

SEARCH FOR UNITY IN BENEVOLENCES: RESPONSE TO MINUTES OF THE MEETING ON JANUARY 9, 2020 OF THE PEACE AND JUSTICE COMMITTEE

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My reasons for lack of unity are more detailed than reported in the minutes of our meeting. At the meeting, I spoke orally and distributed a written report of my concerns. I understand that it was not easy to incorporate all my concerns in the minutes. I report them here.

- **A yearly review of programmatic and financial information:** For responsible giving, the experience of our meeting demonstrates that a yearly review of programmatic and financial information is essential. In attempting to contribute responsibly to organizations, our meeting has found that changes in program and finances have required substantial adjustments in the amounts we give. Year after year, Chapel Hill Friends have found that by asking organizations for programmatic and financial information we have detected needs we had not previously known.
- **Evidence of need for substantial adjustments:** The Meeting's experience demonstrates we have needed to adjust annually, sometimes by large amounts.
 - **FCNL 2011:** The financial downturn of 2008-2010 caused FCNL to lay off 25 percent of their employees. We promptly raised our contribution from \$2,000 to \$3,500.
 - **AFSC 2011:** The same financial crisis caused AFSC to lay off 25 percent of their employees. Chapel Hill Friends responded by raising our contribution from \$1,500 to \$2,500.
 - **NC WARN 2014:** NC WARN responded to our request for financial information by telling us that they had received a generous contribution and did not need any money in 2014.
 - **Quaker House 2016:** Quaker House told us they lost a major donor accounting for close to 20% of income. We responded by raising our contribution to Quaker House from \$4,350 to \$6,120.
 - **Quaker House in 2020:** On January 19, Betsy Brinson reported to the Meeting that after repairing the roof and facing a cost of \$16,000-\$18,000 to replace the heating system, Quaker House reserves were down to only \$6,000-\$8,000. In light of this report, I am not at unity with the recommendation to reduce this year the percentage of our contribution for Quaker House from 27% to 21% and to reduce the amount by \$1,429. Some Friends have said that adjustments the Meeting makes are so small they do not matter. Consider that the two senior counselors for conscientious objection at Quaker House each earn about \$12 thousand a year. If one of these counselors in the spirit of St. Francis absorbed the cut of \$1,429, he would lose 13% of his annual salary. For Quaker House the proposed cut of \$1,429 does matter.

- **Quakers believe in continuing revelation.** We believe the Spirit moves and brings us new insights and concerns. Therefore, I am not in unity with mechanically setting percentages based on past history of ten years of our giving and freezing those percentages for the next three or five years. Ironically, while our understanding of the climate crisis has increased, our giving to the organizations focused on the environment has declined over ten years from 12% to only 7%. I wonder whether Friends will want to increase our giving to those organizations focused on the environment. I wonder whether Friends will want to contribute to the new Friends Committee on North Carolina Legislation for a better opportunity to focus issues in North Carolina such as prisons, education, gerrymandering, voting, as well as the environment. Mechanically fixing percentages on our historical giving will preclude our giving meaningfully to those organizations where the Spirit may now be leading us.
- **A five-year review?** Without specifying either content or criteria, the subcommittee recommends that representatives of the five designated benevolences present annual reports to the MWAB. Each reporter would independently choose the content and describe whatever they deemed appropriate. Without comparable or necessarily even relevant information, without financial information, without specifying a deliberative process, the subcommittee urges Friends every five years to use their “hearts and minds” to make judgements about the benevolences for the next five years.
- **A deliberative process?** What process should Friends follow after the reporters report? May Friends ask questions? What happens when the reporters cannot answer the questions? Can other Friends submit additional information? The subcommittee recommends using the allocations of the past ten years to set percentages. Can Friends change the aggregate percentage for the five “legacies”? Can Friends suggest a different criterion to set the aggregate and individual organizational percentages or is that criterion fixed? What opportunity would there be to restore a higher percentage to environmental groups? How might Friends suggest changes in the percentages – to increase or decrease the allocations? Do Friends make all decisions regarding benevolences in plenary session or does the subcommittee recommend appointing a committee?
- **Which organizations?** May only five organizations report? Is it possible that the Spirit would move Friends to add or subtract an organization? How could Friends add an organization such as the Friends Committee on North Carolina Legislation? Over the years, Chapel Hill Friends have supported other organizations. How does the subcommittee define “legacy”? Merriam Webster defines legacy as “something transmitted by or received from an ancestor or predecessor or from the past...” Do Friends designate an organization as “legacy” in perpetuity? Can Friends ever designate other organizations as “legacies”? For example, Chapel Hill Friends have supported Quaker Earthcare Witness and the Bolivian Quaker Education Fund for more than ten years. Could Friends ever designate those organizations as “legacies”? Do Friends really want to use the word “legacy” without defining it?

A meaningful review requires more than listening to non-comparable reports with unspecified information. A meaningful review requires an opportunity to compare and analyze relevant information. Relevant information should include both programmatic and financial information. Without comparable program and financial information and without a specified opportunity to analyze and compare the information, there is no meaningful review.

Friends must

- require comparable essential information,
- be willing to engage in constructive dialogue with one another on that essential information,
- listen to the needs of all the organizations,
- be willing to admit continuing revelation, and
- discern thoughtfully and responsibly how to allocate funds.

In sum, I am not at unity with the proposal from the subcommittee to promote a series of non-comparable reports to MWAB from only five organizations with unspecified information chosen by the presenter and with no plan for constructive dialogue to discern how to allocate funds.

An alternative:

- **Suggested essential information:** At our meeting, I presented in writing the essential information I suggested for an adequate review. I repeat my suggestion:

It is clear that in the past, our Meeting has been able to respond intelligently and quickly to financial difficulty or financial well-being because we asked the organizations to report their basic program and financial information.

What information do we require to make intelligent, responsive decisions?

Program information: Start with a basic, rarely changing organizational description. Simply add up-to-date but concise program information:

- New programs, changed programs, and deleted programs – a short description requiring no more than 100 words and 15 – 20 minutes of effort to write.

Financial information: A sudden large influx or decrease in contributions can radically change financial needs. We can easily detect such changes with minimal information as suggested by the following table.

Organizational Financial Information						
Fiscal Year (Note End of Fiscal Year)	General Fund Contributions	Capital Contributions	Endowment Contributions	Operating Expenses	Amount of endowment and reserves	Number of Full-time equivalent employees
A: This Year						
B: Last Year						
A-B: This Year - Last year						

It is true that we cannot directly compare the operations of one organization with another, but we can use the simple information above to detect important financial changes within an organization. In 2011, we used a chart similar to that above to detect the discharge of personnel by AFSC and FCNL. Financial officers have readily reported information to us in the past and told us it was easy to report. Students asking for financial aid customarily report their family resources. Similarly, organizations asking for money readily report their information to a potential donor. High standards of financial reporting are good for both presidential candidates and Quaker organizations. Financial transparency beats unsubstantiated trust. Those who lower their standards may buy many Brooklyn Bridges.

When the easiest mechanical way may not be the best way: Doubtless, it is easiest not to wrestle with new information. Letting the calculator mechanically apply a ten-year average instead of using our minds to grapple with changing information and our hearts to respond to compelling needs requires less work on our part.

- Analogously, in apartment housing, in defiance of HUD guidelines, property owners prefer to apply a blanket rule to all applicants instead of looking at individuals on a case-by-case analysis. It is easier to exclude all applicants with a ten-year-old criminal conviction than to see how people may have changed their lives.

The easiest way may not be the best way. Are we willing to do the work and use information to engage our minds and hearts?

- The joy of witnessing the creative work of our benevolences: I hear some Friends saying they find no joy in benevolences. I agree that it is possible to miss the joy emanating from our benevolences if we fail to listen carefully to what the organizations are doing. Great joy can

come from listening attentively to the reports of how our benevolences are creatively meeting the needs of those they serve. How do we engage with Friends? If we listen carefully to others and absorb for ourselves some of their enthusiasm they report for the organizations they know, perhaps we will come to know the joy of mutually agreeing on priorities for our giving. I am therefore not in unity with the idea of failing to discuss benevolences. I am in favor of bringing our discussions up to a higher level of careful listening to what the benevolences are doing.

- Responding to the Spirit: I believe Friends are capable of listening to one another, responding with joy to the creative work of our benevolences, and using relevant information to dialogue with one another about the needs of these organizations. Rather than using a fixed, mechanical process based on old information, I believe Friends can open their minds and hearts to the movement of the Spirit through events in our present world and discern thoughtfully and responsibly how to allocate our funds.