

**Southern Appalachian Yearly Meeting and Association
Representative Meeting 153
Tenth Month, 5, 2024
Via Zoom**

153-01 Opening Worship and Centering

After a period of fellowship, Friends settled into worship at 9:00 am ET.

153-02 Clerk's Welcome

Presiding Clerk Jennifer Dickie (Atlanta) welcomed Friends. She noted that our hearts are with SAYMA Friends impacted by Hurricane Helene and the recent flooding. She encouraged Friends to visit sayma.org and [SAYMA's Facebook page](#) where updates related to the flooding are being posted, including donation options especially recommended by Friends in Asheville's Buncombe County and Celo's Yancey County.

So far SAYMA has been contacted by 12 Friends organizations (including yearly meetings, monthly meetings, and Wider Quaker Organizations) concerned for SAYMA Friends' safety and needs. The SAYMA Administrative Assistant, Rob Collins (Birmingham), is collecting information and will respond to these inquiries on behalf of SAYMA Friends. During the visiting time prior to the morning's opening worship, Friends were able to share updates on individual Friends.

**153-03 Roll Call and Introduction of Those Holding the Meeting in the Light
([Attachment A: Attendance Roster](#))**

The roll of meetings was called. Ten monthly meetings and three worship groups were represented.

Jennifer Dickie, in her first experience of clerking a meeting as SAYMA Presiding Clerk, introduced those holding the Representative Meeting in the light:

- Rob Collins was providing tech support. His contact information was shared through the Zoom chat.
- Alison Mawle was providing Zoom support, holding the meeting in the light, and supporting the Clerk.
- Margaret Farmer was in a Friend's home which had electricity, joining as Assistant Clerk, holding the meeting in the light, and supporting the Clerk.
- Blake Burr was serving as Recording Clerk.

153-04 Agenda Review

The agenda was reviewed. There were no amendments.

The agenda was approved.

153-05 Treasurer's Report ([Attachment B: Treasurer's Report](#))

On behalf of the Treasurer Daryl Bergquist (Birmingham), Assistant Treasurer Kendall Ivie (West Knoxville) presented the Treasurer's Report. He noted the valuable input of SAYMA's new part-time bookkeeper Brianna Kempe.

Kendall stressed that the fiscal year closed just recently, on September 30, 2024. However, the FY24 report has now been finalized. Some corrections to the FY23 report are also reflected in the FY24 report.

In the budget, 90% of the assessments in FY24 were directed to Personnel costs. If assessments go up in FY25, still more than 82% of the assessments will be directed to Personnel costs. Thus, little remains for other budgeted items.

SAYF's bank account is no longer treated as a SAYMA fund.

For the first time, in FY24 SAYMA was able to receive stock. This has resulted in higher income for FY24 than anticipated.

The Yearly Meeting sessions for FY24 had a surplus of approximately \$1,300.

SAYMA ended the year with a surplus of \$2,378.80.

A Friend asked for clarification regarding the FY24 budget for Wider Quaker Organizations (WQOs). Original approval of the budget included an agreement that WQO donations would be restored if assessment income was adequate to cover those donations.

A Friend encouraged continued caution in spending for FY25, given SAYMA's high Personnel costs and the uncertainty of future assessments or stock donation.

The report was accepted.

153-06 Finance Committee ([Attachment C: Finance Committee Clerk's Report](#))

Finance Committee Clerk Karen Morris (Atlanta) presented the Finance Committee Clerk's Report. She echoed gratitude for the work of the new bookkeeper, whose position reports to the Finance Committee Clerk.

As noted in the report, the Finance Committee decided that the increase in income in FY24 would allow the committee to restore line item amounts for the two membership

organizations, Friends General Conference or FGC (\$1,250) and Friends World Committee for Consultation or FWCC (\$1,250), and for the ten WQOs historically supported by SAYMA (restored at half of the FY23 level).

The potential FY25 impact of the newly approved guidelines for increased assessments is still unknown, in that most meetings budget on a calendar year. Those in attendance at the Representative Meeting were encouraged to share information about the new guidelines with their monthly meetings during this budget-setting season for many meetings.

The Finance Committee carries a concern for donations to SAYMA's Racial Conflict Transformation Program Cohort 3, which has extended its registration deadline until October 12, 2024. To meet costs for the cohort (including pay to its external partner Ukumbwa Sauti), 37-39 registrants at the recommended registration amount are needed. The cohort is open to those outside SAYMA. According to the Treasurer, most paid registrations to date are from those who have been part of previous cohorts and plan to participate again.

The report was accepted.

153-07 Ad-hoc Naming Committee

Jennifer Dickie noted that the Naming Committee is continuing to meet. Star Smith (Paul Cuffee) and Alison Mawle (Atlanta) provided an update on behalf of committee clerk Chris Berg (associate), who was not able to attend the Representative Meeting. SAYMA-approved positions on the Nominating Committee currently include Friends from West Knoxville, Nashville, and Atlanta. At the close of Yearly Meeting sessions in June 2024, the Naming Committee had not yet identified additional nominees for the SAYMA-approved positions on the Nominating Committee. Thus, the Naming Committee has continued to meet. Jennifer noted that there may be Friends in local meetings who are not yet active in SAYMA but who may have valuable gifts to bring to SAYMA's Nominating Committee.

153-08 Nominating Committee: First Reading of Slate ([Attachment D: Nominating Committee Report](#))

Committee co-clerk Kevin Moran (Atlanta) presented the Nominating Committee's report and proposed slate. The following slate was presented to come forward for approval in the afternoon during its second reading:

Wesley Morris (Nashville Monthly Meeting) as a new member of the Southern Appalachian Young Friends (SAYF) Steering Committee 2024-2026. Wes is an educator and parent.

Devin Lenz (Atlanta Monthly Meeting) as a new member of the SAYF Steering Committee, 2024-2026. Devin is a SAYF parent.

Kelly Askins (Memphis Monthly Meeting) as a new member of the SAYF Support Committee, 2024-2026. Kelly formerly served as a member of the SAYF Steering Committee.

Maia Hallward (Atlanta Monthly Meeting) as a new member of the SAYF Support Committee, 2024-2026. Maia is the director of the International Conflict Management program.

Melissa Preast (West Knoxville Monthly Meeting) as the new clerk of the Yearly Meeting Planning Committee, 2024-2026. Melissa has served SAYMA in multiple positions and is a human relations administrator.

Sam Singer (Nashville Monthly Meeting) as a new member of the Yearly Meeting Planning Committee, 2024-2026. Sam is an educator and parent.

Ian Wells (Atlanta Monthly Meeting) as a new member of the Yearly Meeting Planning Committee, 2024-2026. Ian is an active participant at Yearly Meeting. Many know him as **Big Softy**.

Chris Berg (Associate) as a continuing member of the Yearly Meeting Planning Committee, 2024-2026. He will serve as the worship coordinator.

Hank Fay (Berea Monthly Meeting) as a continuing member of the Outreach Committee, 2024-2026.

wood bouldin (Associate) as the continuing clerk of the Outreach Committee, 2024-2026.

Star Smith (Paul Cuffee Worship Group) as the new representative to FWCC, 2024-2027. Star has served as Clerk of Uplifting Racial Justice (URJ) and as a member of the ad-hoc Faith and Practice Committee.

Friends were encouraged to reach out to members of the Nominating Committee with any questions prior to the second reading of the slate in the afternoon. Email addresses of committee members were provided in the Zoom chat.

A Friend asked for clarification about the role of worship coordinator on the Yearly Meeting Planning Committee. Karen Morris previously served as worship coordinator and provided information about the role. Responsibilities include organizing worship sharing groups and managing the committee's planning for other worship periods that occur during Yearly Meeting as well as worship-sharing queries to be used at Yearly Meeting (these queries are finalized in collaboration with Ministry and Nurture). A Friend asked that in the upcoming Yearly Meeting there be a focus on justice in the Yearly Meeting worship-sharing queries. Friends were encouraged to share thoughts on worship-sharing queries with Melissa Preast and Chris Berg as key members of the new Yearly Meeting Planning Committee.

A Friend noted that according to the previous year's reports from the Nominating Committee there had not been unity regarding the nomination of Star Smith as FWCC Representative. This Friend noted that the current Nominating Committee is bringing forward Star's nomination. This Friend also noted that the Nominating Committee has been meeting frequently, every two weeks. Kevin Moran, as co-clerk, confirmed that the committee has been focusing heavily on Friends' gifts and is in unity on Star's nomination. A Friend noted that this is an example of continuing revelation.

Friends asked for clarifications regarding the roles of wood bouldin and Hank Fay on the Outreach Committee. Typos were corrected in the Nominating Report and are reflected above.

The report was accepted.

After a short break, the meeting resumed. Friends reflected on the reports given. Karen Morris noted her own leading on the great value of the SAYMA Racial Conflict Transformation Program. Star Smith, one of the organizers of this program, emphasized that the program is a program of SAYMA. Those in attendance were encouraged to consider registering for Cohort 3 and inviting others from their meetings to register.

153-09 Uplifting Racial Justice Committee ([Attachment E: Uplifting Racial Justice Report](#))

Committee clerk Star Smith (Paul Cuffee) presented the committee's report. Jennifer thanked the committee for its continued work to support Friends of Color.

The report was accepted.

153-10 Ad-hoc Faith & Practice Revision Committee ([Attachment F: Ad-hoc Faith & Practice Revision Committee](#))

The Clerk noted that committee clerk Melissa Preast (West Knoxville) had connection difficulties and could not be present at the Representative Meeting. Friends were encouraged to read the committee report in full, which includes specific asks for all SAYMA committees:

- Clerks, please review your committee section and recommend updates.
- Identify items that should be moved to the SAYMA Handbook.
- Provide suggestions related to items missing from the Faith & Practice in general. (What do you want to see in your F&P?)

Monthly meetings and worship groups are also asked for the following:

- Please review the current glossary and provide recommendations for edits to definitions or omissions along with a draft definition.
- Please review the section on Monthly Meetings and provide suggestions for edits or omissions.

Committee member Star Smith noted that the committee is a spirited and cohesive group.

The report was accepted.

153-11 Clerk's Items

The Clerk noted that during Yearly Meeting sessions in June 2024, Co-clerks Margaret Farmer and Daryl Bergquist (Birmingham) stood up a new ad-hoc team, with work by S Bowland (Atlanta, Paul Cuffee) beginning in the lead-up to Yearly Meeting sessions and continuing during the sessions. The following charge has evolved since the June 2024 Yearly Meeting:

Ad-hoc Racial Conflict Transformation Team (10/2024)

a. Charge:

- i. To develop processes that can effectively address the racial conflict in the yearly meeting.
- ii. To identify Quaker resources available to aid us in this work.
- iii. To implement the process as needed to address racial conflict.

b. Members:

- i. Interested members of SAYMA Uplifting Racial Justice Committee (changed during the meeting to be “Interested SAYMA Friends of Color”)
- ii. SAYMA Presiding clerk(s)
- iii. Clerks or representatives from M&N Committee, Yearly Meeting Planning Committee, the Racial Justice Working Group, and Finance Committee and/or SAYMA Treasurer
- iv. Additional members may be added as needed for the work.

Friends asked if this should be an ad-hoc team, a standing committee, or a subcommittee of another committee. Jennifer expressed her vision that it will be an ad-hoc committee or team, with recommendations emerging for a permanent structure. Margaret Farmer expressed her and Daryl’s vision that the team will be experimental and interim.

A Friend asked how this charge overlaps with URJ’s mission and goals. Jennifer encouraged Friends to review URJ’s mission:

To help SAYMA become a welcoming place for Friends of color. The committee will do this by providing safe space for Friends of color to bring issues and concerns regarding racism within their Monthly Meetings and SAYMA, to find support and advocacy. The committee will also work to raise awareness about White Supremacy aka racism within SAYMA, by compiling and disseminating educational resources.

Star Smith, clerk of URJ, expressed that this new ad-hoc team is unique within SAYMA in that it brings together both white and BIPOC Friends to transform racial conflict that has occurred within SAYMA and to live into the vision “Let us see what love can do.”

Margaret encouraged Friends to review Atlanta’s 2022 [Interpersonal Racist Incident Policy](#) and FGC’s [Racial Wounding Policy](#) as examples of similar work.

A Friend asked for membership details of SAYMA URJ. Star Smith clarified that three members of URJ were present at the Representative Meeting and willing to be publicly identified as URJ members. One of those members, S. Bowland, offered that she has seen approximately seven to eight attendees at URJ meetings.

Friends continued to express confusion and conflict. Jennifer asked Friends to settle into worshipful silence.

In response to a question, Jennifer explained that the new ad-hoc team has now met twice, selected Lissa Place (Atlanta) as clerk, and set a goal of having a report for the Representative Meeting in Spring 2025.

Star clarified that URJ will only accept suggestions for URJ committee change from Friends of Color.

A Friend of Color expressed concern that Friends of Color who are not part of URJ may not be represented on the ad-hoc team. Jennifer noted this concern and is hopeful that several opportunities exist to incorporate additional voices. Upon review of the minutes, Star Smith as clerk of URJ suggested that the first membership sub-item be expanded to read “Interested SAYMA Friends of Color.” Jennifer will incorporate this recommendation.

Jennifer then provided a report on a long-standing ad-hoc working group of white allies supporting the work of URJ. At a previous juncture, the working group had asked to become a standing committee. At this time, the working group is not requesting to be a standing committee:

Ad-hoc Racial Justice Working Group Committee Charge:

The committee is composed of a Clerk and up to four members.

Continuing members:

Shannon Roberts-Smith, clerk

Karen Morris

Margaret Farmer

Melissa Preast

Susan Firestone

The committee will:

A. be guided by SAYMA-URJ in order to understand the impact racism has on the lives of Friends of Color, and to better understand how white Friends can best engage in anti-racist work in SAYMA;

B. collaborate with SAYMA-URJ to maintain a regularly updated list of recommended anti-racist resources;

C. share information and provide assistance to individuals and monthly meetings in identifying how individuals and institutions maintain/challenge/resist racist power structures, particularly within SAYMA itself;

D. serve as anti-racism accountability partners to individual white Friends in SAYMA, particularly for those sitting in positions of greater responsibility within SAYMA;

E. support SAYMA-URJ's strategic initiatives regarding anti-racist structural changes within SAYMA;

F. when requested by SAYMA-URJ, provide technical and logistical assistance.

A Friend noted that the ad-hoc working group appears to be like a standing committee in its charge. Another Friend asked whether a membership of five would be the maximum or the minimum. Jennifer will relay these questions to the working group.

The morning minutes were reviewed in the face of the meeting and approved.

After lunch, Friends resumed business with ten minutes of centering silent worship.

153-12 Discretionary Fund for Donations to Friends in Western North Carolina

The Clerk provided an overview of information gathered thus far related to the needs of Friends in Western North Carolina and inquiries received from Quaker organizations. Two SAYMA meetings - Asheville and Celo - have been directly impacted, and another Quaker meeting not affiliated with SAYMA has also been directly impacted. Currently there is no central information source or way to donate money within Quaker organizations' social media. The Clerk queried Friends about a possible SAYMA discretionary fund perhaps under the care of Ministry & Nurture. The Clerk asked Friends for input.

One Friend noted the wide and deep need across the region and the difficulty of prioritizing specific needs. This Friend suggested that instead of managing a discretionary fund we direct donors to organizations trusted by those who are living in the area.

A Friend who is a member of one of the impacted meetings recommended that SAYMA identify a designated person for each meeting who can collect and communicate individual and meeting-level needs to SAYMA's Administrative Assistant. Monthly meetings may be led to make direct donations to those meetings.

The SAYMA Administrative Assistant noted that Quaker organizations have indicated a high level of trust in SAYMA to distribute any funds collected. However, the Clerk noted the sense of the meeting that SAYMA should not collect funds and instead should serve as an information disseminator and amplifier of Quaker-specific needs.

American Friends Service Committee (AFSC) is the Quaker organization that historically has been directly involved in relief efforts. However, it does not appear to be currently involved in Hurricane Helene relief and recovery. One Friend noted that AFSC has frequently worked in collaboration with Mercy Corps. Another Friend noted that evangelical Friends provided direct service during Hurricane Katrina through Friends Disaster Relief.

153-13 Nominating Committee: Second Reading and Approval of Slate **(Attachment D: Nominating Committee Report)**

The slate as prepared by the Nominating Committee was read for a second time.

A Friend asked for more information about the committee's continuing revelation about Star's nomination as a FWCC Representative. Jennifer noted that a total of three FWCC Representative positions are open. The co-clerks of the Nominating Committee spoke of their own experiences of continuing revelation on this matter, expressing their confidence in Star's initiative and willingness to serve in this role and their appreciation for her attendance at the recent FWCC World Plenary.

The Friend asking the previous question stated that he does not feel Star represents SAYMA. Jennifer noted that no Friend is able to represent all Friends. Later, in response to the Friend's statement, Star noted that her nomination has been endorsed by both SAYMA-URJ and Geeta McGahey, SAYMA's FWCC Representative through Yearly Meeting Sessions 2025 and FWCC Southeast Regional Coordinator. Star and other Friends mentioned the value of having a Friend of Color as an FWCC Representative. Currently there is little visible representation of Friends of Color among FWCC Representatives from the US.

A Friend asked if Star will make a report on her attendance at the FWCC World Plenary. Jennifer responded that FWCC reports are accepted at the Yearly Meeting and Star will make a report at that time.

This Friend also noted the Released Friend report by Adrian Mehr (Memphis) which was accepted into the minutes of Yearly Meeting in June 2024, with this report including Adrian's perceptions of harm from Star and URJ. Jennifer noted that Adrian's report

includes perceptions of harm from many additional SAYMA Friends in positions of responsibility. In the review of these Representative Meeting minutes, Star requested that the minutes reflect her objection to Adrian's perceptions.

The conversation returned to gifts. Several Friends spoke of Star's many gifts, especially her willingness to confront white people on their racism and her long-standing scholarship on racism. One Friend noted he has seen Star's gifts especially in her work with young adults. Another Friend reminded gathered Friends that Star has been the one calling Friends to see what love can do.

Friends were asked to discern the nominations from a spiritually grounded place. Jennifer reminded Friends that many of those on the Nominating Committee slate are unknown to most SAYMA Friends: "This troubles me. We are putting one person's gifts under the microscope." She continued, "I have been asked if there is urgency to this nomination." Jennifer expressed that she does feel urgency on behalf of SAYMA. She reminded Friends that two additional FWCC Representatives are still being sought. She asked for Friends to settle into worshipful silence.

Star told a story from FWCC World Plenary. At an FWCC Americas session, Star shared with others that she was attending as a delegate rather than a Representative. In response, others at the session expressed shock.

The Clerk tested approval of the slate as a whole, with one Friend standing aside and one Friend standing against Star's nomination.

A Friend noted that as Quakers we are called to labor with those who stand in the way or stand against. He asked if the Friend standing against Star's nomination was willing to stand aside and if other Friends could remain open to the humanity of those who are standing aside and uneasy with Star's nomination. The Friend standing against Star's nomination did not stand aside.

A Friend noted the teachable moment presented by this situation of structural harm in Quaker process and the need to find our way to loving community through the work the transformation team hopes to accomplish.

The following proposed minute was brought forward:

152-13-01 Minute: Nominations are approved, without Star's nomination, and listed on the attachment:

- **Wesley Morris** (Nashville Monthly Meeting) as a new member of the Southern Appalachian Young Friends (SAYF) Steering Committee 2024-2026.
- **Devin Lenz** (Atlanta Monthly Meeting) as a new member of the SAYF Steering Committee, 2024-2026.
- **Kelly Askins** (Memphis Monthly Meeting) as a new member of the SAYF Support Committee, 2024-2026.
- **Maia Hallward** (Atlanta Monthly Meeting) as a new member of the SAYF Support Committee, 2024-2026.
- **Melissa Preast** (West Knoxville Monthly Meeting) as the new clerk of the Yearly Meeting Planning Committee, 2024-2026.
- **Sam Singer** (Nashville Monthly Meeting) as a new member of the Yearly Meeting Planning Committee, 2024-2026.
- **Ian Wells** (Atlanta Monthly Meeting) as a new member of the Yearly Meeting Planning Committee, 2024-2026. Many know him as **Big Softy**.
- **Chris Berg** (Associate) as a continuing member of the Yearly Meeting Planning Committee, 2024-2026.
- **Hank Fay** (Berea Monthly Meeting) as a member of the Outreach Committee, 2024-2026.
- **wood bouldin** (Associate) as the continuing clerk of the Outreach Committee, 2024-2026.

Friends approved, with one Friend standing aside in disagreement with the exclusion of Star Smith's nomination.

Star asked for her observation to be recorded that the approval of the slate without her name is clear evidence of racism. Although only one Friend stood aside at the time of approval, the number of Friends expressing disappointment and willingness to stand aside increased in the review of the minutes. A Friend spoke of her meeting's sharp frustration with the seeming stagnation of SAYMA on this matter. A Friend shared Psalm 31:7:

I will be glad and rejoice in your love, for you saw my affliction and knew the anguish of my soul.

153-14 Announcements

The Clerk asked that Friends read the following announcements:

- This year Friends General Conference will host an online gathering from Saturday, February 1, through Sunday, February 9. The theme will be A

Spring Whose Waters Never Fail. Registration is expected to open after Thanksgiving. More information is available on the [FGC web site](#).

- Current contact information is being sought for remaining members of the Oxford Monthly Meeting. The SAYMA office has received a request for this information from the Starkville Worship Group, which was organized under the care of the Oxford Monthly Meeting. Anyone with information may contact saymaclerk@gmail.com or saymaoffice@gmail.com.
- [Registration](#) for [Cohort 3 of SAYMA's Racial Conflict Transformation Program \(RCTP\)](#) has been extended until Saturday, October 12. As of October 2, 30 people have registered. The suggested registration fee for participants who are not Friends of Color is \$300. Other donations are also welcome, as there is currently not a budget line item at SAYMA to support this work. Donations will allow the RCTP to continue to engage with Ukumbwa Sauti who has been serving as an external partner for the program.
- As noted within the URJ report, there are now regularly scheduled virtual Meetings for Worship with the Paul Cuffee Worship Group (PCWG). The PCWG was created by SAYMA URJ for people of color who wish to worship in the manner of Friends without having to affiliate with an all-white or mostly-white Monthly Meeting. The Paul Cuffee Worship Group meets virtually every two weeks, on New Moons and Full Moons at 7:00 pm Eastern. All people of color are welcome to join us in Worship. All that is required is that you send a message to the clerk at urj@sayma.org, share your name, and identify yourself as a person of color who wishes to worship with PCWG so that the link and schedule can be shared with you.

The minutes for Representative Meeting 153 were reviewed and approved in the face of the meeting.

153-14 Closing Worship - 3:58 pm ET

Friends entered silent worship, after which RM153 was closed.

Respectfully submitted,

Jennifer Dickie
Clerk
(archived copy is signed)

Blake Burr
Recording Clerk
(archived copy is signed)

Attachment A: Attendance Roster

[\(return to the minutes\)](#)

The roster appears in the archived copy of the minutes.

Attachment B: Treasurer's Report

[\(return to the minutes\)](#)

Date: October 5, 2024

To: Representative Meeting 153

From: Daryl Bergquist, Treasurer and Kendall Ivie, Assistant Treasurer

Re: Treasurer's Report

At the Yearly Meeting Sessions in June 2024 Daryl Bergquist was approved as the new treasurer. Since then, Daryl and Kendall have worked to bring Daryl up to speed and to get the bookkeeping records up to date. We have been greatly helped by our new bookkeeper Brianna Kempe.

SAYMA's fiscal year is October - September, so the attached reports for the fiscal year 2024 which ends September 30, 2024 are complete to the best of our ability.

General items of note.

- In the FY 2025 Budget our Personnel Costs are over 90% of the Assessments. If our assessments increase by 10% in FY 2025, Personnel costs would still be over 82% of the Assessments.
- On 10/1/2024 we received an invoice of \$1250 from Friends Journal Publishing for ads we placed for a new Administrative Assistant and a Bookkeeper. This will fall under Personnel and may require an adjustment to the budget at the spring rep meeting.
- We are no longer treating the SA YF Bank Account as a fund. Therefore it does not show up in the reports.
- Brianna Kempe has helped us correct errors in FY 2023. The comparison reports has the updated FY 2023 numbers.
- SAYMA has received \$21,443.67 in stock donations this fiscal year that were split between General Funds and various Donor Restricted Funds. They were received by Friends Fiduciary, sold and the proceeds put into the Short Term Investment Fund. At this time we have unrealized gains of approximately \$500 which are not reflected in the following reports.
- Budgeted Assessments for FY 2024 were \$42,142.00. Actual Assessment received in FY 2024 was \$43,664.26 which is 103.61% of the budget.
- Donations to the General Fund were \$16,028.67 which was \$13,028.67 over the budget.
- The YM 2024 Sessions had income of \$35,481.82 and expenses of \$34,150.00. This gave a surplus of \$1,331.82.
- The FY 2024 budget had a deficit of \$17,135. The FY 2024 ended with a surplus of \$2,378.80.
- The FY 2024 budget projected that the Undesignated Equity would be under \$1,883 at the end of FY 2024 whereas it ended FY 2024 at \$19,662.52.
- The fund balances show up in the Balance Sheet Comparison Report.

Donor Restricted Fund Activity

- Kenworthy Charitable Trust Fund. \$5,785.00 was used as scholarships to bring YAFs to YM Sessions 2024 and an additional \$2,810.50 was used to send an individual YAF to the FWCC meeting in South Africa. Balance 9/30/2024 = \$7,594.50.
- YAF Scholarships Fund. A donation of \$2,500 was received. Balance 9/30/2024 = \$2,500.
- FWCC Third World Delegates Fund. \$150 was used as part of the \$6,500 payment to FWCC for Third World Delegates. Balance 9/30/2024 = \$0.
- FWCC SAYMA International Delegates Fund. \$1,100 was used as part of the \$1,300 payment to FWCC for SAYMA's Delegate registration. Balance 9/30/2024 = \$0.
- Uplifting Racial Justice Fund. \$653 was received in donations and spent \$2,200. Balance 9/30/2024 = \$277.30.
- Racial Conflict Transformation Fund. \$11,250.00 was received as follows: Cohort 2 \$2,750 registration, Cohort 3 \$1,500 registration and donations of \$7,000. The fund has current obligations \$4,050 which is broken down into \$1,500 for Cohort 3 and \$2,550 for other

obligations. Balance 9/30/2024 = \$4,443.05.

Set-Aside Fund Activity

- The budgeted yearly allotments were made to all Set-Aside Funds.
- Boone MM In Trust Fund. No Activity. Balance 9/30/2024 = \$2,677.
- FWWC 3rd World Delegates Fund. Allotment = \$750. \$5850 sent to FWCC for 3" world delegates. Balance 9/30/2024 = \$1,500.
- FWCC SAYMA Intl Delegate Fund. Allotment = \$400. \$200 sent to FWCC for registration. Balance 9/30/2024 = \$5,600.
- Released Friend Fund. Allotment = \$2,000. No Activity. Balance 9/30/2024 = \$2,859.
- Spiritual Development Fund. Allotment = \$500. \$500 spent. Balance 9/30/2024 = \$1,898.
- Uplifting Racial Justice Fund. Allotment = \$1,500. No Activity. Balance 9/30/2024= \$2,122.
- YAF Scholarship Fund. No activity. Balance 9/30/2024 = \$815.
- Youth Enrichment Fund. No Activity. Balance 9/30/2024 = \$2,696.

Balance Sheet Comparison Report

The comparative balance sheet shows SA YMA's assets, liabilities, and equity as of the end of FY2023 (September 30, 2023) and FY2024 (September 30, 2024).

Report items of note:

- Total Accounts payable of \$5,968.90 for FY 2024 is because we sent many checks near the end of FY 2024 that have not been processed by the recipients.

Income and Expense Comparison Report

This report shows the income and expenses fiscal year for FY2024 compared to FY2023.

Report items of note:

- CC Processing Fees are costs of using Square borne by SAYMA. Next fiscal year these will appear under Bank Fees.
- DR or Set-Aside Fund Expense has gone up this year because of FWCC and the way we record fund expenses.
- Grants were from the Released Friend Fund.
- In FY 2023 the Racial Conflict Training expenses were paid from the Cmte Exp - Contingency Pool and the DR Racial Conflict Transformation Fund.
- In FY 2024 the Racial Conflict Training expenses were paid from the Ad Hoc Exp - Racial Conflict Training and the DR Racial Conflict Transformation Fund.

Budget vs Actuals Report

This report compares the actual income and expenses to budgeted amounts. Funds income and expenses do not show here.

FY 2025 Budget

Column Z has been updated to show FY2024 actuals. Column AA Row 132 Undesignated Funds is now based on the actual Undesignated Fund at the end of FY 2024.

SAYMA
Balance Sheet comparison with Previous Year
September 30, 2024

	Sep 30, 2024	Sep 30, 2023 (PY)	Change	% Change
ASSETS				
Bank Accounts				
Checking - PNC	20,917.98	43,640.58	-22,722.60	-52.07%
Friends Fiduciary	21,443.87	0.00	21,443.87	
Money Mkt - Self Help	40,907.98	39,584.52	1,323.46	3.34%
TOTAL ASSETS	\$ 83,269.83	\$ 83,225.10	\$ 44.53	0.05%
LIABILITIES AND EQUITY				
Liabilities				
Total Accounts Payable	\$ 5,968.90	\$ 0.00	\$ 5,968.90	
Total Payroll taxes payable	\$ 448.35	\$ 462.07	-\$ 13.72	-2.97%
Total Liabilities	\$ 6,417.25	\$ 462.07	\$ 5,955.18	1288.80%
Equity				
Donor-Restricted Funds				
FWCC 3rd World Delegates	0.00	150.00	-150.00	-100.00%
FWCC SAYMA Intl Delegates	0.00	1,100.00	-1,100.00	-100.00%
Kenworthy Charitable Trust	7,594.50	16,190.00	-8,595.50	-53.09%
Racial Conflict Transformation	4,443.05	2,740.00	1,703.05	62.16%
URJ Fund	277.30	1,824.30	-1,547.00	-84.80%
YAF Scholarships	2,500.00	0.00	2,500.00	
Total Donor-Restricted Funds	\$ 14,814.85	\$ 22,004.30	-\$ 7,189.45	-32.67%
Funds Designated by SAYMA				
Reserves	22,208.00	22,208.00	0.00	0.00%
Set-Aside Funds				
Fund - Boone MM in Trust	2,677.00	2,677.00	0.00	0.00%
Fund - FWCC 3rd World Delegates	1,500.00	6,600.00	-5,100.00	-77.27%
Fund - FWCC SAYMA Intl Delegate	5,600.00	5,400.00	200.00	3.70%
Fund - Released Friend	2,859.00	859.00	2,000.00	232.83%
Fund - Spiritual Development	1,898.04	1,898.04	0.00	0.00%
Fund - Uplifting Racial Justice	2,122.22	622.22	1,500.00	241.07%
Fund - YAF Scholarship	814.75	814.75	0.00	0.00%
Fund - Youth Enrichment	2,696.00	2,696.00	0.00	0.00%
Total Set-Aside Funds	\$ 20,167.01	\$ 21,567.01	-\$ 1,400.00	-6.49%
Total Funds Designated by SAYMA	\$ 42,375.01	\$ 43,775.01	-\$ 1,400.00	-3.20%
Undesignated Equity	19,662.52	16,983.72	2,678.80	15.77%
Total Equity	\$ 76,852.38	\$ 82,763.03	-\$ 5,910.65	-7.14%
TOTAL LIABILITIES AND EQUITY	\$ 83,269.83	\$ 83,225.10	\$ 44.53	0.05%



SAYMA

Income And Expenses Comparison

October 2023 - September 2024

	TOTAL	
	OCT 2023 - SEP 2024	OCT 2022 - SEP 2023 (PP)
Revenue		
Assessments		0.30
Asheville	4,125.00	4,125.00
Athens	600.00	600.00
Atlanta	14,250.00	14,250.00
Berea	3,000.00	1,762.50
Birmingham	2,100.00	2,625.00
Celo	3,037.50	2,325.00
Charleston		562.50
Chattanooga	2,269.26	1,886.70
Columbia	1,800.00	1,800.00
Cookeville	675.00	575.00
Greenville	825.00	825.00
Huntsville	1,120.00	1,120.00
Memphis	3,000.00	3,000.00
Nashville	3,375.00	3,937.50
West Knoxville	3,487.50	2,643.75
Total Assessments	43,664.26	42,038.25
Contributions to SAYMA		
Contrib to DR RCT	11,250.00	6,321.23
Contrib to DR Released Friend Fund		694.00
Contrib to DR URJ	653.00	
Contrib to DR YAF Scholarship	2,500.00	
Contrib to DR YM Sessions Scholarship		325.00
Contrib to General Fund	16,028.67	3,286.62
Total Contributions to SAYMA	30,431.67	10,626.85
Interest - Money Mkt	1,323.46	944.97
Publication Sales	31.36	55.92
YM Sessions Income	35,481.82	32,976.69
Total Revenue	\$110,932.57	\$86,642.68
GROSS PROFIT	\$110,932.57	\$86,642.68
Expenditures		
CC Processing Fee	78.53	
DR or Set-Aside Fund Expense	22,057.45	4,245.00

TOTAL		
	OCT 2023 - SEP 2024	OCT 2022 - SEP 2023 (PP)
Grants		9,000.00
Junior Yearly Mtg Exp	5,013.30	5,541.39
SAYMA Operations		
Banking Costs		0.00
Bookkeeping Costs	841.31	317.89
Liability Insurance	829.67	895.00
Office Admin		
Office - Guilford Archiving	150.00	150.00
Office - Phone ISP	429.90	1,073.69
Office - Postage	4.40	
Office - Volunteer Bkgrnd Chks	250.94	407.44
Travel - Office Staff	631.48	471.73
Total Office Admin	1,466.72	2,102.86
Personnel	33,754.62	30,872.55
Publication Expenses		
Pub Exp - Faith & Practice		51.18
Pub Exp - Web & Hosting Svcs		438.83
Total Publication Expenses		490.01
SAYMA Committees		
Ad Hoc Exp - Racial Conflict Training	3,500.00	
Cmte Exp - Contingency Pool		7,638.78
Cmte Exp - YM Planning	149.90	138.78
Total SAYMA Committees	3,649.90	7,777.56
Transfer to SAYF	1,500.00	3,000.00
Travel Reimbursements		
Travel - WQO Delegates	2,216.72	4,228.03
Total Travel Reimbursements	2,216.72	4,228.03
Total SAYMA Operations	44,258.94	49,683.90
Set-aside Fund Annl Allotments		
FWCC 3rd World Delegate Allot	750.00	3,000.00
FWCC SAYMA Intl Delegates Allot	400.00	1,800.00
Released Friend Annl Allotment	2,000.00	
Spiritual Devt Annl Allotment	500.00	0.00
Uplifting Racial Justice Allot	1,500.00	
Total Set-aside Fund Annl Allotments	5,150.00	4,800.00
Transfer out of Fund to GF		0.00
Transfer to Reserve		4,000.00
WQO Annual Contributions		
WQOs - Membership		
WQO - FGC	1,250.00	1,250.00
WQO - FWCC	1,250.00	1,250.00
Total WQOs - Membership	2,500.00	2,500.00

	TOTAL	
	OCT 2023 - SEP 2024	OCT 2022 - SEP 2023 (PP)
WQOs - Other		
WQO - AFSC	300.00	600.00
WQO - BQEF	150.00	300.00
WQO - FCNL	450.00	900.00
WQO - FLGBTQ	150.00	300.00
WQO - Friends Journal	300.00	600.00
WQO - Friends Peace Teams	150.00	300.00
WQO - Quaker Earthcare Witness	450.00	900.00
WQO - Quaker House	450.00	900.00
WQO - Quaker Volunteer Service	300.00	600.00
WQO - Right Sharing World Res	300.00	600.00
Total WQOs - Other	3,000.00	6,000.00
Total WQO Annual Contributions	5,500.00	8,500.00
YM Sessions Expense New	34,150.00	34,997.88
Total Expenditures	\$116,208.22	\$120,768.17
NET OPERATING REVENUE	\$ -5,275.65	\$ -34,125.49
NET REVENUE	\$ -5,275.65	\$ -34,125.49



SAYMA
Budget vs. Actuals
October 2023 - September 2024

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Revenue				
Assessments				
Asheville	4,125.00	4,050.00	75.00	101.85 %
Athens	600.00	600.00	0.00	100.00 %
Atlanta	14,250.00	14,250.00	0.00	100.00 %
Berea	3,000.00	2,700.00	300.00	111.11 %
Birmingham	2,100.00	2,100.00	0.00	100.00 %
Celo	3,037.50	2,925.00	112.50	103.85 %
Chattanooga	2,269.26	1,960.00	309.26	115.78 %
Columbia	1,800.00	1,800.00	0.00	100.00 %
Cookeville	675.00	500.00	175.00	135.00 %
Greenville	825.00	825.00	0.00	100.00 %
Huntsville	1,120.00	1,120.00	0.00	100.00 %
Memphis	3,000.00	3,000.00	0.00	100.00 %
Nashville	3,375.00	3,375.00	0.00	100.00 %
Oxford		200.00	-200.00	
West Knoxville	3,487.50	2,737.00	750.50	127.42 %
Total Assessments	43,664.26	42,142.00	1,522.26	103.61 %
Contributions to SAYMA				
Contrib to General Fund	16,028.67	3,000.00	13,028.67	534.29 %
Total Contributions to SAYMA	16,028.67	3,000.00	13,028.67	534.29 %
Interest - Money Mkt	1,323.46	600.00	723.46	220.58 %
Publication Sales	31.36	0.00	31.36	
YM Sessions Income	35,481.82	38,100.00	-2,618.18	93.13 %
Total Revenue	\$96,529.57	\$83,842.00	\$12,687.57	115.13 %
GROSS PROFIT	\$96,529.57	\$83,842.00	\$12,687.57	115.13 %
Expenditures				
CC Processing Fee	78.53		78.53	
Junior Yearly Mtg Exp	5,013.30	6,500.00	-1,486.70	77.13 %
SAYMA Operations				
Bookkeeping Costs	841.31	960.00	-118.69	87.64 %
Liability Insurance	829.67	925.00	-95.33	89.69 %
Office Admin				
Office - Duplication		50.00	-50.00	
Office - Guilford Archiving	150.00	150.00	0.00	100.00 %
Office - Officer Expense		150.00	-150.00	
Office - Phone ISP	429.90	1,500.00	-1,070.10	28.66 %
Office - Postage	4.40	50.00	-45.60	8.80 %
Office - Supplies, Equip, Misc		50.00	-50.00	
Office - Volunteer Bkgrnd Chks	250.94	400.00	-149.06	62.74 %

TOTAL				
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Travel - Office Staff	631.48	800.00	-168.52	78.94 %
Total Office Admin	1,466.72	3,150.00	-1,683.28	46.56 %
Personnel	33,754.62	36,242.00	-2,487.38	93.14 %
Publication Expenses		500.00	-500.00	
SAYMA Committees				
Ad Hoc Exp - Racial Conflict Training	3,500.00	3,500.00	0.00	100.00 %
Cmte Exp - Contingency Pool		300.00	-300.00	
Cmte Exp - Earthcare		0.00	0.00	
Cmte Exp - Faith & Practice		0.00	0.00	
Cmte Exp - Finance		0.00	0.00	
Cmte Exp - Ministry & Nurture		200.00	-200.00	
Cmte Exp - Nominating		0.00	0.00	
Cmte Exp - Outreach		0.00	0.00	
Cmte Exp - Upl Racial Justice		0.00	0.00	
Cmte Exp - WQO Allocations		0.00	0.00	
Cmte Exp - YM Planning	149.90	200.00	-50.10	74.95 %
Total SAYMA Committees	3,649.90	4,200.00	-550.10	86.90 %
Transfer to SAYF	1,500.00	1,500.00	0.00	100.00 %
Travel Reimbursements				
Travel - WQO Delegates	2,216.72	2,500.00	-283.28	88.67 %
Total Travel Reimbursements	2,216.72	2,500.00	-283.28	88.67 %
Total SAYMA Operations	44,258.94	49,977.00	-5,718.06	88.56 %
Set-aside Fund Annl Allotments				
FWCC 3rd World Delegate Allot	750.00	750.00	0.00	100.00 %
FWCC SAYMA Intl Delegates Allot	400.00	400.00	0.00	100.00 %
Released Friend Annl Allotment	2,000.00	2,000.00	0.00	100.00 %
Spiritual Devt Annl Allotment	500.00	500.00	0.00	100.00 %
Uplifting Racial Justice Allot	1,500.00	1,500.00	0.00	100.00 %
Total Set-aside Fund Annl Allotments	5,150.00	5,150.00	0.00	100.00 %
WQO Annual Contributions				
WQOs - Membership				
WQO - FGC	1,250.00	625.00	625.00	200.00 %
WQO - FWCC	1,250.00	625.00	625.00	200.00 %
Total WQOs - Membership	2,500.00	1,250.00	1,250.00	200.00 %
WQOs - Other		0.00	0.00	
WQO - AFSC	300.00		300.00	
WQO - BQEF	150.00		150.00	
WQO - FCNL	450.00		450.00	
WQO - FLGBTQ	150.00		150.00	
WQO - Friends Journal	300.00		300.00	
WQO - Friends Peace Teams	150.00		150.00	
WQO - Quaker Earthcare Witness	450.00		450.00	
WQO - Quaker House	450.00		450.00	
WQO - Quaker Volunteer Service	300.00		300.00	
WQO - Right Sharing World Res	300.00		300.00	
Total WQOs - Other	3,000.00	0.00	3,000.00	
Total WQO Annual Contributions	5,500.00	1,250.00	4,250.00	440.00 %
YM Sessions Expense New	34,150.00	38,100.00	-3,950.00	89.63 %

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Total Expenditures	\$94,150.77	\$100,977.00	\$ -6,826.23	93.24 %
NET OPERATING REVENUE	\$2,378.80	\$ -17,135.00	\$19,513.80	-13.88 %
NET REVENUE	\$2,378.80	\$ -17,135.00	\$19,513.80	-13.88 %

	B	W	X	Y	Z	AA	AC
	SAYMA FY 2025 Budget V1.0a		FY24 Budget 1.0 Approved 6/25/2023	FY24 Budget 1.1 Approved 6/21/2024		FY25 Budget 1.0 Approved 6/22/2024	
		FY23 Actual 9/30/2023			FY24 Actual 9/30/2024		Notes
1							
2							
3	Income	\$83,257	\$83,842	\$83,842	\$96,530	\$84,655	Totals are in Black
4	Adjustments to Income						Individual Items are in Blue
5	Assessments	\$40,913	\$42,142	\$42,142	\$43,664	\$42,955	Increase in assessment is not reflected here
6	Asheville	4,125.00	\$4,050	\$4,050	\$4,125	\$4,050	
7	Athens	\$600	\$600	\$600	\$600	\$600	
8	Atlanta	\$14,250	\$14,250	\$14,250	\$14,250	\$14,250	
9	Berea	\$1,763	\$2,700	\$2,700	\$3,000	\$2,700	
10	Birmingham	\$2,625	\$2,100	\$2,100	\$2,100	\$2,100	
12	Celo	\$2,325	\$2,925	\$2,925	\$3,038	\$3,225	
13	Charleston	\$563					
14	Chattanooga	\$1,887	\$1,960	\$1,960	\$2,269	\$1,960	
15	Columbia	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	
16	Cookeville	\$575	\$500	\$500	\$675	\$500	
17	Crossville				\$0	\$0	
19	Greenville	\$825	\$825	\$825	\$825	\$825	
20	Huntsville	\$1,120	\$1,120	\$1,120	\$1,120	\$1,120	
21	Memphis	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	
22	Nashville	\$2,813	\$3,375	\$3,375	\$3,375	\$3,375	
23	Oxford		\$200	\$200	\$0	\$0	
24	Swannanoa Valley						
25	West Knoxville	\$2,644	\$2,737	\$2,737	\$3,488	\$3,450	
26	Contributions – General	\$3,287	\$3,000	\$3,000	\$16,029	\$3,000	
27	Interest - CD						
28	Interest - Money Mkt	\$945	\$600	\$600	\$1,323	\$600	
29	Publication Sales	\$56	\$0	\$0	\$31	\$0	
32	YM Income	\$38,056	\$38,100	\$38,100	\$35,482	\$38,100	
33	YM Adjustments to Income (Kenworthy)	\$4,570	\$4,500	\$4,500	\$5,785	\$4,500	
34	YM Bookstore Inc	510	1,300	1,300	252	1,300	
35	YM Receipts	32,977	31,100	31,100	29,179	31,100	

	B	W	X	Y	Z	AA	AC
36	YM Scholarship Contrib	-	1,200	1,200	266	1,200	
37							
38	Expenses	\$103,587	\$97,977	\$100,977	\$94,151	\$100,424	
39	Adjustments to Expenses						
40	SAYMA Operations	\$49,684	\$46,977	\$49,977	\$44,337	\$49,274	
41	SAYF Operational Transfers	\$3,000	\$1,500	\$1,500	\$1,500	\$1,500	
42	Bookkeeping Costs - QuickBooks Online	\$318	\$960	\$960	\$841	\$960	
43	Liability Insurance	\$895	\$925	\$925	\$830	\$925	
44	Office Admin	\$2,103	\$3,150	\$3,150	\$1,545	\$3,150	
45	Banking Fees	\$0			\$79		Square processing fees
46	Office - Duplication		\$50	\$50	\$0	\$50	
47	Office - Guilford Archiving	\$150	\$150	\$150	\$150	\$150	
48	Office - Supplies, Equip, Misc		\$50	\$50	\$0	\$50	
49	Office - Officer Exp		\$150	\$150	\$0	\$150	
50	Office - Phone, Zoom	\$1,074	\$1,500	\$1,500	\$430	\$1,500	
51	Office - Postage		\$50	\$50	\$4	\$50	
52	Office - Volunteer Bkgrd Chks	\$407	\$400	\$400	\$251	\$400	
53	Travel - Office Staff	\$472	\$800	\$800	\$631	\$800	
54	Payroll Expenses	\$30,873	\$33,242	\$36,242	\$33,755	\$39,039	Includes \$3600 for Bookkeeper, 3% COLA and performance increase
55	Payroll Costs	\$919			\$1,475		
56	Salaries Exp	\$27,825			\$30,978		
57	Tax Payments	\$2,129			\$1,302		
58	Publications Expenses	\$490	\$500	\$500	\$0	\$500	
59	Pub Exp - Directory						
60	Pub Exp - Faith & Practice	\$51	\$0	\$0	\$0	\$0	
61	Pub Exp - Newsletter						
62	Pub Exp - Web & Hosting Srvc	\$439	\$500	\$500	\$0	\$500	
63	SAYMA Committees	\$7,778	\$4,200	\$4,200	\$3,650	\$700	
64	Cmte Exp - Contingency Pool	\$7,639	\$300	\$300	\$0	\$300	
65	Cmte Exp - Faith & Practice Rvsn		\$0	\$0	\$0	\$0	
66	Cmte Exp - Finance		\$0	\$0	\$0	\$0	
67	Cmte Exp - Ministry & Nurture		\$200	\$200	\$0	\$200	
69	Cmte Exp - Outreach		\$0	\$0	\$0	\$0	
70	Cmte Exp - Peace & Social Concerns		\$0	\$0	\$0	\$0	

	B	W	X	Y	Z	AA	AC
71	Cmte Exp - SAYMA Earth Justice						
72	Cmte Exp - Uplifting Racial Justice		\$0	\$0	\$0	\$0	
73	Cmte Exp - WQO Allotments						
74	Cmte Exp - Operational Handbook		\$0	\$0	\$0	\$0	
75	Cmte Exp - JYM Support						
76	Cmte Exp - Personnel						
77	Cmte Exp - SAYF Support						
78	Ad Hoc Exp - URI Support						
79	Cmte Exp - Yearly Meeting Planning	\$139	\$200	\$200	\$150	\$200	
80	Ad Hoc Exp - Racial Conflict Training		\$3,500	\$3,500	\$3,500		Donations should cover FY25
81	Travel Reimbursements	\$4,228	\$2,500	\$2,500	\$2,217	\$2,500	
82	Travel - Rep Meetings		\$0	\$0	\$0	\$0	
83	Travel - WQO Delegates	\$4,228	\$2,500	\$2,500	\$2,217	\$2,500	
84	Set-aside Fund Annual Allotments	\$4,800	\$5,150	\$5,150	\$5,150	\$4,800	
85	Boone MM In Trust						
86	FWCC 3rd World Delg Annl Exp	\$3,000	\$750	\$750	\$750	\$400	Hold until Near EOY
87	FWCC Conference Annl Exp	\$1,800	\$400	\$400	\$400	\$400	Hold until Near EOY
88	Released Friend Annl Exp		\$2,000	\$2,000	\$2,000	\$2,000	Hold until Near EOY
89	Spiritual Development Annl Exp		\$500	\$500	\$500	\$500	Hold until Near EOY
90	Uplifting Racial Justice Annl Exp		\$1,500	\$1,500	\$1,500	\$1,500	Hold until Near EOY
91	YAF Scholarships Annl Exp						
92	Youth Enrichment Fund Annl Exp						
93	Yearly Meeting Gathering	\$35,062	\$38,100	\$38,100	\$34,150	\$38,100	JYM no longer sums here
94	Facilities & Services Exp	\$34,017	\$35,800	\$35,800	\$32,967	\$35,800	
95	YM Accommodations & Meals	\$28,094	\$34,200	\$34,200	\$26,524	\$34,200	
96	Financial Services Fees (Eventbrite)	\$2,223	\$0	\$0	\$2,133	\$0	
97	YM Honoraria and Speaker Travel	\$935	\$500	\$500	\$700	\$500	
98	YM Services	\$2,678	\$700	\$700	\$3,610	\$700	
99	YM Supplies	\$87	\$400	\$400		\$400	
100	YM Bookstore Exp	\$981	\$1,300	\$1,300	\$396	\$1,300	
101	YM Print Post Phone & Misc	\$64	\$1,000	\$1,000	\$788	\$1,000	
102	Junior Yearly Meeting Exp	\$5,541	\$6,500	\$6,500	\$5,013	\$7,000	
103	JYM Asst Coordinator(s)	\$1,334			\$2,700		
104	JYM Coordinator(s)	\$4,040			\$1,980		
105	JYM Supplies, Sitters, Misc	\$167			\$333		
106	Quaker Membership Orgs Annual Contribns	\$2,500	\$1,250	\$1,250	\$2,500	\$1,250	

	B	W	X	Y	Z	AA	AC
107	WQO - FGC	\$1,250	\$625	\$625	\$1,250	\$625	Restore if funds are available
108	WQO - FWCC - Direct Contrbn	\$1,250	\$625	\$625	\$1,250	\$625	Restore if funds are available
109	WQO - FWCC - Capital Campaign		\$0	\$0	\$0	\$0	Restore if funds are available
110	Other WQO Annual Contribns	\$6,000	\$0	\$0	\$3,000	\$0	Restore if funds are available
123	Net(Surplus/Deficit) before Reserve Change:	-\$20,330	-\$14,134	-\$17,134	\$2,379	-\$15,769	
124	Yearly Gathering Net:	\$2,994	\$0	\$0	\$1,332	\$0	
125							
126	Reserve Change:	\$4,000	\$0	\$0	\$0	\$0	
127	Net(Surplus/Deficit) with Reserve Change	-\$24,330	-\$14,134	-\$17,134	\$2,379	-\$15,769	
130							
131	Reserve	\$22,208	\$22,208	\$22,208	\$22,208	\$22,208	
132	Undesignated Funds	\$16,954	\$4,883	\$1,883	\$19,332	\$3,563	Based on 9/30/2024 Undesignated funds
134	est EOY Undesignated fund on 6/22/24				\$15,000	-\$769	\$15,000 Plus Line AA127
135							
136	File: FY25 Budget - V1.0a						

Attachment C: Finance Committee Clerk's Report

[\(return to the minutes\)](#)

Finance Committee Report October 5, 2024

For SAYMA Representative Meeting

The Finance committee welcomes Brianna Kempe, SAYMA's bookkeeper. She is taking on tasks formerly under the Treasurer's mantle that require professional knowledge and is making a big difference already in financial records and responsibilities.

The committee also welcomes Daryl Bergquist as incoming Treasurer. Kendall Ivie, is the assistant treasurer for the next year, and is working closely with Daryl as he learns the treasurer role.

FY 2024 ended September 30

As you saw in the Treasurer's report the fiscal year ended with a bountiful increase in donations. The committee offers a grateful thanks to all who made additional donations.

A decrease in budgeted expenses and an increase in donations allowed the Yearly Meeting to restore line items that were waiting to be paid as funds became available at the end of the fiscal year. The following funds received the budgeted allotments:

- Ministry & Nurture Released Friend fund
- M&N and Spiritual Development fund
- Uplifting Racial Justice set aside fund
- FWCC 3rd World delegate annual expense
- FWCC Conference annual expense

The Finance Committee decided that the increase in income in FY2024 will allow the committee to restore the line items amounts for the 2 membership organizations, Friends General Conference (FGC) and Friends World Committee for Consultation (FWCC), and for the contributions to the 10 Wider Quaker Organizations (WQO's) that SAYMA has been supporting for years.

In FY2023, FGC and FWCC were each sent \$1250 for memberships and the Finance Committee approved restoring that amount for FY2024.

In FY 2023, SAYMA funded the additional 10 WQO's a total of \$6000. For FY 2024 the Finance Committee agreed to restore the funds to half of the previous year, or \$3000. The WQO Allotment Committee sets the percentage of the total for each organization. (See list of WQO's at the end of the report.)

Assessments

The clerk of Finance wrote a letter to MM treasurers and clerks which was sent by Administrative Assistant Rob Collins in early September explaining the increase in assessments for Monthly Meetings beginning in FY 2025 that the body approved in YM sessions. If your MM clerk and/or treasurer didn't receive the letter, please let the Finance clerk, or SAYMA AA, Rob Collins, know ASAP.

There are two options for MM's to consider when planning their annual assessments for SAYMA. You will find the approved minute from June 2024 sessions (**Minute 53-18-01**) at the end of this report. We suggest that assessments be paid quarterly, although small meetings may choose to pay annually. The SAYMA Treasurer will be in contact with MM treasurers in December and January to ask what assessment payments SAYMA should expect for FY 2025.

Racial Conflict Transformation Cohort 3

The deadline for registering for Cohort 3 has been moved to October 12, 2024. The clerk of Finance, who is part of the Racial Conflict Transformation team, encourages each of you to sign up for this exemplary program, for community building with individuals from different monthly meetings, and this year with people from other yearly meetings in the U.S. and Canada. Help expand our institutional capacity for addressing uncomfortable conversations about race, racism, and patterns of oppression within Quaker communities. Here is a link for registering and paying. (https://www.sayma.org/c3_invitation.pdf). There is no cost for Friends of Color.

Donations to SAYMA

Friends, the Finance committee encourages individuals to consider contributions to SAYMA as you are able. Stock donations are now possible with our account at Friends Fiduciary. Please contact the Treasurer (Saymatreasurer@gmail.com) if you wish to donate IRA distributions, stocks, and other non-cash donations, or for questions. The “Contribute” section of the SAYMA website also indicates how you can make dedicated contributions to particular set-aside funds.

Karen Morris, clerk Finance committee

Minute 53-18-01 (from the Yearly Meeting sessions June 2024)

Friends approved, with one person standing aside, the updating of SAYMA’s assessment guidance for monthly meetings through the recommendation of the following, **with meetings encouraged to select whichever generates the higher amount:**

1. An amount of 12.5% of the MM previous year contributions income, or
2. Paying \$85 per member-attender in 2025 using the current counting method. This rate would increase to \$93/person in 2026, then \$100/person in 2027, followed by an annual increase such as CPI.

Notes: CPI = Consumer Price Index

SAYMA’s assessment guidance may be found on the SAYMA website. From the menu on the first page, choose, “Documents” then look for “SAYMA Handbook” and choose “Finance section PDF.” The table of contents lists “Assessments” on p. 17. Click the link provided to see the “assessment guidance” section which is in the appendices. If you need assistance, please reach out to me or the treasurer. finance@sayma.org and saymatreasurer@gmail.com.

WQO’s to which SAYMA contributes

Friends General Conference and Friends World Committee for consultation are membership organizations.

Other WQO’s to which SAYMA contributes

American Friends Service Committee
Bolivia Quaker Education Fund
Friends Committee for National Legislation
Friends for LGBTQ Concerns
Friends Journal
Friends Peace Teams
Quaker Earthcare Witness
Quaker House
Quaker Voluntary Service
Right Sharing of World Resources

Nominating Committee Report to Representative Meeting 153

Since our last report, we have been busy with the work that we have been tasked to do. We have been meeting online every two weeks since August 20th. We have invited Monthly Meetings that do not currently have a representative to the Nominating Committee to discern if there is someone in their respective meetings who would like to join us in this work. Likewise, we have invited Monthly Meetings that do not have a representative to the Ministry and Nurture Committee to do the same. We are particularly grateful to Melissa Preast for agreeing to serve in the critical role of Yearly Meeting Planning Committee Clerk. We would be delighted if any young adult friends would like to join the committee work or speak to us about any open positions of responsibility. The committee thanks those who have volunteered their time and talents.

Below is the current slate of nominees we are bringing forward:

Wesley Morris (Nashville MM) as a new member of the SAYF Steering Committee 2024-2026. Wes is an educator and parent.

Devin Lenz (Atlanta MM) as a new member of the SAYF Steering Committee, 2024-2026. Devin is a SAYF parent.

Kelly Askins (Memphis MM) as a new member of the SAYF Support Committee, 2024-2026. Kelly formerly served as a member of the SAYF Steering Committee.

Maia Hallward (Atlanta MM) as a new member of the SAYF Support Committee, 2024-2026. Maia is the director of the International Conflict Management program.

Melissa Preast (West Knoxville MM) as the new clerk of the Yearly Meeting Planning Committee, 2024-2026. Melissa has served SAYMA in multiple positions and is a human relations administrator.

Sam Singer (Nashville MM) as a new member of the Yearly Meeting Planning Committee, 2024-2026. Sam is an educator and parent.

Ian Wells (Atlanta MM) as a new member of the Yearly Meeting Planning

Committee, 2024-2026. Ian is an active participant at YM. Many know him as Big Softy.

Chris Berg (Associate) as a continuing member of the Yearly Meeting Planning Committee, 2024-2026. He will serve as the worship coordinator.

Hank Fay (Berea MM) as a continuing member of the Outreach Committee, 2024-2026.

Wood Bouldin (Associate) as the continuing clerk of the Outreach Committee, 2024-2026.

Star Smith (Paul Cuffee WG) as the new representative to FWCC, 2024-2027. Star has served as Clerk of URJ and as a member of the ad-hoc Faith and Practice Committee.

Submitted by
SAYMA Nominating Committee
Kevin Moran, Atlanta MM co-clerk
Kendall Ivie, West Knoxville MM co-clerk
Wesley Morris, Nashville MM
Ian (Big Softy) Wells, Atlanta MM

Attachment E: Uplifting Racial Justice Report
([return to the minutes](#))

URJ Report: October 2024

URJ thanks Star Smith for her dedication to URJ's mission, to provide support and advocacy for Friends of Color experiencing racism, in the face of massive opposition. We thank her for serving as a delegate to the FWCC World plenary in South Africa and for bringing our concern for unacknowledged and unaddressed racism among Friends to the world body. It took time, energy, and commitment to meet so many people, and to carry such a heavy message from Friends of color in the US concerning historical and present injustices, which was one of the themes of the gathering.

URJ is delighted with Star's report of the many fruitful encounters, messages, and leadership she brought to the gathering of global majority Friends of Color in Africa. We wholeheartedly appreciate her and want her to continue.

Therefore, URJ nominates Star Smith again, as a SAYMA REPRESENTATIVE to FWCC, for the 4th time, so she can continue the good work she started, regardless of the adversarial environment, and the desire of some misguided Friends to stand in the way of her ministry.

Announcement:

There are now regularly scheduled virtual Meetings for Worship with the Paul Cuffee Worship Group.

The Paul Cuffee Worship Group was created by SAYMA Uplifting Racial Justice (URJ) for people of color who wish to worship in the manner of Friends without having to affiliate with an all-white or mostly-white Monthly Meeting.

It was agreed that the Paul Cuffee Worship Group would meet virtually every two weeks, on New Moons and Full Moons at 7:PM Eastern Time/6:PM Central. All people of color are welcome to join us in Worship. All that is required is that you send a message to the clerk at urj@sayma.org, share your name, and identify yourself as a person of color who wishes to worship with us so that the link and schedule can be shared with you.

Approved by URJ on 9.26.2024
Submitted by Star Smith, clerk

Attachment F: Ad-hoc Faith & Practice Revision Committee

[\(return to the minutes\)](#)

Dear Friends,

A small ad hoc committee is experiencing the joy of updating A Guide to Our Faith and Practice. The current guide was created as a spirit-led process developed over ten years from 2002-2012 (blue cover) with a modification to queries published in 2021 (pink cover). In keeping with the principle of continuing revelation - we seek a document that carries us forward, guides us in our spiritual practices, and supports our faith for the next ten years and beyond. We introduced our approach during the plenary at Yearly Sessions 2024. We are now ready to get to work.

As we move forward with discerning what should be updated, we ask for support from SAYMA Friends to participate. Suggestions can come from any Quaker body such as a Worship Group, Monthly Meeting, Clerks Committee, or other committees. Send suggestions related to a committee section to the clerk of the committee. Send general items to the F&P Committee. The approval process for changes is still under discernment.

It is the F&P Committee's recommendation that each committee section include a statement on the vision and purpose so individuals and Meetings know what spiritual roles the committee fills and why/how to interact or contact a committee. There should also be information about the makeup of the committee such as how many serve, how to join a committee, and specific roles within the committee. Deeper information about how the committee operates may be better suited to the Handbook.

We have three asks of Committees:

Clerks, please review your committee section and recommend updates;

Identify items that should be moved to the Handbook;

Provide suggestions related to items missing from the F&P in general.
(What do you want to see in your F&P?)

We also seek support from Monthly Meetings with two asks:

Please review the current glossary and provide recommendations for edits to definitions or omissions along with a draft definition.

Please review the section on Monthly Meetings and provide suggestions for edits or omissions.

We reach out to the entire community for suggestions on spiritually uplifting items such as a poem you wrote, quotes from those who inspire you (with the attribution to the author), drawings, and artwork. that can be included in the updated F&P.

Submissions can be sent by email to FandP@sayma.org. We hope to see edits from Committees by March 2025. You are welcome to participate in the google group which will provide access to progress, submissions, and ability to make comments. Send a request to join using the F&P email.

In Harmony,
Faith & Practice Ad Hoc Committee Members
Melissa Preast Wood Bouldin
Kathleen Mavournin Star Smith
Joel O'Brien