

## **Report of the Development Committee to ILYM Spring Continuing Committee**

Our committee had not been formed as of last Annual Sessions, although the charter for our work was approved in 2010 (Minute #42, and also spelled out on pp. 45-6.) Three of us have met 4 times by conference call, functioning without a clerk and eager for appointment of more members.

We have met under the weight of the minutes brought by Finance Committee that "Development work on behalf of the Yearly Meeting is becoming increasingly urgent" (see pp 30 and 107 of the MinuteBook). We are now ready to begin asking Friends for contributions, bequests, and other estate planning, but we need more information plus advice from Continuing Committee and approval on certain matters as we discover them.

There are records we need to do our work. We have discovered that these have been fragmented (not centrally located) and some procedures (such as thanking) have been uneven. As noted in Finance Committee's report, we lack records of pledges Friends may have made, or the ability to track giving patterns. Therefore, we have asked for whatever data on contributions can be shared with us by the Treasurers, past and present, and we have established a working relationship with Finance Committee.

Another need we readily discovered is to know clearly what are the kinds of projects, line items in our budget, and existing funds for which we can solicit contributions, pledges, or bequests. Subject to direction from this committee (or Annual Sessions if need be), we believe it is appropriate to seek funding for:

- a. The General Fund, the needs of the annual budget.
- b. Capital Improvements identified in the Capital Assets Management Plan.
- c. The Property Improvement Fund generally, but only for those items already approved by the Yearly Meeting.

If a Friend wishes to earmark a contribution for something not yet reviewed by a committee and recommended for approval by the Yearly Meeting as a whole, we will work with that Friend to interpret our process and encourage their patience as we seek the wisdom of the whole body.

The priorities for our plans for the future must be made clearer, emerging from consultation among relevant structures of the Yearly Meeting, and gaining corporate approval. As directed in Minute #33 from 2012, we expect a working group of key committees to meet to determine how we actualize the approved site plan by setting priorities for expenditures. That will give us a roadmap we may then follow.

The Yearly Meeting will benefit from our clearly conveying anticipated uses for solicited money. We need some help in knowing how to present that narrative and do interpretation. Some years ago Henry Freeman provided outside assistance, and he is willing to work with us again. Thus, we will seek budgetary approval to engage his services for limited consultation.

Our committee needs tools to do our work. One of these will be to have actual donation records, which may be an indication of giving capacity. We will receive and honor these in strict confidence. But we also need to organize and consolidate records, tracking pledges and giving patterns, in order to make intelligent approaches. To do this, we perceive several options and seek your advice. We could:

- (1) Set up a simple spreadsheet of our own design, or
- (2) Purchase a relatively low-cost but field-tested software package, in consultation with our Treasurers, for which we would ask Finance Committee for inclusion in next year's budget.

The development of good relations with present and potential donors requires a clear protocol for sending thank-you letters, other than end-of-year receipts for gifts. Is there guidance that Continuing Committee wishes to give at this time?

Although this has not existed previously, we have begun to keep a record of intended bequests to the Yearly Meeting. We encourage those who have ILYM in their estate plans to let us know. We also wish to have the website show the need for and mechanisms of including ILYM in wills and deferred giving plans. Would there be any reservations about this?

Our committee is ready to make some appointments to meet with existing and potential donors to explore how they may support ILYM's work and vision. Where possible, we would like to be accompanied by Adult Young Friends, whose enthusiasm is palpable. What more should we be aware of as we undertake this responsibility?

For the committee of Bob Bartles, Maurine Pyle and himself,

David Finke/reporter