

Proposal from the Task Force for Revising Financial Data Reported from Organizations Receiving Benevolences

At Meeting for Worship with Attention to Business on January 17, 2021, Friends voiced concern regarding the financial data currently required for organizations supported by benevolences. The following is an excerpt from the minute approved in MWAB on February 16, 2020:

Additionally, we ask that each of the five organizations provide financial information for the past two fiscal years for general fund contributions, capital contributions, endowment contributions, operating expenses endowment and reserve totals and number of full-time equivalent employees.

Note: “The five organizations” refer to the legacy organizations —American Friends Service Committee (AFSC), Carolina Friends School (CFS), Friends Committee on National Legislation (FCNL), Interfaith Council (IFC) and Quaker House.

Concerns noted by Friends at the January 17th MWAB included the following: lack of clarity in how the information was to be used, difficulty in obtaining the information, and discomfort with a managerial stance implied by requiring this amount of financial data.

A Task Force was formed to bring to MWAB a revision of the benevolence process regarding the collection of financial data. Hank Elkins, Naveed Moeed, Monteze Snyder, Faye Stanley and Carolyn Stuart volunteered to serve on the task force. At our initial meeting, we asked Chris Stanley, who had sent the zoom link, to serve as our clerk, and he agreed to do so. Chris refrained from participating to a great extent in the conversation, primarily assisting us in maintaining good order in our spirited and respectful discussions.

We met four times by zoom (January 27, February 15, March 15 and March 22). Our discussions were marked by respectful listening, a divergence of viewpoints and sincere efforts to reach unity. Over the course of our discussions, we focused on the following three questions:

1. How can we collect financial data that best helps the Meeting understand the needs, strengths and challenges of the organizations that we support through benevolences?

In our wide-ranging discussion, we reached unity in our desire to rely primarily on our relationship with the organization — knowledge gained through our service, membership on boards, and interactions with the organization’s staff and clients. We decided that we wanted to obtain other than financial information, as will be seen the following section of this proposal.

We reached unity on obtaining information through the following request made by the Friend writing the annual report or who has a relationship with the organization:

Please share with the Chapel Hill Friends Meeting your needs and strengths as an organization — financial, volunteer and staff, and spiritual?

Should the staff person indicate needs, follow-up questions would be asked, such as the following:

What information might you share that will help me convey this need to the Meeting? Who might I ask for this information (if the person in conversation does not have the information)?

An additional request regarding specific financial data will be made.

Every five years, the Meeting assesses its allocation of funds to Meeting benevolences. The next assessment will be made in 2025. To make this assessment, we need two pieces of financial data for the current fiscal year: contributions to the general fund and the number of full-time equivalent employees. What is the best way for us to obtain this information?

2. How can we better understand the efforts of the organizations we serve to address issues of diversity, equity and justice?

Although this was not a part of the task assigned to us, we felt that the lack of consistent consideration of how organizations supported by the meeting address diversity, equity and justice was a serious omission. We were careful not to be judgmental of organizations. After all, we have far to go in addressing these important issues. We've made strides in the past year, including the approval of the Statement on Anti-Racism. Still, there's much work ahead for all of us (the Meeting and organizations we support).

We reached unity in making the following request to the organizations we support:

The Society of Friends and we, as a Meeting, are struggling with issues of racism and injustice. How has your journey in dealing with issues of diversity, equity and justice changed your organization over the past year?

This request is seen as an opening to a conversation with mutual sharing on the part of the organization and the Meeting.

3. Should this proposed revision to the benevolence process apply to the five legacy organizations (AFSC, FCNL, IFC, CFS and Quaker House) or to all organizations that we support through benevolences?

We found unity on including all organizations, not solely the legacy organizations. It would be helpful to have information on financial and other needs and strengths, as well as diversity, equity and justice for all organizations.

