

SAYMA Assessment Survey
Conducted by Ad Hoc Committee on SAYMA Assessment
Reported to March 2017 Representative Meeting

The survey was comprised of 12 questions in four categories:

1. Monthly meeting (MM) name and contact info for person who filled out survey. (Q1-Q4)
2. MM fiscal or budget year, and how frequently MM pays SAYMA. (Q5-Q7)
3. How MM determines the amount to pay for its assessment. (Q8-Q11)
4. Percent of MM budget that goes to assessment. (Q12)

Following are all 12 questions and summarized survey data for all responses except Q2-Q4, which provide individual contact information for the respondents. In addition to summarized numerical data, responses to open-ended questions are included.

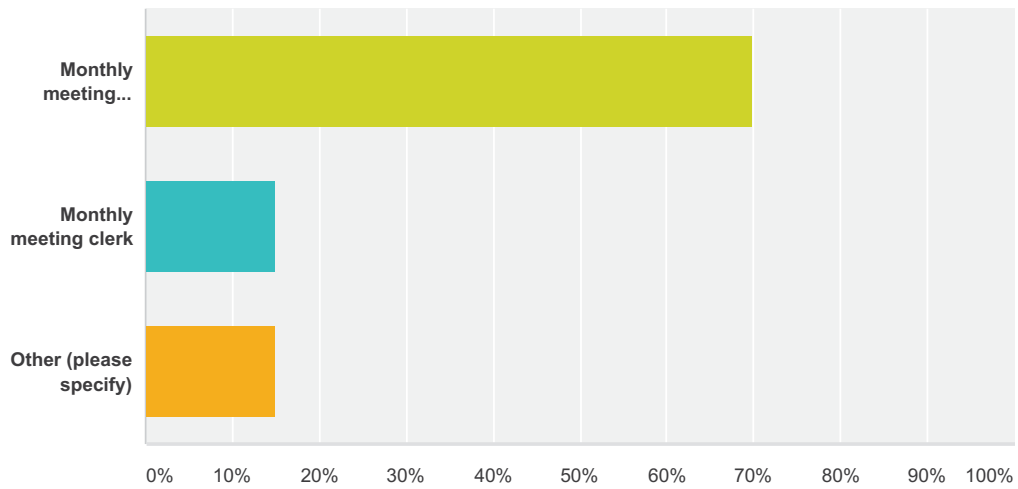
Q1 What is your monthly meeting?

Answered: 20 Skipped: 0

#	Responses	Date
1	Columbia ,SC Monthly Meeting	1/28/2017 4:09 PM
2	Oxford Quaker Meeting	1/26/2017 10:55 AM
3	Boone Friends	1/25/2017 7:02 PM
4	Asheville Monthly Meeting	1/5/2017 1:18 PM
5	Atlanta	1/4/2017 3:14 PM
6	Fozfire Monthly Meeting	12/27/2016 1:53 PM
7	West Knoxville Monthly Meeting	12/17/2016 2:01 PM
8	Chattanooga Friends Meeting	12/16/2016 12:25 PM
9	Charleston WV	12/16/2016 9:39 AM
10	Crossville	12/15/2016 7:22 PM
11	Huntsville Area Friends Meeting	11/20/2016 3:09 PM
12	Cookeville Friends Meeting	11/15/2016 7:15 AM
13	Athens Religious Society of Friends	11/12/2016 8:15 PM
14	Brevard m.m.	11/7/2016 4:11 PM
15	Swannanoa Valley	11/7/2016 11:02 AM
16	Greenville Monthly Meeting (SC)	11/6/2016 6:21 AM
17	Berea	11/4/2016 5:56 PM
18	Memphis Friends Meeting	11/4/2016 4:59 PM
19	Celo Friends Meeting	11/4/2016 4:28 PM
20	Nashville	11/4/2016 12:57 PM

Q2 What is your role?

Answered: 20 Skipped: 0

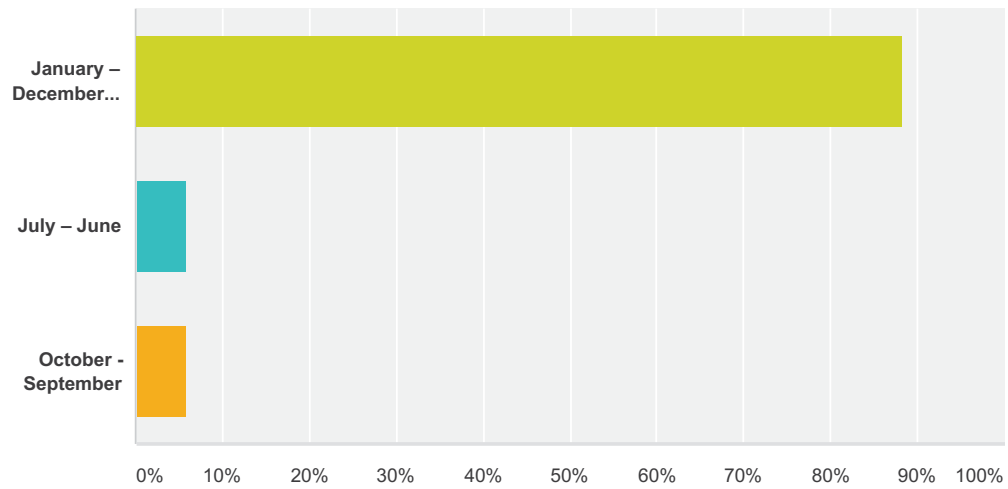


Answer Choices	Responses
Monthly meeting treasurer	70.00% 14
Monthly meeting clerk	15.00% 3
Other (please specify)	15.00% 3
Total	20

#	Other (please specify)	Date
1	At present, John and I are the only Friends meeting. We have an attender who enjoys the silence.	1/25/2017 7:02 PM
2	Clerk of Finance Committee	12/16/2016 12:25 PM
3	SAYMA rep, co-founder of the Meeting	11/7/2016 11:02 AM

Q5 What is your meeting's fiscal or budget year?

Answered: 17 Skipped: 3

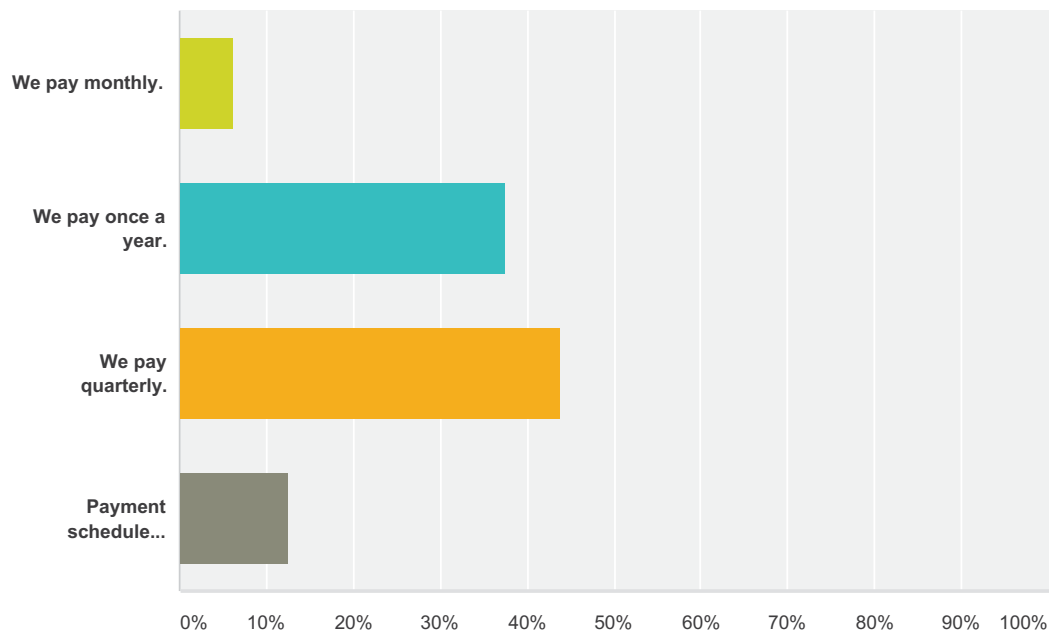


Answer Choices	Responses
January - December (calendar year)	88.24% 15
July - June	5.88% 1
October - September	5.88% 1
Total	17

#	Other (please specify)	Date
1	We have no official budget year at this time.	1/25/2017 7:03 PM
2	June - May	12/15/2016 7:22 PM
3	May - April	11/4/2016 5:56 PM

Q6 On what schedule does your meeting make assessment payment(s) to SAYMA?

Answered: 16 Skipped: 4



Answer Choices	Responses
We pay monthly.	6.25% 1
We pay once a year.	37.50% 6
We pay quarterly.	43.75% 7
Payment schedule depends on available cash.	12.50% 2
Total	16

#	Other (please specify)	Date
1	Twice a year	1/28/2017 4:10 PM
2	we have been paying Quarterly, but the finance committee has authorized one yearly payment. Which does SAYMA prefer?	1/5/2017 1:21 PM
3	That seems to depend on who is treasurer and who is on the finance committee.	12/16/2016 12:27 PM
4	usually twice a year, no definite dates	11/7/2016 11:03 AM
5	We used to pay quarterly.	11/6/2016 6:22 AM
6	We pay twice a year.	11/4/2016 5:00 PM

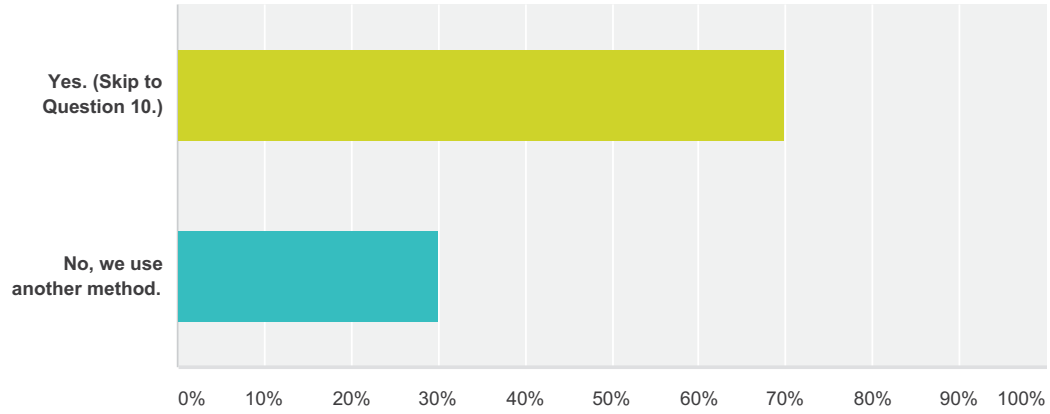
Q7 If you have anything to add about the annual schedule, please explain.

Answered: 6 Skipped: 14

#	Responses	Date
1	We are such a very small meeting that our share has to be small, so it doesn't make sense to make more than one payment.	1/26/2017 10:56 AM
2	John Geary, my husband, is supposed to access the meeting account (our former treasurer died) and contribute to SAYMA.	1/25/2017 7:03 PM
3	Our Quarterly payments have sometimes been late and this has caused confusion for the SAYMA treasurer with regard to how many payments we have made during SAYMA's fiscal year. I will try and do better during our coming year in making timely payments.	1/5/2017 1:21 PM
4	Our schedule may also change depending on whether we are ahead or behind our budget projections.	12/16/2016 12:27 PM
5	We understand that SAYMA prefers to receive payment distributed over the fiscal year. We're flexible as to the frequency of payment.	11/20/2016 3:11 PM
6	Over the years, we have mostly made donations to SAYMA quarterly. When funds are low, we donate when funds are available.	11/12/2016 8:18 PM

Q8 Does your meeting determine its assessment amount by multiplying the SAYMA assessment (\$60 in recent years) by a number of individuals?

Answered: 20 Skipped: 0



Answer Choices	Responses	
Yes. (Skip to Question 10.)	70.00%	14
No, we use another method.	30.00%	6
Total		20

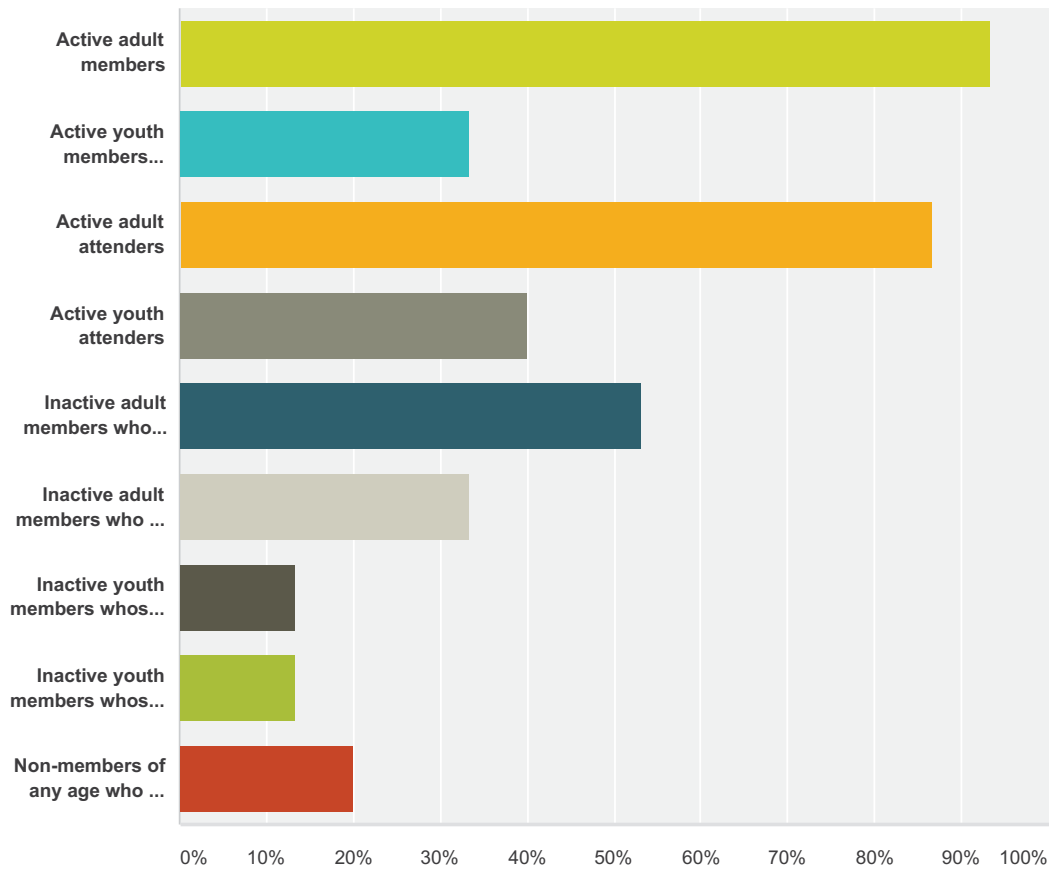
Q9 If you answered No to the question above, please explain how your meeting determines the dollar amount of the assessment.

Answered: 6 Skipped: 14

#	Responses	Date
1	We do the calculation (\$60 x number of members/attenders) but then take a good look at our bank account and determine the assessment based on what we can afford, preferably the recommended amount.	1/26/2017 10:59 AM
2	I don't know.	1/25/2017 7:04 PM
3	The number of Recorded Members is uncertain as our records are incomplete. The number attending Meeting for Worship is inconsistent and there is nobody counting. Any number we would arrive at would be a guess. Some in the meeting suggest that the contribution should amount to 15% of our budget, but this has not been correct for many years if it was ever correct. The true answer is that it has been \$2860 for several years. Our new budget will be approved in the next month or two, and that budget includes an increase in this amount. The final amount will be determined once the Meeting for Business approves the budget.	1/5/2017 1:26 PM
4	We collect individual assessments and send in whatever we collect.	11/15/2016 7:17 AM
5	We use the suggested \$60 / number of individuals method when our Meeting has enough funds. When funding is low, we donate an amount that fits our budget.	11/12/2016 8:45 PM
6	This year (2017 budget) we determined the givings based on a percentage (~22%) of our budget. In previous years the givings determination was made by identifying the number of Friends who qualified as members or regular attenders with an expectation that it should be about 20% of our budget.	11/4/2016 4:36 PM

Q10 When determining the number of individuals for whom the assessment should be paid, which of the following are counted? Check all that apply. (Note: "Youth" in this context means non-adult, at whatever age your meeting draws that line.)

Answered: 15 Skipped: 5



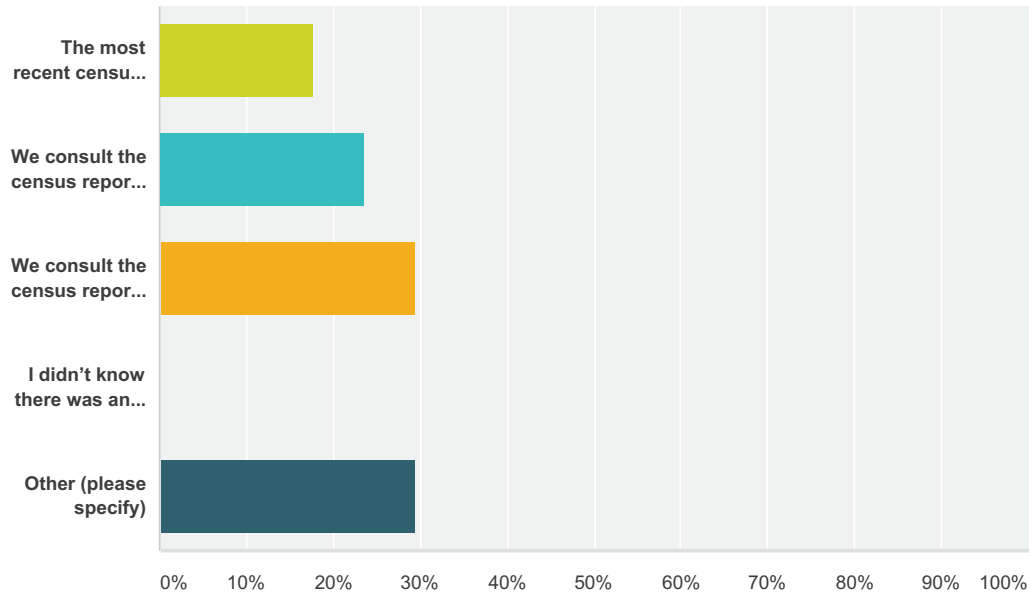
Answer Choices	Responses
Active adult members	93.33% 14
Active youth members (including associate members*, if applicable)	33.33% 5
Active adult attenders	86.67% 13
Active youth attenders	40.00% 6
Inactive adult members who contribute financially	53.33% 8
Inactive adult members who do not contribute financially	33.33% 5
Inactive youth members whose families contribute financially	13.33% 2
Inactive youth members whose families do not contribute financially	13.33% 2
Non-members of any age who do not attend but contribute financially	20.00% 3

Total Respondents: 15

#	Other (please specify)	Date
1	We pay half the assessment for youth members	1/28/2017 4:14 PM
2	This fall the Finance Committee took over CFM's SAYMA Census for two reasons. 1. The assessment census needs to be done the same way each year for consistency. (It past years it was done by one person. The person doing that year's census chose his/her own methodology.) 2. Finance needs the census to be done in the fall so that we can use the figure in developing our budget. We can't afford the "spring surprise" anymore. We noted that SAYMA "suggests" that we pay the assessment on every member over the age of eighteen, and every "active attender". SAYMA has no definition of active attender. The CFM Census formula will count each member of CFM, unless the member has had no contact with the meeting in 2 years and does not support the meeting financially. We will count as an "active attender" one who comes to MFW at least half the time, on average, and who contributes somehow to the life of the meeting, for example attending second hour, MFB and/or social events, or financially. CFM has nearly a dozen members whom we have not seen or heard from in years. We don't have addresses, phone numbers or email for those members. We are a small meeting. In 2017, using this formula, SAYMA is nearly 12% of our budget. We can't afford to include long-lost members and still do any work in our meeting, our community, and the world. Unfortunately, we don't have any attenders or members under 18. Thank you for asking and working on this issue.	12/16/2016 12:42 PM
3	We have no youth or inactive members who contribute	12/15/2016 7:23 PM
4	We count whoever pays the assessment.	11/15/2016 7:17 AM
5	We do not differentiate between members and attenders; in following the equality testimony, all Meeting participants are treated equally. To determine participation, we look at the average number of people attending each week over the past year (regardless of age or official membership status).	11/12/2016 8:45 PM
6	We use the numbers from our "census", which I have not been involved in. I would ask our clerk how this is calculated (nfmclerk@gmail.com).	11/4/2016 1:03 PM

Q11 In calculating the number of individuals for whom the assessment should be paid, what connection is there to the monthly meeting's annual census report to SAYMA?

Answered: 17 Skipped: 3



Answer Choices	Responses
The most recent census report determines the assessment count and agrees with it.	17.65% 3
We consult the census report, but the assessment count may differ because the census cut-off date does not correspond with our budget year.	23.53% 4
We consult the census report, but numbers may differ because the census does not correspond on all points to the definitions used for assessment .	29.41% 5
I didn't know there was an annual census report.	0.00% 0
Other (please specify)	29.41% 5
Total	17

#	Other (please specify)	Date
1	Like the number of Recorded Members, the census report is our best estimate of the state of our members and attenders. Some in our meeting think the assesment should include everybody, including young children and infants. Others think that the assesment should be based only on adult attenders and recorded members. Others think it should be based only on the number of recorded members regardless of their state of activity. In short, if you ask any group of Friends from Asheville meeting, you will get the number of Friends asked plus one (or two or three) opinions.	1/5/2017 1:30 PM
2	We use the formula stated above to determine the assessment. The Finance Committee has not yet done a census and I don't know what our decisions will be about that form. We have encouraged the meeting to clean its membership rolls. In my humble opinion, budget years, the census, and the assessment need to work together better. For example, our budget year is the calendar year. Our next-year budget is finalized in December. Doing the census in the early spring means the budget was only a guess. In 2016, the assessment ended up being 13.75% of our income. We can't afford guesses and surprises. The only solution I can think of immediately is to have a rolling census, where each meeting does theirs at the end of their budget year. Again, thank you for asking.	12/16/2016 1:03 PM
3	The assessment count is determined by how many pay the assessment. This normally does not agree with our census since there are some who cannot pay.	11/15/2016 7:19 AM

4	Two of the above seem appropriate: the census date does not correspond with our budget year, and, the definitions on the census do not correspond to definitions used for assessment.	11/12/2016 8:49 PM
5	It has not been used at all. They were thought to be separate processes unconnected to each other.	11/4/2016 4:38 PM

Q12 What percentage of your monthly meeting's annual budget goes to the SAYMA assessment?

Answered: 17 Skipped: 3

#	Responses	Date
1	12%	1/28/2017 4:21 PM
2	We don't do this calculation.	1/26/2017 11:01 AM
3	11.36% of income, 12.6% of contributions, 5.29% of total expenses. We performed significant renovations and maintenance on the meetinghouse amounting to more than our budget projection for all other expenses. Thus, we spent twice as much money as originally budgeted.	1/5/2017 1:49 PM
4	6.5%	1/4/2017 3:16 PM
5	11%	12/17/2016 2:09 PM
6	11.5 to 13.75	12/16/2016 1:05 PM
7	about 15%	12/16/2016 9:43 AM
8	25%	12/15/2016 7:24 PM
9	16%	11/20/2016 3:14 PM
10	Last year it was about 12%.	11/15/2016 7:24 AM
11	approximately 7.5%	11/12/2016 9:02 PM
12	15%	11/7/2016 11:05 AM
13	Appox. 25%	11/6/2016 6:24 AM
14	10.5%	11/4/2016 5:58 PM
15	12-13%	11/4/2016 5:05 PM
16	~22%; you did not but I will state that we decided to use a percentage because several individuals objected to using financial offerings of friends as part of the determining factor for whether or not someone's head counts. Also, in rural meetings some offerings are in cash, unnamed, and well below the \$65 per head.	11/4/2016 4:43 PM
17	8.67%	11/4/2016 1:04 PM