

General Secretary's Report of the Staff Activity for the Past Year to 2019 Sessions

Business and Finances:

We upgraded our accounting software with a budget module and are standardizing our internal processes and using technology to automate tasks, all of which increases the capacity of our finance department. We are working to:

- streamline reporting from the accounting system so reports can be generated quickly and efficiently with less manual modification.
- extract historical data to create year-over-year comparative reports as well as -monitor trends and forecast how the year will end up.
- upload the approved budget at the touch of a button, saving us literally weeks of work.

Other highlights include:

- We evaluated our Operating Reserve status and it is holding steady. In 2018, after PYM met its Operating Reserve goal of \$1.2 million, the Finance Committee approved a rubric to apply on an annual basis to ensure the Reserve is not becoming underfunded or overfunded. In 2019 we reviewed it and found that the Operating Reserve is at 97% of six months of annual operating expenses for the fiscal year just ended (\$1.29 million) – an excellent result.
- For many years PYM has provided staff to support the distribution committees of the Tyson and Grandom Funds 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 members of both committees and Friends Fiduciary, we completed a transfer of staffing responsibility from PYM to Friends Fiduciary.
- In 2017, We accepted responsibility for managing the Anna T Jeanes Cremation Fund from which grants to offset the cost of cremation are given to PYM Friends. This had been managed by Green Street Meeting for the previous 100 years. Green Street is now gifting the last piece of the fund and that addition will permit more cremation grants.
- All of PYM's data is now in the cloud. This year we moved the library database, the constituent relationship management database and all of the staff files (including all of the archives back to the 1990's from servers to the cloud). Several years ago the accounting database was moved. This move provides security while decreasing expenses and eliminating our reliance on servers.
- The restoration work at Millington Burial Ground is complete. As reported and warmly received at 2018 Annual Sessions, PYM plans to give the old Quaker burial ground to the Town of Millington to preserve and use as an historic site and green open space. The town had asked PYM to make certain improvements and PYM engaged conservators to clean and reset the burial ground's small number of headstones and refurbish an historic wrought iron fence. That work was completed in early May with the reinstallation of the fence. Conveyance of the burial ground to Millington is on the agenda for these sessions.
- Burial grounds from the 1600's, one of which was Quaker, are likely to be disrupted by construction in the Schuylkill Yards project. PYM was briefly mentioned in a May 2 Inquirer story on the topic. The General Secretary has been invited into conversations with the construction company, which is also consulting Quaker burial ground scholars.

Fundraising:

As patterns of philanthropy change within the country and within the Quaker community, we are shifting the ways in which we engage in fundraising. There are three new initiatives we engaged in this year:

- The new **Legacy Fund** is constructed to provide support to the annual fund in perpetuity and honor the lives of donors by receiving contributions in their name. The first gifts to the fund were received this year and are on track to total around \$70,000.
- **Quakers Got Talent** debuted as a fundraising event. The evening featured younger PYM Quakers with incredible talent including slam poetry, singing and musical performance. There was also a silent auction and a live auction of a single handcrafted pair of natural pearl earrings by a world-renown jeweler from Sotheby's. Tickets were \$35 each, or pay-your-age. Two pre-show dinners also took place. This test-run yielded over \$10,000.
- Individuals have been invited and have stepped forward to contribute beyond their traditional gifts to cover the needs of specific projects.

Other highlights include:

- Periodic analyses throughout the year have consistently indicated a pattern of current donors generally matching or exceeding their prior years' giving. Lapsed donors from as long ago as the year 2000 have made gifts.
- We mail three appeals each year. This year's December appeal included a "no-ask" alternate version sent to 400 households that have requested not to be solicited so they still received the information about our community included in the mailing. The Spring Appeal featured donated illustrations by a Quaker professional artist. The final appeal will reach mailboxes September 1, a month before the end of our fiscal year.
- The 2018 Annual Report was mailed to all PYM donors for the first time. Donors were also advised that starting in 2020 an alphabetical listing of donors will be shared, and invited to inform PYM of their wish to be anonymous. The annual report was also sent as part of the annual covenant outreach mailing to monthly meeting treasurers. The mailing to meetings included a gift of the new *Faith and Practice*.
- At the close of the calendar year PYM reminds donors to make a gift to their monthly meeting in its final electronic appeal. This led to increased end of the year online gifts to meetings. In 2018 PYM collected about ¼ million dollars worth of on-line gifts on behalf of Monthly Meetings and gave the meeting the full value of those gifts. We absorbed all costs of these transactions.
- A Development Committee was established in the care of the Administrative Council.

Program, Events and Ministry:

- **Friends in Fellowship:** an event series that bring Friends—and friends of Friends—together for fellowship, refreshments, and networking.
 - The second year of this event series brought hundreds of Friends from across the yearly meeting together at six events. Two of them were at monthly meetings on a Sunday, two were at Arch Street Meeting House, one was a pop-up surprise, one doubled as a successful fundraiser.
 - The events featured: Malik Neal, the founder of the Philly Bail Fund; Cordell Carter of the Socrates program at the Aspen Institute; A panel discussion titled About Faith featuring PYM's Marcelle Martin, Steven Davison, Ayisha Imani, and David Watt; The Director of the Hagley Museum and a tour of William Brinton House; National Trail network talk with Steve Elkinton; A diverse roster of performers of younger Friends, headlined by Rachel Zatzoff, a Broadway star.
- **Friends in Business:** A semi-annual event for Friends who are in the field of business, and their Friends.
 - The Fall event hosted the Governor of Pennsylvania, Tom Wolf. Enrollment was at a record high of about 90 people; it was a tremendously successful evening.

- The Spring event featured the Friends Education Equity Collaborative and 50 people attended.
- **Outreach:** Staff worked with other Quaker organizations on several projects related to outreach:
 - **Pendle Hill:** PYM program staff helped frame and publicize the first Quaker Institute at Pendle Hill. The PYM Youth Religious Life Coordinator facilitated the workshop titled “Recognizing the Gifts of Young People in Community and Worship.”
 - **Friends Committee on National Legislation:** We are working with Christine Ashley at FCNL to imagine how our community might creatively and collaboratively use FCNL’s new Quaker Welcome Center.
 - **Friends General Conference:** FGC’s Spiritual Deepening Program has a focus related to welcoming newcomers and inclusion. PYM staff met with FGC staff, members of the Quaker Life Council (QLC) Program Committee, the PYM Membership Development Granting Group, and members from New York Yearly Meeting who are focused on outreach.
 - **Friends Journal:** We worked with QuakerSpeak to produce four videos that can be used as resources for monthly meetings around welcoming newcomers.
 - FGC and Friends Journal staff led sessions at the Outreach and Communications Thread Gathering
- **Sessions:**
 - Friends from over 50 meetings attended Continuing Sessions in the Fall (at Arch Street Meeting House) and Spring (in Reading PA)
 - Following the movement of the Spirit at the 2018 Annual Sessions, Spring Continuing Sessions included a morning action at Berks Family Detention Center.
 - Two Young Adults joined the Sessions Coordinating Committee which added some great flow between the action at March Continuing Sessions and the work of the larger committee.
- **Thread Gatherings:** These events bring Friends together for learning, community and skill-building on topics that are relevant to all meetings.
 - This year Quaker Life Council approved five official threads: Ministry & Care, Peace & Social Justice, Religious Education, Outreach & Communications and Governance & Stewardship.
 - Gatherings this past year included: Governance & Stewardship - focusing on historic meeting houses and burial grounds; Outreach & Communications - focusing on meetings’ outreach; Ministry & Care – focusing on everyday spiritual and emotional health of the meeting community through a multigenerational lens.
- **Resource Friends:** Friends who are invited to help our community thrive by providing support in specific areas of concern in our monthly and quarterly meetings. These are Friends who offer a diversity of gifts and extensive “how-to” knowledge.
 - We solidified the areas in which we will develop Resource Friends – they are the same areas that have been named as Threads (see above)
 - Friends identified to serve in religious education have begun to develop the practice area.
 - Resource Friends worked with and supported meetings which have a concern for Ministry and Care and for Social Justice
- **Bridge Contacts**
 - Bridge Contacts launched! Bridge Contacts are those identified by their meeting or other constituency to serve as a communications and relationship bridge between the activity in their meeting (or other constituency) and the activity in the yearly meeting and monthly meetings.

- Monthly/Quarterly Meeting Bridge Contacts now number over 30; a group of Bridge Contacts convened at Continuing Sessions to help shape the PYM program with Meeting and Quarterly Meeting input.
- **One Quilt One Yearly Meeting:** This initiative invites every yearly meeting constituency – monthly meetings, collaboratives, any group that identifies as part of our community – to complete a fabric square which will be sewn together in a single quilt.
 - The staff produced a video to share with meetings and others to encourage their participation. The project is being promoted with weekly Facebook updates, stories, and pictures about each meeting’s quilt square.
 - Many, many squares have been received by meetings and other Quaker groups (like our Young Adult Friends and Quaker schools) and the Quilt will be revealed at Sessions.
 - We continue to collect additional quilt squares as meetings send them!
- **Young Adult Engagement**
 - The Young Adult Friends winter retreat welcomed several new attenders, and four new people were added to its pastoral care and outreach committee.
 - Young Adult Friends worked collaboratively to plan for the action on closing the detention center for families in Berks County.
 - The spring retreat yielded the rich epistle on membership that is included as an advance report and would serve as an Adult RE class in any meeting.
- **Networking and meeting visitation in Youth Engagement.** The team is focusing on developing relationships with the meetings that are most successful at supporting youth work and religious education. As a result, over time, they will get to know the families and youth workers with whom to network to build a community of practice and enhance the support we are able to give each other as a yearly meeting community across meetings.
 - The Youth Engagement staff 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.
 - *Tote Bag*, a monthly e-newsletter with resources for religious education and families was sent to over 1100 subscribers on April 1. Sent the inaugural and second issues of the "Tote Bag" e-newsletter with resources for religious education and families was sent to nearly 1200 email addresses.
 - PYM Staff facilitated an in-service about Quakerism and nurturing children’s spiritual lives for Goshen Friends School.
 - An online conversation with Youth Coordinators in Quarterly Meetings was organized and facilitated by PYM staff.
- **Youth Programs:** Programs for youth and families are held throughout the year. A sampling of the events are described here
 - *Young Friends (high school aged youth)* –The Winter Gathering was held at Greene Street meeting in Philadelphia. The young Friends explored the theme of activism, working with Just Act, a theatre-based catalyst for healing, change and activism to build a just world.
 - Middle School Friends (grades 6-8) - The Winter Gathering was held at Medford meeting in New Jersey. A highlight was exploring race with Friends from the PYM Social Justice Resource Friends. This workshop helped participants become more aware of their own cultural identity and views

about people from different backgrounds, and become more conscious of stereotypes and varying cultural norms.

- 40 youth (MSF and Young Friends), four youth programs staff and seven wonderful volunteers attended the retreat weekend at Camp Swatara with Caln Quarter. Staff led a workshop titled "Hand in Hand: Supporting young people and their spiritual journeys."
- Children and Families – The Winter Family Overnight was held at Camp Onas. There was twice the registration of last year's event. Throughout the year the C&F program is focusing on the theme, "Who is my neighbor?" and looking at the experiences of immigrants, refugees, and asylum-seekers through the lens of children's literature and age-appropriate resources and activities.
- Quaker Family Meetup event for PYM families was held at Princeton meeting featuring an afternoon of fellowship, play, worship sharing, and spiritual refreshment. And snacks.

➤ **A Selection of Other Events:**

- The Quaker College Fair, an annual event co-sponsored by PYM and Friends Association for Higher Education
- The Spiritual Formation Weekend Retreat designed all who are interested in a deeper communion with Spirit, spiritual formation, and/or spiritual nurture to refresh, renew, deepen, nurture, and learn sponsored by the Spiritual Formation Collaborative.
- 65 Friends attended the Legislative Policy Collaborative all-day event at Friends Center on May 4th that included speakers from FCNL.
- At the invitation of the organizers, PYM took part in a multi-faith news conference held at Friends Center following the shootings at the synagogue in Pittsburg and outside the church in Kentucky
- Princeton Meeting had a workshop on Quakerism, its past and its present facilitated by PYM staff.
- About 20 people participated in a conference call with Church World Service on Refugee and Migrant Justice on April 16.
- Aging as Friends – A one-day event featuring workshops on issues of aging for meetings was held in February

Communications:

We launched Salesforce just before the start of this fiscal year. This database provides an integrated approach to managing seven major areas of information we care for (demographics, electronic communications, donations, online giving, event and program participation, skills and gifts of PYM Friends and grantmaking) so we can know more about the patterns of the engagement of PYM Friends.

- Over 35 meetings and 500+ Friends provided updated demographic information, improving our ability to communicate.
- We've been able to use standard and specialized reports to more clearly understand giving trends.
- Reports to support mailings and fundraising appeals are pulled directly from the database.
- In the next year we'll gain fluency in using the database for communications and program tracking and increase what we can do with tracking all aspects of fundraising.

Other highlights include:

- We shifted from a monthly to a weekly email to PYM Friends and found that there is a higher open rate and higher click rate.
- We have instituted a continuous study of user experience of the website. As we learn we are renewing and re-designing parts of the website. We redesigned the website's home page so it now loads in 2 seconds, includes a more robust calendar and a reconfigured and well-populated news section. We updated the [PYM Grants web pages](#), making the structure much clearer, and easier to navigate.

- Completed six months of technical background work on the website so that when WordPress updates our website will still function.
- Faith IN Practice, our print newsletter, had two editions this year, fall and summer. Both are beautiful productions that feature artwork by Quaker artists and stories from monthly and quarterly meetings.
- We use traditional print mail to Friends to publicize events so that we are connecting with Friends directly and not relying entirely on the website and email communications. We designed and sent postcards for events including Thread Gatherings, Friends in Fellowship, Continuing Sessions and the YAF led action at Berks Detention Center for Families and an eco-justice initiative. We also designed and sent Valentine’s cards to children and Christmas cards.

Staff and Administration

Significant Staff Changes

- Our first Director of HR and Inclusion, Zakia Williams, joined PYM in August. She is managing the ongoing conversation about the ways in which we are shifting our culture to be increasingly inclusive and actively anti-oppressive. In addition she is managing our standard HR needs. We are finding that it is too much responsibility for a part time position and have partnered with contractors and AFSC to provide additional support.
- A one-year position, Transitional Meeting Engagement and Data Coordinator, started in August. Wendy Kane served in this role and was instrumental in helping us transition to our new database and transition into the full functioning of the new department “Advancement & Relationship.”
- As the Transitional Meeting Engagement and Data Coordinator position sunsets and the part-time position of Sessions Coordinator becomes vacant in August, we will begin seeking candidates for two new positions: Advancement & Relationship Coordinator (part-time) and Program & Resources Coordinator (full-time).
- We turned the annual staff chili cookoff into a retirement party for Carol Walz and, with a mix of joy and sadness, celebrated her 24 years of skilled and dedicated service to the PYM community as Director of Grantmaking. Nick Gutowski, who worked closely with Carol for years as the Grants Associate, was promoted to the position of Director and we are seeking a new Grants Associate.
- With the departure of our Controller in November we contracted with Your Part Time Controller to manage our accounting work while helping us to make the desired upgrades and automation of our software.

Other highlights include:

- We completed the process of updating all staff policies so they are in alignment with the governance and legal changes. It has been reviewed multiple times by staff, the Personnel Committee, consultants and lawyers. It was approved by the Administrative Council. We immediately started on another round of revisions that look at our policies with an inclusion and anti-racism lens.
- The onboarding process has become comprehensive and includes an individualized plan for each new employee with a focus on a) welcoming the employee and ensuring they have all the tools and support needed to get started and be successful in their job and b) building an inclusive and cohesive work environment. Onboarding is a key aspect of our staff and inclusion work because this is where employees begin to understand what we do, why we do it, and how we work together. We are continually strengthening and refining the process.
- The General Secretary and Director of HR and Inclusion recommended to staff that we eliminate the staff voice policy because its goals can be addressed more robustly with attention to culture and processes in staff and, additionally, because a separate policy can be restrictive and experienced as oppressive. After multiple opportunities to discuss discontinuing the policy that

staff approved the previous year, the staff agreed with that recommendation. The Personnel Committee and then the Administrative Council approved the decision.

- Staff re-established the role of a staff liaison on the Personnel Committee based on the work of an ad hoc committee that included one staff member from each department. The committee recommended the duties of the staff liaison and proposed that Meg Rose serve in the position. Staff approved both of those.
- The 1:00 Wednesday open-door staff check-in time is a weekly meeting where staff can hear about and discuss things that are happening in the yearly meeting or the office so their thoughts and ideas can be included. Some topics of discussion have included the clerks' letter to PYM, reviewing the budget practice, discussing social media, talking about staff position changes and the staff voice policy among many other things.

Inclusion and Anti-Racism:

This past year with the support of the Director of HR and Inclusion the staff stepped back into discussion and training around inclusion and anti-oppression, with a particular focus on anti-racism. Some staff members had been engaging in the work individually with the financial and time support of the yearly meeting but we were hesitant to do the work together, after some severely difficult experiences in recent years, without the care and structure that could be offered the staff role of Director of HR and Inclusion. As a result of this year's steady and cumulative discussions and experiences, together we have decided to engage in:

- Training for all staff: baseline anti-racism training that cultivates a shared understanding among staff. Basic terminology and discussion of power dynamics as well as the historical impact of inequity and racism are topics needed. Other requests include definition of racism and other "isms". Equality vs. equity, marginalization, oppression, systemic racism (impact and examples), and microaggressions.
- Training for supervisors: 2 layered training focused on (1) basic supervisory & management skills and (2) addresses how diversity impacts a supervisory relationship, managing bias, navigating differences etc.
- Deepen skills for staff with addressing issues when they arise: Develop an understanding and comfort-level with having conversations about race in inequity, acknowledging when it shows up at PYM and honoring individual experiences. With these skills staff wants to engage in a regular practice of noticing the "patterns of diversity" that show up in ourselves and our community.
- Anti-bias training for search committees: In order to move toward a more diverse staff we want support for identifying and resisting bias in the process of hiring new staff.

Other highlights include:

- The Operations Team (senior staff) has included an agenda item on inclusion and anti-racism for each monthly team meeting. It is a place where we discuss our own observations and experiences. Over time, the conversation gets deeper and more varied.
- See the point about onboarding above in the Staff & Administration section
- The General Secretary was appointed by the National Council of Churches to their newly re-established task force on ending racism.
- Based on the recommendation of the Multicultural Audit Steering Committee we are talking Prototype Entities to explore how they might meet our training needs and interests.
- We've begun drafting a Diversity Statement for ourselves.

Staff Visits

Monthly & Quarterly Meetings

Birmingham
Camden
Centre
Chester
Chester River
Concord Quarter
Darby
Greenwich
Gwynedd
Haddonfield Quarterly Meeting
Lancaster
Lansdowne
Medford Meeting
Monthly Meeting of Friends of Philadelphia
Mount Holly
Mullica Hill
Princeton
Providence
Reading
Solebury
Third Haven
Trenton
Upper Susquehanna Quarter
West Philadelphia
Western Quarter
Westfield
Wicomico
Woodstown
Yardley

Events & Organizations

Arch Street Meetinghouse Preservation Trust Board
Bucks Quarter Peace Fair
FCNL's Annual Meeting
FGC's Central Committee
Friends Center Board
Friends Fiduciary Board
Friends Historical Association
FWCC, Section of the Americas Section Meeting
National Council of Churches
Pendle Hill - Continuing Revolution
Pennswood Village
Philadelphia Interfaith Leadership Council
Upper Susquehanna Quarter Family Retreat
West Chester Friends School
Westfield Friends School

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