White, M.P. Acquafredda, W. Errickson, L-H. Zhu, M.C. Allen, S.A. Mills, G. Dimmig, & K.M. Dittmer (2020). Convergence, continuity, and community: a framework for enabling emerging leaders to build climate solutions in agriculture, forestry, and aquaculture. *Climatic Change* 162 (4).

**S.K. Birthisel** & E.R. Gallandt (2019). Trials evaluating solarization and tarping for improved stale seedbed preparation in the Northeast USA. *Organic Farming*.

**S.K. Birthisel**, G.A. Smith, G.M. Mallory, J. Hao, & E.R. Gallandt (2019). Effects of field and greenhouse solarization on soil microbiota and weed seeds in the Northeast USA. *Organic Farming*.

E.H. Roche, E.B. Mallory, & **S.K. Birthisel** (2019). Using farmer storytelling to build understanding of our "new weather reality." *Journal of Extension* 57 (5).

E.R. Gallandt, **S.K. Birthisel**, B.J. Brown, M. McCollough, & M.A. Pickoff (2018). Organic farming and sustainable weed control. Chapter 34 *in* *Weed Control: Sustainability, Hazards and Risks in Cropping Systems Worldwide*. N.E. Korres, N.R. Burgos, & S.O. Duke, eds. Science Publishers: Boca Raton, FL.

**S.K. Birthisel** (2018). Multi-tactic ecological weed management in a changing climate. PhD Thesis: University of Maine, Orono, ME. Available at: <https://digitalcommons.library.umaine.edu/etd/2928/>

R.G. Smith, **S.K. Birthisel**, S.C. Bosworth, B. Brown, T.M. Davis, E.R. Gallandt, A. Hazelrigg, E. Venturini, & N.D. Warren (2018). Environmental correlates with germinable weed seed banks on organic farms across northern New England. *Weed Science* 66, 78-93.

**S.K. Birthisel**, E.R. Gallandt, R. Jabbour, & F.A. Drummond (2015). Habitat and time are more important predictors of weed seed predation than space on a diversified vegetable farm in Maine, USA. *Weed Science* 63, 916-927.

**S.K. Birthisel**, E.R. Gallandt, & R. Jabbour (2014). Habitat effects on second-order predation of the seed predator *Harpalus rufipes* and implications for weed seedbank management. *Biological Control* 70, 65-72.

**S.K. Birthisel** (2013). Sources of variability in agronomic weed seed predation: Time, space, habitat, and hyperpredation. Masters Thesis: University of Maine, Orono, ME. Available at: <https://digitalcommons.library.umaine.edu/etd/2023/>

## Teaching Experience

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Instructor: Field Problems in Ecology & Environmental Sciences (EES 217)

May 2023, University of Maine, Orono, ME

- Instructor for hands-on intensive travel and field study course

Instructor: Introduction to Sustainable Gardening

April 2022, Coastal Maine Botanical Gardens

- Developed and taught a mini-course on sustainable horticulture principles and practices

Co-Instructor: Plant Science (PSE 100)

Fall 2022, University of Maine, Orono, ME

- Provided lesson plans and technical assistance to ensure success of this co-instructed course

Instructor: Human Populations and the Global Environment (EES 100)

Spring 2020, University of Maine, Orono, ME

- Adapted and facilitated lectures, class activities, and assessments for a class of 150
- Supervised the work of a Teaching Assistant and two undergraduate Maine Learning Assistants

Instructor: Critical Issues in Environmental Policy / Capstone (EES 489)

Fall 2019, University of Maine, Orono, ME

- Revised syllabus, developed class activities and assessments
- Provided mentorship for student Capstone projects

Instructor: Introduction to Ecology and Environmental Science (EES 117)

Fall 2019, University of Maine, Orono, ME

- Facilitated skills-based seminar course

Instructor: Environmental Horticulture Capstone (PSE 430)

Spring 2019, University of Maine, Orono, ME

- Developed syllabus, class activities, and assessments
- Provided mentorship for student Capstone projects

Teaching Assistant: Plant Taxonomy (BIO 464)

Fall 2018, University of Maine, Orono, ME

- Facilitated one lab section and assisted with grading

Instructor: Cropping Systems (PSE 101)

Spring 2018, University of Maine, Orono, ME

- Developed syllabus, writing labs, and assessments
- Coordinated lectures with co-Instructors and guest experts

Instructor: Plant Science (PSE 100)

Fall 2017, University of Maine, Orono, ME

- Developed syllabus, lectures, labs, and assessments
- Lectured and facilitated three lab sections
- Supervised the work of a teaching assistant

Teaching Assistant: Principles of Sustainable Agriculture (PSE 105)

Falls 2015, 2016, University of Maine, Orono, ME

- Guest lectured and assisted with grading

Teaching Assistant: Experimental Design (PSE 509)

Spring 2016, University of Maine, Orono, ME

- Developed and taught unit on linear regression
- Assisted with lecturing and grading

**Service Member: FoodCorps/AmeriCorps**

2013-2014, University of Maine Cooperative Extension, Bangor, ME

- Developed and taught K-12 garden-based nutrition and science lessons

**Teaching Assistant: Plant Science (PSE 100)**

Fall 2012, University of Maine, Orono, ME

- Assisted with lab facilitation and guest lectured

**Instructor: Microbiology and Wilderness Survival Skills**

Summer 2012, Maine School of Science and Mathematics Science Camp, Limestone, ME

- Developed and taught week-long courses for middle school students

**Teaching Assistant: Introduction to Biological Principles (BIO 100)**

2007-2010, Luther College, Decorah, IA

- Assisted with laboratory instruction, grading, and tutoring

## Advising & Student Engagement

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**Director**

2020-present, The Wilson Center, Orono, ME

- Runs an independent nonprofit affiliated with University of Maine that offers students and the wider community opportunities to engage in spiritual exploration and multifaith dialogue
- Partners with University of Maine Office for Diversity and Inclusion, Student Life, and other on-campus partners to provide expertise and programming on religious diversity
- Serves on University of Maine President's Committee on Diversity, Equity, and Inclusion

**Senior Honors Thesis Committee Member**

2019-2023, University of Maine, Orono, ME

- Co-chaired the committee of Bailey Lewis (2023)
- Served on the committees of Ashley Kayser (2020) and Sarah Meyer-Waldo (2021)

**Member of Graduate Faculty**

2018-2022, University of Maine

- Served on the committees of MS students Ruth Sexton Clements (2021) and Andrew Chase (2022)

**Academic Adviser for Ecology and Environmental Sciences Program**

2019-2021, University of Maine, Orono, ME

- Provided tailored academic advising to up to 50 undergraduate students

**Co-Coordinator for Graduate Student Climate Adaptation Partners (GradCAP) Program**

2018-2019, USDA Northeast Climate Hub

- Co-coordinated pilot project to create a virtual consortium of graduate Scholars from across the Northeast USA working on climate adaptation in agriculture, aquaculture, and forestry

**Adviser for EPSCoR Summer Research Internships**

Summer 2015; 2016-2017, University of Maine, Orono, ME

- Served as mentor to four high school student projects through UMaine's EPSCoR program
- Student Grace Smith co-authored a manuscript
- Student Ana Eliza Souza Cunha co-authored a peer reviewed outreach bulletin

**Adviser for Summer Research Fellowship**

Summer 2016, University of Maine, Orono, ME

- Served as mentor for Swarthmore Biology major Gavriella Mallory's Summer Research Fellowship

**Service Member with FoodCorps/AmeriCorps**

2013-2014, University of Maine Cooperative Extension, Bangor, ME

- Reached 1,900 students with garden and nutrition-related programming through activities implemented in classrooms, cafeterias, after school programs, and community events



## Resident Counselor

2010-2011, Illinois Mathematics and Science Academy, Aurora, IL

- Lived in residence hall with high school students; built community, enforced school policies, and mediated student disagreements
- Co-advised Theater Club

## Awarded Grants (\$263,828 Total)

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**S.K. Birthisel** & B. Gorelick (2023). Support for a Wilson Center Rabbi in Residence and Related Programming (three grants, totaling \$8,760). Jewish Community Endowment Associates.

**S.K. Birthisel** (2021-2023). Support for Interfaith Luncheon series (three grants, totaling \$5,880). Jewish Community Endowment Associates.

**S.K. Birthisel** (2022). Orono Contra Dance re-launch (\$800). Hamm Campus Activities Grants.

B. Katz & **S.K. Birthisel** (2022). Seed grant for a community garden at the Wilson Center (\$500). Maine Hunger Dialogues.

T. Shanteler & **S.K. Birthisel** (2022). Support for a Kosher commercial dishwasher at the Wilson Center (\$3,903). Jewish Community Endowment Associates.

**S.K. Birthisel**, S. Barker, J. Labouff, & S. Caron (2022). Leveraging our religiously diverse landscape toward community wellbeing (\$6,000). Interfaith Youth Corps.

J. Leopold & **S.K. Birthisel** (2021). Culture night series to expand DEI reach of community dinner series (\$1,000). Interfaith Youth Corps.

**S.K. Birthisel**, S. Ishaq, A. Smart, & E. Kinnebrew (2020). A working group on tarping and soil solarization (\$19,350). Northeast IPM Center Partnership Grant.

A. Daigneault, I. Fernandez, A. Weiskittel, **S.K. Birthisel**, H. Pingree, and S. Curran (2019). An integrated approach to quantifying the GHG mitigation potential of Natural Climate Solutions from Maine's working lands (\$132,174). United States Climate Alliance USCA Grant Program for NWL Research.

R. Dennet (2019). Maine Climate Resilience Training Program (\$29,787). Northeast SARE Partnership Grant ONE19-334.

A. Daigneault, I. Fernandez, C. Isenhouer, and **S.K. Birthisel** (2019). A Maine soil health initiative to enhance agricultural sustainability and mitigate climate change (\$22,981). Senator George J. Mitchell Center for Sustainability Solutions Sustainability Research Grant Program.

**S.K. Birthisel** & G.M. Mallory (2016). Impacts of soil solarization on soil microbial community and function (\$714). University of Maine School of Food and Agriculture Analytical Laboratory.

E.R. Gallandt, **S.K. Birthisel**, A.K. Hoshide, & D. Hiebeler (2016). A decision-aid to improve weed management on Maine organic farms (\$15,000). Senator George J. Mitchell Center for Sustainability Solutions Sustainability Research Grant Program.

**S.K. Birthisel** & E.R. Gallandt (2015). Soil solarization for enhanced weed control in vegetables (\$5,000). Maine Agricultural Center Research and Extension Grant Program.

**S.K. Birthisel** (2014). Annie's grants for gardens: Ridge View Community School outdoor classroom (\$2,500). Annie's Homegrown, Inc.

C. Greaves & **S.K. Birthisel** (2014). Fuel Up to Play 60 Grant: Ridge View Community School playground revitalization (\$2,400). Fuel Up to Play 60, LLC.

**S.K. Birthisel** (2012). The effects of vegetative cover on hyperpredation of weed seed predator *Harpalus rufipes* DeGeer (\$3000). MAFES Graduate Student IMP Initiatives Grant Program.

**S.K. Birthisel** (2012-2018). Graduate student travel and degree-related grants (six grants, totaling \$4,078). University of Maine Graduate Student Government.

## Outreach Materials

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B.J. Brown & **S.K. Birthisel** (2024). Seed-Eating Beetles, Solarization, and Climate Change, with guest Sonja Birthisel. Into The Weeds (New York State IPM) Podcast, available on Spotify.

N. Lounsbury & **S.K. Birthisel** (2023). Sonja Birthisel, Agroecologist & PhD from the University of Maine. Podcast interview for The Market Garden Podcast, available at:  
<https://notillmarketgardenpodcast.libsyn.com/sonja-birthisel-agroecologist-phd-from-the-university-of-maine>

**S.K. Birthisel** (2022). Tarping in the Northeast: A Guide for Small Farms. Northeast IPM Center IPM Toolbox Webinar, available at: <https://www.northeastipm.org/ipm-in-action/the-ipm-toolbox/tarping-in-the-northeast-a-guide-for-small-farms/>

N. Lounsbury, **S. Birthisel**, J. Lilley, & R. Maher (2022). Bulletin #1075, Tarping in the Northeast: A Guide for Small Farms. University of Maine Cooperative Extension, available at:  
<https://extension.umaine.edu/publications/1075e/>

A. Daignealt, E. Simons-Legaard, **S.K. Birthisel**, J. Carroll, I. Fernandez, & A. Weiskittel (2021). Final Report: Maine Forestry and Agriculture Natural Climate Solutions Mitigation Potential. University of Maine Center for Research on Sustainable Forests, available at: [https://crsf.umaine.edu/wp-content/uploads/sites/214/2021/08/UMaine-NCS-Final-Report\\_final\\_8.4.21.pdf](https://crsf.umaine.edu/wp-content/uploads/sites/214/2021/08/UMaine-NCS-Final-Report_final_8.4.21.pdf)

**S.K. Birthisel** (2020). Non-Chemical Weed Management. UNH Weed IPM Webinar Series presentation, available at: <https://www.youtube.com/watch?v=YtnUArGx7Jg&feature=youtu.be>

**S.K. Birthisel**, E. Conover, & C. Gunderson (2020). Dance Your PhD: Multi-tactic ecological weed management in a changing climate. AAAS video contest entry, available at:  
<https://www.youtube.com/watch?v=mBsyqzT4YWQ>.

**S.K. Birthisel** (2018). Rain, rain, go away: Effects of changing precipitation on days suitable for agricultural fieldwork. USDA Northeast Climate Hub GradCAP webinar presentation, available at:  
[https://www.climatehubs.oce.usda.gov/sites/default/files/birthisel\\_final\\_web508.pdf](https://www.climatehubs.oce.usda.gov/sites/default/files/birthisel_final_web508.pdf).

**S.K. Birthisel**, E.R. Gallandt, & A.E. Souza Cunha (2018). Solarization and tarping for weed management on organic vegetable farms in the Northeast USA. eOrganic bulletin, available at:  
<https://articles.extension.org/pages/74713/solarization-and-tarping-for-weed-management-on-organic-vegetable-farms-in-the-northeast-usa>.

**S.K. Birthisel**, P. Rimkunas, J. Sullivan, & E.R. Gallandt (2017). WEEDucator: a digital tool for agricultural weed management education. Computer game prototype, available at:  
<https://skbirthisel.weebly.com/outreach.html>.

**S.K. Birthisel**, E.R. Gallandt, & E.M. Venturini (2017). Physical weed control: Managing weeds through hand weeding, cultivation, and flaming. UMaine Weed Ecology bulletin, available at:  
<https://skbirthisel.weebly.com/uploads/1/0/6/9/106960183/physicalweedcontrol.pdf>.

**S.K. Birthisel** & E.R. Gallandt (2017). Seedbank management: Managing weeds through germination, preemption, predation, and flaming. *UMaine Weed Ecology bulletin*, available at: <https://skbirthisel.weebly.com/uploads/1/0/6/9/106960183/seedbankmanagement.pdf>.

G.K. Landis, **S.K. Birthisel**, & E.R. Gallandt (2017). Weed management for beginning farmers: Principles for organic growing. *UMaine Weed Ecology bulletin*, available at <https://umaine.edu/weedecology/wp-content/uploads/sites/354/2017/10/beginningfarmers.pdf>.

A. Jones, **S.K. Birthisel**, R. Jabbour, F.A. Drummond, & D. Yarborough (2013). Carabidae (ground beetles) on Maine farms. *UMaine Cooperative Extension Fact Sheet No. 196*. University of Maine, Orono, ME. Available at: <https://extension.umaine.edu/blueberries/factsheets/insects/insects-196-beneficial-insect-series-2-carabidae-ground-beetles-on-maine-farms/>.

## Scholarly Presentations

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**S.K. Birthisel**, B.J. Brown, & E.R. Gallandt (2019, February). Looking for 'rare' weeds of agronomic concern in a changing climate. Talk presented at Weed Science Society of America annual meeting, New Orleans, LA.

R. Sexton, **S.K. Birthisel**, & E.R. Gallandt (2018, November). Impacts of increasing precipitation on physical weed control. Poster presented at the Rutgers Climate Symposium, New Brunswick, NJ.

**S.K. Birthisel** (2018, August). Communicating within and beyond science. Graduate student workshop facilitated at American Society for Horticultural Science annual meeting, Washington, DC.

**S.K. Birthisel** (2018, August). Comparing solarization and tarping for weed management in the Northeast USA. Talk presented at American Society for Horticultural Science, Washington, DC.

**S.K. Birthisel**, E. Mallory, & E.H. Roche (2018, March). Farming in a new weather reality: Farmer stories from Maine. Talk presented at USDA Northeast Climate Hub meeting, New Brunswick, NJ.

**S.K. Birthisel** & E.R. Gallandt (2018, January). WEEDucator: A digital tool for organic weed management education. Talk presented at Weed Science Society of America annual meeting, Arlington, VA.

**S.K. Birthisel** & E.R. Gallandt (2017, February). Solarization in the Northeast: Effective weed control with transient effects on soil microbes. Talk presented at Weed Science Society of America annual meeting, Tucson, AZ.

**S.K. Birthisel** & E.R. Gallandt (2016, February). Solarization for improved stale seedbed preparation in the Northeast. Poster presented at the Weed Science Society of America annual meeting, San Juan, Puerto Rico.

**S.K. Birthisel**, E.R. Gallandt, R.G. Smith, S.C. Bosworth, A. Hazelrigg, & B.J. Brown (2015, August). Potential invasions and extirpations of rare agronomic weeds in northern New England. Poster presented at the Ecological Society of America annual meeting, Baltimore, MD.

R. Jabbour, **S.K. Birthisel**, F.A. Drummond, & E.R. Gallandt (2013, November). Habitat effects on granivore diversity and weed seed predation in a New England farmscape. Invited talk in Program Symposium "Impacts of Global Change on Biodiversity and Biological Control" at the Entomological Society of America annual meeting, Austin, TX.

**S.K. Birthisel**, E.R. Gallandt, R. Jabbour, & F.A. Drummond (2013, August). Comparing sources of variation in agronomic weed seed predation: Time, space, and habitat. Talk presented at the Ecological Society of America annual meeting, Minneapolis, MN.

**S.K. Birthisel**, E.R. Gallandt, R. Jabbour, & F.A. Drummond (2013, February). Variation in seed predation across a farmscape. Talk presented at the Weed Science Society of America annual meeting, Baltimore, MD.

**S.K. Birthisel**, E.R. Gallandt, & R. Jabbour (2013, February). Hyperpredation of seed predator beetle *Harpalus rufipes*. Poster presented at the Weed Science Society of America annual meeting, Baltimore, MD.

## Press & Online Appearances (Partial List)

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How to make your own mulch at home. **Bangor Daily News** article available at:

<https://bangordailynews.com/2020/06/09/homestead/yes-upcycled-diy-mulches-work-but-with-a-few-limitations/>

What you should know before you take a flamethrower to weeds. **Bangor Daily News** article available at: <https://bangordailynews.com/2020/06/02/homestead/what-you-should-know-before-you-take-a-flamethrower-to-weeds/>

The biggest mistake first-time gardeners make when mulching. **Times Herald-Record** article available at: <https://www.recordonline.com/story/lifestyle/2020/06/18/garden-careful-when-spreading-mulch/3177439001/>

This simple trick could rid you of your weed woes for good. **Bangor Daily News** article available at: <https://bangordailynews.com/2020/06/03/homestead/this-simple-trick-could-rid-you-of-your-weed-woes-for-good/?ref=most-popular>

Here's what works when it comes to natural weeding solutions. **Bangor Daily News** article available at: <https://bangordailynews.com/2020/05/23/homestead/heres-what-works-when-it-comes-to-natural-weeding-solutions/>

The easier way to make a garden bed. **New York Times** article available at:

<https://www.nytimes.com/2020/04/24/realestate/the-easier-way-to-make-a-garden-bed.html>

Maine gardener: And you think you hate weeding now? **Portland Press Herald** article available at: <https://www.pressherald.com/2020/02/02/and-you-think-you-hate-weeding-now/>

Whether or not Roundup is safe, the gardener has better options. **Washington Post** article available at: [https://www.washingtonpost.com/lifestyle/home/whether-or-not-roundup-is-safe-the-gardener-has-better-options/2019/09/17/8ccb8a5e-ca95-11e9-a1fe-ca46e8d573c0\\_story.html](https://www.washingtonpost.com/lifestyle/home/whether-or-not-roundup-is-safe-the-gardener-has-better-options/2019/09/17/8ccb8a5e-ca95-11e9-a1fe-ca46e8d573c0_story.html)

UMaine graduate student researchers attend GradCAP workshop. **UMaine News** release available at: <https://umaine.edu/news/blog/2019/04/01/umaine-graduate-student-researchers-attend-gradcap-workshop/>

Reducing weeds: A 101 on soil solarization. **A Way To Garden Podcast** episode available at: <https://awaytogarden.com/reducing-weeds-a-101-on-soil-solarization-with-sonja-birthisel/>

Sonja Birthisel will help you meet the beetles. **Portland Press Herald** article available at: <https://www.pressherald.com/2017/11/26/meet-the-beetles/>

That seed-eating ground beetle may be your garden's best friend. **Bangor Daily News** article available at: <https://bangordailynews.com/2018/04/12/homestead/that-seed-eating-ground-beetle-may-be-your-gardens-best-friend/>

How to solarize your garden for weed prevention. **Midwest Workshop & Garden** YouTube video available at: <https://www.youtube.com/watch?v=oPQ40KFOGmU>

In the weeds. **UMaine Today** YouTube video available at: <https://www.youtube.com/watch?v=IYurDLnsDOM>

## Other Presentations

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**S.K. Birthisel** (2022, September). How Can We Be Honest Brokers in an Honestly Broken System? Invited Seminar at The Senator George J. Mitchell Center for Sustainability Solutions, Orono, ME

**S.K. Birthisel** & I. Peterson (2020, November). Effort to Shut Down the Last New England Coal Plant. Invited Talk at NHCUC New England Environmental Justice Youth Summit, Zoom.

**S.K. Birthisel** (2020, January). Soil Solarization and Tarping for Improved Stale Seedbed Preparation. Invited talk at Empire State Producers Expo, Syracuse, NY.

**S.K. Birthisel** (2020, January). Weed Management in a Changing Climate. Invited talk at Maine Agricultural Trades Show, Augusta, ME.

**S.K. Birthisel** (2019, December). Organic Weed Management in a Changing Climate. Invited talk at New England Vegetable & Fruit Conference, Manchester, NH

**S.K. Birthisel** (2019, November). Climate Change Adaptation Strategies. Workshop at MOFGA Farmer to Farmer Conference, Northport, ME

**S.K. Birthisel** (2019, October). Farmers' Tools & Resources. Invited classroom lecture and discussion for UMaine Climate Adaptation course, Orono, ME

R. Clements & **S.K. Birthisel** (2019, October). Sustainable Farming in a Changing Climate. Invited workshop for middle school girls at Expanding Your Horizons STEM event, Orono, ME.

**S.K. Birthisel** (2019, September). Seed predation: An ecosystem service on Maine farms. Invited classroom lecture at College of the Atlantic, Bar Harbor, ME.

**S.K. Birthisel**, R. Clements, & A. Daigneault (2019, September). Climate adaptation for Maine farms. Workshop at MOFGA Common Ground Country Fair, Unity, ME.

E.H. Roche, **S.K. Birthisel**, & G. Koehler (2019, August). Introduction to the Maine Climate and Agriculture Network. Invited talk at Maine AGCOM meeting, Augusta, ME.

**S.K. Birthisel** (2019, April). Adapting Maine farms to climate change. Invited talk at Merryspring Nature Center, Camden, ME.

E. Mallory, B. Tooley, & **S.K. Birthisel** (2019, March). Farming in a changing climate. Invited lecture for Aroostook Soil and Water Conservation District Winter Ag School, Houlton, ME.

**S.K. Birthisel** (2019, January). Clear plastic for weed solarization. Invited talk at Vermont Vegetable and Berry Growers Association Mulching and Tarping Conference, Fairlee, VT.

**S.K. Birthisel** & E.H. Roche (2019, January). Weather tool show and tell. Workshop at the Maine Agricultural Trades Show, Augusta, ME.

- S.K. Birthisel** (2018, December). Global and US perspectives on climate change and agriculture. Invited lecture for UMaine Principles of Sustainable Agriculture class, Orono, ME.
- S.K. Birthisel** (2018, November). Soil solarization. Invited lecture for UMaine Organic Matter Management class.
- S.K. Birthisel** (2018, September). Ground beetles! Invited workshop at MOFGA Common Ground Country Fair, Unity, ME.
- S.K. Birthisel** (2018, September). Dichotomous keys and why we use them. Invited workshop for UMaine Weed Biology and Identification class, Orono, ME.
- S.K. Birthisel** (2018, September). Choosing hand tools that work for you. Invited demonstration at UMaine Master Gardener Field Day, Old Town, ME.
- S.K. Birthisel** (2018, July). Solarization and tarping for weed management. Invited talk at UMass Extension Organic Weed Management Field Day, North Easton, MA.
- S.K. Birthisel** (2018, May). Weed seedbank management. Invited lecture at Eastern Maine Orchid Society Meeting, Orono, ME.
- S.K. Birthisel** (2017, November). Role of predatory ground beetles in weed seed predation. Invited lecture as part of Xerces Society short course on conservation biological control, Unity, ME.
- S.K. Birthisel** (2017, November). Dirty weeds done dirt cheap: Coupling weed ecology and economics to aid farmer decision-making. Invited seminar at the Mitchell Center for Sustainability Solutions, Orono, ME.
- A. Daigneault, J. Jansujwicz, S. Roy, S. De Urioste-Stone & **S.K. Birthisel** (2017, November). A conversation about decision support tools (Moderator: L. Silka). Panel discussion at the Mitchell Center for Sustainability Solutions, Orono, ME.
- S.K. Birthisel** (2017, September). Seed predation. Invited classroom lecture at College of the Atlantic, Bar Harbor, ME.
- S.K. Birthisel** (2017, February). Agronomic weeds and climate change: Scouting for potential invaders. Talk presented at Maine Climate and Agriculture Network Graduate Student Mini-Symposium, Orono, ME.
- S.K. Birthisel** & E.R. Gallandt (2016, April). Soil solarization for weed management in a changing climate. Talk presented at Maine Climate and Agriculture Network Symposium, Orono, ME.
- S.K. Birthisel** (2016, November). A decision-aid to improve the economic sustainability of Maine organic farms through improved weed management. Lightning talk presented at Senator George J. Mitchell Center for Sustainability Solutions Seminar, Orono, ME.
- S.K. Birthisel** (2016, September). Managing weeds with soil solarization & occultation. Talk presented to visiting beginning farmers and Purdue Cooperative Extension personnel, Old Town, ME.
- S.K. Birthisel** (2016, August). Mechanistic differences between soil solarization and occultation for weed control. Talk presented to the National Sustainable Agriculture Coalition, Old Town, ME.
- S.K. Birthisel** (2016, July). Soil solarization and occultation for weed management. Talk presented at UMaine Sustainable Agriculture Field Day, Old Town, ME.

**S.K. Birthisel** (2016, May). Organic weed management in a changing climate. Talk presented during FoodCorps Graduate Research Symposium Webinar.

**S.K. Birthisel** & E.R. Gallandt (2016, April). Soil solarization for weed management in a changing climate. Talk presented at UMaine Climate Change and Agriculture Symposium, Orono, ME.

E.R. Gallandt, B.J. Brown & **S.K. Birthisel** (2015, September). Climate change and weed management. UMaine Climate Change and Agriculture Symposium, University of Maine, Orono, ME.

**S.K. Birthisel** (2015, July). Managing weeds with soil solarization. Talk presented at the UMaine Sustainable Agriculture Twilight Tour, Old Town, ME.

T.K. Fogler, K.M. Brown, **S.K. Birthisel**, & E. Ripley (2015, February). STEM Hub teen science café. Panel discussion for the Dexter-Dover-Guilford STEM Hub, Dexter, ME.

**S.K. Birthisel** (2013, June). Ecological weed management. Workshop presented at two Maine Organic Farmers and Gardeners Association Farmer Training Project events, Orono, ME and Brunswick, ME.

**S.K. Birthisel** (2012, March). Hand weeding tools for the small-scale vegetable gardener. Workshop presented at the Maine Rural Living Day, Thorndike, ME.

## Scholarships & Awards

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- Community Solidarity Award, 2023, Food AND Medicine
- Gulf of Maine 2050 Scholarship, 2019, Gulf of Maine Research Institute
- Fiore Art Center Academic Writing Residency Award, 2019, Maine Farmland Trust
- Distinguished Nominee for Edith Patch Award, 2019, UMaine Edith Patch Award Committee
- Outstanding Service Award, 2018, UMaine College of Natural Sciences, Forestry, & Agriculture
- Samuel L. Boucher Horticulture Education Scholarship, 2018, UMaine School of Food and Agriculture
- Student eOrganic Article Competition Winner, 2018, American Society for Horticultural Science Organic Interest Group
- Outstanding Contribution to Sustainability Research by a Graduate Student, 2017, Senator George J. Mitchell Center for Sustainability Solutions
- Correll Fellowship, 2015, UMaine Ecology and Environmental Sciences Program
- Sarah Jane White Spruce Memorial Scholarship, 2015, UMaine School of Food and Agriculture
- Graduate Student Travel Award, 2013, Weed Science Society of America
- Regent Scholarship, 2006-2010, Luther College

## Other Academic & Community Service

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- Member of the Maine Bureau of Labor Education Advisory Board (2023-present)
- Member of the Maine Rail Group Board (2023-present)
- Member of ISO-NE Consumer Liaison Group Coordinating Committee (2022-present)
- President of The Sacred Tribe Board of Directors (2022-present)
- Member of the Orono Town Council (2022-present)
- Member of the Board of Food AND Medicine (2022-present)
- Faculty Adviser for Maine Peace Action Committee (2020-present)
- Volunteer with the Maine People's Alliance (2020-present)
- Teacher for Young Adults With Pizzaz youth program (2019-present)
- Member of Church of Universal Fellowship Board of Trustees (2019-present)
- Member of Maine Climate and Agriculture Network (2016-present)
- Contra dance caller (2016-present)

- Instructor for Our Whole Lives comprehensive sexuality education program (2015-present)
- Faculty Adviser for UMaine Interfaith Group (2021-2022)
- Member of the Epic Skill Swap organizing committee (2018-2022)
- Editorial Board Member for Spire: the Maine Journal of Conservation and Sustainability (2019-2020)
- Interim Coordinator of Maine Climate and Agriculture Network (Fall 2019)
- Member of UMaine Friends of the Herbarium Society (2016-2019)
- Coordinator for Wilson Center SCOPE Community Service Grants Program (2017-2018)
- Coordinator for Dorothy Clarke Wilson Peace Writing Prize (2017-2018)
- Garden caretaker for the Wilson Center at UMaine (2017-2018)
- Member of Martin Luther King, Jr. Breakfast planning committee (2017-2018)
- Faculty Sponsor for UMaine undergraduate AcroYoga club (2016-2017)
- Organizer of Bangor Blues monthly dance series (2016)
- Member of UMaine Witter Research Center Farm Manager hiring committee (Spring 2016)
- Member of UMaine Ecology and Environmental Sciences seminar committee (2012-2013)

## Affiliations & Certifications

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- Cooperative Extension Tractor Safety certification
- Cooperative Extension Master Gardener
- ServSafe Manager certification



## Selected Education

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### Jewish Spiritual Leadership Institute, New York, NY

- Rabbinic Ordination, 2019
  - Beit Deिन: Rabbi Monte Sugarman, Rabbi Reuven Silverman, Rabbi Steven Blane
  - Thesis: *Psychedelics and Judaism*

### ALEPH: The Alliance for Jewish Renewal, Philadelphia, PA

- Jewish Spiritual Director Certification Program, 2018
  - Thesis: *Transcendent Practice in Modern Kabbalah*

### Davvenen' Leadership Training Institute, Falls Village, CT

- Jewish Service Leadership Certificate Program, 2017

### Wilderness Education Association, Black Mountain, NC

- Program Assessor Trainer, 2011

### Alaska Pacific University, Anchorage, AK

- MS, Chemical Engineering, 2002
  - Thesis: *Synthetic Control of Intrinsic Ground State Defects in a Mixed Valence Quasi-One-Dimensional Sodium Crystal Chain*
- MS, Chemistry, 2002
  - Thesis: *Ultrafast Vibrational Dynamics in a Quasi-One-Dimensional System*
- BS, Chemical Engineering, 1999
- BS, Chemistry, 1999
- BS, Environmental Science, 1999

## Key Skills

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- **Educational Leadership:** Extensive experience in leading educational institutions and programs, with a focus on transformative and experiential learning.
- **Curriculum Development:** Proficient in designing innovative and comprehensive curricula, blending traditional and modern educational theories.
- **Experiential Learning Techniques:** Proficient in creating immersive learning experiences, utilizing innovative techniques to enhance student engagement and understanding.
- **Assessment Design & Analysis:** Skilled in developing and implementing effective assessment strategies, including competency-based and portfolio models.
- **Interdisciplinary Teaching:** Skilled in integrating various disciplines such as Kabbalah, quantum mechanics, and modern educational methodologies for a holistic teaching approach.
- **Program Design & Implementation:** Expertise in conceptualizing and executing educational programs that combine academic rigor with real-world application.
- **Strategic Planning & Execution:** Demonstrated ability in strategic visioning, planning, and execution, ensuring alignment with educational goals and institutional growth.
- **Community Engagement & Collaboration:** Strong background in fostering community relationships and collaborative educational environments across diverse cultural and spiritual settings.
- **Mentorship & Faculty Development:** Experienced in mentoring educators and developing faculty capabilities to foster a progressive and dynamic educational workforce.
- **Inclusion & Diversity Advocacy:** Committed to creating inclusive learning environments, emphasizing respect and accommodation for diverse student needs.

## Selected Professional Experience

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## The Wilson Center, University of Maine

Rabbi-in-Residence, 2023-2024 Academic Year

- **Innovative Program Development:** Pioneered the creation and implementation of a unique Coming-of-Age program, seamlessly integrating educational elements from diverse spiritual traditions such as Kabbalah, Hinduism, Sufism, the I-Ching, and Western Gnostic practices, tailored to the diverse needs of the University of Maine community.
- **Pastoral Care and Student Support:** Provided comprehensive pastoral care, offering essential guidance and emotional support to students and staff, enhancing the Center's supportive environment.
- **Multifaith Worship and Inclusivity:** Designed and led inclusive multifaith worship services, fostering a campus atmosphere of spiritual inclusivity and active interfaith dialogue, contributing to a broader understanding and respect among various faith communities.
- **Cultural and Religious Event Coordination:** Organized and executed significant Jewish ceremonies and cultural events, enriching the campus's religious and cultural landscape, and promoting cultural awareness and diversity.
- **Interfaith Educational Collaboration:** Co-taught and facilitated a range of multi-faith educational programs, encouraging mutual understanding and collaborative learning among students from different religious backgrounds, aligning with contemporary interfaith educational practices.

## Mifneh L'Kedushah – A School of Transcendence, Multiple Locations Across the USA

Executive Director, 2018-Present

- **Innovative Curriculum Design:** Developed and implemented a unique curriculum integrating Kabbalistic teachings with modern educational techniques, enhancing students' personal growth and spiritual understanding.
- **Strategic Leadership in Educational Programming:** Spearheaded the overall strategic vision, fostering the school's expansion and aligning educational objectives with comprehensive personal development goals for children.
- **Assessment and Engagement Strategies:** Crafted and utilized novel assessment tools to measure student engagement and intellectual progress, ensuring a deep, experiential understanding of key concepts.
- **Experiential Learning and Capstone Projects:** Guided students in creating and presenting Bar or Bat Mitzvah projects, emphasizing these as capstone experiences that reflect their holistic learning journey and personal growth.
- **Collaborative Partnerships for Educational Enhancement:** Established and nurtured partnerships with various academic institutions and community organizations, broadening the educational scope and fostering a collaborative learning environment.
- **Faculty Development and Teaching Methodology Innovation:** Led initiatives for faculty development, focusing on innovative teaching methodologies to effectively communicate complex spiritual concepts in an accessible manner.
- **Community Building and Inclusivity:** Actively promoted and facilitated community-building activities, creating a nurturing and inclusive educational setting that encourages exploration and application of spiritual principles.

## The Sacred Tribe, Denver, CO

Congregational Rabbi, 2020-2023

- **Leadership in Worship and Ceremonial Services:** Orchestrated diverse religious services and ceremonies, ensuring they were meaningful and engaging, contributing to the spiritual wellbeing of the congregation.
- **Pastoral Care and Spiritual Guidance:** Provided comprehensive pastoral care and spiritual counseling, supporting community members through various life stages and challenges, fostering a supportive and nurturing environment.
- **Educational Program Development:** Developed and implemented a wide range of educational programs tailored to different demographics, including innovative adult education initiatives and youth engagement activities, enhancing the congregation's learning experience.
- **Interfaith Dialogue and Outreach:** Led interfaith dialogues and community outreach initiatives, building and strengthening relationships both within the Jewish community and with other faith groups, promoting understanding and collaboration.
- **Religious, Social, and Educational Enrichment:** Played a key role in overseeing and enriching the congregation's religious, social, and educational activities, ensuring a vibrant and dynamic community life.

## Congregation Bet Ha'am, South Portland, ME

Executive Director, 2017-2019

- **Educational Program Development:** Spearheaded the development and implementation of innovative adult and youth education programs, aligning them with the human skills curriculum from my dissertation, focusing on personal growth, community engagement, and holistic development.

- **Strategic Leadership in Educational Operations:** Directed comprehensive synagogue operations, with a special focus on educational initiatives, strategic planning, and community-building.
- **Collaborative Growth and Outreach:** Worked closely with the Board of Trustees, staff, and volunteers, as well as the larger Jewish community, fostering organizational growth and enhancing community outreach, particularly through educational programs.
- **Revenue Growth through Educational Initiatives:** Drove a successful growth initiative, significantly increasing program attendance and volunteer engagement, particularly in educational offerings, leading to exceeded revenue and participation targets.
- **Staff Development with a Competency and Portfolio Based Framework:** Created and administered a personnel development plan focused on enhancing educational competencies among staff, including performance metrics, training programs, and assessment tools, leading to improved team performance and educational delivery.

### **The Mountain Guide School, Multiple International Locations**

Director, 2005-2016

- **Curriculum Innovation and Technical Education:** Established an accredited 4-year technical college with a groundbreaking curriculum that seamlessly integrated technical skills training with comprehensive human skills development.
- **Competency-Based Educational Framework:** Designed and implemented a comprehensive, portfolio-based competency model for the objective assessment of human skills, incorporating behavioral indicators and thresholding concepts to ensure student competence.
- **Human Skills Integration in Technical Training:** Innovated in the field of technical education by incorporating behavioral economic theory and outcome-aligned heuristics, enhancing student decision-making and leadership capabilities.
- **Global Collaboration and Accreditation:** Fostered international collaboration and accreditation by partnering with government agencies, training organizations, and industry leaders in 11 countries and 4 languages, enhancing the school's global presence and curriculum validity.
- **Diverse Team Leadership and Inclusivity:** Managed a diverse team of 7 administrators and 58 instructors, focusing on multicultural education and inclusivity across global campuses, and overseeing the development of over 180 students.
- **Financial and Operational Management:** Demonstrated financial leadership by managing a \$7.2 million annual budget, ensuring financial sustainability and transparency in a multi-country operation.
- **Strategic Growth and Marketing Initiatives:** Drove the strategic expansion of the college, utilizing various media channels to enhance reach and market presence, resulting in significant growth in program attendance and global recognition.

### **The Wilderness Education Association, Black Mountain, NC**

Director of Curriculum and Accreditation, 2012-2014

- **Curriculum Development and Accreditation:** Spearheaded the development and implementation of comprehensive accreditation standards for Outdoor Leadership programs at 38 universities globally, enhancing the quality and consistency of educational experiences.
- **Collaboration and Standardization:** Worked closely with academic institutions to establish and uphold rigorous educational standards, focusing on continuous improvement and excellence in outdoor leadership training.
- **Assessment Process Design:** Developed a robust process for assessing schools, creating criteria and methodologies to evaluate the effectiveness and quality of their outdoor leadership curriculums.
- **Accreditation Framework Development:** Pioneered the construction of a detailed accreditation framework, defining benchmarks for educational excellence and compliance, ensuring high standards across all participating institutions.
- **Implementation and Monitoring of Standards:** Oversaw the implementation of these new standards and frameworks, regularly monitoring and providing feedback to institutions, ensuring adherence to the established guidelines and continuous improvement in curriculum delivery.

## **Selected Projects**

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### **The Art Paradigm**

Co-Facilitator, December 2022 to April 2023

- **Innovative Program Development:** Co-developed "The Art Paradigm," a 10-week immersive program uniquely blending artistic, spiritual, and professional elements to guide participants towards meaningful and financially stable work.

- **Curriculum Design and Concept Integration:** Crafted the program structure to delve into the interplay between spirituality, art, and business, addressing critical themes like the influence of money and desire in creative endeavors and the development of a personal creative process.
- **Dynamic Learning Experiences:** Created and facilitated a range of interactive educational experiences, including workshops, small group tutorials, and daily audio content, to deeply engage participants in exploring these paradigms.
- **Holistic Teaching Approach:** Employed a comprehensive teaching methodology that combined personal storytelling, examination of diverse narratives (artistic, spiritual, business), and practical applications to the participants' professional and personal lives.
- **Community-Centric Learning Environment:** Cultivated a collaborative learning atmosphere, fostering peer interactions, discussions, and reflective practices through platforms like Voxer, enhancing community support and dialogue.
- **Participant Empowerment and Outcome Focus:** Guided participants towards a practical understanding and application of an artistic approach in their professional life, aiming to enhance personal fulfillment, creativity, and financial insight.

## Mussar

Creator and Facilitator, August to October 2022

- **Innovative Program Design:** Developed a unique three-month program that uniquely combined the Jewish philosophy of Mussar with quantum mechanics principles, aiming to foster personal growth and a deeper understanding of life's interconnectedness.
- **Holistic Educational Approach:** Merged ethical teachings from Mussar with advanced quantum mechanics concepts, creating a comprehensive curriculum for self-improvement and enhanced worldview comprehension.
- **Personal Growth Tracking:** Implemented a behavioral indicator/portfolio system, enabling participants to systematically track and assess their development in ethical character traits and personal growth.
- **Narrative Learning Techniques:** Utilized storytelling as a central teaching method, facilitating a richer understanding of complex philosophical and scientific ideas through relatable narratives.
- **Emphasis on Transformation:** Encouraged participants to engage in self-reflection, linking their life experiences with the program's teachings, thereby promoting personal transformation aligned with ethical and scientific insights.
- **Interactive Learning Environment:** Fostered an immersive and active learning setting where participants discussed, participated in workshops, and practiced reflective exercises, applying the program's teachings to their own spiritual and personal paths.
- **Development Portfolio Creation:** Guided participants in creating their own growth portfolios, documenting their journey of transformation during the program and establishing a basis for ongoing personal development.

## Shalom Maine

Co-Founder, 2018

- **Innovative Educational Integration:** Initiated and led the formation of an organization dedicated to harmonizing adult education across six synagogues from diverse Jewish denominations (Reform, Conservative, Orthodox), fostering a comprehensive and inclusive educational landscape.
- **Collaborative Educational Platform:** Orchestrated efforts to create a diverse and inclusive educational platform, bridging denominational gaps and bringing varied Jewish traditions and perspectives together.
- **Resource and Curriculum Sharing:** Facilitated the exchange of resources, educators, and curricula among participating synagogues, significantly enhancing the quality and diversity of educational experiences available to adult learners in the Jewish community.
- **Diverse Educational Offerings:** Curated and developed a broad spectrum of educational programs, catering to various interests and observance levels, ranging from traditional Torah study to contemporary Jewish thought and ethics.
- **Inter-Denominational Dialogue:** Fostered dialogue and understanding across denominations, establishing a unique learning environment where members of different Jewish communities could mutually enrich their knowledge and perspectives.
- **Special Events and Lecture Series:** Organized joint events and lecture series featuring esteemed speakers and educators, showcasing the depth and diversity of Jewish learning, scholarship, and thought.
- **Adaptive Teaching Methods:** Implemented progressive teaching methods and approaches, including online classes and interactive workshops, to reach a wider audience and accommodate evolving educational preferences and styles.

## The Passover Experience

Director, January to April 2017

- **Immersive Theatrical Production:** Spearheaded an 8-day interactive theater program, meticulously designed to

emotionally parallel the Passover story, guiding participants through an experiential 3-hour journey.

- **Emotional Journey Design:** Crafted the experience to navigate through six key emotional stages - helplessness, bondage, terror, liberation, gratitude, and creation - offering a deep, comprehensive exploration of the Passover narrative.
- **Innovative Storytelling Techniques:** Employed cutting-edge theatrical and storytelling methods, deeply engaging participants and enabling them to intimately experience the emotional and spiritual dimensions of the Passover story.
- **Interactive Set Creation:** Developed a series of vivid, interactive sets and scenarios, symbolically tracing the Israelites' journey from slavery to freedom, significantly enhancing the overall immersive quality of the program.
- **Collaborative Artistic Effort:** Collaborated with a diverse team of actors, musicians, and artists, bringing the Passover story to life with a blend of historical authenticity and creative flair.
- **Reflective Discussions Facilitation:** Led reflective debriefing sessions post-experience, encouraging participants to process their experiences and relate the themes of freedom and redemption to their personal life narratives.

## Unction

Director, October 2021

- **Innovative Retreat Leadership:** Conceptualized and led a unique three-day spiritual retreat that creatively combined storytelling, personal transformation, and Jewish teachings in a serene mountain setting near Denver, offering a unique educational experience.
- **Immersive Educational Sessions:** Facilitated immersive sessions inspired by the rich narratives and teachings of Judaism, utilizing the art of storytelling to impart deep spiritual lessons and insights.
- **Guided Personal Reflection:** Conducted sessions that encouraged personal reflection and introspection, helping participants draw connections between personal stories, Jewish faith, and traditional themes, fostering a deeper understanding and personal growth.
- **Integration of Mystical Teachings:** Seamlessly incorporated Kabbalistic principles, guiding attendees in exploring these mystical teachings as pathways to deeper spiritual understanding and connection.
- **Empowerment and Self-Discovery:** Motivated participants to explore and discover their own "Unction" or sacred purpose in life, leading them on a transformative journey of self-discovery and spiritual enlightenment.
- **Community and Supportive Environment:** Created and maintained a safe and nurturing environment, encouraging individuals to connect deeply with themselves and others, thereby fostering a sense of community and collective spiritual exploration.

## Building the Whole Human: A Professional Development Series

Creator and Lead Instructor, Annually from 2010 through 2016

- **Comprehensive Educator Training Program:** Developed and led a six-month training program, covering a wide range of teaching competencies and methodologies, tailored to modern educational needs.
- **Fundamentals of Education Training:** Delivered in-depth training sessions on core principles of contemporary educational theory and practice, establishing a strong foundational knowledge base for participants.
- **Advanced Curriculum Design Workshops:** Facilitated specialized workshops in advanced curriculum design, empowering educators to create engaging, effective, and adaptable educational plans.
- **Assessment Techniques Best Practices:** Integrated best practices in student assessment, instructing educators on designing, implementing, and analyzing various assessment methods.
- **Innovative Teaching Strategies:** Concentrated on cutting-edge pedagogical strategies, equipping teachers with the skills to foster dynamic, interactive, and student-centered learning environments.
- **Mentorship Skills Development:** Introduced a mentorship module, training educators in effective mentorship practices to promote professional growth and development within educational communities.
- **Inclusion and Diversity Focus:** Emphasized the importance of inclusive teaching, providing educators with practical tools and strategies to create diverse and accommodating learning environments for all students.

## Move

Director, June and July 2016

- **Interdisciplinary Art Installation Leadership:** Co-created a distinctive 10-day art installation in Ireland, collaborating with a Buddhist monk and a Pagan/Celtic priestess, focusing on the creative synthesis of diverse spiritual and cultural expressions.
- **Innovative Visual Artistry:** Developed "light tapestries" as a central visual feature, intricately blending patterns of light with fabric to create visually captivating displays, demonstrating a unique approach to artistic expression.
- **Dynamic Performance Integration:** Seamlessly incorporated live music and dance performances into the installation,

providing an engaging and immersive experience for audiences, showcasing the ability to create dynamic learning environments.

- **Contemplative Space Design:** Thoughtfully designed the installation as an intimate and reflective space, inviting attendees to explore the rich intersections of different spiritual traditions through art, enhancing their understanding and appreciation of diverse cultures.
- **Artistic Mediums Fusion:** Orchestrated a harmonious integration of various artistic forms – light, music, and dance – each element synergistically contributing to the overall aesthetic and thematic impact of the installation.
- **Community Building and Spiritual Exploration:** Fostered a communal atmosphere, enabling attendees to engage in shared spiritual exploration and connect with diverse cultural and religious practices, emphasizing the importance of community in learning experiences.

## **Selected Presentations, Conferences, and Teachings**

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### **Transcendent Curriculum Design**

Darkhei Rephua, 2021

### **Divergent Thought**

Darkhei Rephua, 2020

### **Transcendent Practice in Modern Kabbalah**

The Kabbalah Center, 2020

### **Most of All, I Want My Child to be a Good Person**

Limmud Boston, 2018

Limmud Chicago, 2018

Limmud New Orleans, 2018

Limmud Seattle, 2018

Limmud, Boston, 2017

### **Using Behavioral Indicators in Adult and Children's Education**

NewCAJE, 2018

### **The Six Elements of Spiritual Feedback**

Limmud Chicago, 2017

Limmud Seattle, 2017

### **Using Behavioral Indicators to Assess a Human Based Competency Training Program**

Corporacion Nacional Forestal, 2016

American Alpine Association, 2016

American Avalanche Association, 2015

Wilderness Education Association, 2015, 2014, 2013, and 2012