

To: MM Clerks, Representatives and Treasurers
From: SAYMA Finance committee
July 2020

The Southern Appalachian Yearly Meeting and Association is composed of its constituent monthly meetings, preparative meetings, and worship groups. All members and attenders of these bodies have both the privilege and responsibility to participate in keeping the affairs of the yearly meeting in good order.

The yearly meeting exists to support its constituents as they seek in the manner of Friends to live out their lives according to God's leadings. SAYMA Faith & Practice, p.25, 2012 revision

The Finance committee's primary responsibility each year is creating and managing the annual budget. Between January and early March, Finance requests input from SAYMA committees, Monthly Meetings (MMs), and individuals in positions of responsibility within SAYMA. The committee then develops an annual budget taking this input into account. With the seasoning of Representatives meeting in March, as well as the input of all who come together at Yearly Meeting (YM) in June (both cancelled in 2020), the proposed budget is discussed, amended and approved. The annual budget has a fiscal year (FY) of October 1 – September 30. MM contributions are the primary source of YM funds for SAYMA's ongoing activities, additions to set-aside funds, and contributions to wider Quaker organizations (WQOs).

As SAYMA reps and committee clerks prepare for the called July 2020 Reps meeting, Finance committee asks everyone to give careful consideration to the first reading of the proposed budget for FY 2021 (attached) keeping in mind the analysis of the current areas of budgeted expenditures over the last 3 years (FY 2018- 2020), shown below. The Finance committee will consider revisions based on discussion and bring a final budget proposal for a second reading and request for approval to the Sept. 2020 Reps meeting.

- Keeping SAYMA running and connecting Friends in SAYMA's constituent MMs (office admin, committees, newsletter & website): 40%
- Working with Quaker teens in the region Southern Appalachian Young Friends (SAYF) set-aside and SAYF staff): 27%
- Supporting the work of WQOs through contributions and by sending delegates to participate in governance and other activities: 21%
- Racial justice work (Uplifting Racial Justice -URJ- set-aside): 9%
- Supporting SAYMA Friends' spiritual growth opportunities (Spiritual Development Fund): 3%

NOTE: In general the expense of the annual YM gathering in June is not covered by MM assessments. This expense is covered by fees paid by participants, contributions for scholarships, and scholarship assistance from MMs.

FOLLOW-UP & VISIONING

As the Finance committee considers the financial state of Yearly Meeting going forward, we respectfully request that MM Reps ask their meetings to participate in a visioning process to engage the entire YM through its constituent monthly meetings and worship groups in setting budgeting priorities for the long term. In this way Finance hopes that we can keep "the affairs of the yearly meeting in good order," as stated in our Faith & Practice.

We suggest the following questions for consideration and discernment through worship sharing, threshing meetings or meetings for business.

1. How can SAYMA serve and support monthly meetings, preparative meetings (PMs) and worship groups (WGs)?
2. How are MMs, PMs, and WGs enriched and supported by their participation in SAYMA?
3. Considering your responses to the above questions, how should SAYMA assessments be allocated and prioritized?

Is your Meeting comfortable with the distribution percentages allocated in recent budgets (shown above)? Are they in line with your meeting's priorities? Possible responses: "no change, "add/subtract ___% for (name of cause)."

Some of the categories to consider for spending are: spiritual nurture, care, and development, racial justice work, teen program, administrative support for SAYMA, communication from YM to MMs, peace concerns, environmental justice concerns, subsidies for annual yearly meeting gathering, and connections to and information about WQOs.¹ Please add other concerns that come up in your discernment process.

Please send written responses to the Finance committee clerk (finance@sayma.org) by October 31, 2020. You may choose to minute your responses in a meeting for business, but it is not necessary. Note your meeting name, the current clerk, and YM reps names, as well as the date of your response. A summary report will be generated from the responses the committee receives. We thank you so much for participating in this discernment process.

In the Light,

SAYMA Finance committee

Geeta McGahey, clerk, Carol Lamm, treasurer, Jackson Napier, assistant treasurer, Karen Morris, Kendall Ivie

¹ SAYMA currently donates to these WQOs: American Friends Service Committee, Bolivia Quaker Education Fund, Friends Committee on National Legislation, Friends for LGBTQ Concerns, Friends General Conference, Friends World Committee for Consultation, Friends Journal, Friends Peace Teams, Quaker Earthcare Witness, Quaker House (Fayetteville), Quaker Voluntary Service, Right Sharing of World Resources, and William Penn House.

Proposed SAYMA Budget for FY 2021
 (October 1, 2020 - September 30, 2021)
 Version 1.0, July 2020

			FY20 Approved 6/16/19	FY 20 Projected as of 7/8/20	FY21 Proposed v. 1.0
1	Proposed SAYMA FY 2021 Budget	FY19 Actual			
2	DRAFT v. 1.0				
3	Income				
5	Assessments	58,884	50,425	49,998	45,016
26	Contributions – General	2,727	1,500	-	100
28	Interest - Money Mkt	545	700	319	100
29	<i>Publication Sales</i>	296	50	65	100
32	<i>YM Income</i>	41,787	52,900	-	45,350
37	Total Income	104,239	105,575	50,382	90,666
38					
39	Expenses				
41	SAYMA Operations	37,307	43,520	36,338	35,508
42	Liability Insurance	677	850	816	850
43	<i>Office Admin</i>	4,775	5,295	2,375	3,140
53	<i>Personnel</i>	24,185	25,705	25,705	26,098
57	<i>Publications & Website Expenses</i>	427	270	342	220
62	<i>SAYMA Committees</i>	211	3,800	2,500	1,350
63	Cmte Exp – Contingency Pool	-	500		-
64	Cmte Exp – Ad Hoc Conflict Transformation				1,350
65	Cmte Exp - Faith & Practice Rvsn	-	100		-
66	Cmte Exp - Finance	69	2,500	2,500	-
67	Cmte Exp - Ministry & Nurture	90	500		-
68	Cmte Exp - Nominating	-			-
69	Cmte Exp - Outreach	-	-		-
70	Cmte Exp - Peace & Social Concerns	-			-
71	Cmte Exp - SAYMA Earthcare Action	-			-
72	Cmte Exp - Uplifting Racial Justice	-			-
73	Cmte Exp - WQO Allotments				-
74	Cmte Exp - Yearly Meeting Planning	52	200		-
75	<i>Travel Reimbursements</i>	5,032	7,600	4,600	3,850
76	Travel - Rep Meetings	32	100	100	100
77	Travel - WQO Delegates	4,999	7,500	4,500	3,750
78	<i>Set-aside Fund Annual Allotments</i>	5,177	8,600	8,600	3,800
79	Boone MM In Trust	2,677			-
80	FWCC 3rd World Delg Annl Exp	-	1,800	1,800	800
81	FWCC Conference Annl Exp	-	1,800	1,800	-
82	Released Friend Annl Exp	-			-
83	SAYF Annl Exp (formerly "SAYF Operational Trar	2,000	2,000	2,000	500
84	Spiritual Development Annl Exp	500	3,000	3,000	-
85	Uplifting Racial Justice Annl Exp	-			2,500
86	YAF Scholarships Annl Exp	-			-
87	Youth Enrichment Fund Annl Exp	-			-
88	<i>Yearly Meeting</i>	43,848	52,900	250	45,350
89	Facilities & Services Exp	35,035	44,150	-	35,800
101	<i>Quaker Membership Orgs Annual Contribns</i>	1,500	2,500	2,500	2,000
102	WQO - FGC	750	1,250	1,250	1,000
103	WQO - FWCC - Direct Contrbn	750	1,250	1,250	1,000
104	<i>Other WQO Annual Contribns</i>	4,500	4,650	4,649	4,000
116	Adjustment to Reserve	857	(540)	(598)	-
117	Total Expenses	93,189	111,630	51,739	90,658
118					
119	Surplus (deficit)	11,050	(6,055)	(1,357)	8
120	YM Net:	(2,061)	-	(250)	-