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*General Secretary Report on Staff Activity to Councils  
Mid-September Through Mid-October 2018*

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**Business and Finances:**

- Our fiscal year ended September 30<sup>th</sup>! The year-end prompted a variety of tasks including communications with monthly meetings and quarters about their final covenant payments, getting out last minute grants and payments and closing the fourth quarter books.
- The annual fund raised \$311,770 This result is below our goal and our last two years' totals of around \$340,000. However, given the diversion of attention this year to the database conversion, the changes in staffing over the year and the complications with getting out the final appeal (problems and delays with the printer, and that we did this mailing during the data migration to Salesforce) we find the final number not discouraging.
- We manually analyzed a sample set of 40 gifts. In that review we documented 65% of our donors increased what they gave over the prior year; 27.5% did not change their gifts and only 7.5% reduced their giving.
- We are in full swing preparing for the audit which begins on November 12
- Finance and Development researched options for financial institutions to support planned giving.
- We now have a draft brochure for the Legacy Annual Fund program and are testing it with target audiences prior to printing it.
- There were several property-related matters at Arch Street, including evaluating bids from electrical contractors for the relighting of the East Room, getting approval from the Philadelphia Historical Commission for storm water management solutions, and nearly finalizing negotiations on an access agreement between PYM and the developer of a neighboring townhome project.
- The Arch Street Meeting House Preservation Trust met for an all-day retreat for the board, non-board committee members. Staff members Lynne Calamia, Arch Street Meeting House Executive Director and Linell McCurry, Associate Secretary for Business & Finance attended. The focus included an exploration of mission, vision and resources, and a facilitated Resource Development Workshop.
- For many years PYM's has provided staff to support the distribution committee of the Tyson Fund and received a fee for doing so. After several internal discussions about the value of staff time compared to the value of receiving the fee and additional conversations with the Tyson Fund members and Friends Fiduciary, we completed a transfer of staffing responsibility from PYM to Fiduciary. At the meeting to make the transfer there was a good deal of appreciation for Carol's work.

**Program and Ministry:**

- We held a well-attended (50+) Friends in Fellowship (the founder of the Philly Bail Fund spoke) at Lehigh Valley Meeting on 9/13
- We held a Pop-up **Friends in Fellowship** event with Cordell Carter of the Socrates program at the [Aspen Institute](#) was held at Friends Center on a Tuesday morning. Cordell enjoyed getting to know more about Quaker and Friends loved his presentation.
- The Quaker College Fair is an annual event co-sponsored by PYM and Friends Association for Higher Education and was held on October 6<sup>th</sup>. The Young Adult Engagement and Sessions Coordinator,

Meg Rose, supported the Quaker College Fair with marketing efforts (print, email, and social media) and also served on the discussion panel.

- The planning of fall, spring and summer sessions are under way at various levels. Fall Continuing Sessions work is focused on publicity and program refinement; we're seeking a location for Spring Continuing Sessions and working with Young Adult Friends to plan the programming; we're working on a three year contract with The College of New Jersey for Annual Sessions.
- We are working with Friends Counseling Service to ensure that the Friends Counseling Service Advisory Panel (a committee under QLC) is fully populated and poised to provide policy and clinical practice stewardship for the service. The business model of the Friends Counseling Service continues at a sustainable pace.
- Staff is supporting the logistics with respect to payments, communications, and marketing for the upcoming Spiritual Formation Collaborative retreat.
- All of this years' youth events are scheduled.
- The Youth Engagement Coordinator, Melinda Wenner Bradley ran a retreat for youth with some of the youth staff at Newtown, providing quality programs and making space for spiritual community for the children and youth there, so people who are parents could participate in the retreat. This is an example of work that we did not previously have staff capacity to support.
- Networking and meeting visitation has commenced within the area of Youth Engagement. We are focusing on developing relationships with the meetings that are most successful at supporting youth work and religious education. As a result, over time, we will get to know the families and youth workers with whom to network in order to build a community of practice and enhance the support we are able to give each other as a yearly meeting community across meetings.
- We have begun recruiting Resource Friends to serve in the practice area of youth work and religious education.
- We are also working on developing a Resource Friends practice area for young adults. As inspirational starting points, we have calls set up with FWCC to understand how they are engaging their young adults through their "Young Adult Friends Development Fund" and meeting with young adults who have received granting funds through the Travel & Witness Granting Group to run special projects.
- We are planning the launch of the Bridge Contacts program. There will be "soft launch" at the fall continuing sessions.

### **Communications and Technology:**

- We published the fall edition of Faith and Practice, which should hit mailboxes this week. This is the 12-page Comic Book issue (featuring YAF graphic storytellers and Signe Wilkinson)
- Salesforce data migration was seamless in terms of the financial data – but contact data needs extreme amounts of tweaking.
- Staff have participated in a variety of trainings for using the database and the Transitional Meeting Engagement and Data Coordinator, Wendy Kane has been a tremendously valuable resource in our learnig Salesforce.
- We are experimenting with the regularly-scheduled email to Friends which highlights PYM activity. It has shifted from a monthly to a weekly event and we are testing which day it gets highest response rate and which kind of content is most responded to.
- Our website is on the Word Press platform which is rolling out significant changes that will affect our website. The web manager, Malcolm McAttee, is working hard transforming the 'invisible' structure so that the transition will be as seamless as possible.

- We have begun a continuous study of user experience of the website. As we learn we are renewing and re-designing parts of the website, including improving site navigation and putting a donate button on the homepage
- Russian spammers discovered the section of our website called PYM Connect. As they seek to enter this section of the website with their fake IDs, we have been denying access and deleting each fake ID. For security reasons, and to protect the PYM community, we deactivated PYM Connect on 10/11/2018. Please note that the comments on PYM Connect were more than a year old.

### **Staff and Administration**

- We are in process of transferring responsibility for benefits from the Controller's office to HR and Cliessa is working closely with Zakia Williams on health benefits for 2019.
- The Community Engagement Team has integrated a new member, Wendy Kane, Transition Meeting Engagement and Data Coordinator. With Wendy's inclusion the team now includes staff from Program & Religious Life and Advancement & Relationships which helps to integrate the work of the two departments.
- We have begun annual performance reviews. Most will be completed by Thanksgiving with the exception of the youth staff whose reviews will be conducted in December.
- Our new HR Coordinator, Zakia Williams, has met with each each staff person to hear about their position, their experience of working for PYM and their experience and thoughts about our anti-racism work.

### **Visits**

- Grace Sharples Cooke, Associate Secretary for Advancement & Relationship, visited the Pennswood Village Quaker community where she was a guest speaker at their annual dinner.
- Grace visited Gwynedd Meeting for Meeting for Worship and spoke with about 30 Friends about Fundraising and Outreach
- Grace spent a weekend in Southern Quarter visiting with Friends from Wicomico River, Third Haven and Chester River Meetings.
- Olivia Brangan, Community Engagement Coordinator, attended the Bucks Quarter Peace Fair, and worked in the Bucks Quarter tent and at the "welcome table".
- Melinda Wenner Bradley, Youth Engagement Coordinator, and Kimani Keaton, Children's Program Facilitator, visited Third Haven Meeting for a Family Open House.
- Meg Rose, Young Adult Friends and Sessions Coordinator, visited West Philly Meeting about the YAF-led ministry on immigration and shutting down Berks Detention Center.
- Christie Duncan-Tessmer, General Secretary, visited Gwynedd Meeting (on a different week from Grace) for Meeting for Worship and spoke afterwards about her 2017 participation on the National Council of Churches delegation to the Middle East.
- Christie attended the Upper Susquehanna Quarter Family Retreat for one night and participated in all of the activities and met with many Friends.
- Christie attended the National Council of Churches annual meeting and semi-annual board meeting.
- Christie attended the annual gathering and retreat for General Secretaries and General Superintendants of Quaker Yearly Meetings.
- Christie attended a lovely "Friend-raiser" event held by Westfield Friends School