



Philadelphia Yearly Meeting

Joint Council

Saturday, December 14, 2024

9:00 AM - 12:00 PM EDT

In Attendance: Bethann Morgan, Jessy Eaby, Jean-Marie Barch (Clerk, Quaker Life Council), Meg Barney (Recording Clerk), Emily Blanck (Recording Clerk), Terry Christensen, Susan Claggett, Terry Cooke, Chuck Devers, Sue Dietz, Jeanne Elberfeld (Clerk, Administrative Council), Kruskal Hewitt, Nikki Mosgrove (Presiding Clerk), Michael Moulton, Debbie Murray-Sheppard, Carter Nash, Kathryn Pettus, Nancy Robbins, Chloe Rosenthal, George Schaefer (Clerk, Nominating Council), Serita Spadoni, Selden Smith (Rising Clerk), Cathy Toner, Deb Wood, Tom Zemaitis (Treasurer)

Regrets: Andrew Anderson, Kate Bregman, Carleton Crispin, Robert Greene, Neil Holzman, Ron Inskeep, John Marquette

Elder: Terry Whiteford

Recording Clerk: Sally McQuail

Staff: Christie Duncan-Tessmer (General Secretary) Cecilia Filauro (Executive Administrator),

F. Salvador Orellana (Deputy General Secretary), Linell McCurry (CFO)

Meeting of the PYM Joint Council opened at 9:01 am with worship.

George Schaefer, clerk of Nominating Council, served as clerk.

Meeting for Learning: Types of PYM Groups

George Schaefer, clerk of Nominating Council

Friends were asked to watch a short video in advance and were invited to briefly comment on highlights in the meeting. There were positive reports on the video, which described Governance Groups (appointed by PYM to meet a specific PYM need) and Community Groups (organized by individuals around common interests). We wondered what we could do with this video and whether it could be shared. The video could be made more accessible for visually impaired people by making the slides a dark background with white letters. PYM staff may put together a complete library of videos like this to provide as a resource for members. We could also link to this video in the governance handbook. Friends accepted the report.

General Secretary Report

Christie Duncan-Tessmer, General Secretary

Christie shared highlights from her report. The written report is available.

Christie highlighted that PYM has hired new staff very recently. CFO David Park, from Kennett Meeting, will start in February but will begin joining council and finance meetings now. In addition, Director of Program and Religious Life, Simone Small Gellizeau, an attender at Ujima meeting, and a new Director of Development Joe Kirkenir, an attender at York Meeting, will join the staff. They are all active in Quaker Meetings and are “giddy” about joining the staff.

Christie shared one item that was not in the report. PYM has been involved with Unity Meeting. Unity Friends Meeting is a part of Philadelphia Quarterly Meeting and has had only one member that had been doing incredible work in the community. She passed away a couple of years ago. The meetinghouse and the assets are held in a trust at PNC Bank. Unity is under a care committee made up of Friends from the successor organizations as described in the trust document and Faith and Practice: Frankford Monthly Meeting, Philadelphia Quarterly Meeting, and Philadelphia Yearly Meeting.

Friends accepted the report.

New Business: Request from Western Quarter

Jeanne Elberfeld, clerk of Administrative Council

We received a minute from Western Quarter. They are seeking guidance on the legal and practical steps to lay down a meeting, including selling property. Western is separating the spiritual and financial pieces of this work of laying down a meeting. This relates to the property committee, a topic for later discussion in this Council Meeting, which has been dormant and shows why revitalizing the committee is relevant. The laying down of meetings is a rising concern throughout the Yearly Meeting. This highlights the needs of graveyards. The very small meetings also need Pastoral Care. We discussed creating a committee, perhaps including members of the Property Committee and Ministry and Care to craft a playbook to address these concerns. Friends accepted the report.

Old Business: Climate Benchmark status

Jean-Marie Barch, clerk of Quaker Life Council

The climate benchmarks were approved on Sunday at Fall Continuing Sessions 2024.

The PYM benchmarks are:

1. Measure the carbon footprint of Yearly Meeting operations, gatherings, and facilities.
2. Identify how the Yearly Meeting could be carbon net zero by 2030.
3. Invite monthly meetings to strive to reach 50% carbon reduction for members and Meetings.

The Request for Proposal(RFP) has gone out to hire someone to consult with us on the first steps to measure our carbon footprint. The RFP has been sent to seven organizations. The goal is to approve a contract by February. It is also important to consider how we are going to work individually and with Monthly Meetings to reach these goals, particularly the third benchmark. Reach out to F. Salvador Orellana if you would like to see the RFP, which will also be on PYM news soon. Friends received the report.

Ongoing Business: Nominating Council

George Schaefer, clerk of Nominating Council

1. QM minutes on appointments to Nominating Council

It is our policy to read into Council minutes from a Quarterly Meeting when a new member is appointed to the Nominating Council.

Deb Wood, of Westtown Monthly Meeting, Concord Quarter and Western Quarterly Meeting Coordinator, was appointed from Western Quarterly Meeting, and Jessy Eaby of Reading Monthly Meeting was appointed from Caln Quarterly Meeting.

2. Council role in filling Nominating Committee seats

George shared queries for the council members to consider: What needs to happen for PYM members to come under the weight of their responsibility in service to the YM? How do we make such service not only something Friends are willing to do and actually see as part of their faith practice?

George pointed out that only six of thirteen Quarters are represented, and these Council members are important to our connection with all of the Quarters. We had a rich discussion about the many challenges and opportunities of nominating people for the Yearly Meeting. Someone has highlighted that there is a lack of trust in PYM and it may be helpful for Pastoral Care to help people reconnect with the Yearly Meeting. Other Quarters are unclear on the process on how or what kind of person to appoint. Some don't understand why they should serve. The Yearly Meeting still needs to improve how we communicate the purpose of PYM and recognize and value the gifts of our members. PYM needs to directly reach out to Quarterly Meetings and also to Monthly Meetings. Our small meetings have little time to be involved in the Yearly Meeting. If we think of PYM as an interconnected part of the Quarterly and Monthly Meetings, not a separate entity, then work for PYM may be perceived as work for the local meetings. Friends accepted the report.

Ongoing Business: Sessions Theme

Jeanne Elberfeld, clerk of Administrative Council

Sessions has one theme that is used for Spring Continuing Sessions, Annual Sessions, and Fall Continuing Sessions. The proposed theme for the calendar year 2025 is “Members One of Another.” This theme reflects our need to build trust and reconnect with each other. ***The Councils approved this theme: Members One of Another.*** If you have ideas about keynotes, speakers or panels, please share them with one of the clerks. A Friend suggested Tom Gates, from Lancaster Monthly Meeting, since he wrote a pamphlet with this title. Friends accepted the report.

Ongoing Business: Committees

General Secretary Search Committee

Nikki Mosgrove, Presiding Clerk of PYM

Nikki updated the Councils. She noted that Annual Sessions will be meeting at Cheney University next summer. She reminded the council that the young and diverse members of the General Secretary Search Committee were announced in the Fall Continuing Sessions. They have met and will meet twice a month. They are updating the job description and will use a search firm. Friends accepted the report to date.

Program Support Committee

Jean-Marie Barch, clerk of Quaker Life Council

The Program Support Committee has delegated authority to distribute the funds allocated for use of collaboratives under the care of QLC. They have not budgeted all of their funds so they have some funds to provide as needs arise. In addition, the committee is seeking more members. Friends approved the acceptance of the report.

Ministry & Care Committee

Jean-Marie Barch, clerk of Quaker Life Council

The Ministry and Care committee has been looking at the Spiritual State of Philadelphia Yearly Meeting. They have found that there is a great need for pastoral care, and the Yearly Meeting resources are not being effectively received. They will be working on creating a Pastoral Care Toolkit. Friends approved the acceptance of the report.

Property Committee

George Schaefer, clerk of Nominating Council

We discussed that we have a need to revive this committee. There are resources already available from Friends Fiduciary and Partners for Sacred Places to provide for some of the needs that have arisen, as well as Resource Friends. Friends agreed with the Clerk’s suggestion that it

be called a Property Advisory Committee. It is important to consider the spiritual and information-sharing dimensions of property. Monthly Meetings own their own property. ***The Councils have approved that the Property Committee be revived and will share the updated charge with the Councils in January.***

Review and Approval of Minutes

Sally McQuail, recording clerk, and Emily Blanck, recording clerk

The minutes were read and approved with minor changes.

Ongoing Business: Sprints

Listen & Lobby Sprint status report

Jeanne Elberfeld, clerk of Administrative Council

The Listening and Lobbying sprint is nearing completion of its work. Jeanne shared this document, as they have come to unity on it for PYM groups use only. Please email thoughts or concerns to Jeanne. The Clerk commended the process and their continuing work. The draft of this Sprint will be considered for approval in March. This will be circulated before March continuing sessions. Friends accepted the report.

Sprint status report

Christie Duncan-Tessmer, General Secretary

This sprint has completed drafting the survey. They will present Friends with a survey and, based on the resulting information, consider what is important to include in our Sessions going forward. Friends were supportive of the plans for this survey to proceed.

Revision of the Governance Handbook Sprint status report

Christie presented a brief status report. The General Secretary has been charged by the Governance Advisory Committee to redraft the handbook for their consideration based on Joint Council direction and approved documents. It will hopefully come to Council for review in January. The Clerk said that Faith and Practice does not include information on governance. The Administrative Council approved the Sprint last year. The staff will be assisting in preparing this document.

Friends were supportive of the plans to go forward.

Indigenous Lands Visual Representation sprint status report

This was started under QLC as the next step after the land acknowledgment. The land acknowledgement asks “Do you know the history of the lands on which your land sits?” This second sprint will work on a resource to help answer that question. It is difficult to discern which tribe historically stewarded the land.

News from around the YM: Noticings, concerns, and joys from around the YM

George Schaefer, clerk of Nominating Council

Friends who have visited meetings or attended YM events are invited to share noticings, concerns, and joys regarding how Spirit is moving through the body. George also served as a resource friend. It seems that we are having new and younger members join our meetings, often with concerns about war. Be aware of how to respond to these new Friends.

Tom Zemaitis attended The Meetinghouse by Candlelight gathering at Arch Street which featured performances by Friends Schools. Seldon Smith from State College Meeting reported that they are considering creating a wildflower meadow as they celebrate the centennial of the Meetinghouse. Chris Stern from Middletown Meeting presented 'Who turned on the light?' A play about how George Fox might react to current questions. Nikki Mosgrove said that during Patriot Week, Trenton Meeting will present a Quaker's view during wartime. Meg Barney shared visiting with a small group of Friends from Woodbury Meeting, and they are developing a relationship. She encourages making Friends with other Meetings. George Schaefer attended the thread gathering on grief. It was a wonderful day, rich with resources. Staff member Tara Rubenstein did a wonderful job coordinating the event. Susan lifted up the opportunities for families at Monthly Meetings to participate in community events. At the holiday parade, Third Haven Meeting had a float. Abington Meeting changed the name of the RE committee to the Family Programming Committee.

Sally McQuail and Emily Blanck, recording clerks

Recap Public Communication

George Schaefer, clerk of Nominating Council

The minutes will be posted and shared publicly on PYM's website. Additionally, one item from the day's work will be highlighted. The minutes will be published on Thursday, December 19, 2024. What shall we lift up for this communication? The Lobbying Sprint report will be highlighted. The document will be attached. Friends approved.

Respectfully submitted,

Sally McQuail, PYM recording clerk

Emily Blanck, recording clerk

Meg Barney, recording clerk

General Secretary Report to Councils

December 2024

Connecting: *Connect Friends and Meetings*

- PYM Connect, the online platform that allows individuals and meetings to be connected to one another and their ministries, is coming along. The Alpha testers have finished their work. We'll begin refining it with Beta Testers in January. If you want to participate or can recommend a Quaker Influencer who thrives with social media, please let Salvador know.
- FCNL's annual meeting was held in the last month. The General Secretary joined more than 20 PYM Friends who were in attendance and lobbied congress as well as managed the business of FCNL which is revising its governance structure.
- The Quakerism staff at AFSC met with the General Secretary to consider how we can support each other and bring the gifts of activism to PYM meetings. We discussed a partnership in visiting meetings and encouraged AFSC to use the PYM calendar, news and resources sections of the website.
- The World Affairs Council in Philly invited the General Secretary to meet with dignitaries from Palestine, Lebanon, Iraq, Egypt, Saudi Arabia, and Mauritania who were visiting Philadelphia and wanted to understand Quakerism and our activism and our approaches to education. The Youth Engagement Coordinator, Executive Administrator and four members of the Middle East Collaborative attended as well.

Belonging: *Deepen relationship while ensuring our community is welcoming and safe*

- The program staff are on the cusp of launching a program to support individuals with disabilities and/or their family members.
- PYM now offers case worker support for meetings when they have a member in their care who needs more help than the meeting knows how to give. After a highly successful pilot program, we received funding from the John Martin Trust, a fund of Monthly Meeting of Friends of Philadelphia (Arch Street) to continue the program.
- The staff is midway through a process of articulating the staff values, which reflect belonging. Two are complete and will be taken to staff for approval next week:
Connect & Communicate: *Extending our own grace to one another* and **Listen & Adapt:** *Continuous learning with an attitude of flexibility.* One related to Fun & Enthusiasm is still in process.

Witnessing: *Address Racism and Climate Change*

- A school version of the Guide to Creating a Playbook for Climate Action is nearing completion. The penultimate draft is in the hands of sprint members who are sending it to a small group of school personnel and students for fresh feedback.
- The Request for Proposals (RFP) for measuring the carbon footprint of PYM's operations has been sent out.

Communicating: *Say Who We Are*

- A revision of the governance handbook is underway. The first full draft, which relies on direction given by the councils, will go to the Governance Advisory Committee for review this month.
- A viewbook that explains PYM is in process. It will be a highly designed and accessible publication that describes the ways in which Friends and Meetings are connected with one another as a function of the yearly meeting – such as collaboratives and bridge contacts. It also describes the scaffolding that supports the community including governance and Faith & Practice.
- The Memorial to the Lost at ASMH, presented by the Quakers Ending Gun Violence Collaborative was featured on WHYY and other news outlets.
whyy.org/articles/philadelphia-arch-street-meeting-house-gun-violence-memorial-shirts/

Functioning: *Simplify Governance and Administration*

- We hired a CFO! David Park will start mid-February. He is a member of Kennett Meeting and comes from the world of business and finance. He has a strong background in credit unions, banking and property and has a keen eye for how to make systems work well together as well as how to make systems work to take care of people. Linell will stay on fulltime for a couple of months and then we'll make a plan for what is needed from there to make sure the transition is smooth.
- We hired a Director of Program & Religious Life. Simone Small Gellizeau is an attender at Ujima Meeting and is working on her degree in interfaith counseling. She has experience in a range of program settings.
- Our Director of Development finished her service with PYM in November and our incoming Director will begin December 17. Joe Kirkenir is an attender of York Meeting (Baltimore Yearly Meeting) where he was recently married. Joe has been serving as a consultant through a Development-focused agency.
- We upgraded PYM phones so they now run through the Microsoft Office Suite of products that we use. This means a) wherever we are working our work phones can

be answered and b) the numbers can be redirected easily, allowing us to set up a system in which callers can always reach a live person between 10 and 4 M-F (this initiative will softly launch in January).

- We are reviewing and revising how we budget and report on our finances. PYM has had an extremely complex system going back a long time before the current CFO and General Secretary were on staff. It worked with a finance staff three times the size than we have now. Our financial reports already come directly from the accounting system and we are working to automate reports at the program level and more of the budget process. -- The revision will be in place before Linell leaves.
- The database is moving into the next stage of being used also to receive applications and manage outgoing grants. This will cut down on paper and processing time. It will simplify the work of applying for a grant and make applications easily available to granting group members.
- We have completed a milestone in our upgrade for supporting online giving for meetings. At this point all recurring contributions to meetings are going directly to the meetings' bank accounts and do not have to pass through PYM's accounts first. This provides quicker access and clearer accounting information. There are a few meetings that have not yet given us their account information so they haven't been switched to the new system.

EDQ: Every Day Quaker

- The end-of-calendar-year appeals are in the mail. A series of accompanying e-mail appeals begin on 12/13. The appeal focuses on children and families in the form of a Christmas card with photos of our kids.
- Currently Friends Fiduciary Corporation is a supporting organization of PYM, it's largest investor. However, it is actually an organization that supports many Quaker meetings and nonprofits and it has been advised by it's attorneys to instead be a supporting organization of all the groups that invest with it. That work is in process.
- The office will be closed from Dec 24-Jan 2 for our annual winter retreat period. This time can either be used by staff for paid time off or for working in a retreat mode on projects that can benefit from no interruptions of meetings or email.
- Youth and Program staff were certified in CPR.
- The quarterly staff meeting for learning with attention to Quakerism focused on worship.
- The quarterly staff meeting for learning with attention to Inclusion focused on navigating individual cultural differences.

A partial list of visits since the last council meeting:

- Rancocas Valley MM, worship (General Secretary)
- Seaville MM, worship and talk about PYM (General Secretary)
- Atlantic City Area MM, worship (General Secretary)
- FCNL Annual Meeting (General Secretary)
- FGC Annual Meeting (General Secretary)
- National Council of Churches Annual Meeting (General Secretary)
- Downingtown MM, Young Friends gathering (Youth staff)
- Kennett MM, Family meetup (Youth staff)
- Old Haverford MM retreat at Pendle Hill, Program Facilitation (Inclusion & Belonging Coordinator) and children's program (Youth staff)
- Salem QM, children's program (Youth staff)
- Concord QM, youth program (Youth staff)
- Potluck, Young Adult Friends (Inclusion & Belonging Coordinator)



Request for Proposal (RFP): Net Zero Consultant

About the Organization:

PYM is a regional (Eastern Pennsylvania, South Jersey, Delaware, and the Eastern Shore of MD) community of visible, welcoming, vibrant, multigenerational Quaker meetings (congregations) and worship groups united by shared understanding and shared practices described in our book of *Faith and Practice*. We are grounded in our meetings for worship with silent and vocal ministry reflecting our yearning for and direct experience of the Divine. Individually and as meetings, we witness the transforming power of love and respond to leadings of the Spirit with joy in word and deed. We live into our testimonies and work for a world where justice and peace prevail. Our organizational structures are simple so that our primary bond may be to God.

The yearly meeting as a whole has a commitment to address climate change:

As people of faith, seekers of the truth, and stewards of Creation, we must act with urgency to prevent further suffering and destruction of our planet. We seek to energize everyone involved with PYM to actively undertake this leading and help halt the destruction of life on this sacred earth.

Find out more at [Philadelphia Yearly Meeting · Quakers](#)

About the Opportunity:

PYM is seeking proposals from qualified consultants to comprehensively assess our carbon footprint in our operations, gatherings and facilities and to provide recommendations for reducing or eliminating it. The consultant will focus on measuring carbon emissions associated with various activities, programs, events, and buildings within the PYM community.

Scope of Work:

The selected consultant will be responsible for the following tasks:

1. Measure the carbon footprint of the following:
 - Activities of people and groups (excluding programs & events):
 - PYM staff
 - PYM Governance Groups (e.g., officers, councils, committees, granting groups, elders, representatives to organizations, Stewards)
 - PYM Community Groups (e.g., collaboratives, young adult Friends)

- Programs & events:
 - Annual and Continuing Sessions
 - Staff-run events (including youth and young adult events, themed gatherings, and other programs)
 - Governance and Community-run events (including collaborative-run events, granting, annual meetings)
 - Buildings:
 - Friends Center, a LEED platinum certified building at 1515 Cherry Street
 - Arch Street Meeting House, an historic meeting house built in 1804
2. Categories of contributors to carbon footprint to include:
- Transportation
 - Food
 - Consumption of goods and materials
 - Energy
3. Make recommendations for decreasing or eliminating our carbon footprint, considering the historical nature of ASMH and our limited authority regarding Friends Center and other sites where programs and events may be held.

Deliverables:

The consultant is expected to deliver the following:

- Comprehensive report detailing carbon footprint measurement across activities, programs, events, and buildings.
- Clear and actionable recommendations for reducing or eliminating carbon emissions.
- Presentation of findings and recommendations to PYM Stewards and Join Council.

Proposal Submission:

Interested consultants should submit the following documents:

- Cover letter expressing interest and summarizing relevant experience.
- Resume.
- Detailed proposal outlining the approach, methodology, timeline, and cost.
- Examples of similar projects and references.

Proposal Evaluation Criteria:

Proposals will be evaluated based on the following criteria:

- Experience and expertise in carbon footprint assessment and sustainability consulting.
- Understanding of the unique challenges and considerations within PYM's context.
- Approach and methodology for conducting the assessment and providing recommendations.
- Cost-effectiveness (Maximum \$25,000.00).

Timeline:

- Proposal Submission Deadline: *January 6, 2025*
- Evaluation Period: *January 7-14, 2025*
- Contract Award: *January 15, 2025*

Contact Information:

For inquiries and submission of proposals, please contact: *Jess*

Purvis, Office Administrator at Jpurvis@pym.org

Listening and Lobbying Sprint: Guidance on Advocacy and Lobbying December, 2024

Dearly beloved Friends, these things we do not lay upon you as a rule or form to walk by, but that all with the measure of the light which is pure and holy may be guided, and so in the light walking and abiding, these may be fulfilled in the Spirit—not from the letter, for the letter killeth, but the Spirit giveth life.

— ELDERS OF BALBY, 1656

Introduction

Quakers have a deep and abiding tradition of listening to and following the leadings of the Spirit to advocate for peace, justice, mercy, equality, environmental stewardship, and other concerns. This witness is carried out both through individual and collective actions.

Under U.S. tax laws, 501(c)(3) tax exempt religious organizations like Philadelphia Yearly Meeting (PYM) may engage in “advocacy” but may only engage in “lobbying” so long as it is not a “substantial part of its activities.” The IRS rules are not clear as to where the line is between permitted advocacy and restricted lobbying. No definition of “substantial part” is provided for religious organizations. The IRS regulations are clear, however, that exempt organizations are prohibited from partisan political activities and cannot endorse specific candidates for public office.

PYM recognizes the practical and important legal and financial needs that are served by protecting its status as a 501(c)(3) tax-exempt religious organization. The tax-exempt status enables PYM to receive tax-deductible contributions, to administer certain trusts currently in our care, to be exempt from real estate taxes, and to receive grants from other non-profit organizations. As the parent organization, PYM’s tax-exempt status is shared with monthly and quarterly meetings. Collectively, these tax advantages greatly expand the resources and services that PYM and its constituent meetings can provide.

Should PYM lose its tax-exempt status, monthly and quarterly meetings relying on PYM status would also lose their tax-exemption. The opposite, however, is not true. Should a monthly or quarterly meeting be collectively led to engage in actions which violate the 501(c)(3) limitations, that meeting might lose its tax-exempt status, but that loss would not affect the status of other meetings or PYM.

This Guidance on Advocacy and Lobbying relates to the ways in which PYM, as an organization, conducts its business with respect to lobbying. It does not limit in any way the ability of individual Friends to seek to influence government and legislation as they are led, so long as they do not claim that they are acting as representatives or agents of PYM.

Definitions

Advocacy covers a wide range of mission-related engagement, educational activities, and activism. It includes expressing opinions about policies, issues, and legislative priorities, including specific legislation; educating Friends about issues and effective participation; and contacting legislators and public officials about concerns without asking them to vote in a specific way on specific legislation. As a result of advocacy, Friends who are so led can contact legislators and public officials about issues and legislation.

Lobbying always involves attempting to influence legislation through a “call to action”. Direct lobbying refers to attempts to influence a legislative body through communication with legislators or employees of a legislative body, or with a government official who participates in formulating legislation. Grassroots lobbying refers to attempts to influence specific legislation by attempting to affect the opinion of the public by encouraging a ye or nay vote or action on that piece of legislation. To constitute lobbying, communications must reflect and advocate for support or opposition to specific legislation or be in support of or opposition to a particular political party or candidate.

501(c)(3) religious organizations (see the description in the introduction). In addition, since the Revenue Act of 1934, the IRS has prohibited 501(c)(3) tax exempt religious organizations from engaging in activities for purposes of propaganda or to otherwise attempt to influence legislation. The term legislation includes any action by Congress, any State legislature, any local council or similar governing body or by the public in a referendum, initiative, constitutional amendment, or similar procedure.

501(c)(4) organizations are categorized by the IRS as “social welfare organizations”. They are not charities and donations to them are not tax-exempt; consequently, they are permitted under federal law to lobby. Friends Committee on National Legislation (FCNL, which is separate from the FCNL Education Fund which is a 501(c)(3) organization) and the Quaker Action MidAtlantic Region (QAMAR) are both 501(c)(4) organizations which we may, as individual Friends, support for purposes of lobbying, if we are so led. We cannot use resources of 501(c)(3) organizations (like PYM) to provide direct support to a 501(c)(4) organization.

Guidance on Advocacy and Lobbying

Understanding this legal framework, PYM offers this Guidance on Advocacy and Lobbying. The Guidance is not intended for Quarterly and Monthly Meetings, as those meetings are free to determine these issues for themselves. Monthly and Quarterly Meetings are welcome to adopt or adapt the Guidance on Advocacy and Lobbying for their own use and may seek advice from PYM senior staff and council clerks on questions concerning nonprofit status.

Please note that the numbering of this guidance does not denote importance or priority, but rather is included for ease of reference.

1. PYM affirms that public witness, deeply grounded and faithful to Spirit, enriches the Yearly Meeting and enables the Yearly Meeting to give voice to its commitments.
2. Friends are advised that *“Being attentive to the Light Within grounds discernment beyond the immediate facts and feelings so that members grow in unity with Spirit. Our search is for unity, not unanimity. We consider ourselves to be in unity when we share the search for the Truth, when we listen faithfully for God, when we submit our wills to the guidance of the Spirit, and when our love for one another is constant.”* (Faith and Practice, 2018, pg. 18).
3. Friends are reminded that there are deeply held differences of opinion on specific issues within the membership of our meetings. There are also varying levels of comfort with advocacy and activism being a part of our spiritual community. All must be tender with those who hold other points of view. Regular centered worship can draw us closer to one another in love. Meeting for Worship is fundamental to our purpose, and we want to ensure a welcoming atmosphere for all, free from political rancor.
4. PYM affirms the traditional path to bring concerns to the Yearly Meeting. Individuals should carry a concern to their own monthly meeting, then to the quarterly meeting, and then to the Yearly Meeting. Alternatively, recognized PYM Groups can bring a concern to a council which might take it to the presiding clerk. Friends from across the Yearly Meeting sharing a similar concern can request (of the Quaker Life Council) to form a collaborative or sprint.
5. PYM affirms its ability to advocate clearly and broadly on issues that are important to Friends. This advocacy work can be done by the Yearly Meeting as a whole, or through Governance Groups, through Community Groups, such as the Collaboratives, and other groups that may arise.
6. PYM affirms that as individuals, Friends are free to engage in advocacy, activism, education, and lobbying activities as they are led. They may identify themselves as Quakers and that their commitment to a particular issue grows out of their Quaker faith. They are speaking as individual Quakers, and not as representatives of any Quaker group or PYM.
7. PYM affirms that a recognized PYM Group, such as a Collaborative, may use the vehicles of communication and other resources of PYM for the purpose of advocacy: educating, engaging, and encouraging others to act in a manner consistent with Friends’ leadings. Friends may reference specific legislation and state their views. They may say, “I believe that this bill will harm the environment because…” or “I believe this bill will reduce accidental deaths of children by requiring safe storage of firearms.”
8. PYM also affirms that a recognized PYM Group, such as a Collaborative, may use the vehicles of communication and other resources of PYM for the purpose of encouraging others to act in a manner consistent with Friends’ leadings. The group may mobilize Friends, if they are so led, to action by referring them to a 501(c)(4) organizations (e.g.

Friends Committee on National Legislation, Quaker Action – MidAtlantic Region, and others). These actions would be within the parameters permissible for PYM as a 501(c)(3) religious organization.

9. PYM advises that a recognized PYM group, such as a Collaborative, be fully aware of this Guidance on Advocacy and Lobbying and carefully discern the appropriate course of action in efforts that involve direct lobbying. As active members of PYM, we seek to be responsible and sensitive to legal issues. We do not want to put PYM staff members in awkward situations. Should Friends have questions about how to proceed, PYM senior staff and council clerks can offer additional advice. If there is a conflict of interpretation of this guidance, a council clerk, not staff, will respond.
10. PYM affirms its historic practice of calling special meetings of the body to address urgent matters in the public arena that require a response from our faith community. Where the Yearly Meeting reaches unity which requires action, it may minute that action should be taken and may designate an individual or group to speak on the Yearly Meeting's behalf, consistent with the minute.
11. PYM recognizes the IRS limitations on partisan political activities and endorsement of a particular candidate in the name of the Yearly Meeting. Such partisan political activity is divisive, is not in our tradition, and has not been condoned or permitted. Moreover, the 501(c)(3) rules prohibit such partisan politicking altogether. Friends are reminded of the wisdom of Edward Burrough in 1659,
"To the present distracted and broken nation: We are not for names, nor men, nor titles of Government, nor are we for this party nor against the other ... but we are for justice and mercy and truth and peace and true freedom, that these may be exalted in our nation, and that goodness, righteousness, meekness, temperance, peace and unity with God and with one another, that these things may abound."
(PYM Faith and Practice, 2018, p. 168).
12. PYM affirms that this Guidance on Advocacy and Lobbying may be modified in the future, at the direction of the Yearly Meeting in session, or its governance structure, should conditions warrant reconsideration. Any such modification would require approval by the Yearly Meeting in session.