

**Minutes
Permanent Board
Framingham Friends Meeting
May 10, 2025**

25-19 Roll Call

Willa Taber (Fpond), Permanent Board recording clerk, read the roll.

Permanent Board Members

In the room:

Susan Davies (PB clerk), Willa Taber (PB Recording clerk), Travis Belcher, Thomas Brenner, Allison Randall, Carole Rein, Martha Schwope, Newell Isbell Shinn, Liesa Stamm, Kathleen Wooten

On Zoom:

Martin Forsythe, Elizabeth Hansen, Carolyne Lamar Jordan, Frances Lightsom, Edward Mair, Diane Weinholtz, Donn Weinholtz

Ex-officio members

In the room:

Marian Dalton (Treasurer), Sarah Gant (clerk, Meeting Accompaniment Group), Rebecca Leuchak (Presiding Clerk), Jackie Stillwell (YM Secretary Supervisor, clerk of Nominating Committee)

On Zoom:

Scot Drysdale (Finance clerk), Noah Merrill (YM Secretary), Carl Williams (clerk of Ministry and Counsel)

Regrets/Absent

Kimberly Allen, Darcy Drayton, Meg Klepack, Bob O'Connor, Anna Radochia, Morgan Wilson, Mary Zwirner

Visitors

In the room:

Anna Hopkins Buller (Wellesley, Friends Camp Director), Betsy Cazden (Providence), Beth Collea (Dover), Jeremiah Dickenson (Dover), Richard Lindo (Framingham), Martha Manglesdorf (New Bedford), Fredrick Martin (Beacon Hill), LouAnne McDonald (Hartford), Sara Smith (Concord), Rob Spivey, (Brunswick), Nia Thomas (Northampton, Program Director), Phil Veatch (Fresh Pond, Rising Clerk)

On Zoom:

Elizabeth Hacala (Events Coordinator), Mary Hopkins (Fpond), Kristina Keefe-Perry (Fresh Pond/Three Rivers), Kara Price (Storrs), Michael Wajda (Bennington), Maille Wooten (Lawrence).

25-20 Minutes from previous meetings

The clerk expressed her thanks to Kathleen Wooten (Lawrence) for taking minutes at our March meeting in the absence of our recording clerk. The document containing the minutes from March was lost soon after the meeting, and it has taken a while to reconstruct it. People have reviewed this document, and there are enough changes to it that we will be holding over approval of minutes to our next meeting, which will probably be a called meeting this summer.

25-21 Permanent Board Clerks comments

Susan Davies (Vassalboro), Permanent Board clerk, expressed our thanks to Framingham Meeting for hosting us even as they have been providing hospitality for several other Yearly Meeting activities. Noah Merrill (Putney) is joining us from Zoom because he is with his father after his father's emergency heart surgery. She also called our attention to the report from Connecticut Valley QM that Litchfield Hills Meeting has been laid down (attached). Also attached is the letter from the clerk of Permanent Board to Quarterly Meeting Leaders.

Recently, a reconstituted planning group from within the Salem Quarter has taken the initiative to call together the Friends in the quarter interested either in restarting the quarter or envisioning how Friends are called in the quarter. That is something that we very much welcome. In the meantime, the Permanent Board continues to carry the responsibility and the charge to ensure that the quarter is functioning structurally and functioning in terms of relationships. We will continue to be involved in that. Susan would certainly welcome hearing from any Permanent Board members who would like to participate in these efforts. Susan called our attention to a notice in the advance documents, attached, announcing that she has appointed a working group consisting of Mary Link, clerk of the Legacy Gift Committee; Morgan Wilson, past clerk of the Salem Quarter Funds Committee; and John Robinson, treasurer of Salem Quarter, to serve on a working group to develop a new Memorandum of Understanding to resume availability and disbursement of funds from the Salem Quarter Fund

Susan Davies also called Friends attention to the report from Mary Zwirner and Gordon Bugbee concerning their travels among Native American people in Oklahoma, attached. She also asked Richard Lindo (Framingham) to report on his recent travel to Cuba. The Puente des Amigos delegation consisted of himself, Carolyn Stone (Wellesley), Erik Philbrook (Wellesley), and David Barabas (Wellesley). They just returned last week. They

spent most of their time in Puerto Padre and Delicias but also visited Holguín and Velasco.

Also in the Advance Documents are minutes of recording of gifts in ministry going back quite a way. If Friends know of corrections, additions or other minutes of recording, please forward them to Susan.

25-22 Friends Camp endowment update

Anna Hopkins, the director of Friends Camp, reported on the Camp. In a month staff will be on site and in 6 weeks, campers will be arriving. There are 7 international staff members who they are hoping will be able to obtain their visas and join us this summer. There is concern that some of them will not receive their visa. The camp will be offering over \$150,000 worth of camperships this year.

She presented the proposal for creating an endowment fund for camperships here attached. This is a 30-year term-limited endowment, after which time it will become a board-designated fund. This is done to allow flexibility because no one knows what things will look like in 30 years, while allowing donors to know that the funds will continue to grow and may outlast them. Any capital campaign to fund this endowment would be carried on in coordination with the Yearly Meeting. The Friends Camp Finance Committee will have oversight of the fund.

Friends suggested that the document not list specific testimonies but instead reference NEYM Faith and Practice for this information, or describe included testimonies as only some of Friends testimonies.

Friends **approved** the policies outlined for the 30-year limited endowment fund for Friends Camp camperships.

25-23 Archives Committee revised Memorandum of Understanding

In 2017 the NEYM archives were moved from the Rhode Island Historical Society to the University of Massachusetts Special Collections and University Archives (SCUA). They are presenting revisions for the Memorandum of Understanding here attached. These changes include updates to the policies on privacy and on digitization. These are areas which have changed significantly in the time since the original version was first agreed to.

Friends **approved** the updated Memorandum of Understanding.

25-24 Treasurer's Report

Marian Dalton, NEYM Treasurer, presented the Treasurer's report here attached. At the end of FY 2024 we had operating reserves of about 3%. Since then, we have received about \$56,000 in Employee Retention Tax Credit funds and about \$3,000 from the laying down of Litchfield Hills Meeting. This has increased our reserves somewhat. On the other hand, the first quarter of 2025 was a bad time for our investments. Our net income for the first half of the fiscal year is still negative but that is part of our normal cash flow. Our net income will improve once we start getting income coming in from Sessions.

25-25 Finance Committee Report

Scot Drysdale (Hanover) presented the Fiscal Year 2026 budget and his commentary on the budget, both of which are attached. The Finance Committee is not presenting a budget for us to approve to send to Sessions because there is a great deal of uncertainty about what Sessions will look like in 2026. They had hoped that the Sessions Visioning process would have resulted in some concrete proposals, but it did not. We do not know what Sessions will look like in 2026, but the Finance Committee is assuming that Sessions, in whatever form, will return \$30,500 to the general budget.

If we run about a \$60,000 deficit as we have in the past several years, we will exhaust all of our reserves and the COVID relief money. About 78% of the non-Sessions budget goes to pay staff. About one third of staff time is spent on preparing for Sessions. The priorities established by the Permanent Board are to support staff and support monthly meetings.

Does the Permanent Board have guidance to the Finance Committee on where we might make further cuts?

This is not a contingency budget meaning that we are not planning to distribute any possible surplus to other Friends organizations.

Friends raised a number of concerns about the budget: One Friend spoke of her long involvement with AFSC and the important work that it has been doing, including work in Palestine and Gaza, and would hope that NEYM could provide some support for AFSC even while we are not supporting other organizations. Another suggested a hiring freeze. Friends expressed the need to balance the budget, under the concern that the economy is getting worse. The NEYM deficit budgets of the last several years are not sustainable.

Scot Drysdale and Noah Merrill explained that the increase in staff costs has been due to some cost-of-living increases and increases in health-care costs. In some recent years individual giving has gone down and staff expenses have gone up. This problem is not limited to NEYM but has been seen in other non-profits. Nationally, attendance at large

conferences and gatherings are down 30% overall, and this has been true for us. Contributions have not increased to what they were before the pandemic, while the cost of living has gone up. Half of our deficit in 2023 and 2024 was due to reduced attendance at Sessions.

The big questions about the budget cannot be answered by the Finance Committee. The Permanent Board needs to engage more in the larger questions so that the Finance Committee can provide PB with actionable information. Do we need to rethink our process in light of the structural problems that we are encountering? These are large questions that cannot be resolved in a single PB meeting. How can we change our actions to deal with the structural problems we are facing? Do we need to make a 5-year plan so that we are not making these decisions on a year-to-year basis?

Friends also expressed excitement about the programs and work that NEYM is doing. Our alternatives are to cut what we do or to effectively invite new people to join us. We were running surpluses before the pandemic. We are not on a long descent into disaster but what we need to do is to adapt to changing conditions. It is faith that supports us. What we're called to do in the world is important. A time of constriction is the time to think of creative new solutions that will transform the constriction into something else with God's help.

25-26 NEYM Secretary's Report

Noah Merrill thanked Friends for their prayers and support as he sits with his father, who has had a serious heart attack this past week.

He started his report with two quotes:

“Ring the bells that still can ring forget your perfect offering There is a crack in everything That's where the light gets in.” (Leonard Cohen)

“Let us walk together the journey that God has prepared for us.” (Pope Leo XIV)

Noah said, “I always consider our life together as Friends in our meetings and in our relationships as a journey. A journey in which we're accompanied by the Spirit and one another and a journey that leads in whatever sense we can imagine to home. And I've always been grateful as a Friend to be part of a tradition that recognizes that even in the moment where we remember that invitation, even in the moment where we turn our attention and our hearts again to that journey together, we are already in some sense arriving. I just want to invite us into that in the midst of all of the turmoil and the anxiety and the intensity around us. This has been an anchor and a gift to me in these recent days and months and years. I hope it might be for some of us as well.”

He recently rejoined the executive committee of the Friends World Committee for Consultation (FWCC) Section of the Americas. At the section meeting in Arizona, it became clear that there were problems among the six yearly meetings in Bolivia. He was invited to travel to Bolivia to accompany Evan Welken, the new FWCC clerk, who had never been to Bolivia before. The primary visit was to Central YM in Bolivia on the occasion of its 50th anniversary. There are over 50,000 Quakers in Bolivia. Bolivia is the poorest country in South America. People are waiting in lines up to 8 blocks long to get gasoline. In that context, hundreds of people traveled for up to a day to arrive at the small town in the Altiplano to celebrate the life in their yearly meeting. He found that being in the midst of this growing and dynamic yearly meeting gave him perspective on our problems. Many Friends in Bolivia were moved by NEYM's lawsuit to challenge ICE interference in our meetings.

25-27 Development Report

Noah Merrill and Michael Wajda (Bennington) presented a plan for a development initiative for the Yearly Meeting. What has emerged in a lot of prayerful conversation is to focus our fundraising efforts with understanding that the yearly meeting is not a traditional nonprofit but that we are really a set of local communities of transformative practice bound together in a covenant relationship with one another and with God. And that framing our approach to development that way has seemed more and more important.

Noah presented a series of slides here attached.

The goals of the development project are:

- To deepen relationships among Friends in this time of scattering and division.
- To nurture a shared understanding of the vision and ministries which God calls us to as a yearly meeting.
- To nourish local meetings and Friends through inviting broader participation in, and support of these ministries.
- Increase giving to the annual fund about 5% per year to increase resilience and to keep pace with rising costs and disruptions.

This will be done by continuing and strengthening our current annual fundraising efforts, gathering and training a group of people to visit meetings and invite conversations, and continuing to season ideas for other fundraising efforts.

The expected cost of this project is:

- Expanding Events Coordinator position to full time, \$140,000 over 3 years
- Continuing relationship with the Development Consultant, \$50,000 over 3 years
- Administrative expenses, \$25,000 over three years. For a total of \$215,000 over 3 years.

The three-year period for this is because that is the shortest time in which it is likely to start to see results from this work. There are significant up-front costs for training and planning that will be incurred before we begin to see the desired increases in giving.

Michael Wajda spoke of the six strengths that he sees in New England Yearly Meeting.

1. We name ourselves as a spiritual movement and see ourselves as being grounded in the living stream.
2. We are working towards sustainability as a long-term goal. We are not building something new, we are continuing something that has been going for 365 years.
3. We recognize that it is all about the relationship. We need to visit and affirm relationships.
4. NEYM is showing leadership, accountability and responsibility: Leadership because the visioning process for Sessions involves everyone; responsibility because the need for change is real. We showed leadership in stepping up for the lawsuit against ICE. People see that as strength.
5. The world is noticing Quakers in this fraught time. We represent a nonviolent approach to conflict resolution.
6. New England Yearly Meeting is us. We are family. The story we are telling is a story of us.

Fundraising is work. It takes time, care, vulnerability, listening, and faith. When we do it with faith it is a gift.

Friends approved designating \$215,000 of the Future Uses Fund to be spent over three years to implement the fundraising program outlined here.

25-28 Personnel Policy

Sara Hubner (Gonic), NEYM Office Manager, has been working with the YM Secretary, the PB clerk, the Nominating Committee clerk, and other experienced NEYM Friends on

revising the Personnel Policy Manual. They hope to bring it to the September Permanent Board Meeting for approval.

25-29 Addressing racism in the Yearly Meeting

PB previously approved, in concept, bringing in Collabarinth as a consultant to meet with people to focus on staff and volunteer leaders to address issues of diversity, inclusion, and equity. Noah has issued a retainer of \$10,000 to hire Melvin Bray to consult on these issues from the contractual services budget line, but he would like to take these funds from the Future Uses Fund.

Friends approved paying consulting fees up to \$10,000 to Melvin Bray, to be taken from the Future Uses Fund.

25-30 Ministry and Counsel clerk's report

Carl Williams, clerk of Ministry and Counsel, reported that the third Meeting for Listening will be held at Hartford on June 21. In some ways this is a rebirth of the traditional Friends annual meeting for ministers and elders, who gathered before Sessions every year to consider the state of the Yearly Meeting. He hopes that some members of Permanent Board will be able to attend. We look forward to the establishment of a "Thriving Ministers and Elders" group to continue reimagining and nurturing the work and functions of Ministry and Counsel.

25-31 Meeting Accompaniment Group report

Sarah Gant (Beacon Hill), clerk of the Meeting Accompaniment Group, reported that the group held a retreat to review their Purposes, Procedures and Composition document. The members of the group feel that this work is very personal, tender, and intimate and is very rewarding. The Accompaniment Group will be the presenters at the monthly meeting leaders call on May 13. One of the benefits of having been named by Sessions is the consistency of meeting and their communications with the meetings they are working with. Their largest work is to listen and to raise up the existing capacity of the meeting. It is to support the monthly meetings in their own discernment about their own issues in their meeting.

25-32 Presiding Clerk's and C&A report

Rebecca Leuchek, Presiding Clerk, presented her written report and the report of the Coordinating and Advisory committee, both here attached. We have all been grieving and when we come together we can comfort each other. She hopes that at Sessions we can have an opportunity to mourn and grieve together but also move forward together. Can we feel Spirit at Sessions at every moment and not just during worship?

25-33 Nominating Committee clerk Nomination

Rebecca Leuchek and Susan Davies presented a report on their recommendation for the clerk of Nominating Committee, here attached.

Friends **approved** the nomination of Sadie Forsythe to serve as clerk of the Nominating Committee.

25-34 Nominating Committee report

Jackie Stillwell (Monadnock) presented the report of the Nominating Committee here attached.

Friends **affirmed** sending the name of Bill Monroe to the Moses Brown School Nominating Committee to be nominated to the Moses Brown Board of Trustees.

She brought the first reading of the name Janet Hough of Cobscook to be clerk of Ministry and Counsel.

25-35 Sessions Visioning Report and next steps

The report from the Sessions Visioning Process is here attached. Nia Thomas (Northampton), NEYM Program Director, reported on the outcomes of that process and the next steps in the process. The slides that she used in her presentation are attached. She reminded us of the purpose of Sessions as described in the Purpose, Procedures and Composition document for the Sessions Planning Committee approved at Sessions in 2022:

Friends gather at Annual Sessions to encourage the ministry and spiritual life of the Religious Society of Friends in New England. We seek to gather in ways that are intergenerational, welcoming, and inclusive. We seek to share our experience of how the Spirit is moving, and the ways it is impeded, to learn from each other, to discern how God is leading us as a People, and to experience Divine Love as it appears in our midst and is revealed in our relationships. (NEYM 2022 Minute Book, p 28.)

This is still true today.

In this process we have learned that many Friends across our Yearly Meeting feel a deep call to meaningful relationships with Friends across the region and that we understand ourselves as a people of God undertaking a shared journey of faith. Many people who have attended Sessions often have cherished memories of Sessions. There is a widespread desire to increase attendance at Sessions as a way to deepen our community and to improve the financial health of the Yearly Meeting. Many friends are also aware that there are many barriers to attending Sessions, including cost, travel time, and work

schedules. There is also a widely held desire to change our approach to corporate discernment so that we can have more spacious discernment on fewer items.

The visioning process did not lead to a single vision of how to proceed. We will need to approach modifications of Sessions as experiments that we learn from, and adapt, based on our experience.

The next steps in the process will be:

- We will carry forward what was learned in the visioning process into our planning for Sessions in coming years.
- The Permanent Board clerk will continue to consult with Quarterly Meeting clerks.
- A presentation of the planning process will be made at Sessions 2025.
- As planning continues through the fall of 2025 there will be regular updates on the process. Friends will be encouraged to give concrete and specific feedback on the plans.
- In late winter, Sessions planners will conduct extensive outreach to share the plans for Sessions 2026.

25-36 Approval of Memorial Minutes

Friends received memorial minutes for Donna McDaniel, Karen Cadbury, Andrea Cousins, Sarah Spencer, and Elizabeth Kincaid-Ehlers, here attached. The Permanent Board **approved** the memorial minute for Donna McDaniel on behalf of Salem Quarter. It then **approved** forwarding all five of these memorial minutes to Sessions.

Connecticut Valley Quarterly Meeting
of New England Yearly Meeting
connecticutqm@neym.org

March 17, 2025

Noah Merrill
Yearly Meeting Secretary
New England Yearly Meeting

Dear Noah,

I am writing to inform you that Litchfield Hills Monthly Meeting (LHMM) of the Connecticut Valley Quarterly Meeting has been discontinued. This action was taken at the request of Jeff Van Wagenen, the last member of LHMM, at the February 2, 2025 meeting of the Quarter. Liesa Stamm, of Hartford Friends Meeting, brought the request from Jeff to the Quarter in her capacity as a member of the NEYM Meeting Accompaniment Group.

We understand that the Quarter is responsible for confirming the conditions required to discontinue a meeting and those conditions are:

All members of the meeting have been given the opportunity to transfer their membership.

Jeff, the only remaining member, does not want to continue as a Friend.

The property and assets of the meeting have been transferred to the yearly meeting.

The remaining funds (\$3,153.69) in the LHMM bank account have been sent to the Treasurer of NEYM. LHMM owns no property.

The meeting records have been transferred to the quarterly meeting for appropriate disposition.

Jeff gave Liesa a box containing the meeting's records. Bank statements and membership records have been removed from the box of meeting records and have been discarded. What remains is minutes and other records of the meeting including such things as the guest books that were used in the meeting space. These materials cover the life of LHMM from about the mid-1960s to early into the current century. These materials were deposited with the Yearly Meeting Archives at UMass Amherst as part of the CVQM collection on March 17.

Jeff also gave Liesa seven boxes of books. We received the help of Peter Blood in reviewing these books. Peter took a stack of books for his online inwardlight.org project. Other books were set aside for review by other Friends. The bulk of the books were determined to be only suitable for discard or donation to a used book sale because the books were either moldy or non-Quaker or out of date.

Those present at our Quarterly meeting shared memories of their connections with LHMM in decades past. It's hard to see the meeting disappear. We held a moment of silence for a meeting that has served its purpose and must now be released.

In Gratitude,
David Ahlfeld, Clerk, CVQM

Cc:

Rebecca Leuchak, Presiding Clerk, NEYM, clerk@neym.org

Susan Davies, Permanent Board Clerk, pbclerk@neym.org

Sara Hubner, NEYM office manager, office@neym.org

Liesa Stamm, Meeting Accompaniment Group, liesastamm1@gmail.com

Jeff Van Wagenen, 1516 Straits Turnpike, Middlebury CT 06762

DRAFT 5/2/2025

Friends Camp Endowment Fund Policy

Approved by the Friends Camp Committee on May 3, 2025

Purpose & Use of Funds

- A. The Friends Camp Endowment Fund exists for the purpose of supporting Friends Camp, a ministry of New England Yearly Meeting of Friends (NEYM).
- B. The Endowment Fund will specifically support campership (scholarship) funding for Friends Camp and for no other purpose except as described in the next subsection. Camperships shall support campers with financial need attending camp, with need determined by the Camp Director.
- C. If at any point Endowment funds can no longer be used for camper scholarships, Endowment funds will be released to the general fund for use for the benefit of Friends Camp. If Endowment funds can no longer be used for any purpose relating to Friends Camp, all Endowment funds would be released to New England Yearly Meeting for the purpose of funding youth activities or programs. If Endowment funds cannot be used for that purpose, they will be released to the general fund for New England Yearly Meeting of Friends and used in accordance with Friends' Governing Principles.
- D. Term Limit: From the inception of the Endowment fund until its termination on June 1, 2055, Endowment funds shall be restricted as described in this document. After June 1, 2055, the Endowment fund will become a board (camp committee) designated fund for the same purposes above.

Gift Acceptance

- A. There shall be a minimum contribution of \$1,000 to the Endowment Fund.
- B. All gifts to the Endowment Fund shall be pooled together for the same purpose, and funds within the Endowment Fund shall not be further designated.
- C. Friends Camp will accept cash, cash equivalents, and securities.

Withdrawal

- A. Once per year, Friends Camp shall withdraw up to 5% of the current market value of total endowment assets for camperships. The percentage to be withdrawn shall be determined by the Friends Camp Committee in its sole discretion.

Investment Policy

- A. NEYM and the Friends Camp Committee have delegated decisions regarding investment of funds to the Friends Camp Finance Committee.

- B. For fund investing for the Endowment Fund, the Friends Camp Finance Committee shall prioritize affirming Friends' testimonies, professional long-term investment management, preservation of principal, and prudent risk management. Friends' testimonies include simplicity, peace, integrity, community, equality, and stewardship.
- C. At the inception of the fund, the Friends Camp Finance Committee has elected to invest funds with the NEYM Pooled Funds and adhere to the same investment policies as the Board of Managers of NEYM Pooled Funds.
- D. Friends Camp Finance Committee shall review investments, income and fund performance and recommend changes as needed. Reviews shall be at least once each calendar year.

Management of the Endowment Fund shall be in compliance with the requirements of Maine's Uniform Prudent Management of Institutional Funds Act, 13 MRSA Sec. 5101, et. seq. as amended and updated from time to time.

Review of updated MOU with UMASS SCUA from the Archives Committee

Carol A Forsythe <carol.forsythe@comcast.net>

Mar 18, 2025,
11:26 AM

To: Susan Davies, Permanent Board Clerk, Carol, NEYM Secretary

Susan Davies,

This year the Archives Committee worked with Danielle Kovacs of the Special Collections and Archives (SCUA) at UMASS to update the Memorandum of Understanding which we put in place when the NEYM were placed with SCUA.

We would like to report on this update. It does not substantially change the understanding, but is updated based on our five years of experience.

We are currently waiting on the final review by the director at SCUA, but once that has occurred, I will send a report discussing the changes as well as the document itself.

A member of the committee will come to Permanent Board to present the report.

I am writing now to let you know of this work.

thank you,
Carol Forsythe

Report from NEYM Archives Committee on the 2025 update to the Memorandum of Understanding(MOU) with Special Collections and Archives (SCUA) UMass Amherst

Purpose: The Archives Committee is submitting this report to inform the Permanent Board of changes in our MOU with SCUA.

Background: The MOU was originally agreed in 201 and approved by the Permanent Board. The document was created with the intention that it would be regularly reviewed by both our committee and SCUA to ensure documentation of any changes to our operating agreement. Since the MOU was originally developed, both SCUA, the Archives Committee and our Outreach Archivists have seen the need to clarify some of the language to make clear our intent. The changes:

1. Updates Contact information with the name of the new Director at SCUA. Changed the contact information for NEYM to emails so there is continuity of contact with committee clerk or outreach clerk change. Part 3. A.
2. Section D, Privacy and Sensitivity Issues has been clarified regarding closure of submitted materials, examples of sensitive materials and types of access which can be designated at the time submission to SCUA.
3. Clearer description of on-going deposit process, Section E. This now defines a on-time deed of gift from each Meeting and an on-going transfer letter for subsequent deposits.

Action: **Request approval of the revised document.** This has been reviewed and approved by Aaron Rubinstein, Director of SCUA as well as Danielle Kovacs, Curator of Collections, as well as the Archives Committee.

Attachment : Drafted MoU SCUA and NEYM upd-3-2025 (attached). Also, on Google drive: Archives >Archives Committee Minutes and Annual Reports >2024-25 Archives Committee Minutes & Work. Changes remain highlighted in red in sections D and E.

Carol Forsythe, for the NEYM Archives Committee

Memorandum of Understanding relating to the Records of the New England Yearly Meeting of Friends (referred to in this document as “The Collection”)

Part 1.

The Department of Special Collections and University Archives of the UMass Amherst Libraries ("SCUA") and the New England Yearly Meeting of the Society of Friends and its constitutive bodies ("NEYM") bring different gifts to the relationship formalized with this document. SCUA brings knowledge and expertise in managing, maintaining, and providing access to archival collections and institutional records. NEYM brings knowledge of the history and organization of itself and more broadly Quakers, as well as contacts and communications systems with and among NEYM and the individuals that form the corporate body called NEYM. Both parties also bring a willingness to work together to ensure that records with enduring historical value continue to be created, collected, preserved, and made accessible.

This Memorandum of Understanding is intended to be a living document. Both parties understand and agree that changes in process and procedure may become necessary over time. This Memorandum of Understanding will serve as a place to record mutually agreed upon changes. At a minimum, both parties should review this document every year and they should both agree that it is working well. In the event that one or both feel that changes should be made, or new agreements and understandings recorded, they should collaborate to find a mutually agreeable process and procedure.

Part 2.

As stated in the Deed of Gift, SCUA and NEYM agree to work collaboratively to:

- A. Understand the content of The Collection, and resolve any ownership, copyright, and privacy issues that may arise during the cataloging of the collection, or once intellectual access to The Collection is given to the general public.
- B. Develop systems of communication to aid the future collection of records from Monthly and Quarterly Meetings and the Yearly Meeting. SCUA will provide the Archives Committee with an annual report each May, in time for the Archives Committee to prepare its report that is due to NEYM in June. The Archives Committee will update SCUA at least annually about committee goals and any concerns that may have arisen under this agreement.

Part 3.

This section contains the elaboration of policy and procedure mentioned in the Deed of Gift, which specifically refers the parties to the Memorandum of Understanding in four places. It is, however, not intended to limit either party to just those areas if both parties discover other areas that need mutual agreement.

Sections may be collaboratively added, subtracted, or edited as the need arises. "Contacts and organizational structures," for instance, is a new section that was not referenced in the Deed of Gift.

A. Contacts and organizational structures

As an aid to collaboration, both parties will keep the other updated about who to contact to get help or support. For NEYM, possible points of contact include: the NEYM Archivist (Outreacharchivist@neym.org), the Clerk of the Archives Committee (archives@neym.org), the NEYM Secretary (Noah Merrill, secretary@neym.org), and the NEYM Office Manager (Sara Hubner). All appropriate contact information is to be kept updated by NEYM. For SCUA, possible points of contact include: the Head of Special Collections and University Archives (Aaron Rubinstein) and the Curator of Collections (Danielle Kovacs). SCUA will keep contact information up to date.

B. Ownership Issues

1. NEYM, and in future, the donating constitutive body, agrees to convey to SCUA all legal title to The Collection as an unrestricted gift, except as specified in the Deed of Gift and this Memorandum.

2. SCUA agrees that in the event that it shall decide not to retain any materials within The Collection, all such materials shall be returned to the donor, upon request, at SCUA's expense.

C. Copyright Issues

1. NEYM, and in future, the donating constitutive body, agrees to share ownership of any and all copyrights in The Collection that they hold and grants SCUA a nonexclusive right to authorize all uses of these materials for non-commercial research, scholarly, or other educational purposes pursuant to a Creative Commons Attribution, NonCommercial license.

2. Some of the discretionary uses incidental to The Collection's inclusion in SCUA (including, but not limited to digitization, exhibition, display, and research access), may implicate copyrights. To the extent that such activities are not already permitted under statutory copyright exceptions such as fair use, NEYM or the donating constitutive body grants SCUA an irrevocable non-exclusive royalty-free worldwide perpetual license for all reasonable discretionary uses.

3. It is understood that NEYM, and in future, the donating constitutive body, can legally transfer only those rights which it owns; and that The Collection contains materials for which copyright is owned by other parties. In such cases, SCUA will direct researchers who wish to publish this material to request permission directly from the copyright holder. SCUA will also inform researchers in situations where copyright ownership cannot be ascertained.

4. Should NEYM, any of its constitutive bodies, or individuals who have signed release agreements for donated materials request, they may retain copyright for clearly designated portions of The Collection for a clearly specified duration.
5. To the extent that NEYM or the constitutive body holds copyright to the materials in the Collection, that copyright is shared with SCUA and either entity may grant permission to publish material.
6. Requests to publish from any materials in The Collection for which NEYM, any of its constitutive bodies, or individuals who have signed release agreements for donated materials elects to retain copyright, apart from those permitted under statutory copyright exceptions such as fair use, shall be forwarded to the NEYM Archives Committee for consideration.

D. Privacy and Sensitivity Issues

1. NEYM reserves the right to restrict research access to any body of records within The Collection due to concerns over personal privacy, confidentiality, or any other points of sensitivity. It is understood by both parties that it may not be possible, in every case, for NEYM to make the request for closure prior to transfer of the records to SCUA. For the original donation, NEYM will make every effort to determine which, if any, materials require closure as soon as possible after the transfer. If any materials are designated for closure **or restriction**, this will be clearly communicated in writing to SCUA and the materials themselves will be clearly identified. **Examples of records that may contain private or sensitive information include: Vital Record forms, Current Meeting Address lists, Minutes of Pastoral Care Committees, and Minutes of Ministry and Counsel and of its subcommittees such as clearness and support committees. Additionally, photos and videos without consent forms.** The containers of any closed or restricted material, as well as any accompanying finding aids or inventories, will display a firm date after which the records can be made available to all researchers.
2. Any material the prospective donating body deems to be sensitive may be closed or restricted for a set period of time: either 20 years or 40 years from the **date the creation**. Materials deemed too sensitive ever to be made available to researchers should not be transferred to SCUA.
3. **Types of access to be designated at time of transferral to SCUA:**
 - a. **Closed for either 20 or 40 years. The final date of closure will be visible in the SCUA finding aid. If physical, the boxes will not be made available until the end of the closure. If the materials are digital they will be held on SCUA internal only servers until the end of closure.**

- b. Restricted to physical access only for either 20 or 40 years. These materials may ONLY be used at SCUA's reading rooms. If the material is digital it will be provided to the user only through University computers in the SCUA reading rooms.
- c. Open. These materials, whether physical or digital may be accessed at the SCUA reading rooms, or through digital copy. They are available to be accessed through the SCUA website.

3. Through the Clerk of the Archives Committee, NEYM or any of its constitutive bodies may request access to its own restricted materials during the period of closure; all other use shall be prohibited. The Clerk will notify SCUA via email of any decisions about granting access to restricted materials, cc-ing the Secretary of NEYM.

E. Ongoing Deposits

1. Future accruals to The Collection are expected and shall be deemed as falling under the terms of this agreement.

2. NEYM and SCUA will work to encourage the donation of future additions to The Collection, including records of NEYM, its Quarterly and Monthly Meetings, and other constitutive bodies.

3. Donations of physical records and digital records will be accepted by SCUA at any time. The first donation for a Meeting must be accompanied by a signed Deed of Gift. Subsequent gifts must be accompanied by a signed Transfer Letter. The Deed of Gift and Transfer Letter forms, the collecting policy for the Archives, and guidelines for donating materials are available on the Archives Committee web page: <https://neym.org/archives>.

e Archives Committee web page: <https://neym.org/archives>.

4. Donations of recordings of oral history interviews, personal statements such as Spiritual Journeys, presentations, photos, videos or performances should include copies of signed release forms, if at all possible. If releases were not obtained or are not available, the donor should indicate why, to the best of his or her knowledge (e.g.. the person recorded is now deceased). These release forms are also available on the Archives Committee web page: <https://neym.org/archives>.

NEYM
FY2024 Operating Budget vs Actuals Summary
October 2023 - September 2024

	Actual	Budget	Over / (Under) Budget	% of Budget
Income				
4010 Individual Contributions	\$ 206,708.78	\$ 223,000.00	\$ (16,291.22)	92.69%
4020 Monthly Meeting Contributions	\$ 344,668.47	\$ 342,000.00	\$ 2,668.47	100.78%
4030 Organizations Contributions	\$ 1,450.00		\$ 1,450.00	
4050 Interest and Dividend Income	\$ 7,172.35	\$ 12,000.00	\$ (4,827.65)	59.77%
4070 Books & Other Sales Income	\$ 8,677.41	\$ 10,500.00	\$ (1,822.59)	82.64%
4080 Retreat Program Fees	\$ 30,422.00	\$ 37,500.00	\$ (7,078.00)	81.13%
4085 Sessions Program Fees	\$ 161,365.50	\$ 249,475.00	\$ (88,109.50)	64.68%
4090 Change in Fair Market Value	\$ 72.07		\$ 72.07	
4099 Net Assets Released To/From *	\$ -	\$ 5,000.00	\$ (5,000.00)	0.00%
Total Income	\$ 760,536.58	\$ 879,475.00	\$ (118,938.42)	86.48%
Expenses				
5000 Staff	\$ 481,169.40	\$ 503,842.00	\$ (22,672.60)	95.50%
5100 General & Administration	\$ 102,604.06	\$ 87,449.00	\$ 15,155.06	117.33%
5300 Travel & Conferences	\$ 31,135.64	\$ 22,300.00	\$ 8,835.64	139.62%
6000 Programs	\$ 201,081.80	\$ 256,012.00	\$ (54,930.20)	78.54%
6140 Books & Other Sales Expense	\$ 6,743.75	\$ 8,000.00	\$ (1,256.25)	84.30%
Total Expenses	\$ 822,734.65	\$ 877,603.00	\$ (54,868.35)	93.75%
Net Operating Income	\$ (62,198.07)	\$ 1,872.00	\$ (64,070.07)	
Transfers In/Out				
9940 Other Income - Transfers from other funds *	\$ 5,000.00		\$ 5,000.00	
Net Other Income	\$ 5,000.00	\$ -	\$ 5,000.00	
Net Income	\$ (57,198.07)	\$ 1,872.00	\$ (59,070.07)	

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

Total income when including \$5,000 use of net assets is \$113,938.42 under budget.

% of budgeted total income when including \$5,000 use of net assets is 87.04%

NEYM
FY2024 Operating Budget vs Actuals Detail
October 2023 - September 2024

	Actual	Budget	Over / (Under) Budget	% of Budget
Income				
4010 Individual Contributions	206,708.78	223,000.00	(16,291.22)	92.69%
4020 Monthly Meeting Contributions	344,668.47	342,000.00	2,668.47	100.78%
4030 Organizations Contributions	1,450.00		1,450.00	
4050 Interest and Dividend Income	7,172.35	12,000.00	(4,827.65)	59.77%
4070 Books & Other Sales Income	8,677.41	10,500.00	(1,822.59)	82.64%
4080 Retreat Program Fees	30,422.00	37,500.00	(7,078.00)	81.13%
4085 Sessions Program Fees	161,365.50	249,475.00	(88,109.50)	64.68%
4090 Change in Fair Market Value	72.07		72.07	
4099 Net Assets Released To/From *		5,000.00	(5,000.00)	
Total Income	760,536.58	879,475.00	(118,938.42)	86.48%
Expenses				
5000 Staff				
5010 Salaries & Wages	360,924.10	380,988.00	(20,063.90)	94.73%
5020 Payroll Taxes	27,077.77	29,146.00	(2,068.23)	92.90%
5030 Benefits				
5033 Health Benefits	52,982.14	49,199.00	3,783.14	107.69%
5035 Retirements	36,435.95	38,099.00	(1,663.05)	95.63%
5040 Disability	983.41	1,100.00	(116.59)	89.40%
5045 Workers' Compensation	682.00	760.00	(78.00)	89.74%
5050 Spiritual Retreats	727.00	1,200.00	(473.00)	60.58%
5060 Staff Development	1,257.03	3,250.00	(1,992.97)	38.68%
5070 Sabbatical & Paid Leave	100.00	100.00	-	100.00%
Total 5030 Benefits	93,167.53	93,708.00	(540.47)	99.42%
Total 5000 Staff	481,169.40	503,842.00	(22,672.60)	95.50%
5100 General & Administration				
5110 Administration				
5120 Bank Expense	8,530.37	7,000.00	1,530.37	121.86%
5130 Contracted Services	28,655.71	18,000.00	10,655.71	159.20%
5135 Accounting Services		-	-	
5140 Legal Services	2,500.00	2,500.00	-	100.00%
5145 Infrastructure		-	-	
5150 Liability Insurance	6,835.49	5,250.00	1,585.49	130.20%
5160 Payroll Service	7,518.60	5,500.00	2,018.60	136.70%
5170 Recruiting Expense		-	-	
5180 Rent	9,350.00	9,350.00	-	100.00%
5190 Misc. Expense	467.93		467.93	
Total 5110 Administration	63,858.10	47,600.00	16,258.10	134.16%
5200 Office				
5220 Cleaning Services	300.00	299.00	1.00	100.33%
5230 Maint - Equip & Hardware	89.99	500.00	(410.01)	18.00%
5240 Postage	2,200.39	3,750.00	(1,549.61)	58.68%
5250 Office Equipment	237.55	1,500.00	(1,262.45)	15.84%

5260 Office Supplies	1,539.57	1,600.00	(60.43)	96.22%
5270 Printing & Copying	7,415.95	9,500.00	(2,084.05)	78.06%
5280 Software & Updates	23,017.05	19,000.00	4,017.05	121.14%
5290 Telephone	3,833.26	3,700.00	133.26	103.60%
5295 Misc. Office	112.20		112.20	
Total 5200 Office	38,745.96	39,849.00	(1,103.04)	97.23%
Total 5100 General & Administration	102,604.06	87,449.00	15,155.06	117.33%
5300 Travel & Conferences				
5310 Travel - Committee	1,536.36	1,400.00	136.36	109.74%
5320 Travel - Clerk	4,990.75	2,500.00	2,490.75	199.63%
5330 Travel - Programs	3,853.02	3,100.00	753.02	124.29%
5335 Travel - Representatives Travel	8,299.70	2,000.00	6,299.70	414.99%
5350 Travel - Staff	12,455.81	12,900.00	(444.19)	96.56%
5360 Travel - Ministries		400.00	(400.00)	0.00%
Total 5300 Travel & Conferences	31,135.64	22,300.00	8,835.64	139.62%
6000 Programs				
6110 Sessions Room & Board	127,106.70	169,442.00	(42,335.30)	75.01%
6112 Retreats - Room & Board				
6114 Room Rental	13,988.00	10,000.00	3,988.00	139.88%
6150 Food Expense	9,413.65	10,000.00	(586.35)	94.14%
Total 6112 Retreats - Room & Board	23,401.65	20,000.00	3,401.65	117.01%
6125 Program Expenses				
6105 Honoraria - Speakers/Wkshp Ldrs	16,796.92	24,000.00	(7,203.08)	69.99%
6107 Honoraria - Volunteer Leadership	11,250.00	15,000.00	(3,750.00)	75.00%
6115 Equipment Rental	7,708.79	6,500.00	1,208.79	118.60%
6121 Supplies and Other Expenses	8,068.30	9,000.00	(931.70)	89.65%
6165 Pre-Sessions Expense	1,409.44	1,500.00	(90.56)	93.96%
Total 6125 Program Expenses	45,233.45	56,000.00	(10,766.55)	80.77%
6130 Committee Expenses - General	2,100.00	6,350.00	(4,250.00)	33.07%
6134 Childcare		2,000.00	(2,000.00)	0.00%
Total 6130 Committee Expenses - General	2,100.00	8,350.00	(6,250.00)	25.15%
6160 Program Support				
6163 Friends Camp	3,240.00	2,220.00	1,020.00	145.95%
Total 6160 Program Support	3,240.00	2,220.00	1,020.00	145.95%
Total 6000 Programs	201,081.80	256,012.00	(54,930.20)	78.54%
6140 Books & Other Sales Expense				
6142 Books	3,568.64	8,000.00	(4,431.36)	44.61%
6147 Consignment Sales	3,175.11		3,175.11	
Total 6140 Books & Other Sales Expense	6,743.75	8,000.00	(1,256.25)	84.30%
Total Expenses	822,734.65	877,603.00	(54,868.35)	93.75%
Net Operating Income	(62,198.07)	1,872.00	(64,070.07)	
Transfers In/Out				
9940 Other Income - Transfers from other funds *	5,000.00		5,000.00	
Net Transfers In/Out	5,000.00	-	5,000.00	
Net Income	(57,198.07)	1,872.00	(59,070.07)	

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

Total income when including \$5,000 use of net assets is \$113,938.42 under budget.

% of budgeted total income when including \$5,000 use of net assets is 87.04%

NEYM
Statement of Activities - All Funds
October 2023 - September 2024

	<u>Operating</u>	<u>Non-Operating</u>	<u>Total</u>
Income			
4010 Individual Contributions	206,708.78	40,717.28	247,426.06
4020 Monthly Meeting Contributions	344,668.47	13,945.06	358,613.53
4025 Unallocated Income	0.00	1,903.44	1,903.44
4030 Organizations Contributions	1,450.00	29,980.00	31,430.00
4050 Interest and Dividend Income	7,172.35	71,281.17	78,453.52
4070 Books & Other Sales Income	8,677.41	25.00	8,702.41
4077 Consulting Fee Contribution	0.00	2,207.50	2,207.50
4080 Retreat Program Fees	30,422.00	1,070.00	31,492.00
4085 Sessions Program Fees	161,365.50	0.00	161,365.50
4090 Change in Fair Market Value	72.07	259,567.09	259,639.16
4099 Net Assets Released To/From	0.00	0.00	-
Total Income	\$ 760,536.58	\$ 420,696.54	\$ 1,181,233.12
Expenses			
5000 Staff	481,169.40	49,542.38	530,711.78
5100 General & Administration	102,604.06	5,465.57	108,069.63
5300 Travel & Conferences	31,135.64	3,353.01	34,488.65
6000 Programs	201,081.80	5,140.28	206,222.08
6140 Books & Other Sales Expense	6,743.75	0.00	6,743.75
6200 Support of Other Organizations	0.00	97,396.96	97,396.96
Total Expenses	\$ 822,734.65	\$ 160,896.20	\$ 983,632.85
Net Operating Income	\$ (62,198.07)	\$ 259,798.34	\$ 197,600.27
Other Income			
Transfer support from reserves for Volunteer Leadership honoraria per PB Minute 21-43 May 2021	5,000.00		
Transfer from Quasi-Endowment to 3500 Undesignated Net Assets per PB		20,000.00	
De-designate remaining amount from \$30K originally designated to Nurturing Faithfulness program including net income of Exploring Spiritual Practices course		28,902.55	
Transfer from Quasi-Endowment to 3500 Undesignated Net Assets		88,114.49	
Witness & Ministry Fund support for extra staff hours during YM Secretary leave		7,000.00	
Transfer FY24 budgeted amount from 5140 Legal Services Expense (Operating) to Legal Services Revolving Fund		2,500.00	
Transfer FY24 budgeted amount from 5070 Sabbatical & Paid Leave Expense (Operating) to Sabbatical Revolving Fund		100.00	
Sessions Minute 2024-62.2 combined the purposes of Future Fund and W&M Fund, creating one fund titled Witness & Ministry Fund; available balance in Future Fund transferred to W&M Fund.		732.31	
9940 Other Income - Transfers from other funds	5,000.00	147,349.35	152,349.35
Total Other Income	\$ 5,000.00	\$ 147,349.35	\$ 152,349.35

Other Expenses

Transfer support from reserves for Volunteer Leadership honoraria per PB Minute 21-43 May 2021			5,000.00
Transfer income from Quasi-Endowment to Operating 4050 Interest & Dividend Income			2,959.54
Transfer from Quasi-Endowment to General Fund per PB			20,000.00
Transfer from Quasi-Endowment to 3500 Undesignated Net Assets			88,114.49
Sessions Minute 2024-62.2 combined the purposes of Future Fund and W&M Fund, creating one fund titled Witness & Ministry Fund; available balance in Future Fund transferred to W&M Fund.			732.31
Witness & Ministry Fund support for extra staff hours during YM Secretary leave			7,000.00
Transfer Equalization Fund Individual donations to 4010 Individual Contributions (Operating)			26,543.00
Transfer Equalization Fund Monthly Meeting donations to 4020 Monthly Meeting Contributions (Operating)			10,695.00
De-designate remaining amount from \$30K originally designated to Nurturing Faithfulness program including net income of Exploring Spiritual Practices course			28,902.55
Transfer income from Endowment Fund to Operating 4050 Interest & Dividend Income			2,500.47
Transfer income from West Falmouth Prep Mtg Fund to 4020 Monthly Meeting Contributions (Operating)			203.63
9950 Other Expense - Transfer to other funds	0.00	192,650.99	
Total Other Expenses	\$ 0.00	\$ 192,650.99	\$ 192,650.99
Net Other Income	\$ 5,000.00	\$ (45,301.64)	\$ (40,301.64)
Net Income	\$ (57,198.07)	\$ 214,496.70	\$ 157,298.63

NEYM
Statement of Financial Position
As of September 30, 2024

	As of Sep 30, 2024	As of Sep 30, 2023	Change	% Change
ASSETS				
Current Assets				
Bank Accounts				
1000 Checking Accounts				
1010 Santander Checking	72,175.64	137,586.68	(65,411.04)	-47.54%
1015 Everence Fed Credit Union Checking	6,093.78	4,740.49	1,353.29	28.55%
1040 Petty Cash	40.00	2,862.00	(2,822.00)	-98.60%
Total 1000 Checking Accounts	<u>78,309.42</u>	<u>145,189.17</u>	<u>(66,879.75)</u>	<u>-46.06%</u>
1020 Money Market Accounts				
1028 Santander Money Market Savings	75,870.98		75,870.98	
1029 Everence Fed Credit Union SHARE Savings	609.45	608.09	1.36	0.22%
Total 1020 Money Market Accounts	<u>76,480.43</u>	<u>608.09</u>	<u>75,872.34</u>	<u>12477.16%</u>
Total 1050 Certificates of Deposits	<u>-</u>	<u>-</u>	<u>-</u>	
Total Bank Accounts	<u>154,789.85</u>	<u>145,797.26</u>	<u>8,992.59</u>	<u>6.17%</u>
Accounts Receivable				
Total Accounts Receivable	<u>-</u>	<u>-</u>	<u>-</u>	
Other Current Assets				
1075 Pooled Funds	1,812,116.54	1,660,663.94	151,452.60	9.12%
1100 Accrued Receivables	526.76	1,050.00	(523.24)	-49.83%
1110 Due to/from Friends Camp				
1112 Camp Disability	(1.07)	(1.17)	0.10	8.55%
1113 Camp Health Ins	1,005.65	689.51	316.14	45.85%
1114 Camp - Retirement	853.34	798.49	54.85	6.87%
Total 1110 Due to/from Friends Camp	<u>1,857.92</u>	<u>1,486.83</u>	<u>371.09</u>	<u>24.96%</u>
1150 Prepaid Expenses	6,272.22	6,897.22	(625.00)	-9.06%
1190 Misc due to/from	-	-	-	
1499 Undeposited Funds	-	-	-	
Total Other Current Assets	<u>1,820,773.44</u>	<u>1,670,097.99</u>	<u>150,675.45</u>	<u>9.02%</u>
Total Current Assets	<u>1,975,563.29</u>	<u>1,815,895.25</u>	<u>159,668.04</u>	<u>8.79%</u>
TOTAL ASSETS	<u>1,975,563.29</u>	<u>1,815,895.25</u>	<u>159,668.04</u>	<u>8.79%</u>

LIABILITIES AND EQUITY**Liabilities****Current Liabilities****Total Accounts Payable**

	-	-	-	
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Credit Cards**2005 Credit Card Elan St Marys**

5,539.46	3,859.89	1,679.57	43.51%
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Total Credit Cards

5,539.46	3,859.89	1,679.57	43.51%
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Other Current Liabilities**2010 Accrued Liabilities**

76.60	76.60	-	0.00%
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2100 Payroll Liabilities

105.76		105.76	
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2110 Federal Taxes

(797.40)	-	(797.40)	
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2120 State Taxes

757.46	(39.94)	797.40	1996.49%
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2150 Health Insurance Premium

340.90	601.21	(260.31)	-43.30%
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2155 Sect 125 Employee Withholding

22.57	(721.82)	744.39	103.13%
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2160 403B Retirement

420.26	320.26	100.00	31.22%
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Total Other Current Liabilities

926.15	236.31	689.84	291.92%
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Total Current Liabilities

6,465.61	4,096.20	2,369.41	57.84%
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Total Liabilities

6,465.61	4,096.20	2,369.41	57.84%
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Equity**3500 Undesignated Unrestricted Net Assets**

80,005.15	(13,766.52)	93,771.67	681.16%
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Total 3600 Board Designated Funds

1,179,777.34	1,145,470.07	34,307.27	3.00%
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Total 3700 Revolving Accounts

75,092.91	119,675.99	(44,583.08)	-37.25%
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Total 3800 Permanently Restricted Funds

691,420.35	595,597.22	95,823.13	16.09%
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3900 Retained Earnings

-	-	-	
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Net Income

(57,198.07)	(35,177.71)	(22,020.36)	-62.60%
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Total Equity

1,969,097.68	1,811,799.05	157,298.63	8.68%
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TOTAL LIABILITIES AND EQUITY

1,975,563.29	1,815,895.25	159,668.04	8.79%
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FY2024 Meeting Contributions

	General Fund	Equalization	Total
Connecticut Valley Quarterly Meeting			
Hartford Monthly Meeting	21,000.00		21,000.00
Mount Toby Monthly Meeting	33,875.00		33,875.00
New Haven Friends Meeting	8,715.00		8,715.00
Northampton Friends Meeting	9,227.00	567.00	9,794.00
Storrs Friends Meeting	4,000.00		4,000.00
Subtotal	76,817.00	567.00	77,384.00
Dover Quarterly Meeting			
Concord Monthly Meeting	8,241.50	361.00	8,602.50
Dover Monthly Meeting	8,150.00		8,150.00
Gonic Monthly Meeting	388.08		388.08
North Sandwich Friends Meeting		400.00	400.00
Weare Monthly Meeting	1,500.00	500.00	2,000.00
Subtotal	18,279.58	1,261.00	19,540.58
Falmouth Quarterly Meeting			
Brunswick Friends Meeting	1,100.00		1,100.00
Durham Monthly Meeting	6,300.00		6,300.00
Portland Friends Meeting	16,000.00		16,000.00
Southern Maine Friends Meeting	200.00	50.00	250.00
Windham Friends Meeting	150.00		150.00
Subtotal	23,750.00	50.00	23,800.00
Northwest Quarterly Meeting			
Bennington Monthly Meeting	1,700.00		1,700.00
Burlington Monthly Meeting	5,550.00	1,050.00	6,600.00
Hanover Friends Meeting	23,039.00		23,039.00
Middlebury Friends Meeting	3,800.00	400.00	4,200.00
Monadnock Quaker Meeting	6,100.00	300.00	6,400.00
Northeast Kingdom Quaker Meeting	500.00		500.00
Plainfield Monthly Meeting	1,000.00		1,000.00
Putney Friends Meeting	6,000.00		6,000.00
Quaker City Unity Friends Meeting	1,000.00		1,000.00
South Starksboro Monthly Meeting	350.00		350.00
Wilderness Friends Meeting	400.00		400.00
Subtotal	49,439.00	1,750.00	51,189.00
Salem Quarterly Meeting			
Amesbury Monthly Meeting	2,720.00		2,720.00
Beacon Hill Friends Meeting	11,500.00	1,357.00	12,857.00
Framingham Friends Meeting	10,000.00	800.00	10,800.00
Fresh Pond Monthly Meeting	9,080.00	2,260.00	11,340.00
Friends Meeting at Cambridge	44,872.00	1,000.00	45,872.00
Lawrence Monthly Meeting	400.00		400.00
North Shore Friends Meeting	3,000.00	100.00	3,100.00
Wellesley Monthly Meeting	23,492.26		23,492.26
Subtotal	105,064.26	5,517.00	110,581.26
Sandwich Quarterly Meeting			
Allen's Neck Monthly Meeting	2,710.00		2,710.00
East Sandwich Preparative Meeting	500.00		500.00
Martha's Vineyard Monthly Meeting	840.00		840.00
Mattapoisett Monthly Meeting	200.00		200.00
Nantucket Worship Group	600.00		600.00
Sandwich Monthly Meeting	1,100.00		1,100.00
Sandwich Quarterly Meeting		300.00	300.00
West Falmouth Preparative Meeting	5,303.63	200.00	5,503.63

Westport Monthly Meeting	6,000.00		6,000.00
Yarmouth Preparative Meeting	1,000.00		1,000.00
Subtotal	18,253.63	500.00	18,753.63
Southeast Quarterly Meeting			
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	500.00	7,120.00
Subtotal	29,620.00	1,000.00	30,620.00
Vassalboro Quarterly Meeting			
Acadia Monthly Meeting	1,300.00		1,300.00
Belfast Area Friends Meeting	200.00		200.00
Cobscook Monthly Meeting	800.00		800.00
Eggemoggin Reach Monthly Mtg	150.00	50.00	200.00
Farmington Monthly Meeting	600.00		600.00
Narramissic Valley Monthly Meeting	50.00		50.00
Orono Monthly Meeting	250.00		250.00
Vassalboro Friends Meeting	7,000.00		7,000.00
Winthrop Center Friends Church	2,400.00		2,400.00
Subtotal	12,750.00	50.00	12,800.00
Total All Quarters	333,973.47	10,695.00	344,668.47

NEYM FY2024 Continuing Projects

<i>Project</i>	<u>Stone of Hope</u>	<u>RSEJ Book Project 2017</u>	<u>Friends Foundation for Aging Grants (SAGE & ARCH)</u>	<u>Quakers Advocating Justice for Palestine</u>	<u>Quaker Outreach 2015 grant</u>	<u>Printing of Interim Faith & Practice</u>	<u>OBBF Youth Retreat Handbook</u>
<i>Project Balance beginning of year (from end of previous year)</i>	<u>918.00</u>	<u>250.62</u>	<u>2,244.18</u>	<u>867.88</u>	<u>4,022.96</u>	<u>1,423.60</u>	<u>1,527.50</u>
Income							
4010 Individual Contributions							
4030 Organizations Contributions			15,700.00				
4080 Retreat Program Fees			<u>1,070.00</u>				
Total Income			<u>16,770.00</u>				
Expense							
Total Expense	<u>918.00</u>		<u>16,816.03</u>				<u>1,527.50</u>
9940 Other Income - Transfers from other funds							
9950 Other Expense - Transfer to other funds							
Net of Income and Expense FY2024	<u>(918.00)</u>	<u>-</u>	<u>(46.03)</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(1,527.50)</u>
Ending Balance (Sept 30, 2024)	<u>-</u>	<u>250.62</u>	<u>2,198.15</u>	<u>867.88</u>	<u>4,022.96</u>	<u>1,423.60</u>	<u>-</u>

NEYM FY2024 Continuing Projects

<i>Project</i>	Partners in Spirit Program	Shoemaker Fund Grant	Archives Transition Processing	Nurturing Faithfulness Program	Growing Edges Youth Programs Initiatives	Acting Secretaries 2024 (OBBF+Legacy)	Evaluation Consulting for FWCC Quaker Connect	Continuing Projects Totals
<i>Project Balance beginning of year (from end of previous year)</i>	1,044.94	14,678.31	2,495.00	27,159.89	820.10			57,452.98
Income								
4010 Individual Contributions					7,500.00			7,500.00
4030 Organizations Contributions						14,280.00		29,980.00
4080 Retreat Program Fees								1,070.00
Total Income					7,500.00	14,280.00	2,207.50	40,757.50
Expense								
Total Expense	1,044.94	7,155.89		1,325.00	7,034.15	21,280.00	2,207.50	59,309.01
9940 Other Income - Transfers from other funds				3,067.66		7,000.00		10,067.66
9950 Other Expense - Transfer to other funds				28,902.55				28,902.55
Net of Income and Expense FY2024	(1,044.94)	(7,155.89)	-	(27,159.89)	465.85	-	-	(37,386.40)
Ending Balance (Sept 30, 2024)	-	7,522.42	2,495.00	-	1,285.95	-	-	20,066.58

NEYM

FY2024 Committee Budgets vs Actuals

October 2023 - September 2024

	Actual	Budget	Remaining
315 C&A	300.00	500.00	200.00
320 F&P Revision		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	300.00	700.00	400.00
TOTAL	\$ 2,100.00	\$ 6,350.00	\$ 4,250.00

Notes

390 "Other Committees" = Permanent Board & Nominating Committees. FY24's \$300 spent by Permanent Board.

This report excludes expense sub-account 6134 Childcare, budgeted for \$2000, visible in full budget-vs-actual report.

Board-Designated and Revolving Funds

	Balance Sep 30, 2023	Investment Income	Change in Fair Market Value	Other Income	Expenses	Net Change 10/1/23-9/30/24	Balance Sep 30, 2024
3600 Board Designated Funds							
3620 Faith & Practice Revision	60,434.93	2,259.56	8,234.20	25.00		10,518.76	70,953.69
3630 World Conference Travel	0.00					0.00	0.00
3650 Quasi-Endowment (Investments)	101,573.12	2,959.56	10,593.13		111,074.03	(97,521.34)	4,051.78
3681 NEYM Future Fund **	732.31				732.31	(732.31)	0.00
3682 NEYM Ministry Fund	982,729.71	40,335.13	146,987.07	1,791.96	67,072.00	122,042.16	1,104,771.87
Total 3600 Board Designated Funds	1,145,470.07	45,554.25	165,814.40	1,816.96	178,878.34	34,307.27	1,179,777.34
3700 Revolving Accounts							
3705 Archives	1,394.60				1,394.60	(1,394.60)	0.00
3706 Sabbatical	0.00			100.00		100.00	100.00
3707 Accounting Services	19,700.00					0.00	19,700.00
3708 Infrastructure	1,016.50					0.00	1,016.50
3709 Legal Services	508.45			2,500.00	1,419.78	1,080.22	1,588.67
3710 Equalization	0.00			37,238.00	37,238.00	0.00	0.00
3711 Equalization - Restricted	0.00					0.00	0.00
3712 FUM Intervisitation	1,259.15				1,259.15	(1,259.15)	0.00
3715 Peaceworker	1,784.36					0.00	1,784.36
3716 Bodine-Rustin Fund	4,911.86			301.41	4,161.86	(3,860.45)	1,051.41
3720 Prejudice & Poverty	0.00					0.00	0.00
3725 Puente de Amigos	10,397.11			8,563.28	10,425.98	(1,862.70)	8,534.41
3730 Sufferings - Restricted	0.00					0.00	0.00
3732 Sufferings - Unrestricted	18,158.62					0.00	18,158.62
3760 Young Friends Travel	3,092.36					0.00	3,092.36
3775 Continuing Projects	57,452.98			50,825.16	88,211.56	(37,386.40)	20,066.58
Total 3700 Revolving Accounts	119,675.99			99,527.85	144,110.93	(44,583.08)	75,092.91

* The current year Operating Net Income, shown on the Balance Sheet and the Statement of Activities, is transferred to Account 3500 at the start of the next fiscal year.

** Sessions Minute 2024-62.2 combined the purposes of the Future Fund and the Witness & Ministry Fund, creating one fund titled Witness & Ministry Fund; available balance in Future Fund transferred to W&M Fund.

Permanently Restricted Funds

Fund	Balance Sep 30, 2023	Unavailable (Invested) Oct 1, 2023	Remaining Available from FY2023	Investment and Other Income *	Expenses	Change in Fair Market Value	Unavailable (Invested) Sept 30, 2024	Remaining Available Sept 30, 2024	Balance Sep 30, 2024
3802 Endowment Fund	57,060.33	57,060.33	0.00	2,500.47	2,500.47	9,112.09	66,172.42	0.00	66,172.42
3804 Alice Needham	18,950.40	18,950.40	0.00	830.44	830.43	3,026.22	21,976.62	0.00	21,976.62
3806 Amy S. Hayden	62,641.49	62,641.49	0.00	2,745.04	2,745.04	10,003.33	72,644.82	0.00	72,644.82
3808 Anna M. Brown	41,550.42	41,550.42	0.00	3,724.24	3,724.24	6,635.26	48,185.68	0.00	48,185.68
3810 Freedmen's	151,981.73	149,981.73	2,000.00	6,572.42	8,572.41	23,950.85	173,932.58	0.00	173,932.58
3812 FUM Foreign Missions	51,071.01	51,071.01	0.00	2,238.00	2,238.01	8,155.62	59,226.63	0.00	59,226.63
3814 FUM Home & Foreign	7,101.85	7,101.85	0.00	311.22	311.21	1,134.10	8,235.95	0.00	8,235.95
3816 FUM Ramallah	64,576.92	64,576.92	0.00	2,829.85	2,829.85	10,312.40	74,889.32	0.00	74,889.32
3824 Mosher Book & Tract	87,349.09	82,196.39	5,152.70	3,601.96	0.00	13,126.09	95,322.48	8,754.66	104,077.14
3826 Phillips/Purinton/Hawkes	27,397.76	27,397.76	0.00	1,200.62	1,200.62	4,375.20	31,772.96	0.00	31,772.96
3828 Pittsfield/Varney	12,050.06	10,690.71	1,359.35	468.48	0.00	1,707.22	12,397.93	1,827.83	14,225.76
3830 Susan B. Kirby	9,219.43	9,219.43	0.00	404.00	404.01	1,472.27	10,691.70	0.00	10,691.70
3832 West Falmouth Prep Mtg	4,646.73	4,646.73	0.00	203.62	203.63	742.04	5,388.77	0.00	5,388.77
Total 3800 Permanently Restricted Funds	595,597.22	587,085.17	8,512.05	27,630.36	25,559.92	93,752.69	680,837.86	10,582.49	691,420.35

* Available amounts for FY2024 were each fund's investment income from the Pooled Funds plus any remaining Available from FY2023.

Investment Income (formerly called Interest & Dividends) was 4% of a 3-year average of the 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.

Anna M. Brown Fund income includes \$1903.44 from a returned check from FY23.

Operating Reserves¹

	Balance Sep 30, 2023	Investment Income	Change in Fair Market Value	Other Income	Expenses	Net Change	Balance Sep 30, 2024
Capital							
3500 Undesignated Unrestricted Net Assets	(13,766.52)	0.00	0.00	133,949.38	40,177.71	93,771.67	80,005.15
3900 Retained Earnings + Net Income	(35,177.71)	0.00	0.00	35,177.71	57,198.07	(22,020.36)	(57,198.07)
Total (9/30 = Undesignated Net Assets Oct 1 next FY)	(48,944.23)	0.00	0.00	169,127.09	97,375.78	71,751.31	22,807.08
3600 Board Designated Funds							
3650 Quasi-Endowment (Investments)	101,573.12	2,959.56	10,593.13		111,074.03	(97,521.34)	4,051.78
Total Operating Reserves	52,628.89	2,959.56	10,593.13	169,127.09	208,449.81	(25,770.03)	26,858.86
Total Expense Budget 2025							847,913.00
Total Operating Reserves as Percent of Expense Budget ²							3.2%

Notes

1. Operating Reserves are composed of 3500 Undesignated Unrestricted Net Assets plus 3650 Quasi-Endowment.

2. 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, 2024 fell below this amount.

To: Permanent Board

From: Scot Drysdale, NEYM Finance Committee Clerk

Date: May 5, 2025

RE: FY 26 Budget Commentary

The proposed FY 26 budget is a work in progress. We expect to have a firmer budget before Sessions.

The first thing to note is that without knowing what form Sessions will take in summer of 2026 we cannot come up with good estimates of either its costs or its income. The budget spreadsheet has a rightmost yellow column entitled "FY2026 Rough Draft Sessions." These costs are hypothetical, projecting the continuation of costs and income that we have seen in recent years. However, the model that we have been using in recent years is the least likely outcome of the Sessions Visioning Process that NEYM has undertaken. We don't know at this time what model will replace it.

Fortunately, we do not need to know what model will replace the current Sessions model in order to know its effect on the budget. Sessions fees have been set to cover direct Sessions costs, plus a small part of the staff time that goes into planning and running sessions. Historically (including last year, but not the first in-person session after COVID) the amount of income above the direct sessions costs has been around \$30,000. Therefore the important figure in the yellow column is \$30,500, the amount that appears in the Net Operating Income line for that column. This can be viewed as a guideline. Whatever Sessions model is chosen should generate \$30,500 of income in excess of direct costs to cover a small part of the staff time devoted to Sessions. Finding a sustainable model for Sessions should relieve budget pressure in future years.

A second thing to note is that the bottom line of this budget is a \$7,123 deficit. This is what resulted from our best estimates of income and expenses.

Noah has consulted with Michael Wajda, a professional fundraiser who is a member of NEYM, to estimate the amount of contributions that we can expect to get with the fundraising efforts that staff and some volunteers intend to make. Footnotes 1 and 3 explain the reasoning behind these numbers. The plan is that in future years we will grow our income at a rate faster than our spending increases and thereby get to a surplus budget that will begin to restore our reserves to the level specified in our policy.

A lot of effort went into cutting costs. As noted in Footnote 7, some mutually agreed on reductions in wages or COLAs kept the increase in staff expenses lower than previous years. We are suggesting a cap on travel expenses. The Honoraria for Volunteer Leadership has dropped from \$15,000 to \$9,000, and will go to \$0 in a few years, after the volunteers who were offered this when they accepted their job rotate out of that job. Laying down these honoraria was approved at last sessions, but other methods of encouraging volunteer leadership may require additional spending.) As noted in

Footnote 12, we are asking Friends Camp to pay for their accreditation expense, which saves a few thousand dollars.

We also propose to add an administration fee of 0.6% on the income from the Pooled Funds that goes to NEYM (but not that that goes to monthly meetings or other investors in the funds). This would cover part of the time that Frederick Martin spends allocating this money to various endowed funds and accounting for it, and part of Sara Hubner's time spent supporting the Legacy Gift Committee.

We don't want to have a deficit, even one that is a small fraction of our overall spending (but a larger fraction of our current reserves). We would appreciate guidance on where else we might reduce our spending. Permanent Board provides Finance Committee with guidance on what our spending priorities should be. What might we do without?

We plan to listen to Permanent Board's feedback and adjust this budget before it is presented at Sessions.

New England Yearly Meeting								
FY2026 Operating (Non-Camp) Budget - DRAFT 4								
draft version of 5/1/2025								
Category	Actuals	FY2024	Budgets	FY2024	FY2025	Δ FY25 to FY26 Budgets	FY2026 draft 3 Budget	Notes
	FY2019	Actuals	FY19 Budget	Budget	Budget			
Income								See note 2
4010 Individual Contributions Total	210,194	206,708.78	212,000	223,000	228,000	11,000	239,000	27,000
4020 Monthly Meeting Contributions Total	333,257	344,668.47	373,000	342,000	345,000	17,250	362,250	3 9,000
4025 Unallocated Income				0	0	10,873	10,873	13
4030 Organizations Contributions	1	1,450.00	0	0	0	500	500	14
4050 Interest and Dividend Income	9,303	7,172.34	4,000	12,000	11,000	(5,288)	5,712	4
4070 Books & Other Sales Income	20,077	\$ 8,677.41	16,000	10,500	10,500	(1,700)	8,800	5 8,500.00
4080 Retreat Program Fees	44,618	30,422.00	50,000	37,500	37,500	3,850	41,350	6
4085 Sessions Program Fees	202,936	161,365.50	185,000	249,475	214,895	(13,895)	201,000	2 201,000
4090 Change in Fair Market Value	960	72.07	0	0	0	-	0	
4099 Net Assets Released To/From	660	0.00	8,500	5,000	0	-	0	
Total Income	822,005	\$ 760,536.58	848,500	879,475	846,895	22,590	\$ 869,485	\$ 245,500
Expenses								
Total 5000 Staff	379,198	\$ 481,169.40	363,915	503,842	516,314	1,444	\$ 517,758	7
Total 5100 General & Administration	89,142	\$ 102,604.06	133,511	87,449	87,449	6,201	\$ 93,650	\$ 11,000
Total 5300 Travel & Conferences	32,007	\$ 31,135.64	36,000	22,300	22,300	700	\$ 23,000	9 \$ 2,000
Total 6000 Programs	243,348	\$ 201,081.80	259,020	256,012	213,850	21,350	\$ 235,200	\$ 195,000
Total 6140 Books & Other Sales Expense	17,447	\$ 6,743.75	14,500	8,000	8,000	(1,000)	\$ 7,000	5 \$ 7,000
Total 6200-6590 Support of Other Organizations	43,471	0	45,975	0	0	-	\$ 0	
Total 6600 Publications	3,522	0	4,000	0		-		
Total Expenses	808,137	822,735	856,921	877,603	847,913	28,695	\$ 876,608	\$ 215,000
Net Operating Income	13,868	(62,198)	-8,421	1,872	-1,018	(6,105)	(7,123)	30,500
Other Income								
9940 Other Income - Transfers from other funds	32,072.22	5,000						
Total Other Income	32,072.22	5,000						
Other Expenses								
9950 Other Expense - Transfer to other funds								
Total Other Expenses								
Net Other Income	32,072.22	5,000						
Net Income	45,940.46	(57,198)						

Notes:

- 1: **4010 Individual Contributions** estimated goal based on development consultant work: 5% growth FY25-FY26.
Growth rate FY22-FY24 has been 9.4% per year. FY15-FY19 was 13.7%; within that, FY16-19 was 17.6%. FY15-FY24 was 5.6%, and FY2008-FY2024 was 6.5%
- 2: **Sessions** is largely unknown. We expected Sessions Visioning Day to provide a single option for the May PB meeting, but did not arrive at unity. So shape of the program is still unknown.
A new column to the right of the FY2026 Budget column breaks out "placeholder" Sessions numbers for easier analysis; the main FY2026 column still includes the Sessions numbers.
Fee waivers: Considering new line to represent lost income due to fee waivers for volunteers at Sessions. Not yet in use. Various ways to assign a value: As if they paid the Traditional Fee? The Low-Income Fee?
Discussion: In 2014-2019, the Sessions budget (Sessions fees, book sales, & pay-as-led/Equalization donations, less direct expenses not including staff time) had an average surplus of \$31,700 each year.
The model was that Sessions paid for part of the staff time needed to organize it, while unrestricted contributions covered the rest.
This FY26 Sessions budget model is still entirely hypothetical, but plans for a surplus of Sessions fees in line with pre-pandemic years.
- 3: **4020 Meeting contributions** for FY25 are projected at about \$348,890 (albeit including about \$5500 in one-time lawsuit contributions): shown in Salesforce Meeting Contribution Campaigns Summary FY25 report,
This FY26 Sessions budget is based on about a 5% increase from FY25 not counting lawsuit contributions.
Assumes meetings either: give a single annual donation at the same level as they did in FY24, maintain their quarterly contributions at their most recent level, or complete the amount they have promised for FY25.
- 4: **4050 Interest income** based on bank account interest Q4 CY24 (\$769 in Santander money market account) + Endowment interest Q4 CY24 (\$621, plus \$38 Q-E interest)
- 5: Bookstore could be removed from Sessions program for 2026, if desired to simplify planning, but was retained here because it adds about \$800 of profit based on 2024
- 6: **4080 Retreat Program Fee** income increased - based on successful surpluses for Living Faith & Discernment Discovery Day.
7. **Staff salary**/wage increase by cost-of-living-adjustment (COLA) of 3%, roughly average CPI for Boston metro area 2024. Some mutually-agreed on reductions in wages or COLAs kept the increase lower than previous years.
Recent previous COLAs have been: FY25 2.0%, FY24 6.1%, FY23 6.3%, FY22 0.5%, FY21 2.22%.
8. **5130 Contracted Services:** FY24 had \$5000 of unplanned one-time expenses in this category. Planned FY26 uses: Archivist \$4500, Communications/social media: \$2500; Sessions (graphic design, some database & website) \$6000, general website & database \$9500.
9. **5300 Travel:** Suggest a cap on travel expenses. Note that **2026 is a Triennial** year for FUM, usually meaning higher Representative Travel usage. YM can reduce number of official reps we appoint and fund.
10. **6107 Honoraria for Volunteer Leadership** reduced following the minutes on its administration and laying down: continue offering payments until terms of current appointees end at EOY FY26.
11. This budget draft reduces **6130 Committee Expenses**
12. **6163 Friends Camp:** This line has recently reimbursed Camp's annual accreditation expense.
13. **Unallocated Income:** Propose an administrative fee of 0.6% on our investments in the Pooled Funds. An admin fee is common for nonprofits with investments.

draft version of 5/1/2025

	Actuals	FY2023	FY2024	Budgets	FY2023	FY2024	FY2025	Δ FY25 to FY26 Budgets	FY2026 draft 3 Budget	Notes	FY2026 Sessions placeholder break-out
Category	FY2019	Actuals	Actuals	FY19 Budget	Budget	Budget	Budget				
Income											
4010 Individual Contributions											See note 2
General Fund Contributions	188,088	171,080.76	179,020.78	191,000	204,225	198,000	201,000	11,000	212,000	1	
Pay-As-Led /Equalization Contributions	22,106	25,928.00	27,688.00	21,000	26,000	25,000	27,000	-	27,000	2	27,000
4010 Individual Contributions Total	210,194	197,009	206,708.78	212,000	230,225	223,000	228,000	11,000	239,000		27,000
4020 Monthly Meeting Contributions											
General Fund Contributions	317,286	340,040	333,973.47	350,000	350,000	333,000	336,000	17,250	353,250		
Equalization Contributions	15,971	8,628	10,695.00	23,000	23,000	9,000	9,000	-	9,000		9,000
4020 Monthly Meeting Contributions Total	333,257	348,668	344,668.47	373,000	373,000	342,000	345,000	17,250	362,250	3	9,000
4025 Unallocated Income		33,451			31,000	0	0	10,873	10,873	13	
4030 Organizations Contributions	1		1,450.00	0	0	0	0	500	500	14	
4050 Interest and Dividend Income	9,303	7,761	7,172.34	4,000	12,000	12,000	11,000	(5,288)	5,712	4	
4070 Books & Other Sales Income	20,077	11,638	8,677.41	16,000	17,000	10,500	10,500	(1,700)	8,800	5	8,500.00
4077 Consulting Fee Contribution		900						-			
4080 Retreat Program Fees	44,618	25,712	30,422.00	50,000	47,000	37,500	37,500	3,850	41,350	6	
4085 Sessions Program Fees	202,936	158,157	161,365.50	185,000	227,400	249,475	214,895	(13,895)	201,000	2	201,000
4090 Change in Fair Market Value	960	3,225	72.07	0	0	0	0	-	0		
4099 Net Assets Released To/From	660	0	0.00	8,500	30,000	5,000	0	-	0		
Total Income	822,005	786,521	\$ 760,536.58	848,500	967,625	879,475	846,895	22,590	\$ 869,485		\$ 245,500
Expenses											
5000 Staff											
5010 Salaries & Wages	284,515	351,739	360,924.10	267,426	378,053	380,988	389,236	(59,001)	330,235	7	
5037 Housing Allowance								60,000	60,000		
5020 Payroll Taxes	21,100	25,951	27,077.77	20,511	27,392	29,146	30,195	(4,472)	25,723		
5030 Benefits								-			
5033 Health Benefits	39,036	48,051	52,982.14	41,785	45,123	49,199	51,796	6,603	58,399		
5035 Retirements	30,106	34,830	36,435.95	26,743	35,806	38,099	38,924	500	39,424		
5040 Disability	1,402	1,116	983.41	1,800	1,100	1,100	1,013	44	1,057		
5045 Workers' Compensation	812	596	682.00	700	760	760	600	20	620		
5050 Spiritual Retreats			727.00	1,200	1,200	1,200	1,200	-	1,200		
5060 Staff Development	2,228	471	1,257.03	3,750	4,250	3,250	3,250	(2,250)	1,000		
5070 Sabbatical & Paid Leave			100.00		100	100	100	-	100		
Total 5030 Benefits	73,584	85,064	\$ 93,167.53	75,978	88,239	93,708	96,883	4,917	\$ 101,800		
Total 5000 Staff	379,198	462,754	\$ 481,169.40	363,915	493,684	503,842	516,314	1,444	\$ 517,758	7	
5100 General & Administration											
5110 Administration								-			
5120 Bank Expense	7,280	8,396	8,530.37	6,000	7,000	7,000	7,000	(250)	6,750		3,000
5130 Contracted Services	18,702	25,403	28,655.71	60,396	22,000	18,000	18,000	4,500	22,500	8	6,000
5135 Accounting Services	4,000			4,000	0	0	0	-	0		
5140 Legal Services	7,771	2,500	2,500.00	7,750	2,500	2,500	2,500	(1,000)	1,500		
5145 Infrastructure		5,000			5,000	0	0	-	0		
5150 Liability Insurance	4,071	6,388	6,835.49	4,000	5,250	5,250	5,250	1,750	7,000		
5160 Payroll Service	5,229	5,624	7,518.60	4,500	5,500	5,500	5,500	2,000	7,500		
5170 Recruiting Expense				500	0	0	0	-	0		
5180 Rent	9,350	9,590	9,350.00	9,350	9,350	9,350	9,350	-	9,350		
5190 Misc. Expense	488	718	467.93	0	0	0	0	-	0		
Total 5110 Administration	56,890	63,618	\$ 63,858.10	96,496	56,600	47,600	47,600	7,000	\$ 54,600		\$ 9,000
5200 Office											
5220 Archives Office Expenses				0	0	0	0	-	0		
5220 Cleaning Services	264	220	300.00	265	265	299	299	1	300		
5230 Maint - Equip & Hardware	0	11	89.99	1,250	1,250	500	500	(400)	100		
5240 Postage	3,218	3,187	2,200.39	3,750	3,750	3,750	3,750	(150)	3,600		100
5250 Office Equipment	331	1,993	237.55	3,250	3,250	1,500	1,500	(500)	1,000		
5260 Office Supplies	1,376	1,703	1,539.57	2,500	2,500	1,600	1,600	400	2,000		500
5270 Printing & Copying	14,614	13,724	7,415.95	14,500	14,500	9,500	9,500	(4,150)	5,350		500
5280 Software & Updates	9,128	22,233	23,017.05	7,000	7,000	19,000	19,000	3,700	22,700		700
5290 Telephone	3,179	3,006	3,833.26	4,500	4,500	3,700	3,700	300	4,000		200
5295 Misc. Office	142	132	112.20	0	0	0	0	-	0		
Total 5200 Office	32,252	46,209	\$ 38,745.96	37,015	37,015	39,849	39,849	(799)	\$ 39,050		\$ 2,000
Total 5100 General & Administration	89,142	109,827	\$ 102,604.06	133,511	93,615	87,449	87,449	6,201	\$ 93,650		\$ 11,000
5300 Travel & Conferences											
5310 Travel - Committee	7,217	1,279	1,536.36	3,000	3,000	1,400	1,400	100	1,500		
5320 Travel - Clerk	3,552	3,028	4,990.75	5,000	4,500	2,500	2,500	500	3,000		
5330 Travel - Programs	1,460	5,793	3,853.02	4,600	3,700	3,100	4,100	(300)	3,800		
5335 Travel - Representatives Travel	4,746		8,299.70	5,000	6,700	2,000	2,000	400	2,400		
5350 Travel - Staff	15,032	7,377	12,455.81	18,000	17,000	12,900	11,900	-	11,900		2,000
5360 Travel - Ministries				400	400	400	400	-	400		
Total 5300 Travel & Conferences	32,007	30,899	\$ 31,135.64	36,000	35,300	22,300	22,300	700	\$ 23,000	9	\$ 2,000
6000 Programs											
6110 Sessions Room & Board	173,649	126,566	127,106.70	170,000	192,950	169,442	135,570	35,930	171,500	2	171,500
6112 Retreats - Room & Board								-	0		
6114 Room Rental	17,625	8,632	13,988.00	20,000	13,550	10,000	10,000	1,700	11,700		
6150 Food Expense	15,130	13,161	9,413.65	18,000	15,930	10,000	10,000	(550)	9,450		
Total 6112 Retreats - Room & Board	32,754	21,793	\$ 23,401.65	38,000	29,480	20,000	20,000	1,150	\$ 21,150		\$ 0
6125 Program Expenses											

6105 Honoraria - Speakers/Wkshp Ldrs	15,814	15,672	16,796.92	16,500	22,000	24,000	21,000	(500)	20,500		15,000
6107 Honoraria - Volunteer Leadership		11,250	11,250.00		15,000	15,000	15,000	(6,000)	9,000	10	
6115 Equipment Rental	5,412	6,637	7,708.79	6,000	6,000	6,500	6,500	(2,500)	4,000		4,000
6121 Supplies and Other Expenses	5,078	4,967	8,068.30	9,300	7,300	9,000	5,000	400	5,400		3,000
6165 Pre-Sessions Expense	1,406	1,525	1,409.44	1,000	1,000	1,500	1,500	-	1,500		1,500
Total 6125 Program Expenses	27,710	40,051	\$ 45,233.45	32,800	51,300	56,000	49,000	(8,600)	\$ 40,400		\$ 23,500
6130 Committee Expenses - General	5,838	1,632	2,100.00	11,700	6,350	6,350	4,400	(2,650)	1,750		
6134 Childcare	788	297		2,000	2,000	2,000	2,000	(1,600)	400		
6137 Committee Day Expenses				500	0	0	0	-	0		
Total 6130 Committee Expenses - General	6,626	1,929	2,100.00	14,200	8,350	8,350	6,400	(4,250)	\$ 2,150	11	
6160 Program Support								-			
6163 Friends Camp	2,309	2,880	3,240.00	2,220	2,220	2,220	2,880	(2,880)	0	12	
6167 Religious Education & Outreach	300			1,800	0	0	0	-	0		
Total 6160 Program Support	2,609	2,880	\$ 3,240.00	4,020	2,220	2,220	2,880	(2,880)	\$ 0		
Total 6000 Programs	243,348	193,220	\$ 201,081.80	259,020	284,300	256,012	213,850	21,350	\$ 235,200		\$ 195,000
6140 Books & Other Sales Expense				0	0	0		-			
6142 Books	10,068	2,697	3,568.64	14,500	14,500	8,000	8,000	(4,400)	3,600		3,600
6145 Other Items for Sale	1,650	1,126		0	0	0	0	-	0		0
6147 Consignment Sales	5,730	6,220	3,175.11	0	0	0	0	3,400	3,400		3,400
Total 6140 Books & Other Sales Expense	17,447	10,043	\$ 6,743.75	14,500	14,500	8,000	8,000	(1,000)	\$ 7,000	5	\$ 7,000
6200 Support of Other Organizations								-			
6310 FGC	13,075	13,075	0	13,075	13,075	0	0	-	0		
6320 FUM	11,357	10,925	0	13,075	13,075	0	0	-	0		
6325 FWCC	13,075	13,075	0	13,075	13,075	0	0	-	0		
Total 6310-6325 "Umbrella orgs" FGC+FUM+FWCC				39,225	39,225	0		-			
6328 Ramallah Friends School	100	100		100	100	0	0	-	0		
6335 AFSC	300	300		300	300	0	0	-	0		
6340 FCNL	750	750		750	750	0	0	-	0		
6345 QEW	300	300		300	300	0	0	-	0		
6350 Friends Peace Teams	100	100		100	100	0	0	-	0		
6355 FWCC 3rd World Travel	500	500		500	500	0	0	-	0		
6360 QUNO	200	200		200	200	0	0	-	0		
6362 Quaker Voluntary Service	100	100		100	100	0	0	-	0		
Total 6330 Friends' Organizations	2,350	2,350	0	2,350	2,350	0	0	-	\$ 0		
6575 Other Organizations											
6590 Ecumenical Organizations											
6592 State Councils of Churches	3,214	2,982		4,000	4,000	0	0	-	0		
6594 Natl Council of Churches	150	150		150	150	0	0	-	0		
6596 NE Ecumenical Network	150	150		150	150	0	0	-	0		
6598 World Council of Churches	100	100		100	100	0	0	-	0		
Total 6590 Ecumenical Organizations	3,614	3,382	0	4,400	4,400	0	0	-	\$ 0		
Total 6200-6590 Support of Other Organizations	43,471	42,807	0	45,975	45,975	0	0	-	\$ 0		
6600 Publications											
6610 Yearly Meeting Minute Book				1,000	0	0		-	0		
6620 New England Friend (Sessions Issue)	3,522			3,000	0	0		-	0		
Total 6600 Publications	3,522		0	4,000	0	0		-			
Total Expenses	808,137	849,549	822,735	856,921	967,374	877,603	847,913	28,695	\$ 876,608		\$ 215,000
Net Operating Income	13,868	(63,028)	(62,198)	-8,421	251	1,872	-1,018	(6,105)	(7,123)		30,500
Other Income											
9940 Other Income - Transfers from other funds	32,072.22	36,639	5,000								
Total Other Income	32,072.22	36,639	5,000								
Other Expenses											
9950 Other Expense - Transfer to other funds		8,789									
Total Other Expenses		8,789									
Net Other Income	32,072.22	27,850	5,000								
Net Income	45,940.46	(35,178)	(57,198)								

Notes:

- 4010 Individual Contributions** estimated goal based on development consultant work: 5% growth FY25-FY26.
Growth rate FY22-FY24 has been 9.4% per year. FY15-FY19 was 13.7%; within that, FY16-19 was 17.6%. FY15-FY24 was 5.6%, and FY2008-FY2024 was 6.5%
- Sessions** is largely unknown. We expected Sessions Visioning Day to provide a single option for the May PB meeting, but did not arrive at unity. So shape of the program is still unknown.
A new column to the right of the FY2026 Budget column breaks out "placeholder" Sessions numbers for easier analysis; the main FY2026 column still includes the Sessions numbers.
Fee waiver line: New line meant to represent lost income due to fee waivers for volunteers at Sessions. Not yet in use. Various ways to assign a value: As if they paid the Traditional Fee? The Low-Income Fee?
Total direct Sessions expenses divided by all attendees? Or, total direct Sessions expenses plus staff cost of arranging Sessions, divided by all attendees? In 2024, there were 62 Sessions attendees in volunteer roles who received fee waivers. The total direct Sessions expenses divided by all attendees would be \$10 lower than the Low-Income Fee for Adult Full-Time in Dorm.
Discussion: In 2014-2019, the Sessions budget (Sessions fees, book sales, & pay-as-led/Equalization donations, less direct expenses not including staff time) had an average surplus of \$31,700 each year.
The model was that Sessions paid for part of the staff time needed to organize it, while unrestricted contributions covered the rest.
This FY26 Sessions budget model is still entirely hypothetical, but plans for a surplus of Sessions fees in line with pre-pandemic years.
- 4020 Meeting contributions** for FY25 are projected at about \$348,890 (albeit including about \$5500 in one-time lawsuit contributions): shown in Salesforce Meeting Contribution Campaigns Summary FY25 report,
This FY26 Sessions budget is based on about a 5% increase from FY25 not counting lawsuit contributions.
Assumes meetings either: give a single annual donation at the same level as they did in FY24, maintain their quarterly contributions at their most recent level, or complete the amount they have promised for FY25.
- 4050 Interest Income** based on bank account interest Q4 CY24 (\$769 in Santander money market account) + Endowment interest Q4 CY24 (\$621, plus \$38 Q-E interest)
- Bookstore could be removed from Sessions program for 2026, if desired to simplify planning, but was retained here because it adds about \$800 of profit based on 2024
- 4080 Retreat Program Fee** income increased - based on successful surpluses for Living Faith & Discernment Discovery Day.
- Staff salary/wage** increase by cost-of-living-adjustment (COLA) of 3%, roughly average CPI for Boston metro area 2024. Some mutually-agreed on reductions in wages or COLAs kept the increase lower than previous years.
Recent previous COLAs have been: FY25 2.0%, FY24 6.1%, FY23 6.3%, FY22 0.5%, FY21 2.22%.
- 5130 Contracted Services:** FY24 had \$5000 of unplanned one-time expenses in this category. Planned FY26 uses: Archivist \$4500, Communications/social media: \$2500; Sessions (graphic design, some database & website) \$6000, general website & database \$9500.
- 5300 Travel:** Suggest a cap on travel expenses. Note that **2026 is a Triennial** year for FUM, usually meaning higher Representative Travel usage. YM can reduce number of official reps we appoint and fund.
- 6107 Honoraria for Volunteer Leadership** reduced following the minutes on its administration and laying down: continue offering payments until terms of current appointees end at EOY FY26.
- This budget draft reduces **6130 Committee Expenses**
- 6163 Friends Camp:** This line has recently reimbursed Camp's annual accreditation expense.
- Unallocated Income:** Propose an administrative fee of 0.6% on our investments in the Pooled Funds. An admin fee is common for nonprofits with investments.

Two paths...

**traditional
nonprofit**



**covenant
relationship**

Gathered in the Living Stream:

Nourishing the Quaker Movement in New England

- Deepen relationships among Friends as part of a network of covenant communities—as a People of God
- Nurture a shared understanding of the vision and ministries to which God calls us as a Yearly Meeting
- Nourish local meetings and Friends through inviting broader participation in, and support of these ministries
- Increase annual fund giving by ~5% year, growing toward greater resilience to keep pace with rising costs and disruptions

Plans Going Forward

- Strengthen and continue current annual fund efforts
- Gather a group of Friends to work with Michael and Noah to visit meetings and invite conversations, contributions, and shared stewardship of our mission and ministries on behalf of Friends*
- Continue seasoning mission-focused fund concepts and planned/estate/legacy opportunities*

What will this take?

- In person training and preparation, with visits to begin before the end of FY 2025
- Completion of materials and media that compellingly illustrate and articulate the shared ministries of our Yearly Meeting
- An increase in staff capacity to coordinate and administer development activities and release energy for the Yearly Meeting Secretary to focus on visiting and relationships

What will this cost?

Setting aside the following funds for the next three years, to ensure our capacity to follow through on these plans

- Expanding Events Coordinator position from half-time to full-time: ~\$140,000 over 3 years
- Continuing the relationship with the Development Consultant: ~\$50,000 over 3 years*
- Associated costs for travel, communications, misc: ~\$25,000 over three years

Total: \$215,000*

Questions?



**Report from Rebecca Leuchak, Presiding Clerk of New England Yearly Meeting
to the Permanent Board of New England Yearly Meeting
May 10, 2025**

Friends, I have been praying for us these past months and in anticipation of our time together on Saturday. We are living in challenging times. So much around us has changed in a few short weeks. Paradoxically, while so much is happening and so fast for our country and for the world, yet now simultaneously so much is uncertain, transient, or in limbo. Friends across New England are deeply distressed, perhaps even overwhelmed, by the profound suffering and injustice that seem to grow with each passing day. While our deep longing for a better, kinder, loving, Spirit-filled world where all may thrive is so consuming, we may find little energy left to foster the necessary balancing of our event-fueled, reactive, and grieving selves with the more eternal trust and faith in the vision of Spirit's space and God's time.

In the midst of such confusion, where and how do we find ways to (re)establish that balance so that we have the stability of mind and heart to do the work that Spirit calls us to do? And how, if we do find clear grounding for our actions, do we do that with a true generosity of heart that the world is in such need of right now? Are we following the guidance of Friend Fox in these hard times, learning to walk cheerfully over the world, answering that of God in every person? Or are we succumbing to the culturally poisoned hunt for enemies – those we set up in opposition to ourselves – in the wider world and even within our own Friends communities?

I have seen much adversarial energy among us of late. This saddens me, yet I understand why this is so, given the stresses that we are all experiencing. I would urge us to resist the temptation to live in the pervasive culture of anger, blame, and vitriol that is so prevalent as a secular norm. What we need is to return to that which is essential and eternal, for in objectivizing and vilifying others we have strayed so very far from our testimonies. We need to restore the foundations of our Faith, to re-secure our spiritual base that is not focused on self-serving goals but is beyond self and fully obedient to the will of Spirit.

Let us be fully present and listening carefully, navigating tenderly with each other and with those we encounter in the wider world. Let us return to our source and affirm the eternal when all around us seems uncertain. May grace be our gift to offer. All of us gathered, in our own ways, are trying as best we know how to meet this moment. While there is much that tempts us to weariness, frustration and discouragement, we know that we have access to the Light. And that can help us to hold steady.

In our Quaker communities, our homes, and in our hearts may we find those streams of pure Spirit-led love and charity from which we can gain the strength to right so much that is wrong in our world. To remember that Friends have been and can be guided by Divine wisdom. So remind yourself and those around you that here we are together and, Friends, Spirit is with us! Through our service, our work together, we are moving towards God's active presence in the world. Let us grow the power of love, faith, mercy, hope. Let us together in our beloved community lift up the gifts of the Spirit. May we join the many others over more than three hundred years who have labored faithfully to build our beloved community. May we say "yes" to the Truth and Life that each of us is invited to embrace.

May we be the light in the darkness!

The thoughts above were written as much for me as they are to share with you. My main activities in the past several months have been several:

I continue to serve as clerk for the Coordinating and Advisory Committee, which has met several times since our last Permanent Board meeting. (See the Committee Report in the Advance Documents.) Currently I am planning for that committee's annual June retreat.

Our 365th NEYM Annual Sessions gathering with the theme "Streams in the Desert," is just three months away, this year moving to the University of Massachusetts, Amherst campus, and my work is accelerating in preparation.

In addition to working others in planning the scope and shape of this year's Sessions, I am holding some specific concerns which are evolving:

1. Preparing for Sessions, I am holding in my heart the full spectrum of Friends' experience and individuals' needs in these turbulent times. Our Sessions gathering will be an important time for sharing our reactions to current instabilities. But I also recognize that there must needs be a balance between the grieving and the affirmation of God's abiding love and care for the world and for all of us. Finding that balance together is not a static end goal, but rather a dynamic process of finding Spirit within us to sustain and encourage us to adapt to change and cultivate resilience. **My hope is that our time at Sessions will offer us the reminder that divine love can be experienced by each one of us and suffuses our assembled body and all of creation. That through love and the assurance of God's care and grace we will find strength.**
2. From the Sessions Visioning learnings and conversations with many individual Friends over the past several years, I have heard a yearning for deep spiritual communion and concerns about both the quality and quantity of corporate worship when we are together.

May I invite us to recognize the presence of Spirit across the whole of the Sessions programming? May I encourage us to attune our attention to Spirit in all that we do? May we arrive in Spirit, join in Sessions activities in Spirit, attend to business in Spirit, sing and dance and tell really bad jokes at Coffee House in Spirit, and partake of our meals in spiritual mindfulness. How marvelous when Spirit infuses all of our time together! That is something to be aware of and to cultivate actively! And an important practice to carry into the rest of our lives.

The quality question is a matter, I firmly feel, that we all hold responsibility for, and I call us all to greater self-discipline in the practice. May I suggest that the quality of what we do depends on the way that we arrive. I am not suggesting here that we plan in advance certain specific attitudes or actions to bring and enact. But offer that, in our time leading up to Sessions, we prepare for the discipline of listening to Spirit's leading. If we do that by carefully reading the advance documents, through our prayerful planning and packing, and in the journeying (in the sense of a holy pilgrimage) to arrive on campus, then when we are together the fertile soil allowing Spirit-led discernment to flourish will have been well established and may produce

amazing fruit. By coming together may we build ever richer soil for the discernment of right action. May we support each other in being patterns and examples in speaking truth to power. For doing God's work.

3. Corollary to the above is the concern I have heard from many Friends that agendas for the **meetings for worship for the purpose of business have felt too packed to allow for deep discernment. I am crafting those agendas this year in a more spacious way.** And while we are deeply grateful for all the work that our committees, working groups, and resource groups do, we will appreciate their reports in the advance documents for Sessions. Though I personally value the opportunity to hear in real time from those faithful Friends who do so much good work – to see them with us and hear their spoken words - there will be many fewer formal presentations of these groups from the stage this year.
4. **Reconsideration of the process for recording and approving minutes in our meetings for worship for the purpose of business is ongoing.** I am awaiting the approval of nominations for a recording clerk and a reading clerk, in order to work with the full clerks' table in discernment of a proposal for a way of doing this. One that lifts up the importance of the process as faithful to Spirit and also takes into consideration the realities of our gathering together and the capacity of those Friends whom we have asked to serve.
5. Over the past year, in the Yearly Meeting's evolving companionship and support of our quarterly meetings, we have rejoiced in these quarters' faithfulness of Spirit and example of new forms emerging and affirmations of new life in these challenging times. Salem Quarter's journey through a period of Sabbath and into a period now of creative vision for the future is one example of the overarching power of Spirit moving in our quarterly communities. There are many others. **I will be asking our quarters to share with us at Sessions some of their experience of living as a Friends community in Spirit. We have much to learn from each other!**
6. Once again this year we affirm the importance of community as have Friends for the 365 years that Quakers in New England have gathered for Annual Sessions. We also know that we are, as individuals and in our humanly constructed institutions, deeply flawed and mistake-prone beings. These are the conditions in which we may see our Sessions site, the campus of the University of Massachusetts, Amherst, as an example of the complex realities of the world we all navigate. The objection raised about the site for Sessions 2025, based upon concern over the University's decisions on how to deal with a protest on the campus last year, merits serious consideration. Yet the situation may provide the opportunity for us to lean into working with the University to learn from missteps in a compassionate way. I will refer you to an excerpt from the letter that Phil Veatch, rising presiding clerk, and I sent out earlier this week to all Friends in New England: **"Let us take care to guard against the adversarial, separating energy that is sowing such pain in our wider society, and not allow it to undermine our long tradition of laboring together across differences."**

I remind you that plenary speaker at Sessions this year will be Gretchen Baker Smith of Westport Meeting, well known and loved by many in our Yearly Meeting. Our Bible-half-hour presenter will be

Kirenia Criado Pérez of the Iglesia de los Amigos in Havana, Cuba. Our bridge of love “Puente de Amigos” is an ever stronger connection. And we will again have an intergenerational musical plenary with Kim Moberg (Tlingit) who through storytelling and music will present an Anishinaabe prophecy of relevance for our times.

I hope to see you all at Sessions this August!

Continuing in Our Witness Concerning Religious Freedom

As Noah Merrill, Secretary of New England Yearly Meeting, and I shared at the March Permanent Board meeting, our Yearly Meeting partnered with Friends in Philadelphia, New York, and Baltimore Yearly Meetings to file a lawsuit challenging new governmental policy changes which would allow immigration enforcement in houses of worship. Since then we have received many messages of support and requests for more information. Most recently the Friends Journal project “Quaker Speak” interviewed me about the matter. This action taken by our Yearly Meeting offers us all an opportunity for reflection on how we are doing God’s work in the world.

Ex-officio Support of Committees and Working Groups

I continue to attend and support committees and working groups of the Yearly Meeting, including the Noticing Patterns Working Group, Right Relationship Resource Group, the Legacy Gift Fund, the Finance Committee, Spiritual Life Listening Group, and the Accompaniment Group.

All of the above brings me back to the appreciation of you and all in our New England faith community. For your faithful service to our community at the monthly, quarterly, and yearly meeting levels. For our time spent together in our regular meetings of the Permanent Board, the many opportunities throughout the year for gathering, and in our Annual attendance at Sessions. The vision we share and the seeds of change that we are nurturing, whether in our witness for social justice in this country where so much at risk, for our planet where change is accelerating, for our reimagined Sessions gathering, and our ongoing work of right relationship and working through conflict, these are all opportunities for Spirit to shine.

This is indeed the fertile ground of the Spirit in which we grow.

**Coordinating and Advisory Report to the Permanent Board of New England Yearly Meeting of Friends
in preparation for the Permanent Board Meeting on May 10, 2025**

The Coordinating and Advisory Committee continues to meet on the first Tuesday of every month via Zoom. In addition, we gather for working retreats three times a year in fall, mid-winter and early summer. We will be holding our annual early summer retreat on June 3 to 5, 2025 and planning for that is in progress.

Current members of our committee are: Marian Dalton (NEYM treasurer), Susan Davies (clerk of the Permanent Board), Scott Drysdale (clerk of the Finance Committee), Sarah Gant (clerk of the Accompaniment Group), Rebecca Leuchak (clerk of the Coordinating and Advisory Committee and Yearly Meeting presiding clerk), Noah Merrill (Yearly Meeting Secretary), Jackie Stillwell (clerk of the Nominating Committee), Nia Thomas (Yearly Meeting Program Director), and Carl Williams (clerk of Ministry and Counsel). Both the rising presiding clerk of the Yearly Meeting, Phil Veatch, and the rising clerk of the Nominating Committee, Sadie Forsythe, have joined the Committee.

These committee members represent the breadth and width of our region and the monthly and quarterly meetings of our Yearly Meeting, and each of us holds aspects of the Yearly Meeting's activities as our specific area of service and attention. This diversity: regional, monthly meeting, and service role, affords us an aggregate and rich perspective on how Spirit is living among Friends in New England. And this range of perspective is engaged actively as we strive to fulfill the purpose of our committee to shepherd the work of the Yearly Meeting in alignment with the core purpose and the priorities articulated by the Yearly Meeting, and to advise and coordinate the various committees, quarterly meeting leadership, staff, and other initiatives within the Yearly Meeting.

We continue to support and coordinate the initiatives of the Yearly Meeting and the work of our many committees, working groups, and resource groups. The revisioning process for our Annual gathering and the planning for this summer's gathering in August, supporting the evolving structures and work of our Yearly Meeting's Ministry and Counsel, the progress in planning for Yearly Meeting development efforts, the convening and encouragement of quarterly meetings in periodic gatherings, the ongoing work of oversight of our Yearly Meeting finances and the building of a sound annual budget, our youth programs, support of the health and prospering of our monthly meetings, care for the process of nominations to Yearly Meeting service and concern for the adequate populating of the Nominating Committee in order for it to do its work. We are collaborating with and in the process of reviewing the purposes, procedures and charge of the Right Relationship Resource Group, Earth Care Witness, Puente de Amigos Committee, and the Noticing Patterns of Oppression and Faithfulness Working Group. What follows are a few brief updates on some of this work:

Yearly Meeting Support of Quarterly Meetings

C&A has supported the efforts of the Permanent Board Clerk, Susan Davies, and others to foster connection and community among the quarterly meeting leadership and the committee is encouraged by plans for a visioning process which Salem Quarter is initiating. Recent gatherings of clerks of quarters have been well attended and well received.

Sessions Visioning 2026 and Beyond

Following up on the Visioning Day members of C&A met to reflect on the day of helpful sharing, listening, and learning that came out of this highly consultative process. All agreed that this project in visioning achieved its

purpose of engagement, inclusion of different perspectives on possible plans to develop, and mutually beneficial dialogue.

The summary of what was learned, as well as a proposal for a plan for Sessions 2026 will be brought to Sessions this August. Committee members noted that historically Sessions was the only time of year Friends from across the Yearly Meeting got together. But that is no longer the case. We have now a rich menu of gatherings on offer throughout the calendar year and in locations across the Yearly Meeting. But we haven't quite internalized this shift and fully lived into the power of gathering to build and strengthen community. How can we help raise up the fullness of our now established Annual Cycle of Yearly Meeting Gatherings and Worship Opportunities? In addition, how do we factor in the potential and importance of Friends' reconnection through their Quarterly Meetings?

Support of Budget 2026 Planning and Evolving Development Initiatives

C&A is holding the Finance Committee and the clerk in care as they prepare to bring a proposed 2026 budget forward to Sessions. The task is notably challenging as we are in the process of revisioning Sessions which, as a major part of the budget, entails considerable financial implications. Concerns for the Yearly Meeting's financial health encourage creative thinking and C&A lends support to the work developing a fund-raising initiative that will be productive towards ensuring fiscal health.

Purposes, Procedures, and Charge Review Process

C&A supports a periodic cycle of reviewing the purposes, procedures and charge of the entities that do our work within the Yearly Meeting. Currently the Right Relationship Resource Group, Earth Care Witness, Puente de Amigos Committee, and the Noticing Patterns of Oppression and Faithfulness Working Group are in stages of collaborative review. We are blessed in our Yearly Meeting by the talents and energy of many Friends who serve on our committees, resource groups, and working groups.

Transition of Servant Leadership

C&A is caring for the transition of Friends serving in the roles of Yearly Meeting presiding clerk, clerk of Yearly Meeting Nominating Committee, and clerk of Ministry and Counsel so that responsibilities, knowledge transfer, and smooth onboarding is achieved. It is the practice of the Committee to have rising clerks shadow the current clerk and to invite them to join the Committee for one year prior to taking up their new role. The request for approval of a new clerk of Nominating Committee clerk will be presented to the Permanent Board on Saturday.

You will learn more about all of the above as topics of presentation/update/discernment during our time together on Saturday. We have in our Yearly Meeting, as in any complex organism, simultaneous, multifarious, ongoing areas of activity. Spirit is alive and synergistic in it all. Energy is moving in many directions. We are blessed by Spirit with the ongoing fullness of our challenges and the strength of the call to be faithful. The members of the Coordinating and Advisory Committee are keenly aware that in these unpredictable times, our moment so filled with uncertainty and change, it is important to hold to our center, to listen deeply to what Spirit is revealing to us.

Our purpose is to bring forth in our community the most propitious avenues for the Divine to work in and through us to bring about a better world.

Rebecca Leuchak (Providence (RI) Friends Meeting)
Clerk, Coordinating and Advisory Committee

**Proposed Nominating Committee Clerk
(First Reading)
from Rebecca Leuchak, Presiding Clerk and Susan Davies, Clerk of Permanent Board
for discernment at the May 10, 2025 meeting of the Permanent Board**

At the September 2024 Permanent Board meeting a revised Purposes, Procedures and Composition for the Nominating Committee was approved. One of the revisions is that the Presiding Clerk and the Permanent Board Clerk are responsible for nominating the clerk of the Nominating Committee. The Permanent Board has final approval of the nomination.

This message announces the good news concerning the nomination of a new clerk for the Nominating Committee that we are bringing for approval to the May 10 Permanent Board meeting. We are putting forward Friend Sadie Forsythe, a member of Putney Friends Meeting and attender at Mt. Tobey Meeting. Her term serving as clerk would be until 2028.

The process for approving nominations 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 Presiding Clerk at clerk@neym.org

The following is a **First Reading**. It will come to the Permanent Board meeting on 10 May for Second Reading and hopefully approval. Please send any concerns (or affirmations) as soon as possible to Presiding Clerk, clerk@neym.org. 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 Permanent Board meeting on May 10, or withdrawn from the nomination. Depending on the situation, there may be a brief mention of the concerns and response.

Proposed Nominating Committee Clerk – Sadie Forsythe, Putney (attending Mt Toby), 2028

Sadie has many years of experience as a Friend in New England as well as in other yearly meetings. She has served in multiple Friends organizations both professionally and as a committee volunteer. She clerked the American Friends Service Committee's Nominating Committee while serving on their Board and Executive Committee. Sadie has deep listening skills, is spiritually grounded, organized, and frequently called on to serve as an elder. She is not shy about embracing difficult situations. Professionally she works as a psychotherapist. Sadie looks forward to supporting Friends in NEYM as we all discern how we are called to show up in this challenging moment in human history.

Description of Service for this position and the hoped for gifts and skills for the Friend serving in this role:

Nominating Committee Clerk:

Description of service:

- *The Nominating Clerk facilitates the delegation of the work, creating or dissolving sub-groups, and appoints Nominating Committee members to convene and/or clerk sub-groups. In doing so, the Clerk and Committee will pay attention to continuity of good process, practice, and institutional memory; care for relationships with nominees; and the specific gifts and experiences needed for the work a sub-group might be charged to undertake.*
- *The Nominating Clerk clerks meetings of the full Nominating Committee, occurring seasonally or as needed, as well as Nominating coordination meetings (with the conveners or clerks of the nominating sub-groups, as well as the Program Director or other YM staff) occurring about every six weeks or as needed.*
- *The Nominating Clerk serves ex-officio as a member of Coordinating and Advisory Committee*

Gifts and skills hoped for in the Friend serving in this role:

- *Thoughtful listener and identifier of gifts and leadings*
- *Spiritually well-grounded presence*
- *Systems thinker and detail oriented*
- *Organized with clear boundaries*
- *Present with difficult situations; embraces conflict with openness*
- *See complete Nominating Committee PP&C [here](#).*

NEYM Nominating Committee Report to Permanent Board

5 May 2025

The Nominating Committee will bring most names to sessions in August 2025. However, there are two openings for the Clerk's Table that need to be filled as soon as possible. Two Friends are currently discerning if they are led to serve. The potential Recording Clerk would begin immediately. The potential Reading Clerk would not be able to begin until September 2025 after sessions. We hope to bring the names of these Friends forward on Saturday, 10 May. We are also seeking an interim Reading Clerk for this year only. Although we would like to share these names in this report, discernment takes time, and we strive to be faithful always.

Following is a name sent by the Nurturing Friends Education Committee for consideration by Permanent Board. This Friend feels called to serve as a Moses Brown trustee.

Nurturing Friends Education – One of the responsibilities of the Nurturing Friends Education Committee is to forward names for potential trustees to Permanent Board for affirmation. Those names then go to the Moses Brown Board Nominating Committee for consideration, and if chosen, to the whole Moses Brown Board for final approval. The full description is [here](#).

Gifts and Skills hoped for in the Friend serving in this role:

Relevant governance experience, experience with education, connection with Quaker schools, strong Quaker background and active Quaker involvement. Believer in education who brings an orientation toward philanthropy and/or skills in budget oversight; an ability to be an ambassador for Friends education; a cooperative spirit; a deep understanding of Friends business process; a willingness to learn and grow; an ability to offer perspective and counsel on governance matters.

Bill Monroe retired after a 31-year career as a librarian at Brown University Library, following prior positions at Temple, Columbia, and New York Universities, culminating over forty years in academic librarianship. Holding an MA in Library and Information Science from Drexel and a PhD in Medieval History from Columbia University, his scholarly expertise extends to the Program in Medieval Studies and the History Department at Brown. Bill maintains an affiliation with Brown, particularly through the Office of the Chaplain, supporting Quaker and Quaker-interested individuals. A strong advocate for lifelong learning and liberal arts education, he previously served a three-year term on the Council of the Medieval Academy of America. A long-time member of Providence Friends Meeting, he is also the parent of two MB alumni and the partner of current NEYM Presiding Clerk.

Thank you for your prayers and support. Please let us know if you or someone you know might like to be serving the yearly meeting in some new way.

Faithfully,
Jacqueline Stillwell
Clerk, NEYM Nominating Committee
(603)933-2608 or nomclerk@neym.org

Nominating Committee members: Sara Smith (Concord), Beth Hansen (Westerly), Chris Gant (Beacon Hill), Tim Lamm (Worcester), Martha Schwopo (Wellesley), Leslie Manning (Durham)

Subject: Sessions Visioning Report

May 2, 2025

Dear Friends,

In early 2024 when the Sessions Visioning Working Group began meeting, the hope was to design a process for re-envisioning New England Yearly Meeting's Annual Sessions in a way that would not simply help address practical challenges faced by the Yearly Meeting. A broader hope was to engage and connect many Friends across our region, including those not currently active in Annual Sessions. We aimed to foster meaningful dialogue that would bring clarity about possible short-term experimental changes to Sessions. But more than this, we also hoped to dream together and to build up our shared sense of how we are led to nurture our relationships with one another and with Spirit. As the plan for this process described, *"The goal is not to use market research to "fix" the current model to please more potential attenders, but rather to step into broader imagining and discernment about how Annual Sessions relates to the wider work of the Yearly Meeting now."*

Today, I write to thank so many of you for being a part of this process, as we have indeed been blessed to see these hopes come to fruition. Accompanying this letter you will find the Sessions Visioning report, which is also available at neym.org/sessions-visioning. If you are the point person for a Listening Group, please share this with Friends who participated.

As you read the report, you may find it helpful to recall another initial intention of this process when it was approved at Sessions last summer, *"Although unlikely to end up with Friends all agreeing on every aspect of Sessions, we are hoping that we will grow towards unity so that incremental decisions can be made. Key metaphor: We're not trying to create "MapQuest" step-by-step directions to a specific location, we're trying to increase the number of Friends who are looking at the same map and navigating towards the same general direction."*

At the [Permanent Board meeting on May 10](#), there will be time to reflect on this process and the learning that has happened. In addition, next steps for those charged by the Yearly Meeting with planning Sessions 2026, informed by this process, will be discussed in more detail. All interested Friends are welcome to

attend that meeting which will be held at Framingham (MA) Meeting and on Zoom. Further updates and reflections will additionally be part of the meeting for business agenda at Sessions this August 1-6th, at the University of Massachusetts Amherst as well as via Zoom. I do hope many of you are able to be with us then.

And finally, because this process has joyfully affirmed the energy among Friends for conversation about the life of our local meetings, our shared purposes and Friends, and how the activities around the Yearly Meeting can best foster thriving within Quaker meetings, I hope many of you might consider attending our annual [Meeting for Listening](#) held on Saturday, June 21st.

Again, thank you for bringing your presence, honesty, curiosity, creativity, and prayers into this wide-ranging and ambitious process.

With gratitude and hope for the journey ahead,

NiaDwynwen Thomas, Program Director (Nia@neym.org)

Report on Sessions Visioning

May 2025

Submitted by Nia Thomas, Program Director (nia@neym.org)

Background

As Quakers from across New England gathered for our Annual Sessions last August (2024), Friends approved embarking on a year-long consultation and discernment process to re-envision our Annual Sessions, the largest and longest gathering for Friends in our region. Through informed dialogue, reflection, and worshipful discernment we hope to re-align, revitalize, and “right size” Sessions to reflect current needs and resources. We don’t approach this merely as an opportunity to improve an event. Instead, this is a conversation about how our Yearly Meeting’s practice of corporate discernment, our relationships with other Quakers, and use of limited resources can most meaningfully contribute to the spiritual thriving of Friends across New England.

The report below is a summary of the dialogue, distillation, and discernment that has taken place among Friends in recent months.

About the role of Listening Group notes

Discernment requires that we invite God into the place where we are now—including our current perceptions, our honest feelings, our truest intentions, and our best thinking. Taking the time to engage with each other in dialogue and gather rich information allows us to offer all of this up in discernment. In this way, dialogue and informational analysis are not replacements for corporate discernment but powerful aids to it.

It is for this reason that in early 2024 the Sessions Visioning Working Group designed a discernment process that involved ample dialogue among Friends and why qualitative analysis methods were used in developing the brief visual summary of takeaways from the Listening Group notes, which you will find below.

Listening Group notes and summary

Over the course of the winter, Friends were invited to gather in Listening Groups (such as with their local meeting or quarter) to reflect on background information related to Sessions and to explore reflection prompts and alternative models.

Following these conversations, point people from each Listening Group submitted notes and general information about who participated in their conversation. The NEYM Office Manager compiled the notes, assigning a reference number to each paragraph or bullet point.

A “Data Analysis Team” comprised of three Friends with qualitative data analysis experience (Merrill Kohlhofer of North Shore, Liesa Stamm of Hartford, and Nia Thomas of Northampton) independently coded the data for themes and illustrative quotes. From there, the visual summary found at the end of this document was created.

Interested in a deeper understanding of the conversations held across our region? The compilation of all notes received from Listening Groups, listed in the order in which they were received, is available at neym.org/sessions-visioning. Please note, the summary only includes notes received by April 1st, although notes received after that date are included in the compilation document.

About Visioning and Distillation Day

On April 12, 2025, fifty-two Friends came together from the eight quarters of the Yearly Meeting, gathering at Wellesley Meeting for a Visioning and Distillation Day (also referred to as “Visioning Day” for short). Not all listening groups were able to send someone to attend and a couple of registrants were kept away due to an unexpected snow storm. Still, for most listening groups there was someone who was able to be part of the gathering.

Discernment, sharing, exploration, and reflection took many forms during the day. Friends engaged in structured activities and shared with one another during small group conversation reflecting on takeaways from the listening group conversations, possible models for Sessions, and related “big picture” questions these topics invite. Periods of the day in the morning and afternoon were spent in full group worship sharing. The following is a summary of that reflection.

Summary of worshipful reflections from Visioning Day

Morning Reflection

The foundation of New England Yearly Meeting is strengthened by attending deeply to the relationships between local and quarterly meetings. Strengthening these interconnections can better prepare us for our shared work at Sessions.

One tension explored was the tension in broadly participatory and extended discernment processes. How do we pay attention to the resonance of God's call to us, even if it is found in a "minority opinion"?

One significant tension we observed among Friends is the perceived divide between the business, social, and worship aspects of Sessions. Yet all are essential, and a healthy balance nourishes our life together. Out of shared worship and fellowship emerge the grounded choices and Spirit-led actions of our business.

Another core tension is the limitation of time. If we aim to make Sessions more accessible by shortening the length, do we risk losing the depth of discernment that requires spaciousness—to settle, listen, wrestle, and come to unity? The quality of our corporate discernment is often closely tied to the time we give it. However, this time need not be confined solely to Sessions themselves. Deeper preparation — through committee work, advance reporting, personal reflection, and discernment within monthly and quarterly meetings—can allow us to arrive more ready, in a spirit of disciplined, gathered centering.

This leads us to ask: what truly needs to happen during Yearly Meeting Sessions? Might we reimagine the structure, timing, and components of Sessions so that we honor all necessary functions while also allowing for more intentional and sacred space?

Underlying all these questions is a deeper inquiry: What does it mean to be a Yearly Meeting? The purpose of coming together is not merely to enjoy familiar company or complete business, but to gather in the presence of the Divine—to be broken open by God, shaped together as a people of God.

A powerful image emerged repeatedly: New England Friends on a pilgrimage. The journey we are on as we come to Sessions is collective. It is a time-honored path which involves deep spiritual preparation prior to arrival into the gathered community. We must hold close to this pilgrimage vision. As one Friend asked: Do we come together as “just people” (individuals)—or as *a people* of God, called together? It is through shared pilgrimage that Friends find our way into discipleship.

As we reflected on the time we spend together at Sessions and in other Yearly Meeting activities, several voices emphasized the need for smaller gatherings, smaller group opportunities, and relationship-building spaces to help cultivate intimacy and trust. These interpersonal connections are difficult to build in large Meetings for Business but are essential for meaningful corporate discernment. Smaller group interactions help us deepen understanding and shared purpose.

Amid all these reflections, one unifying theme was the essential importance of gathering as a body. Drawing on Barclay, one Friend offered the image of many candles gathered together—their shared light far greater than that of a single flame. This shared experience of being part of something greater than ourselves allows us to carry that gathered light back into our monthly meetings and daily lives.

A vision was shared of all ages woven together as one body—not with younger Friends sidelined so older Friends can do “the work,” but each person seen as whole, vital, and beloved. Our work must reflect that vision of unity and interdependence.

Our life together as Friends in NEYM is not about simply completing business. It is about uniting as the people of God, seeking together what it means to live into our shared faith, and being corporately and individually open to the leadings of the Spirit.

Afternoon Reflection

We were given the image of Sessions as a trustworthy ship. It has carried Friends forward for years. While we’ve experienced favorable conditions and financial sustainability in the past, we now have hit doldrums. What adjustments do we make?

Sessions is a vessel we are committed to making use of, but we recognize that designing its best form given current challenges will likely require flexibility, curiosity, and willingness to experiment and learn as we go. It will also require faith that all we do is held by Spirit. There is a hope for this experimental approach to not only be applied to the form of Sessions but also to other activities of the Yearly Meeting. Sessions is part of a bigger whole.

For some, a primary aim of experimenting with the shape of Sessions is to increase participation. What changes will eliminate the barriers we can and to welcome more Friends into the spiritual richness available?

A meaningful aspect of the richness we find as we gather as a Yearly Meeting is the spiritual intimacy we find when we are able to see and love each other deeply. How much time does this take? In addition to time, our ability to relate in this way may depend on other factors like who we are, what we contribute, and how we prepare.

Some Friends are ready to experimentally try a shortened Sessions schedule over a long weekend in 2026. While there was sadness at the prospect of truncating the duration of Sessions, Friends named a hope that experimenting with this model could increase attendance and accessibility as well as save money for both individuals and the Yearly Meeting. Many hope this option could be considered within dynamic conjunction with midyear gatherings and year-round opportunities for discernment.

For other Friends, shortening Sessions does not feel like the right path. Some hold a strong conviction that keeping a longer Sessions uniquely and essentially fulfills our need for deep, patient discernment and worship. Would it be better to keep the length but to “strip down” other resource-intensive aspects such as by limiting the housing provided by the Yearly Meeting? Have we made assumptions that have closed us off to this possibility? As the time we had set aside to be together elapsed on Visioning Day, we did not find sense of the meeting. We welcomed God to be with us in what felt like a messy place.

While holding these questions about the form of Sessions, we observed that Annual Sessions is already inadequate to fully complete both the business before the Yearly

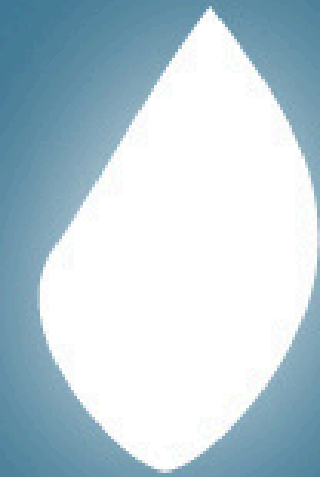
Meeting as well as to cultivate the depth of relationship we are called to as fellow pilgrims on a shared path. It is clear that any successful reimagined Sessions plan must concurrently depend on robust year-round gatherings and the activation, inclusion, and investment of a broad body of Friends throughout the whole year. Some important, valued activities or aspects we have come to expect at Sessions may be fulfilled in other ways. There are many creative ideas among Friends about how we could continue to grow in this direction.

In discerning a revised Sessions form, it is critical that Sessions planners attend to how our time together can help us live into our deepest purposes. At Visioning Day, Friends named several vital aims: fostering spiritual intimacy; engaging in deep corporate discernment; cultivating loving fellowship; and experiencing the presence and guidance of God together, being open to transformation through ongoing revelation. Friends also lifted up the importance of enrichment, education, and meaningful connection for children and young Friends—indeed, for Friends of all ages and experiences. We seek to witness one another's light, to discern and strengthen ministries and callings, and to practice sustainable stewardship of our resources—financial, human, spiritual, and environmental. Underpinning all of this is a shared commitment to the inclusion of diverse Friends, honoring the range of needs and resources present in our community.

A brief visual summary

Sessions Visioning 2025: Takeaways from Listening Group Notes

Complete notes available at neym.org/sessions-visioning





Listening Groups

Amesbury	Junior Yearly Meeting	Providence
Beacon Hill	Junior High	Putney
Bennington	Lawrence with Evangelical Friends	Sandwich Monthly Meeting
Burlington	Monadnock	Storrs
Discernment Day Participants	Mount Toby	Vassalboro Quarter
Dover Quarter	North Shore	Wellesley
Falmouth Quarter	Northampton (#1)	Westerly
Framingham	Northampton (#2)	Westport
Fresh Pond with Three Rivers	Northwest Quarter	Winthrop Center
Cambridge	Parents (#1)	Worcester
Hanover	Parents (#2)	Young adult Friends Midwinter
Hartford	Portland	Young Friends

How many Listening Groups were there?

36 groups total*

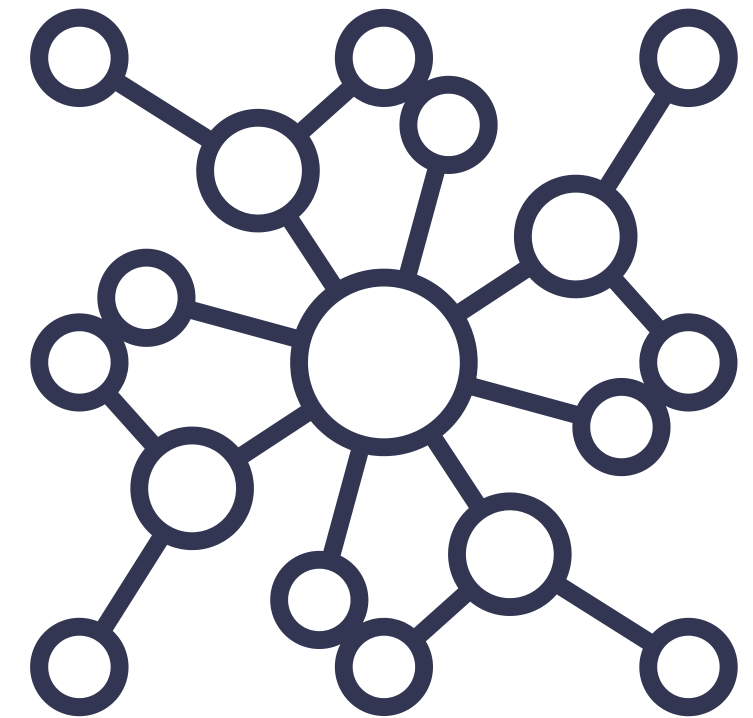
- There were groups in all 8 quarters
- Most groups were local meetings
- Some groups were quarters or pairs of local meetings
- Some groups were life-stage based: Elementary age youth (JYM), middle school age youth (JHYM), high school age youth (Young Friends), young adults (ages 18-35), and Friends currently parenting children and teens
- * this total reflects all groups that submitted notes by the April 1st deadline



How many Friends participated?

449 Friends*

- Group size varied from 4 (not including facilitator and notetaker) to 27.
- The average group size was 12.5
- All groups included people who had attended Sessions in the last three years
- Between 25-33%** of groups included people who have never attended Sessions
- 87% percent of groups included people who have participated in or volunteered for youth programs at Sessions
- At least 87% of groups included people who have attended FGC or other Yearly Meetings



*Each Listening Group point person was asked to share their best estimate of the number of participants and this number reflects the total of these estimates. Some estimates include facilitators, elders, notetakers, and invited “conversation partners” and some do not. A small number of Friends participated in more than one group.

**Demographic data was reported by each group’s point person. Some questions allowed the responses “yes”, “no”, or “don’t know”. Percent ranges are provided where some responses included “don’t know” answers.

What ages were Listening Group participants?

**14-19%* of groups
included youth
(up to age 18)**

**42-46%* of
groups included
younger adults
(ages 19-39)**

**92% of groups
included adults
ages 40-65**

97% of groups
included Friends
over the age of 65**

**56% of groups
included Friends
currently parenting
children or teens**

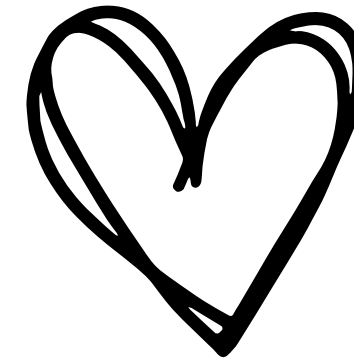
*Reminder: Demographic data was reported by each group's point person. Some questions allowed the responses "yes", "no", or "don't know". Percent ranges are provided where some responses included "don't know" answers.

**The one group reporting no participant over 65 was not including the facilitator and notetaker in their reporting.

Some form of Annual Sessions has great value for many Friends. There are many aspects of Sessions Friends cherish.



In particular...



- **Connecting meaningfully with other Friends**
- **Connecting to a diversity of Friends' experiences and learning from each other's journeys**
- **Contact between local meetings**
- **Feeling part of something bigger**
- **Small group experiences in various forms including around witness/social action**

- **Worship & other spiritual nourishment (such as Bible Half Hours, plenary)**
- **Multigenerational connections including in joyful ways (such as singing)**
- **Programming specifically for youth and families**
- **Shared meals**
- **Being together while separate from our daily lives**



Potential changes brought up different feelings for Friends.

Many Friends who attended Sessions regularly shared:

- Precious memories
- Transformational experiences
- Lasting Friendships
- A yearning to return to a “golden” era
- Feelings of loss at the prospect of change

....at the same time, many Friends shared
acknowledgement (and even hope and excitement)
regarding the need for change in light of challenges as
well as a sense that Sessions had become “too much”

Friends have had differing experiences with....

Being a newcomer at Sessions

Some first time attenders had warm, wonderful, and even life-changing experiences...

...others felt overwhelmed, under-welcomed, or put off by various aspects of Sessions

Hybrid or online discernment

Some Friends find the accessibility that online participation provides as not only convenient and cost effective but essential to our ability to inclusively connect as Yearly Meeting...

...others find it unengaging, limiting, and unsatisfactory for community building and discernment.

The centrality of corporate discernment:

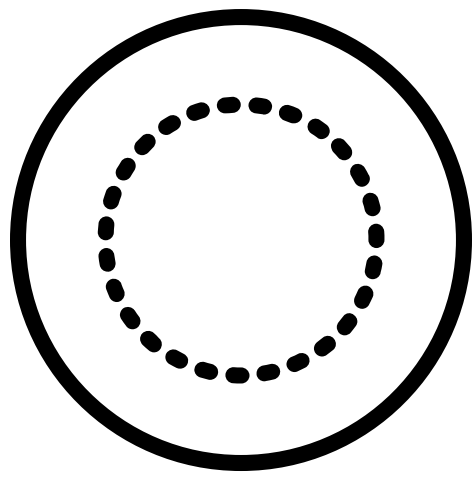
Two different perspectives among Friends



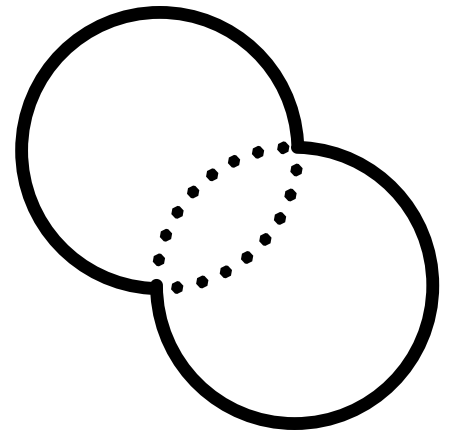
Some Friends clearly see meeting with attention to business as the central purpose of Sessions, as it has been historically



Other Friends see meeting with attention to business as an activity that happens be part of Sessions



Differing perspectives on Meeting for Business (continued)



“Tension exist between Business Meeting remaining central or if Business Meeting should be done outside of Sessions”

“If we sheer off the Meeting for Business into a separate event, we eliminate some of the strongest inducements for participation. We set it apart, perhaps implying that business is not for everyone. And this approach might be a way to avoid rather than address conflict. Peaceable conflict resolution should be Friends’ greatest strength.”

“Separate the business meeting from what Sessions means for most people.”

“Use the youth programs as a guide for how to run Yearly Meeting programs for all of us: focus on joy and love, connecting with others, processing our experiences, brief/focused business, and worship”

“Is there a way to expand how we approach discernment so that it is beyond business meetings? Small conversation circles like this are more connective and accessible than business meeting, especially if you are new to most of the agenda items.”

“For some, a desire to free up space by having less business meeting. For others, a concern about delegating more business to Permanent Board, which could ‘flatten’ the voices participating.”

“Motivation for Sessions attendance is to be with other Quakers and meet people. It is about community building, not Business Meeting.”

“Meeting for Business can provide an important understanding of Quaker process and the questions facing our Society.”

There is widely held desire to change things about our approach to corporate discernment.

Key Suggestions:

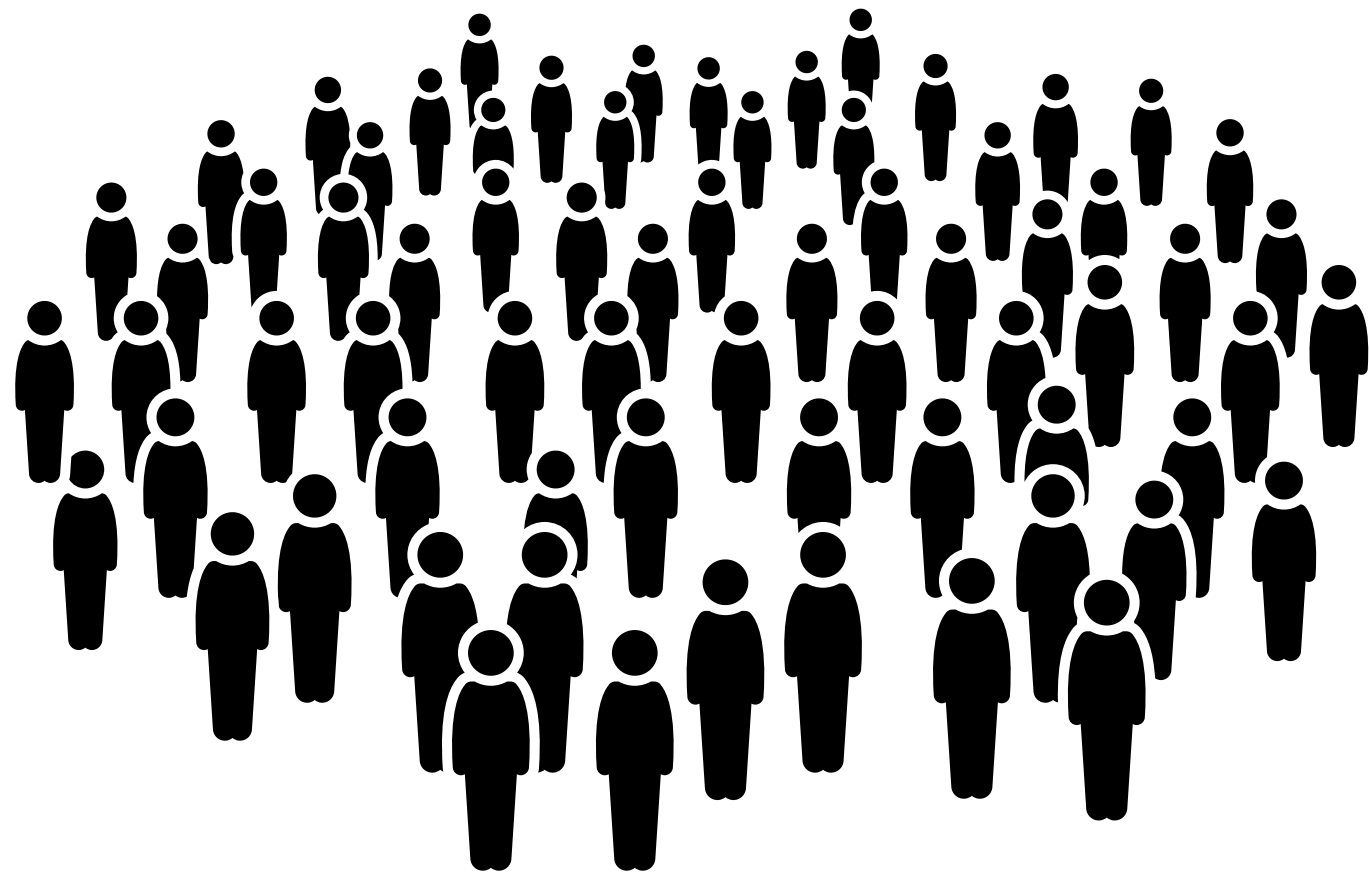
Friends want less time on business during Sessions and fewer agenda items during the business allowing for more spacious discernment

Different ideas were presented about how to make this shift. Season all agenda items via quarters? Give more business to Permanent Board? Revitalize the old meeting representatives model? Gather midyear? More business online? Let committees make more decisions?

Across groups, Quarterly Meeting was mentioned 84 times.

A throughline across the various suggestions was a desire for a smaller group (or groups) to take on more business on behalf of the whole in order to free up space at Sessions.

It is important to Friends that this smaller group(s) has a living connection to (and from) local meetings.



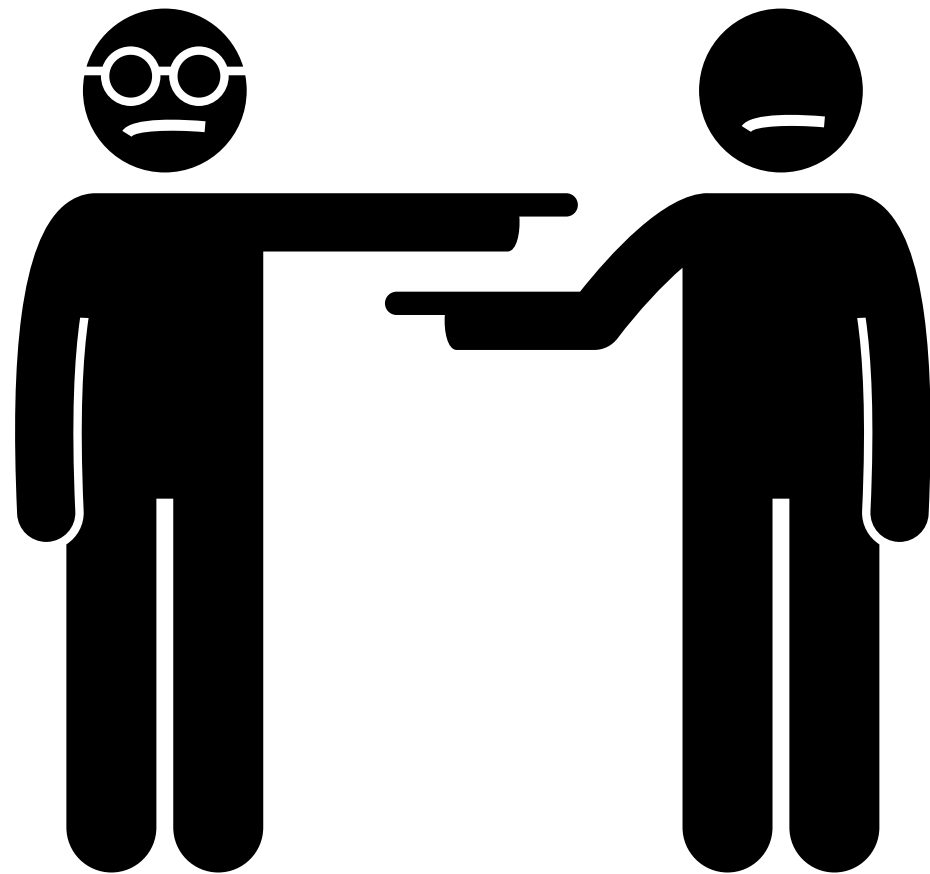
Many groups discussed the issue of attendance.

- Attendance at Sessions is limited by work schedules/busyness/other commitments; cost (even with pay as led), distance (in part because of the time this adds to attendance)
- There's widespread desire to increase attendance—it was named as key to financial sustainability and overall health
- Many Friends who have never attended Sessions felt that the commitment required to attend was too high and also that the “why” regarding why they should attend was not clear
- It was noted that not only is more broadcast communication about Sessions needed but also that there is a need for more personal outreach. In particular, the role of individuals and local meetings in encouraging and supporting first time attendance is needed



Most common concerns with the current model of Sessions:

- “Too much” (trying to do too many things, competing purposes, hectic)
- Too expensive (“sticker shock” even with Pay as Led)
- Too far (when its not located near you)
- Too long (for those with limited time off or limited energy for big gatherings)
- Overwhelming (especially for some newcomers and introverts)
- Hard to “sell” or explain to newer Friends
- Overall, Friends discussed the desire to “simplify” Sessions but didn’t consistently agree on how



Many Friends felt it would be great if more people would...

- Be willing to camp out or go without “creature comforts” during Sessions in order to lower the cost
- Give more money to the Yearly Meeting
- Volunteer at and before Sessions

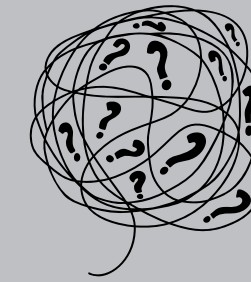
Other things that stood out in reading group notes:



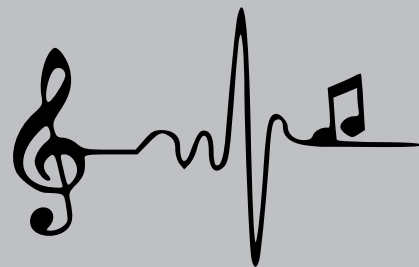
For a number of Friends, the background information about Sessions and NEYM was surprising



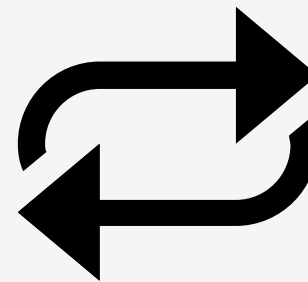
For a number of Friends, their understanding of Sessions and NEYM structures and activities was outdated



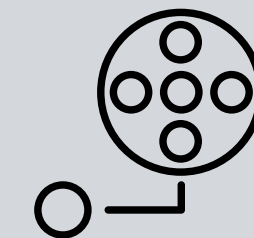
For a number of Friends, the form and function of Permanent Board is unclear



The tone of the responses was very different across groups. We are not all in the same place as we consider changes.



Although there were many different ideas shared, we do feel we reached the “saturation point”, the point at which key themes kept repeating



In a few regards, Portland Meeting was an outlier. While many groups stressed the importance of worship, the Portland group was distinct in that they found unity to move towards a fully volunteer led event, very stripped down and making worship central.



Most disliked option: Online only Sessions

- Many Friends shared that in-person connections are primary to their experience of Sessions
- Many Friends find physically gathering especially important for youth and families, informal connection-making, and shared meals
- Many Friends also disliked the idea of only having youth and families meet in-person which limits multigenerational relationship building
- A number of Friends also found the “every other year” option included too many uncertainties and would strain youth relationships

Most supported alternative model: Make Sessions shorter



- For many groups, they felt making Sessions a long-weekend would lower costs and increase availability of participants and volunteers
- For long-time attenders, many felt this option would require the least change
- Some saw this option as pairing well with midyear gatherings, including increasing attendance at quarterly meetings
- Many expressed a hope that the shorter time spent together would be focused on connection-making and spiritual nourishment
- The biggest concerns/questions with this option are:
 - Will it provide enough time for youth to bond?
 - What will we do with the business that doesn't get done?



The second most affirmed alternative: Limited Housing

Friends liked that....

By choosing a location many Friends could commute to the overall cost of Sessions would decrease

They liked the options this would give individuals and the possibility for some Friends to still have a residential experience

But Friends also worried about...

All the details brought up questions. Who would get housing? What location is “central” and affordable? Would we still have shared meals? How would this change fees to individuals? How would this impact youth programs?

Many Friends discussed the Sessions location:

Many Friends see both the cost of renting facilities and travel distance to Sessions as significant barriers to participation at Sessions. They think that a shorter distance would allow working people to attend part-time and therefore increase attendance and that a cheaper venue is key to decreased cost.



That being said, Friends had many differing ideas about what the ideal location for Sessions would be including: a camp ground, Boston, a Friends School (such as Moses Brown), the Great Meetinghouse (in Newport, RI), a cruise ship, a high school, a new facility we build.

Friends also discussed their hopes for the ways Friends gather throughout the year:

**For connection,
worship, and
learning:**

**For discernment,
decision-making,
and service:**

**Within regions
and Quarters:**

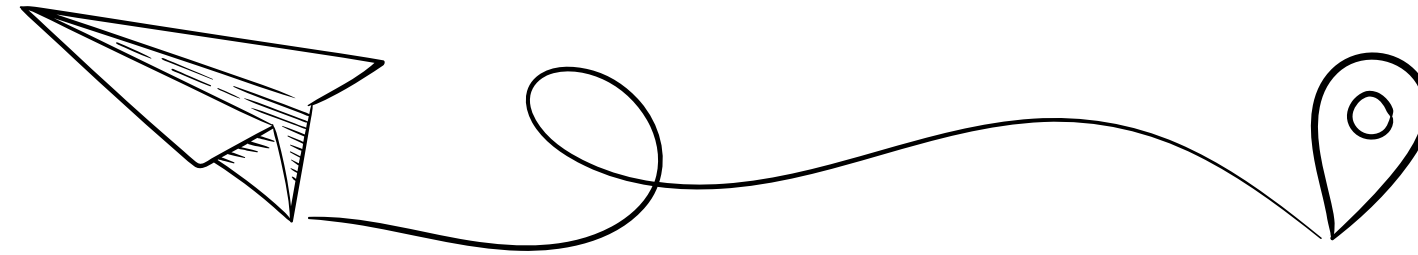
**Many Friends expressed
appreciation for shorter NEYM
gatherings with a focus on
fellowship, connection,
worship, learning, and witness**

**Many Friends wondered how
simplifying Sessions would
impact mid-year discernment.**

**Some Friends discussed the
impact of midyear Yearly
Meeting events on midyear
gatherings offered by
quarters.**

**According to Friends, these are the indicators we
are on the right track in re-envisioning Sessions**

Increased attendance	Increased sustainability	Spiritual health	Relational health
More newcomers & diversity	Financial sustainability	Truth prospering at Sessions	Collaboration between local meetings
More young people	Enough volunteers for key roles	Increased ability to hold both grief and joy	Deepening trust, engagement, communication
More families	Working within staff capacity	Patience with our mistakes	A sense of moving forward together with God



Emerging themes and directions:

- Let's consider trying a shorter Sessions, over a long weekend and paired with care for year-round connection
- Let's explore how to foster opportunities for togetherness and shared meals as we approach housing options
- Sessions should have a strong emphasis on spiritual formation and small groups
- We need to shorten the total hours of business meetings at Sessions; allow more spacious discernment on fewer and more substantive matters
- Other business, especially organizational/administrative business, can be conducted by another body--with particular attention to the connection of this discernment to local meetings
- Pay attention to the health of quarters; they are essential for relationship and seasoning business
- Pay attention to the particular needs of youth and families for high-quality time together--and with other Friends
- Any change will be imperfect and require learning along the way

Memorial Minute for Donna McDaniel

(October 28, 1934 – July 9, 2024)

Donna Lee Bowen McDaniel was born in Chicago, IL in October 1934 and lived her childhood in Jamestown, RI, from where she took a ferry to high school in Newport each school day. She graduated magna cum laude from Tufts University with a major in History and then went on to Boston University where she earned a Masters in Education in Guidance and Counseling.

As a young adult, she worked with the US Department of Defense schools in Germany and Japan where she developed her life-long love of travel and immersed herself in other cultures. Returning to the US, she raised her two sons and pursued her love of writing as a journalist with the *Middlesex News* and the local *Southborough Villager* newspapers.

In the late 1980s, while accompanying her younger son in support of his own spiritual exploration, she found a home among Friends at Framingham Meeting. She soon became active on numerous committees at the meeting and eventually became an important link to the wider Quaker world when Friends General Conference invited her, along with Vanessa Julye, to write a book on Quakers and their relationship with African Americans. *Fit for Freedom, Not for Friendship: Quakers, African Americans, and the Myth of Racial Justice* was published by FGC in 2009 and remains an important reference, not only for Friends with our complicated history, but also as a window into the tortured history of race relations in the US.

Donna was a Renaissance woman: a journalist, teacher, counselor, musician, active participant in two choirs, international traveler with one of them, leader of musical ventures at Christmas and other events at our meeting as well as being a loving and proud mother and grandmother to her sons and grandchildren.

Beyond her many accomplishments, Donna had a large and generous heart. She approached life with a deep passion and intellectual curiosity. When she felt called, she would anchor herself in her deep commitment to justice. She was honored in 2013 as an “Unsung Heroine” by the Massachusetts Commission on the Status of Women, both as the first woman on the Select Board in Southborough and for her devotion to that community.

Donna was justly proud of the research she and Vanessa Julye did in writing *Fit for Freedom*. Quakers had long rested on the laurels of some members who were early leaders in the abolitionist movement; however, long ignored was the way we nonetheless continued to reflect the prevailing white supremacy of the time and were not open to fully embracing African Americans as members of our meetings or educational institutions. *Fit for Freedom* has opened our eyes to our historical complicity. Donna's eyes were similarly opened in the process and she would admit that she emerged a changed person because of her intimate exposure to this painful history. The legacy of this book continues to resonate today as Quakers explore ways to be more honest and open about our continued complicity in white supremacy culture.

Donna's openness and transparency were what made her so loved in our meeting; her smile would brighten a room. She embraced the meeting as her second home and, in turn, we embraced her as she shared her life and struggles with us. It was hard not to feel a sense of reflected pride in her accomplishments because she allowed us to feel part of them. As life brought on changes that required her to leave her home in Southborough and move closer to her son and family in Boston, we missed her generous heart and grieved at the losses she faced.

Donna led with her heart and the love and pride she felt for her sons and their families were a constant in her life. At her memorial meeting in August 2024, there were many expressions of appreciation for her accomplishments. Most moving, however, were the expressions of love that were felt for her, a love that will be her most enduring legacy.

Framingham Friends Meeting

March 2025

Approved by Framingham Friends Meeting at a regularly scheduled Meeting for Worship with Concern for Business, March 16, 2025



Richard H. B. Lindo, Presiding Clerk

Memorial Minute
Karen Sheila Levy Cadbury
June 1945 - March 2024

Friends at Midcoast Monthly Meeting in Damariscotta, Maine give thanks for the many ways Karen Cadbury served the Meeting. She worked on the Finance Committee and the Pastoral Care Committee; she taught First Day School and served as co-clerk; she was the spark that created and secured grant funding for the Meeting's innovative Outreach and Peace project. Karen was energetic and bright - her only sibling, Melaine, described her as "a trooper".

Karen Sheila Levy Cadbury was born in 1945 in Baltimore but spent her early years in Texas, her father's home state. Karen would refer to her father's Jewish background saying she was raised "never to hate". In her teens the family moved to Baltimore, her mother's home area. When Karen was sixteen her mother died. Karen became "like a mother" to Melaine and carried on. She finished high school and enrolled at the University of Maryland. Soon she met David Frederick Cadbury, a student at the Maryland Institute College of Art (MICA). They became a devoted, hard-working couple, sharing a love for birding, ocean sailing, and art for 49 years. David's family was from a Quaker background; Karen would say that her transition to Quakerism was natural. David and Karen moved to Philadelphia and joined Central Philadelphia Meeting, participating there for two decades.

Melaine spoke of a time Karen took her to a civil rights demonstration in Baltimore, saying Karen was "always thinking about people's rights and different cultures." Gradually Karen built a career working for organizations that supported these rights and cultures. She worked in the development office for the University of Pennsylvania and at the university's Museum, where she developed programs that brought Museum exhibits and experts to Philadelphia public school classrooms. She served as staff for the Policy and Legislation Committee of the Peace Committee of Philadelphia Yearly Meeting, constantly encouraging Friends to contact their U.S. Senators and Representatives about important federal legislation. She developed considerable expertise on what was happening in Israel and the Middle East, an interest she continued throughout her life. Meanwhile their two children, Benjamin and Rachel, were born.

A Friend said of Karen and David: "David and Karen together were an inspiring model of supporting and living with each other through all of life's challenges." When David had a heart attack at age 45, they decided to move to Maine where David's family had summered in the past. Karen got a job with College of the Atlantic and soon set up Cadbury Consultants, continuing her work for non-profits.

A Friend spoke of how hard Karen worked at her job but also reached out with caring to people around her. Another Friend said "Karen was one to bounce back. I was in awe of her anchored trust that the best will prevail. Even in her last days, Karen was imagining ways to share and connect people." Karen lived out Quaker testimonies in her many work endeavors and brought her professional organizing and finance skills to Friends' Meetings and organizations.

Karen had a way with words whether listening or communicating. If there was a misunderstanding among Friends she would make personal phone calls and write letters to offer an ear or loving support. As she was transitioning from a demanding career load, she joined a writers' group and began to write a mystery.

Said a member of Midcoast Meeting, "I will miss her way with words that made Quakerism live for me in a special way. She was a brilliant woman who gave so much to the Meeting."

APPROVED 9/15/24



GUY MARSDEN CLERK MIDCOAST FRIENDS

Approved Nov. 2, 2024

Joanna Hodson Voss/Baro Quarter
Joanna Hodson
clerk of the day

Andrea Cousins, Memorial Minute February 2025

Andrea Cousins moved to Leverett in 1990, and a year later, at age My, somehow found her way alone to the Mount Toby Meeting for reasons she could never recall. She liked the silence. For the next thirty-three years until her death in January 2024, she was a steady and steadying presence, sitting in her customary seat in the south-east corner, and, on occasion, blessing the meeting with succinct, thoughtful messages that expressed her characteristic honesty and humor, and sometimes just the inspiration she found among the wildlife of her garden.

Andrea was the oldest child of Norman Cousins, the eminent writer and international peace advocate. Her mother, Ellen, a force in herself, stayed home, where she grew, and promoted, organic vegetables, while mainly supporting her husband in his important work. This division of labor later gave Andrea mixed feelings about the institution of marriage.

Andrea and her three younger sisters grew up in New Canaan, Connecticut. Her father and mother were both of Russian Jewish heritage. Their household was so completely secular that during most of her childhood Andrea was unaware of any Jewish background. She happily attended a progressive and preppy Connecticut private school until, in her teens, she was reluctantly transplanted to a public school to be more in accordance with her father's political views.

Her younger sisters were important to Andrea throughout her life. Sarah moved to Israel, became an Orthodox Jew, and the mother of six children. Candis lived in California, married and had a son, and is, like Andrea, a psychotherapist, confirming their especially close bond. To Andrea's enduring sadness, Amy developed schizophrenia, and died from its complications at age forty-three.

When Andrea entered Sarah Lawrence College, she was happy to find that many of the most interesting women there also had Jewish backgrounds, and she was able to embrace that part of herself while never accepting any particular theological belief. Later, she would explain her wish to be part of the Quaker community without becoming a formal member of it, as part of her lifelong disinclination to be defined by a faith.

When Andrea was invited by the meeting to describe her "Spiritual Journey," she discovered from the enthusiastic overflow attendance, and to her great happiness, just how much she was loved. She had thought of herself as an outsider. It was entirely characteristic of Andrea's intellectual rigor - "opinionated," according to her own description - that she was unable to fully accept the talk's title. She said she did not know what "spiritual" meant, and that "journey" suggested a spurious coherence. She settled for "Life Story."

Andrea's early adult life coincided with the era's civil rights activism and the African independence movement. She was a member of the Student Non-violent Coordinating Committee, and was close to Tom Hayden, a founder of the SOS. She also traveled to Guinea in West Africa, but did not feel she had found her own place in the world. Partly to overcome a

lasting grief from the break-up with a longstanding boyfriend, Andrea went to Algeria to undertake doctoral research in Social Anthropology for a Harvard degree. But this did not prove to be her vocation, and shortly after moving to Leverett she went into psychoanalysis, first as a patient and then as a practicing therapist, with a clinical doctorate. She discovered that this was what she was always meant to do. She practiced psychotherapy and psychoanalysis with great satisfaction, continuing even after she was diagnosed with lung cancer. Many people benefitted from Andrea's care, and she felt entirely fulfilled in her work. She said that as she gained experience as a therapist she became quieter and quieter.

The qualities that made Andrea a natural psychotherapist also benefited the Mount Toby meeting. Apart from her contributions to the Meeting for Worship, Andrea served on the Hospitality, Nominating and Care and Counsel committees, and was a member of a number of "Friendly B's" groups, smaller gatherings that examined inner life and its relationships with the outer world in intimacy and depth. Andrea's welcoming presence, and the honesty, insight and wit she brought, was a central compelling force in these long-lived groups.

Andrea had a talent for friendship but sometimes expressed regret that a partnership in something like a marriage had not been for her. Love, however, did not elude her, and she found great satisfaction in a long relationship with a like-minded man that she chose to treasure by holding it privately to herself.

When Andrea was diagnosed with lung cancer, she immediately knew that it was serious. She decided to continue working and attending meeting as before. When she finally became house-bound, she still enjoyed the conversation and the poetry she had always loved, even when, in the last months, she was drifting in and out of sleep. Her close friend from Meeting, Ken Hoffman, in particular, did much to ease the way of her final months, and after her death, Pam Tinto did much to mindfully close Andrea's beloved Leverett home and distribute her belongings among her friends. Andrea is buried in the Mount Toby Meeting burial ground.

Andrea leaves behind her younger sisters Candis and Sarah, and many nieces and nephews, and their children. Also, her best friend, Ann Bookman, and many other friends, including, locally, John Bollard and Margaret Lloyd, and Olivia Bernard, and a community of Friends from the Meeting that had been such an important part of her life.

Approved by Mount Toby March 9, 2025

Accepted by Connecticut Valley Quarterly Meeting on May 4, 2025

Memorial Minute for Sarah Spencer

Sarah Howe Spencer, beloved elder and Friend, died on September 29, 2023, her 74th birthday.

Sarah grew up in Cleveland, Ohio. In her youth she danced ballet. She continued with dancing, doing Morris Dance and partner dancing as an adult. Even in high school, her classmates noted her lively wit and commitment to social justice. After college she moved to Boston and met Shearman Taber. The young couple connected through common interests in dance and sailing. Sarah and Shearman raised two children, David and Jeanette, and later, Sarah had the joy of a granddaughter, Ramona. While her children were in elementary school, Sarah took courses in computer software engineering, an expertise she shared in her service to Quakers.

Sarah lived with visual impairments due to a genetic condition that from a young age gradually reduced her field of vision. She managed her personal and working life in a manner in which most people did not become aware of her impairment, and for which she rarely asked for accommodation.

Throughout her childhood Sarah attended services in the Episcopal Church, where she found the formal services with the "smells and bells" and theology unsatisfactory. Shearman introduced her to Quakerism, where she found a spiritual home and a lifelong community. Sarah developed a deep knowledge of Quakerism through her extensive readings and discussions with Friends from our various traditions. Her love for Friends was most clearly expressed through her wit and intellect, which she mobilized to provide care and support for her community.

Sarah had a concern for helping Friends increase their knowledge of Quakerism and its history, and making connections both within their meetings and throughout the Society. As part of her work with Beacon Hill Friends House, Sarah edited and published a long-running series of pamphlets highlighting contemporary Quaker voices. Sarah also coordinated the Quaker Studies Program, which was a joint program with Salem Quarterly Meeting. She was an early explorer of online Quaker learning programs through Quaker Studies.

While raising her children, she began teaching in First Day School, which eventually led her to become the coordinator of NEYM's Junior High Youth Group. She told a story of sleeping across the exit door at Woolman Hill during junior high retreats to keep the kids from encountering the local wildlife in the dark. Guiding the young teenagers in learning and using Quaker principles and practices gave her much joy and satisfaction.

Sarah's service to the Yearly Meeting was broad and deep with terms on various committees in many different roles. Her deepening understanding of the Spirit led her to participate in the School of the Spirit and serve on Ministry and Counsel for monthly, quarterly, and yearly meetings. In her later years, she was widely known as an elder, a role that she cherished.

While on Ministry and Counsel, she was asked to edit the memorial minutes being read at Yearly Meeting Sessions. This led her to develop guidelines for writing memorial minutes. One of the challenges Sarah bequeathed to the authors of this minute was her understanding that a memorial minute was an account of a spiritual life and not a recounting of secular milestones.

She and Allison Randall developed and led “Daytreats” for local Meetings’ Ministry and Counsel, Worship and Ministry, and Pastoral Care Committees. These “Daytreats” were an opportunity for Friends serving on those committees in their local Meetings to talk about the joys and challenges of serving in those roles. They brought their wisdom and care for service to those times, enriching Sessions for those who participated and made connections to others serving in similar roles in their Meetings.

When she and Shearman moved to Northampton, Sarah was tapped immediately to serve on Worship and Ministry. She brought her deep knowledge of Friends and her wisdom to all the roles she filled. She had a slightly snarky sense of humor, which she often deployed when things got too serious. She could be forthright in sharing concerns, a quality which was not always appreciated, though her honesty and straightforward approach often kept discussions on course.

While on Worship and Ministry at Northampton, Sarah helped start Midweek Meeting, serving as a shepherd. This meeting has continued to develop into a wonderful community since moving to Zoom during the pandemic, with participants from Oregon to Philadelphia and even Great Britain. Her eldership and presence in that community is deeply missed, as is her wisdom and humor.

Sarah loved spending time with her family, particularly cooking and laughing together. Being with her through joys and challenges always felt like home for all of us—a feeling we may never experience in quite the same way again.

Northampton Friends Meeting
February 9, 2025

Accepted by Connecticut Valley Quarterly Meeting on May 4, 2025

Hartford Monthly Meeting of the Religious Society of Friends

Memorial Minute for Elizabeth Kincaid-Ehlers

1933 - 2024

GIRLS DON'T DO THAT

That refrain clanged
with menace over my youth.

—

"Girls don't do that." Well
I did. And was not sorry, am not sorry, only
pissed that "NO" was everywhere.

Wearing bluejeans? Taking
physics? Wanting to study
rocks? Girls did that.

So there.

(Excerpt from Elizabeth Kincaid-Ehler's poem "Girls Don't Do That")

Elizabeth was a complex and complicated person as reflected in the diverse range of her academic and professional accomplishments and interests. Even for those who knew her well, she remained a bit of an enigma, but had a strong voice, unassuming presence and clear, often boldly worded convictions. In many ways her life experiences are captured in her poems, described by her publisher as "a rich variety of moods ranging from despair to hope, resignation to determination, fury to love. And always there is that wry (and sometimes rueful) wit at play"

Elizabeth was born in Ann Arbor, Michigan where she spent her early years. She later attended the University of Michigan. While there, she received a Hopwood Award in poetry. She left the University during her junior year to marry William Howe Rueckert and moved with him to Troy, NY. She returned to Ann Arbor to complete her B.A. the following year. While raising her four sons and following her husband's career moves, she also managed to earn an M.A. from the University of Illinois and a Ph.D. from the University of Rochester.

Following the end of her marriage in 1979, Elizabeth moved to Connecticut as a visiting-writer-in residence at Trinity College and decided to settle in the Hartford area. Here she continued a variety of teaching assignments that had initially begun at the University of Illinois, Rochester Institute of Technology, the University of Rochester, and Eastman School of Music. After her writing residency at Trinity College, Elizabeth taught part-time at the University of Connecticut and as a visiting writer in several Connecticut public school systems. At one school, a 5th grader interviewed her for the school newsletter and although she had been introduced as Dr. Kincaid-Ehlers, in her published interview, she was called "Dr. Kinky Waller." In Elizabeth's words, her irrepressible alter ego had finally been named and she thereafter wrote many poems under that name

In the mid-nineteen eighties, Elizabeth followed another one of her many callings and retrained as a psychotherapist. She maintained an office at the Hartford Family Institute where she continued to assist

her clients well into her eighties. She was a religious skeptic who questioned the existence of a Christian God while also being a skillful practitioner of Gestalt Therapy which embraced and incorporated deep spiritual components.

Throughout her life Elizabeth was an accomplished writer, who, according to family legend, began making poems when she was three, engaging her mother as amanuensis. She occasionally sent her poems out into the world and eventually published three books of collected poems with Antrim House Books. In addition, her poetry, literary and psychological essays appeared in numerous collections, academic journals and books. Elizabeth read her poems at the inaugural Sunken Garden Poetry Festival at the Hill-Stead Museum and gave countless other poetry readings over many years. She enjoyed her regular meetings with a long-time group of poets who both sustained each other's work and gave each other a hard time. She received numerous awards for her writing including the North Country Poetry Prize and a Pushcart Prize.

In addition, Elizabeth was a talented musician who played the piano and dulcimer and had a particular fondness for bluegrass music and opera. She hiked, skied, and loved to travel, making two cross country driving trips as well as visits to Alaska, Europe, New Mexico, and Hawaii. She lived in Italy (traveling across the Atlantic alone at age 22 on a cargo ship), England, Canada and throughout the United States. But the one place that mattered most to her was the Thousand Islands in the St. Lawrence River where she had a house on Stave Island to which she returned every summer until she could no longer get in and out of the boat.

Elizabeth's introduction to Quakers was in England while participating in a peace march in London during the 1970S. She first attended a Quaker Meeting, Hampstead Meeting, around this time. Sometime later, while at Cambridge University for a year-long post-doctoral assignment in poetry, she attended Cambridge Friends Meeting at Jesus Lane, where she became a member. After she found Hartford Meeting in 1990, the Meeting became a place of great comfort and fulfillment for her. Over many years, she regularly occupied the same rear spot along the western wall of the Meetinghouse, and at times could be overheard offering her opinions or sharing a running commentary about the messages and announcements of various Friends. She participated in the Meeting's book club and provided a great service by proof-reading the Meeting's newsletter for a number of years. This was a task for which she was well-suited as she had a keen eye for punctuation, word selection and formatting. She valued her participation in several Creative Listening groups, the most recent on Zoom.

Elizabeth was a fighter who survived polio as a child and then cancer twice as an adult. She transformed her anguish at the latter into her third book of published poems titled "How Do / Hate Thee?" While she did not suffer fools lightly, her acerbic wit and occasionally sardonic comments belied deep compassion and a burning desire to see peace and justice prevail. Even as a child, she was moved by issues of social justice and felt called to activism. She became a lifelong advocate for the environment, civil rights, women's rights, and peace, participating in many protests, sometimes as an individual by simply holding a sign on a street corner and sometimes as part of a group.

The advent of COVID was a reminder to Elizabeth that her world was shrinking and she uneasily reconciled herself to her new reality, limited not only by the pandemic but increasingly by her mobility restrictions. Her presence with us in worship, although generally quiet, is much missed.

Respectfully submitted,
Ed Paquette and Liesa Stamm

Approved by Hartford Monthly Meeting, June 16, 2024

Accepted by Connecticut Valley Quarterly Meeting on May 4, 2025

Signature: Susan Davies
Susan Davies (Sep 8, 2025 11:59:47 EDT)

Email: pbclerk@neym.org