

General Secretary's Report

May 23, 2002

The Future of our Yearly Meeting: Just Surviving, or Thriving?

Background: It was three years ago that I first wrote a report for this body focused on some larger questions regarding this Yearly Meeting's life and direction. [That was half way through my now (almost) six year long tenure here, which began in July of 1996.] I authored somewhat similar reports to this body each of the following years as well.

Each of those three previous reports raised the need (as I perceive it) for our Yearly Meeting as an organization to define a few central, overarching priorities around which we would be willing to make strategic decisions about the allocation of our resources and focus of our energy over a substantial period of time – say three to five years. Each report talked about the ways in which our service to our Meetings is made less effective, our resources are sometimes wasted, our staff and volunteers are strained, and our impact as an organization is undermined because we lack a clear articulation of purpose and priorities.

There was an interesting pattern of response to those reports. The first generated considerable energy. A special session was called spontaneously at the residential Yearly Meeting that July (1999) where Friends who were enthused about the idea of giving PYM more focus gathered to discuss that possibility. A year long conversation followed, more actively pursued in a few Meetings than in many others, about “what we are called to as a Yearly Meeting.” This process seemed to enrich the reflection of those few Meetings, and a few other Friends, but had little discernable impact beyond that.

The next two years additional reports engendered a substantial response. At Interim Meeting, and in some other settings, some people wanted to talk about giving PYM a clearer focus and establishing some priorities to guide the work of staff and use of resources. I heard from a fair number of individuals who hoped PYM would move in this direction. But, for one reason or another, these discussions either did not take place or could not be sustained.

In recent years the senior members of the staff – the Directors and General Secretary – have also wrestled with these questions. We have been particularly concerned because we are at the center of tensions that exist in the Yearly Meeting over the use of our resources. These tensions impact our work directly. Moreover, because senior staff sits “at the center of the action,” we may see more than many people the opportunities PYM has to make a real difference in the lives of Friends (and others); and the opportunities which are lost because our Yearly Meeting often tries to do too much, tries to be all things to all people, and is unwilling to make hard choices.

Last fall, the senior staff asked for a meeting with the Clerks of Interim Meeting and YM to talk about these matters. We placed before them a document we had worked on explaining why we thought it was critical that some clear set of priorities be articulated that could guide our work over a considerable period of time – even if PYM could not articulate a mission. That discussion was taken to the Administrative Group, which has considered these issues at length, but has not found clarity to take any action.

Thus, we stand in these matters pretty much where we did three years ago. And so I feel the need to address them with this body again.

Two Observations to Set a Context: Let me be clear as I begin this report that when I speak here about “the Yearly Meeting” I am talking about PYM as an organizational and administrative structure. Friends typically use the term “Yearly Meeting” in three ways. First to refer to an event that occurs annually, our sessions. Second to speak of an extended faith community, some 10,000 or more members in 100 or more Meetings. And third, to name an organizational and administrative structure – involving volunteer leaders and workers, staff, and facilities – through which some of the work of that extended faith community gets done. It is the last of these that I focus on in this report.

Next, let me note that much of what I need to talk about here has to do with potential unrealized, opportunities lost, and the price of the progress we have made as an organization in the last five years. To discuss those things I need to highlight the downsides, difficulties, and shortcomings of PYM as an organization, which means much of this report may sound rather negative. But I do not want this to sound like complaining or “doom and gloom.”

We have done much we should feel good about in the last five years. Over the last year particularly I have frequently had people, many different people, talk to me about how they see new and better things happening around the Yearly Meeting, and feel a more positive spirit among us, than they had seen before. I want to affirm those impressions, and want to frame the observations I will make here against that positive background.

That said, I want nonetheless to raise some hard questions.

The Challenges PYM Faces: While I am pleased and grateful for the good things that have happened in and through our Yearly Meeting in the last several years, I am also aware – maybe more aware than many – of the dissatisfaction some members feel, of the costs of our progress, and of some disturbing trends on the horizon. For example:

- ▼ We have a number of programs that are not as strong as they might be, and that do not serve our members as they should – usually because we do not have the member (i.e., volunteer) participation and/or the financial resources we need to make them better.
- ▼ We are both “using up” current volunteers and having difficulties finding new persons to serve on committees and working groups. Typically this is because the charge or focus of the work being done in those groups is often ill defined, they are sometimes poorly clerked, the ways they work are often unnecessarily inefficient, and as a result the service is too demanding and not sufficiently rewarding to entice people to serve.
- ▼ We made good progress in getting Friends to provide more financial support to PYM to support our work in the first four years I was here; but that progress has largely ceased. The reasons why are not clear, though some contributing factors are evident, but the implications are serious and troubling. ◆

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- ◆ **Note:** A word more about “contributing factors” may be useful here. Since I came six years ago, 7 of the 19 donors who were then giving more than \$1000 per year to our Annual Fund have died. These are the folks who gave out of personal and institutional loyalty, i.e., they “believed in the value of PYM.” Very few younger (under 60) donors give this way. They give to specific projects, to make a difference, to cause change. They want to see results. How does an organization with no mission appeal to them?

- ▼ Demands on staff labor and support – at least in many positions – have steadily increased over the last five years; but there is often little recognition of or respect for the work staff does and the skill and knowledge staff brings to this work, and there is no evidence of a readiness to pay for the increased staff needed to provide additional services desired.
- ▼ Attendance at YM sessions has been down for the last two years running, and my impression is that the general awareness of the average member of our Monthly Meetings of what the Yearly Meeting is and does is still very low. The plain truth is that if most of our members do not know or care what the Yearly Meeting is and does, then we will find ourselves with fewer resources and having to do less. Then again, if we do fewer things that really matter to our members and Meetings, we will soon find still fewer members will know or care about or support the Yearly Meeting at all.

So, without wanting to paint too bleak a picture, all this is to say we face serious challenges. And while I truly believe PYM as an organization – and as a faith community – is in a better place than it was six years ago, I have serious doubts whether we are in the place we need to be to meet the future which is coming at us right now.

- Beyond Surviving to Thriving?** Can PYM as an organization meet these challenges? It seems to me that to move beyond surviving – which we are likely to do for a long time, given how much money we have in the bank – to thriving *we have to create an organization that:*
- (1) *Is rooted in and centered on a sense of purpose*, a vision of service, that derives both from a recognition of God’s call upon and gifts in our lives, and from a clearer understanding of the times and the culture in which we live.
 - (2) *Can articulate that purpose or vision in a way that is sufficiently simple, clear, and compelling* to get people excited about being part of it, working within it, and supporting it with their gifts of skill, time, and money.
 - (3) *Carries forward that purpose, does that work, effectively enough to produce visible results*, which give those participating a sense of satisfaction; and efficiently enough so that it does not demand so much time and energy that those who want to be involved frequently feel they cannot afford to be.

I would argue that in order to move towards this reality, to become the organization I have just described, there are both operational and structural changes required of us.

- ▼ I believe the most important thing we can do operationally is develop a statement of fundamental purpose and a clear set of current priorities for PYM; and then we must shape our commitments of resources and energy around those priorities in a disciplined way.
- ▼ I believe the most important thing we can do structurally is create – and delegate some meaningful authority to – a couple, smaller, more efficient groups or committees that can help this organization allocate resources and channel energy to effect those overarching priorities. This would be in contrast to the current situation where the only groups making such decisions have responsibility for only distinctive and discrete elements of our work as an organization; and no group making these decisions has as their first priority the entirety of our work and service and the good of the whole system.

Examples of Our Weaknesses: Let me offer a couple concrete examples of why the present situation is truly problematic, and how the changes I would propose could be helpful.

(I) **Buildings: Burdens or Blessings?** --- Sometime ago the growing Meeting located in the Arch Street meetinghouse began to look at its space needs. Friends from that Meeting asked members of our PYM “Property and Use Working Group” to meet with them – as a “Long Range Planning Committee” – to consider what could be done with that meetinghouse to make it a better home for that Meeting, a better conference center, and a better facility for PYM use and for outreach to the wider community. They looked at ways the building might be renovated for these purposes. They looked at questions of how to generate more revenue through building operations to support the building. They looked at long term needs for maintenance and support of this historic and expensive property. They generated some exciting but expensive ideas.

Finally though, this Planning Committee could not decide what direction to go because they did not know how PYM wanted to use and support the building. So they “kicked the question upstairs” to General Services Standing Committee. But it could not offer any real guidance either because it faces the same difficulty – no one has ever said what we want to use these buildings for in a larger context. What purposes does our holding these properties serve?

Interestingly, at the same time the Friends Center Corporation Board, which is responsible for Friends Center, in which we hold a large equity stake, was generating similar questions. That building in which our main offices are located needs serious work and a lot of money just to be brought up to code – and even more work and money to be what it should be as a Quaker office and hospitality center in the 21st century. Again, General Services Standing Committee is left to ask, “What direction should we go?”

The Standing Committee wants to think about this with an eye to good stewardship, but is stymied by an absence of context. Because the answer to the question is, “It depends.” ***Whether we should invest large amounts of money in center city buildings depends on what services PYM hopes and plans to be providing, and where, and to whom, and how, in the near and long term future.*** If, for instance, we really moved towards more regional staff and programming, then we would probably have fewer people working at Friends Center, and it might make sense to look at alternatives to investing more of our funds in this building.

(II) **Programs and Staff: Regional or Central?** --- That example, in fact, highlights another place where we can see these issues clearly. When PYM reorganized six years ago, we made a commitment in principle to do more programming “in the regions.” We have done more of that, more events of many kinds; and we have added a couple regional staff persons. But there is clearly opportunity – and some of us would say need – to do more yet.

There is evidence that Quarters served by regional staff persons are stronger Quarters with (generally) livelier Meetings than those that are not so served.. One interesting finding of the evaluation of the Membership Development Support grants was that those given to Meetings with access to support staff were, on the whole, more successful. We have several Quarters that have shown an interest in having regional staff that do not have such support now. But we have not acted to provide that staffing.

Why? Because it would require, in the absence of additional money, cutting some other program and staff to provide this. Would that be a good idea? Maybe. I am inclined to think so. ***But this too is a question we cannot answer without reference to an overarching vision of purpose and mission.*** Whether reallocating resources in this way makes sense depends on what we are trying to get done, trying to make happen, in a bigger picture.

Furthermore, it requires there being some group in the Yearly Meeting regularly examining our purpose and performance as an organization, and having some authority to reallocate resources so that resources can be better aligned, or realigned, in accordance with our larger goals and changing circumstances. This is what a “board” does in most normal nonprofits; but we do not have a functional board. Moreover, our present budgeting process locks us into a situation where there is no open and meaningful discussion of changing the allocation of resources from one function (Standing Committee) to another. This makes creative responses to new opportunities virtually impossible absent some new external funding. ❖

(III) Governance & Direction: Staff and Volunteer Roles --- Indeed, the question of how our governance structure works, and how it relates to our staff, highlights a third example of our difficulties. Friends have always insisted they do not want PYM to be a “staff-driven” organization. Members want it to be directed from and responsive to the leadings and needs they feel and articulate from the grassroots. This is a perspective I agree with entirely.

However, there are different ways to be responsive. And the way we have structured our connections to the grassroots carries a high cost. This is the reason our budget process is so time consuming, labor intensive, and inflexible. To solicit ideas from the Monthly Meetings, and run drafts of the budget back by them several times before it is finalized, takes a lot of time. So we find ourselves trying to predict what kind of resources a project addressing changing social conditions will need fifteen months in advance.

Moreover, ways we now respond to grassroots concerns are what frequently pull the organization in six different directions at once. What one group of Friends feels is most important for PYM to do in terms of a specific service is what another group of Friends could not care less about; but that other group will have another project about which they feel just as strongly. So ***at the staff and governance level we face constant, multiple, conflicting demands to give our blessings, time, and energy to more things than we can;*** and we (staff especially) face frequent complaints – sometimes even “attacks” – for not doing what some Friend(s) are absolutely certain “the most important thing” PYM can do right now.

Without the “filter” of a statement of purpose and priorities for PYM, where are we to look for guidance for ordering our work – what to do first, what next, and even what to let go (as we never have enough time to do it all)? Neither Interim Meeting, which is as close as we come to

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- ❖ **Note:** One further important implication of this situation is that there can never be any significant intentional changes in our program alignment or staffing patterns. We will continue to do what we are doing, with the staffing arrangements we have now (more or less) forever. ***Except*** that as costs rise we will eventually have to cut some staff; but again we will have no larger rationale to guide those decisions. So, presumably, those cuts will be made largely by attrition, whether or not they make sense in terms of programmatic priorities, and thus the organization will become less and less effective over time.

having a board, nor Yearly Meeting in session, has ever (to my knowledge) attempted to frame priorities for PYM as a whole for even one year at a time, much less with a longer view. Note the irony here, which is that staff then sometimes end up setting *de facto* priorities for the larger organization by making the choices we have to make without this guidance.

Is PYM as an organization, and the Meetings and Friends we want to nurture and support, well served by this? It seems to me clearly not. Am I, as the chief staff officer, hoping to serve you well, and often overwhelmed by my job, frustrated by this? Absolutely! Do many other staff feel the same way? I can assure you they do.

Let me be plainspoken, here. PYM has almost exactly the same level of staff now as it did ten years ago. This staff is doing considerably more (in most cases) than was required of it ten years ago – especially in a more complex and litigious environment as regards personnel management, the complexity of information systems, financial accounting, and liability issues. In addition, we regularly field requests to do yet another task here or another “little project” there from members and Meetings, including some who should be helping us develop and adhere to some clearer priorities. Finally this staff is also implementing a number of programs for which we hear great appreciation and support around PYM – and whose value we are sure of – but in which there is little or no volunteer involvement.

I have to say I personally find this situation frequently very difficult. I fear we are going to lose some of our best staff people in the near future if we cannot resolve some of these difficulties. I see us losing some of our best volunteers on the governance side now, and see us unable to recruit some who would bring us the skills and gifts we need, because of this context. What is more, I believe this state of affairs is not tenable for PYM for the long haul. Some of the trends and dynamics I cited at the beginning of this report will finally erode the good progress we have made recently if we do not do something about this.

Proposals For Addressing Our Future: I would like, then, to put two sets of proposals on the table for the consideration of Interim Meeting at this point. One set has to do with the immediate and shorter term future; the other with the longer term.

(A) For the Coming Year: In light of the circumstances I’ve described, and the sense of deep frustration the Directors and I face (as senior administrators) in trying to manage the organization under these circumstances, we propose to undertake an experiment. *Unless we are told it is unacceptable, for the next year at least we will try to do our work, and guide the operations of the organization, with the assumption that the following statements of purpose and priorities should direct our efforts.*

Please note, we did not “make these up.” Rather the statement of purpose comes directly from the “Structures and Workings Report” (adopted by YM in session in 1996); and the articulation of priorities follows naturally (we believe) from that statement of purpose, and was refined in discussion with the two Clerks (of Yearly Meeting and Interim Meeting) as we as other volunteers this year.

❖ **Statement of Purpose from “Structures & Workings”** — Philadelphia Yearly Meeting exists “to serve God by nurturing and supporting the collective spiritual journey of Friends and seekers.” We believe our work must center primarily around helping build stronger and deeper Monthly Meetings which, as primary communities of faith, are the foundational elements of a more vital Religious Society of Friends.

❖ **Operational and Strategic Priorities for 2002-2003** — We propose the following priorities as those around which PYM should organize its work for the coming year – and longer – eschewing initiatives and interests that do not fit very clearly within these areas in order to focus our collective efforts and resources to the greatest positive effect. In naming the things we commit ourselves to (below), we envision activities and services done whenever possible with the guidance of, with participation from, and even at the site of various Monthly and Quarterly Meetings.

We believe our working priorities should then include and be limited to:

▶ **3 Programmatic Foci**

Creating more visible and more hospitable Meeting communities

Supporting religious education for children and adults

Enabling community service and witness that expresses what is best in our faith

▶ **3 Vehicles or Methods for Delivery**

Speakers Bureau & Conferences

Service & Skills Training

Financial Services and Resources

As managers, we understand that if we take priorities seriously they tell us what we will not do as well as what we will. Not doing those things that are not priorities is an important part of doing well what are our priorities, because it allows us to focus our energy and resources in ways that help us be effective in our work. And in stating these priorities here I am stating that I (and the Directors) intend to take these seriously.

(B) For the Longer Term / Three to Five Years — and Beyond: As I observed before, I believe deeper operational and structural changes must occur at PYM, changes guided and owned by the membership through our governing structures, if we are going to move beyond surviving to thriving. *I write this report to challenge this body, Interim Meeting, as the only group like a governing board PYM has now, to take responsibility to address these issues and push for these changes.*

It may be that some of the questions or suggestions I have raised can best be considered as part of the process of evaluation of the YM structure that is now ongoing. It may be that this body might want to work in some smaller group (or groups) to approach some of these questions. In any case, however this unfolds, I need to say that I hope this time we will not simply have a “brief discussion of interesting issues” and move on.

It is my conviction that the future of PYM as a significant organization that can contribute to a more vital Quaker community and witness in this region (and more broadly) is at stake here. It may be that the Yearly Meeting organization has outlived its usefulness. It may be that the life of Quakerism can now be readily bifurcated and contained in the local Meetings, on the one hand, and specialized service organizations, on the other. But I do not think so.

Give the circumstances of our time, and trends for the future, it seems to me having an organization that can bring resources to and be effective in supporting the functions of spiritual nurture, religious education, pastoral care, outreach, and shared activities in witness is necessary for Quakerism to thrive. The question is whether PYM can shape itself to be that organization?

Conclusion: Let me conclude by reaffirming my own commitment to help move this organization forward in the ways I have indicated, assuming this is a direction Interim Meeting does not object to.

Finally, let me add that, while this report has spoken in terms primarily practical and organizational, it is clear to me that this work is as much spiritual as it is professional. It is about all of us bringing our best spiritual gifts and insights, and melding them with our best organizational and practical skills, to create something that honors God and contributes to the care and healing of all of God's people and creation.

To meet the challenges we face as a Yearly Meeting we are called to prayer and planning, to discernment and discipline, to worship and work. I hope we will answer the call together, with conviction, and with joy.

Respectfully submitted,

Thomas H. Jeavons