

Shaping the Future of IYM Work Group Recommendations

To be presented at Representative Council April 12, 2014

A. Introduction:

In Mid-March, meetings and individuals were sent a summary of the sessions (and posted on IYM web-site) of "Shaping the Future of IYM". Please review that communication for background information and specific findings recorded from each session. The Financial Work Group, responsible for facilitating this effort, met March 29 to review the findings and develop recommendations from the sessions to be presented to Representative Council April 12 for final action at the July sessions of IYM. The Work Group encourages each meeting and representative to review these recommendations prior to April 12 in preparation for discussion. We know this is short notice for an important business item, but we have been dealing with a tight time to meet the required budget presentation at the Rep. Council meeting. Of course, the weather added to this time frame with some of our sessions being rescheduled due to snow.

Following, you will find a short summary list of major findings from the 11 sessions (Section B). Following that are two lists of recommendations from these findings. The first list includes items beyond the charge to the Work Group but important items IYM needs to address, and we have added our suggestion of the committee(s) we feel should address these items (Section C). The second list of recommendations is those directly dealing with the charge to the Work Group (Section D). These directly address programming and staffing which drive the budget and how the budget should be funded.

The sessions' responses were clear that all desire IYM to continue with its current staffing and programming levels, which are the foundation for the recommendations to follow. Through God's grace and blessing, the 2015 budget is basically funded continuing with the current funding mechanisms. Specifics of how 2015 will be funded are in Section D.

With the 2015 budget covered, we have more time and flexibility to make changes to be effective with the 2016 budget. We heard numerous times that the meetings and members are willing to increase revenue to fund the budget but requested we look at multiple options to raise revenue and be creative in developing a methodology for raising revenue. We feel that the recommendation in Section D for 2016 and following years answers that request. The assessment per meeting is based upon an average of a meeting's adult membership and average Worship Service attendance, actually lowering the rate. Approximately 80% of meetings will see a decrease while 20% will see an increase. You will see in the recommendation this method relies on other funding sources beyond the assessment, particularly donations from individuals and meetings faith promises beyond their assessments. We feel clear that God is working in IYM, He wants us to prosper and grow as a Yearly Meeting, and He will provide. He has already answered our prayers for 2015! Long term, we realize growth of IYM will be a necessity to

provide expanded funding as costs increase and programming expands to meet IYM's needs. This subject was raised in many sessions and included in Section B. There was considerable discussion of the possibility of asking for a percentage of local meetings' operational budgets. This was discussed by the Work Group, but felt would add complexity in attempting to be fair across all meetings with multiple special budget situations, such as building project funds. As noted in Section D, this could be used as a goal or indicator of an appropriate level of minimum total giving by a meeting in their assessments and faith promise giving.

As these recommendations are discussed in local meetings, the Work Group will be available to answer questions and meet with your meetings if this is helpful for all to have a clear understanding as we move forward.

There will be no official action at Representative Council other than to approve a recommendation to be made to the July sessions of IYM. Based upon the Council discussion, modifications may be required before being presented at the July Sessions. If so, additional detailed communications will be provided for the changes.

B. Major findings from sessions:

1. Maintain current programming and staffing levels
2. There is definitely value in belonging to IYM
3. Desire a creative solution to financing IYM budget with multiple options including fund raising from meetings and individuals
4. The need to empower and retain young adults
5. The need for local, sound training for new and existing Quaker Pastors
6. Quaker Haven is a valued asset which must be maintained
7. Review all personnel job descriptions and possibly add functions to the DYCM position
8. The need for expanded communications of IYM finances, programs and activities including the shopping center that houses IYM offices
9. Expand and utilize available technology in all aspects of IYM
10. Evaluate the Quarterly Meeting Structure and purpose
11. Growth through church planting, membership development, and current independent meetings
12. Develop Estate Planning program for IYM
13. Prayer, Prayer, Prayer for IYM

C. Recommendations for actions by IYM which are beyond the charge of the Work Group:

1. Communication Needs – Suggested General Superintendent and Communications and Publications Committee responsibility

- i. Branding - Who we are
 - ii. Website improved/updated – New Logo
 - iii. Education about IYM
 - Job descriptions/responsibilities of employees
 - Shopping Center
 - IYM finances including Endowment
 - Committees and available services for meetings and individuals
 - Other
- 2. DYCM (Director of Youth Camping Ministries) – Suggested Christian Education Committee
 - i. Expanded Youth Ministry at the Local Level
 - ii. Emphasis on retaining and integrating Young Adults (18-40 +/- age)
 - iii. Communication – Social Networking – Technology - #
 - iv. Training
- 3. Training of Pastors – Suggested Ministry and Oversight responsibility
 - i. This effort should be an ongoing workgroup for continuity over the long term
 - ii. Formal post-secondary training
- 4. Program for Estate Planning – Suggested Stewardship and Finance Committee and Trustees responsibility
- 5. Review Quarterly Meeting structure for improvement/replacement – Faith and Practice Committee responsibility
- 6. Church Growth – Suggested Evangelism and Outreach Committee and Ministry and Oversight Committee responsibility
 - i. Planting new meetings
 - ii. Growth within current meetings
 - iii. Independent meetings joining IYM
 - Develop incentives for meetings to join IYM
- 7. Prayer – Everyone’s responsibility
 - i. All continue to hold IYM up in prayer as we transition and grow

D. Recommendations specific to the charge of the Work Group:

- 1. IYM maintain its current programming and staffing level with possible enhancements
- 2. Celebrate that through God’s grace and leading, the 2015 budget is essentially funded by:
 - i. \$136,950 from \$75 assessment per adult member

- ii. \$9000 of Endowment earnings that are not dedicated
 - iii. \$20,000 earnings from Treasurer's account balance
 - iv. \$11,600 administrative funding from the Lilly MEI grant
 - v. \$50,000 approximately from pledges and donations toward 2015
 - vi. This leaves less than \$10,000 gap which may not exist if the budget is not fully expended or could be funded from misc. sources if required.
3. Fund 2016 and beyond Budget with a new combination of options:
- i. \$114,625 from \$50 assessment of the average of members and attenders (1826 members + 2759 attenders / 2)
 - ii. \$25,000 Endowment earnings (\$9,000 current non-dedicated plus \$16,000 from redirecting of temporarily restricted endowment earnings by previous IYM actions)
 - iii. \$20,000 earnings from Treasurer's account balance
 - iv. \$30,000 annual fund raising from individuals
 - v. \$55,000 annual faith promise commitments from Monthly Meetings
 - Each meeting holds an annual "IYM Sunday" promoting IYM, telling its story through presentations/literature/speakers/etc.
 - With the assessment of most meetings declining, it is suggested those meetings commit their reduction and more to IYM in their Faith Promise Giving
 - Local meetings are requested to conduct fund raising activities to fund the IYM budget
 - Identify other creative fund raising activities to support IYM
 - A guiding goal for meetings could be a percentage or "tithing" of their meeting's budget and/or offerings. On average, it would take approximately 6% of all meetings operating budgets to fund IYM's yearly budget.
 - vi. Fund raising for 2016 would start immediately after the 2014 sessions to be completed no later than March 1, 2016
 - vii. In March of 2015, the S&F Committee would develop the budget and adjust revenue streams to meet budget requirements
 - viii. Similar yearly time schedule going forward for 2017 and beyond budgets