

Stipend Evaluation Working Group – Report to the Permanent Board, July 18th, 2024

Members: Roger Jasaitis, Bre-anne Brown, Eleanor Warnock, Doug Armstrong

Executive Summary

The stipends have not been successful at their stated goal of increasing the pool of Friends who can serve in leadership roles at the Yearly Meeting level. Our Working Group does not recommend continuing them. However, the stipends do have perceived value as material support and a sign of acknowledgment. The Permanent Board should explore other mechanisms for increasing the pool of nominees for service and maintain individually targeted support where needed.

Background

A Working Group was convened by the Yearly Meeting Permanent Board in late May of 2024. Its purpose was to evaluate a three-year experiment by NEYM, which offered stipends to volunteers in five leadership roles within the Yearly Meeting. These stipends of \$3,000 annually for each position (for a total of \$15,000 per year), were paid to the Treasurer, Clerk of the Yearly Meeting, Interim Clerk of Ministry and Counsel, Clerk of Permanent Board, and Clerk of Nominating Committee.

The plan for use of reserves to support the experiment, per PB minute 21-43 of May 2021, was: \$15,000 in FY22, \$10,000 in FY23, and \$5,000 in FY24; the plan was to support the stipends entirely from current income in FY25 and forward. In FY22, 55% of the budgeted amount was accepted by the intended recipients. In FY23, 75% of it was accepted.

The Working Group was tasked with contacting nominators and stipend recipients, as well as Friends who were contacted by nominators but ultimately declined to serve. We talked with sixteen people, nine who accepted positions, one who did not (and we had Nominating notes from others who did not), and six from Nominating. Based on conversations with these individuals, the Working Group has produced the following findings and recommendations, working from the Charge provided to us by the Permanent Board.

The Charge

The key questions asked by the Permanent Board to the Working Group, as detailed in our Charge, are reprinted below:

1. *Findings:*

- a. *To what degree has the stipends for volunteer leadership experiment been successful in meeting its intended goal of making it more possible for a wider pool of Friends with gifts of leadership to say “yes” to significant leadership roles within NEYM?*
- b. *What factors contributed to the success (or lack of success) of this experiment?*

2. *Recommendations:*

- a. *Based on what you heard, do you recommend this practice continue?*

- b. If so, are there any adjustments that need to be made and what are the implications of those adjustments?*
- c. Are there different practices you suggest NEYM explore instead of or in addition to this practice?*
- d. If so, what capacities and commitments would such practices require?*

Our Findings

Respondents were consistent in their assertions that the stipends did not impact their decision to serve in the Yearly Meeting. Members of the Nominating Committee were likewise consistent in their reporting that no one who was offered a stipended leadership role spoke of the stipend as a deciding factor in their discernment to accept or decline a role.

However, almost everyone interviewed commented on the stipends' role as an acknowledgment of the amount of work involved in these leadership roles, and a sign of appreciation for their labor. Several Friends spoke appreciatively of the stipends as material support. One Friend commented that there was no payment that approached the value of being called to service, or of serving a body of Friends, but also acknowledged that it was a welcome recognition of the tremendous effort involved in these roles.

Respondents gave a variety of reasons why the stipends did not impact their decision to serve. Several mentioned that they were in a financially sound position, and the stipend did not make a difference in their overall financial condition. Some cashed the issued checks but donated the amount back to the Yearly Meeting. Other Friends stated their efforts to avoid additional income as a form of war tax avoidance was, in fact, made more difficult by the stipend, and some refused to accept it. Others stated it was not a deciding factor in the discernment process surrounding their service, but found the funds to be helpful.

We consulted with the NEYM Treasurer, and she reported that the reserves that were used to fund the experiment are exhausted. New England Yearly Meeting is facing a budget shortfall and may not be able to fund future stipends from income.

An additional finding that threaded through many of our conversations was the need to identify Friends with potential leadership gifts much earlier in the "leadership pipeline" and to nurture those gifts to allow Friends to grow in their service to the Yearly Meeting.

Our Recommendations

Discontinue the Stipend. The stipends have not achieved their goal of "making it more possible for a wider pool of Friends with gifts of leadership to say 'yes' to significant leadership roles within NEYM." The Yearly Meeting has finite financial resources. Given this, we do not recommend continuing with the stipends in their current form.

Support Volunteers as Needed. It is clear to the Working Group that funds need to remain available to provide material support to those serving our Yearly Meeting. The Permanent Board should explore individualized financial support for people in these roles to best meet their needs. The stipend was a “one-size-fits-all” solution, but individual Friends have individual needs, and conversations between nominators and potential volunteers could identify the specific needs of individuals called to serve. Perhaps a small group of people at the Yearly Meeting level could authorize the needed support. For example: do Friends need support in acquiring a laptop and accessing reliable internet, now that so much of Friends’ business is taking place on Zoom? Is the Nominating Committee being explicit about the available reimbursement for travel and childcare expenses, and is it checking in with Friends during their term of service to ensure they are utilizing the support that is available? Would a spiritual retreat be useful, or are there other needs that some financial (or other) support could help address?

Different Practices

The Working Group was charged with identifying actionable recommendations for the Permanent Board. However, we found no specific tasks that we can recommend to this body. This section contains ideas from our interviews that are either not actionable at the Yearly Meeting level or are outside the purview of the Stipend Evaluation Working Group, but may prove fruitful avenues for future exploration by the Permanent Board.

Broadening the Pool: Increasing Nominating Committee connections with local meetings.

The leadership roles targeted by the stipend program typically are filled by seasoned Friends with a history of service within the larger community of Friends. It is important that the Yearly Meeting focus its efforts on the entire “leadership pipeline,” which would, in time, provide a larger and more inclusive pool of Friends with the skills, discernment, service experience, and abilities to fill these roles. The Working Group has learned about several practices that were done in the past to connect people. Some of the things that worked well included broad representation on the Nominating Committee by Monthly Meetings, hosting Committee Days which provided a venue for Friends to get to know one another across meetings, and the former Clerks Nominating Committee making regular calls to the clerks of Monthly Meetings to learn about individuals. We would like more to be done to foster these types of connections.

Broadening the Pool: Long-term relationships with rising leaders. The Yearly Meeting should consider enhancing the practice of following a roster of Friends, checking in consistently over time, and discovering when those Friends are ripe for a call to serve the Yearly Meeting. We have heard that some of this is already being done by the Nominating Committee, and we applaud this work. There is an opportunity to do more of this ongoing relationship-building.

Broadening the Pool: Nurturing bonds with Young Adult Friends. It is widely understood that the transition from Young Friend to Young Adult Friend is under-supported, and many Young Adult Friends lose their connections to their meetings when moving into the wider world of early adulthood. As the leadership of the Yearly Meeting seeks to mentor and encourage Friends earlier in

the leadership pipeline, it is important to proactively reach out to and engage with new Young Adult Friends. There need to be ways to bridge the support gap between Young Friends, with their more comprehensive Yearly Meeting programming, and fully-fledged adult Friends, who often have many years of relationship-building to help weave them into the structure of the Yearly Meeting.

Broadening the Pool: Permanent Board members taking local action. The Working Group heard loud and clear: Permanent Board members need to go back to Monthly Meetings and engage in the long-term project of encouraging Friends to develop the leadership skills and spiritual depth necessary for high-level service, along with an engagement with the Yearly Meeting that would lead to a willingness to serve it. How do you develop the fellowship and community that will grow your Monthly Meetings and thus grow the pool of people to recruit to the yearly meeting level?

As one Friend said in her interview “[service] is a beautiful, invitational thing.” It is a gift in which we want others to share. As Friends committed to the health and future of New England Yearly Meeting, it is on each and every one of us to act. We need to look around each First Day at those on the benches beside us. We need to identify the gifts of those in our local meeting communities, and we need to nurture those gifts. And, most crucially, we need to forge the bonds of community that will invite those Friends into deeper engagement with the larger body of New England Friends.

Incidental Discoveries

In the course of our conversations, the Working Group heard several items which do not particularly answer our Charge, but feel important to share with the Permanent Board.

Membership Concerns. A point that was mentioned is the fact that many meetings have long-time attenders who are extremely active in their local meetings, but do not hold membership. This precludes them from service in the major leadership roles at the Yearly Meeting level. Meetings should engage in thoughtful discernment concerning ways to encourage a committed, engaged, and active meeting community.

Leadership Role Adjustments. Several suggestions were made by those interviewed on ways to make these jobs more doable. These include having an assistant to the Clerk, and increasing training and shadowing for those rising into these roles, and even offloading some administrative tasks to the Yearly Meeting staff.

Other Forms of Support and Recognition. Additionally, there are a number of non-stipended roles that are a tremendous amount of work. Clerk of Accompaniment and Sessions Committee Clerk were mentioned as roles that should be considered for inclusion in financial or other forms of material support. Waived or reduced fees at Sessions were lifted up as possible ways of recognizing the tremendous effort of many of our essential volunteers. One identified role was the Recording Clerks, who basically perform a full-time job for the entirety of Sessions. While Sessions is now “pay-as-led” there is value in telling volunteers explicitly “we do not expect you to pay” or “we do not expect you to pay full-freight” to attend. It is an acknowledgment of the value of their labor.