



New York Yearly Meeting Aging Resources, Consultation and Help (ARCH)

STRATEGIC AND BUSINESS PLAN for mid-2017 to end of 2019

June 2017

The Spirit heals, renews, uplifts, encourages, shelters. It illuminates Friends' unceasing search for Truth. We believe that the Spirit calls us to answer that of God in every person; as we do so, it unites us into a community of God. (p. 10)

...the Spirit remains the firm basis of our life together and for the testimonies and social concerns by which we try to make manifest God's purpose in the world. (p. 7)

Dwell in the pure, peaceable, heavenly wisdom of God, that is gentle and easy to be entreated, that is full of mercy; all striving to be of one mind, heart, soul and judgment in Christ, having his mind and spirit dwelling in you, building up one another in the love of God... -George Fox, 1690 Epistle (p. 87)

- New York Yearly Meeting's Faith and Practice



New York Yearly Meeting's ARCH Program STRATEGIC FRAMEWORK FOR 2017-2019 (June 2017)

OUR VISION	We envision meeting communities whose culture acknowledges and supports both the challenges and blessings of the aging process. We envision a Yearly Meeting in which older and differently abled persons and caregivers can receive appropriate care within their faith communities and in concert with family, friends, and other resources.
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OUR MISSION	The Mission of ARCH is to cultivate meeting communities that effectively support aging and differently abled Friends throughout New York Yearly Meeting.
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OUR STRATEGIC PROGRAM PRIORITIES	<ol style="list-style-type: none"> 1. Increase meeting communities' sensitivity to all aging issues by enhancing their experience of a grounded and loving Friends community 2. Expand our capacity to serve all NYYM meeting communities that want to utilize the ARCH program for services and/or accompaniment 3. Better prioritize program initiatives based on an in-depth understanding of meeting communities' needs and gaps in capacity to meet those needs
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OUR STRATEGIC OPERATIONAL PRIORITIES	<ol style="list-style-type: none"> 1. Consolidate fully the operations of the ARCH program into NYYM's framework of operations and budgeting, reducing redundancies and maintaining integrity of mission 2. Inspire financial support to achieve our programmatic priorities, with increasingly diverse sources of dependable funding
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OUR UNDERGIRDING VALUES	<ul style="list-style-type: none"> ○ With open hearts and minds ○ Seeking spiritual growth for all ○ Acknowledging the mutuality of ministry ○ Grounded in worship ○ Adhering to Friends' traditional practices ○ Accountable and transparent ○ Maintaining confidences ○ Seeking always to honor our commitments to one another
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TABLE OF CONTENTS

New York Yearly Meeting's ARCH Program	i
STRATEGIC FRAMEWORK FOR 2017-2019	i
1. INTRODUCTION	1
2. THE PLANNING CONTEXT	2
3. ENVIRONMENTAL ASSESSMENT	3
4. VISION, MISSION, AND VALUES	6
Our Vision	6
Our Mission	6
Our Values	6
5. THEORY OF CHANGE	7
6. PROGRAM PRIORITIES FOR 2017-2019	8
Program Priority #1: Grounded and Loving Communities	8
Program Priority #2: Harder-to-Reach Meeting Communities	10
Program Priority #3: Design, Monitoring and Reporting, Evaluation, Learning	11
Program Benchmarks	13
7. OPERATIONAL PRIORITIES FOR 2017-2019	14
Operational Priority #1: Structure Fit for Purpose	14
Operational Priority #2: Financial Resources for Our Mission	15
Operational Benchmarks	17
8. FINANCIAL PLAN FOR 2017-2019	18
Projected Revenue and Expenses	18
Revenue and Expense Scenarios for 2019	18
9. MONITORING PROGRESS AGAINST 2017-2019 GOALS	21



1. INTRODUCTION

This Strategic and Business Plan for 2017-2019 for the Aging Resources, Consultation, and Help (ARCH) program of New York Yearly Meeting (NYYM) seeks to guide the Yearly Meeting and specifically the ARCH volunteers and staff as we implement and integrate the ARCH program over the next 2½ years. The plan provides us with a roadmap to help us make choices about program direction, set fundraising priorities, allocate the use of limited human and financial resources, and develop long-term action plans within the whole New York Yearly Meeting context.

The genesis of the ARCH program married the individual spiritual leading of co-founders in NYYM with available funds from the Friends Foundation for the Aging (FFA) to pilot and eventually realize a program to serve aging Friends in NYYM. Unlike Philadelphia Yearly Meeting, NYYM does not have a robust network of Quaker-affiliated aging service providers to support our members and attenders. As originally conceived, the ARCH program serves Friends of diverse socioeconomic circumstances, connecting us with aging resources available through public and private providers and programs. After 10 years of successful programming, implementation of this plan will allow us to expand our capacity to reach even more Friends with options for living gracefully through the last third of life.

The ARCH program of NYYM engages Friends and meeting communities to reconsider assumptions about aging. We do this by beginning with what we think we know about ourselves: that many of us are in the last third of life. Aging: it's what we do! And we continue by creating opportunities to experience growing older as a blessing, not a burden; as something to look forward to, not to get over with; as a rich opportunity for spiritual growth for ourselves and those around us, not the end of our usefulness.

While the ARCH program's integration into the Yearly Meeting structure began several years ago, this plan contemplates full consolidation and formalization of integrated program, financial, personnel, and administrative management. This consolidation will be more efficient, but more importantly, it will locate the mission and vision of the ARCH program within the overarching vision held for our Yearly Meeting and as expressed in the form of Leadings and Priorities (NYYM Priorities Working Group's "Statement of Leadings and Priorities," revised and approved May 27, 2014):

[W]e commit to focus the energy and resources of our Yearly Meeting for the coming five years on achieving a vision of growing and vital monthly meetings which are open and loving communities, effective in their outreach, active in the world, and skillful in nurturing the spiritual lives of Friends of all ages. We envision a yearly meeting structure which is devoted to furthering this vision, is an effective focal point for organizing our collective work in the world, and which communicates that work broadly. We envision a yearly meeting structure which is accountable to these priorities, transparent in its finances and integrally connected to the monthly meetings it represents and supports.

With a long-range view, this plan also pursues diversification of income to support aging concerns in NYYM in alignment with a decreased dependence on grants from the Friends Foundation for the Aging, whose creation a decade ago has made the program possible.

Over the course of the past four months, the Committee on Aging Concerns (CAC), charged with oversight of the program, engaged for the planning process the services of a consultant. The consultant guided preparation of key inputs into the process and organized with the CAC a face-to-face retreat for committee members, the ARCH Director, and others with leadership roles in the Yearly Meeting. That gathering focused on examining our fundamental challenges, assessing the needs of our stakeholders, find the nexus between our strengths and opportunities for the future, and developing key priorities for the coming 2½ years. These efforts culminated in the creation of this strategic and business plan, which the Committee on Aging Concerns and ARCH Director formally approved in June 2017 for implementation beginning July 2017.

Successful implementation of this plan provides for a smooth transition for the ARCH program as it integrates with New York Yearly Meeting. It also broadens our capacity to provide services, for which there is growing demand, to a more diverse group of individuals and a greater number of meeting communities. It will strengthen and increase our resources to live out our mission. It will bring us closer to our aspiration that we experience growing older as a vital and valued aspect of being a Friend. We are poised to fulfill these aspirations in pursuit of the spiritual leading that is as compelling as it was when the ARCH program was created 10 years ago – to address the aging-related concerns of individuals and meeting communities as a spiritual ministry.

2. THE PLANNING CONTEXT

We seek in our meetings one community for the spiritual nurture of all, resonating with Isaac Pennington's words:

Our life is love, and peace, and tenderness; and bearing one with another, and forgiving one another, and not laying accusations one against another; but praying one for another, and helping one another up with a tender hand.

Through individual consultations, workshops, and trainings, the ARCH program currently provides resources to help us all cultivate a community of well-supported aging friends. The program is funded in large part by annual grants from the Friends Foundation for the Aging, with additional support from meetings in NYYM, individuals, a Yearly Meeting trust fund, and other sources. ARCH services and opportunities for learning and spiritual growth are offered within our Yearly Meeting at no cost to participants. Donations are invited and welcomed to support and deepen this gift of ministry in our community.

The ARCH program currently supports a network of ARCH staff that includes a director, an ARCH Specialist, and ARCH Local Coordinators (currently 5) who are geographically distributed around the Yearly Meeting, and over 130 trained volunteer ARCH Visitors. The program has been most successful where ARCH Visitors are supported and utilized by their meeting community, often with significant engagement by meetings' pastoral care or ministry committees.

Through this network, and with vision and eldership ministry from the Committee on Aging Concerns, the services that the program provides have expanded to reach a large portion of the Yearly Meeting – 48 of our approximately 74 meetings as of mid-2017.

Even without the benefit of rigorous analysis of “program impact,” we know we have been successful in our first decade. We have seen the energy mobilized and sustained around this ministry and the wealth of human and financial resources it has attracted. We have experienced strong and increasing demand for our offerings. We have received positive evaluations from participants attending our workshops and heard many expressions of gratitude from those who have benefited from our consultation services. We have witnessed increasing appreciation for how central this work is to the overall work of the Yearly Meeting.

With this foundation, with momentum, and with a degree of maturation, we look to the future with optimism. This plan presents an assessment of the environment within which we will take the work forward. It presents reworked vision, mission, and values statements for the ARCH program that cohere to NYYM’s statement of Leadings and Priorities. It articulates our theory of change, which describes the causal linkages between our activities and achievement of our mission. It lays out three program priorities:

- To increase meetings’ sensitivity to all aging issues by enhancing their experience of a grounded and loving Friends community
- To expand into new meeting communities that want to utilize the ARCH program for services and/or accompaniment
- To better prioritize program initiatives based on an in-depth understanding of meeting communities’ needs and gaps in capacity to meet those needs

To support these program priorities, we will strengthen operational functions, giving highest attention to:

- Consolidating fully the operations of the ARCH program into NYYM’s framework of operations and budgeting
- Inspiring financial support to achieve our programmatic priorities, with increasingly diverse sources of dependable funding

3. ENVIRONMENTAL ASSESSMENT

For this multi-year plan, Friends from different areas and ministries of NYYM came together to consider deeply our calling and the foundations upon which we have built the ARCH program. We analyzed trends in our rapidly changing world, attitudes toward aging and demographic shifts in our society at large and in our religious society, and the spiritual and physical condition of our meeting communities. We discussed frankly the internal *strengths* and *weaknesses* of the ARCH program as it is currently configured and documented the most salient, which are noted below. We described our expectation of the future conditions within which we will be operating in 2017-2019 and the factors that might affect us, and present them below in the form of *opportunities* and *threats*.

Strengths: What are we good at? How are we doing comparatively? What are our resources?

- Listening and networking with each other to solve problems
- Gathering resources for the work we do
- Model program to other yearly meetings
- Broad appeal of and passion for the faith basis of our work
- Excellent staff and high-functioning Committee on Aging Concerns
- High level of buy-in and excitement in NYYM, our constituency
- To date, people in key positions in the NYYM structure support ARCH
- Established current volunteer network, with over 130 trained and broadly distributed volunteers
- Templates for 11 successful workshops and written resources for some of those
- *Quaker Values and End of Life Decision Making Workbook*, for use and for generating revenue (\$4900 in 2016)
- Increasing know-how and experience with doing ARCH work in prisons
- Reliable and sizeable core funding from FFA
- New and increasing base of individual donors, with a significant jump in 2016 with limited fundraising effort
- Success at being a learning program and demonstrating flexibility and capacity to change and grow

Weaknesses: Where do we have gaps in our capacity? What internal challenges do we face?

- Incomplete integration of the ARCH program and its operations within NYYM, and unaddressed perception that ARCH is too large a portion of the NYYM budget relative to other programmatic efforts
- Integrating with NYYM while changes in key personnel and other aspects are in transition
- Lingering negative feelings from conflict around the origination of the program
- Challenged to stay focused, manageable, and flexible in view of ARCH's broad mission
- Weekend Residential ARCH Visitor training model is expensive and doesn't suit all
- Challenged to cover our large geographic area
- No success thus far in raising grant funds from new institutional donors
- Suboptimal communication with NYYM regarding anticipated funding shortage in summer 2016, leaving a negative management image
- Lack of integrated strategy with NYYM Development Committee about whether and how ARCH should conduct additional fundraising from institutions as well as individuals
- Still developing systems and protocols, i.e., this is a relatively young program (just 10 years old)
- Challenge of having clear and definitive communications about the program, given its spiritual basis and the broad spectrum of issues being addressed

Opportunities: What changes in the environment do we expect to see over the next years that favor demand for our competence?

- Increasing proportion of population over 65 both within NYYM and beyond, so we are all paying more attention to aging issues
- Trend toward health/wellness care and various institutions becoming more engaged with aging care and utilizing or integrating programs like ARCH
- Integration of ARCH work with Monthly/Regional Meeting Ministry and Counsel Committees and pastoral care efforts
- Increased services to incarcerated people in connection with Friends meetings in prisons and AVP
- Mobilization of interest and support in response to U.S. federal government threats to or actual cuts to programs serving the elderly
- Improving and increased utilization of technologies for program implementation
- Increased volume of online resources that ARCH can vet and direct people to
- Potential for more significant fundraising from individual donors

Threats: What future changes will affect our program, potentially decreasing demand for our competence?

- Elders/aging is not directly named among NYYM's five priorities in its 2014 Statement of Leadings and Priorities
- Some NYYM Friends feel that caring for older people is a niche rather than a concern of everyone – not necessarily making a connection
- Challenge of maintaining program strength through transitions among NYYM staff (including ARCH staff), volunteers, and Committee on Aging Concerns members
- Many monthly meetings and worship groups (including prison worship groups) have shrinking numbers of participants
- Federal government may cut resources and services to which ARCH refers people
- Continuing rapid changes in information technology can have negative impact on older people (e.g., targeted for scams, increased isolation)
- Reliable core funding from FFA will likely decrease over time to a level 10%-20% below current level
- Integration of ARCH fundraising efforts with other NYYM fundraising efforts could negatively affect levels of dedicated funding for ARCH program activities

In thinking big-picture and medium term, we built this strategic and business plan upon these identified strengths and matched them with opportunities we anticipate will be present in our dynamic context, and have designed strategic and practical approaches that will overcome or minimize the effects of our weaknesses and threats.

4. VISION, MISSION, AND VALUES

Limitations, at any age, call out something in us that we never considered before. They can be boundaries or barriers or an opening to something new.

- Joan Chittister

The soul needs to be properly aged before it leaves. Our psyches and souls mature more deeply when our bodies begin to slow and show diminishment... Each loss of aging – physical or otherwise – is designed to help the soul mellow and mature. Aging is no accident. It is necessary to the human condition, intended by the soul. There's an intelligence built into life that intends aging, just as it intends growth in youth. It's a large mistake to read the signs of aging simply as an indication of dying rather than an initiation into another way of life/being. The soul needs the final years to fulfill its destiny.

- James Hillman

Having conducted the environmental assessment and before making decisions about future priorities, we revisited statements about our vision, mission and values as a ministry of NYYM. We revised these touchstones to guide us as we move forward into this strategy period through 2019.

Our Vision

We envision meeting communities whose culture acknowledges and supports both the challenges and blessings of the aging process. We envision a Yearly Meeting in which older and differently abled persons and caregivers can receive appropriate care within their faith communities and in concert with family, friends, and other resources.

Our Mission

The Mission of ARCH is to cultivate meeting communities that effectively support aging and differently abled Friends throughout New York Yearly Meeting.

Our Values

As Friends, we approach our work with open hearts and minds and as an opportunity for spiritual growth for all involved. We acknowledge the mutuality of ministry. We ground our work in worship and adhere to Friends' traditional practices in a way that is accountable and transparent. Working in a spirit of love, respect, honesty, and teamwork, we maintain confidences and seek always to honor the commitments we make to one another.

5. THEORY OF CHANGE

As part of developing this strategic and business plan, we sought to describe exactly how the ARCH program's approach will effect the change we want to see in meeting communities throughout NYYM. We will use this "theory of change" to help us maintain our focus, to better design our interventions, to support experimentation and innovation as we continue developing a highly effective aging services model for Quaker bodies and others, and to guide how we measure the effectiveness of what we do.

The ARCH Program Theory of Change:

IF our Yearly Meeting embraces the blessings of aging, and
IF our meeting communities have enough Friends who understand that older people enrich the lives of a meeting community and that in caring for people, we ourselves are transformed in a positive way, and
IF our meeting communities have a collective understanding that they have some responsibility for helping people with their aging needs, at a minimum making meetings friendly and accessible to older and differently abled adults, and

IF every meeting community in the Yearly Meeting has access to and appropriately utilizes aging-related resources:

IF ARCH volunteers and staff understand the range of resources available and communicate that effectively,

IF ARCH volunteers and staff are well-trained in how to engage with and support meeting communities with sensitivity,

IF our meeting communities have an understanding of the resources available, ranging from materials to workshops to consultations,

IF our meeting communities are active, have leadership, are not overburdened with property concerns, and/or otherwise have the capacity to use the resources available

IF our meeting communities respond to the call, assuming they feel the need for what the ARCH program offers, and

IF individuals trust in their meeting community enough to ask for and/or receive help,

THEN we will become a network of meeting communities with enhanced sensibilities around and capacity to address aging issues, and

THEN our meeting communities will effectively support aging and differently abled Friends and caregivers to the end of a whole, multigenerational, vibrant, grounded community where love abounds.

6. PROGRAM PRIORITIES FOR 2017-2019

Across the Yearly Meeting, our meetings have significant populations of aging Friends, some of whom may be in need of care and all of whom carry the wisdom gained from long lives that have been well-lived. They have stories to tell and a legacy to share, and they can serve as models for spirit-filled aging and positive ways in which we may take our leave from this world. Similarly, children and young adults bring vitality and fresh ways of seeing the world, approaching situations, and solving problems which they can share with the elders in our meetings. For these reasons, during this strategy period we will pursue increased multigenerational activities and synergistic collaboration between the ARCH program and the Yearly Meeting's children, youth, and young adult programming, as well as other efforts associated with traveling in the ministry and pastoral care throughout the Yearly Meeting.

Our approaches will strengthen meeting communities, benefiting the whole, and will increase both effectiveness and efficiency. This improved working model will help us achieve the ARCH mission while contributing clearly and directly to our Yearly Meeting's stated Leadings and Priorities. The following programmatic priorities represent our best discernment of how to use our limited human and financial resources in pursuit of our newly articulated vision and mission and in alignment with our stated values. Specifically, we will cultivate meeting communities that more effectively support aging and differently abled Friends by:

1. Increasing meeting communities' sensitivity to all aging issues by enhancing their experience of a grounded and loving Friends community
2. Expanding our capacity to serve all NYYM meeting communities that want to utilize the ARCH program for services and/or accompaniment
3. Prioritizing program initiatives based on an in-depth understanding of meeting communities' needs and gaps in capacity to meet those needs

Program Priority #1: Grounded and Loving Communities

Increase meeting communities' sensitivity to all aging issues by enhancing their experience of a grounded and loving Friends community

Key initiatives under this program priority are:

1. Create opportunities for deep listening to self, others, and Spirit to enhance people's experience of a grounded and loving Friends community
 - Coordinate with NYYM Ministry Coordinating Committee (CC) to implement programming that helps meeting communities be open and loving to all participating individuals, using queries, advices, workbooks, and other tools developed for use in worship sharing and other formats of their choosing
 - Engage with NYYM Ministry and Pastoral Care Committee and others to identify ways and implement initiatives to help meeting communities explore core aspects of Quakerism such as the Inner Light, continuing revelation, and the testimonies – and implement programming that helps them embrace change and evolution

2. Catalyze in our meeting communities a cultural shift around aging that may already be underway, helping individuals and groups shift away from prevailing attitudes of aging as disagreeable and a topic to be avoided, and bringing aging into our center where we can think not about aging, but about living into the opportunities that the last (third) phase of life brings
 - Adjust volunteer and staff qualifications and responsibilities to help catalyze this cultural shift
 - Establish an ongoing mechanism for attending to this with key leadership in NYYM (e.g., Religious Education staff and committees, Ministry CC)
 - Review ARCH publications and other materials and revise them or develop new ones to support building more loving and grounded meeting communities sensitive to aging issues
 - Revise and refine the curriculum ARCH uses for training volunteers in our network to ensure the most effective preparation for this work
 - After implementation of the above steps for at least one year, evaluate what additional steps should be taken in support of this cultural shift
 - Document our learnings and successes in changing attitudes and breaking down barriers to spirit-led aging in our time, so as to share our witness within NYYM and contribute to a broader Quaker witness on aging with dignity, respect, and self-determination

3. Integrate ARCH programming with other NYYM ministries to share ARCH's mission, to experience the benefits of multigenerational approaches, and to use synergistic collaboration to strengthen meeting communities
 - Collaborate with others who are leading age-specific ministries to strengthen meeting communities through increased multigenerational engagement and other approaches as identified
 - Build the capacity of and provide resources to other NYYM staff and others traveling in the ministry throughout the Yearly Meeting to help deepen their engagement with meeting communities by lifting up aging concerns
 - Actively seek out and engage with other NYYM ministries and programming to better promote those offerings in concert with those of the ARCH program

Examples of how meetings have already found counter-cultural ways to put their oldest and their aging concerns in the center of their corporate life, bringing spiritual depth to everyone:

- Create celebration opportunities to honor elders' contributions to the community, including a meal, slideshow, and certificate of appreciation, and with participation from family
- Host an extended series of conversations on aging-related issues, held after Sunday meeting for worship
- Include on the meeting's Nominating Committee elders who do not use email and enjoy making phone calls and getting to know new people

Program Priority #2: Harder-to-Reach Meeting Communities

Expand our capacity to serve all NYYM meeting communities that want to utilize the ARCH program for services and/or accompaniment

The ARCH program begins the strategy period with a strong and well-established volunteer network, with over 130 trained and broadly distributed volunteers. While currently reaching 48 meeting and worship group communities with at least one trained ARCH Visitor – 78% of our meetings not in prisons – others who could benefit are not being reached. In keeping with our mission, we want to reach people and communities throughout our Yearly Meeting.

When thinking about how to do this, we look at the opportunities we identified in our environmental assessment. Some of our opportunities come from having an increasing proportion of population over 65 within NYYM; improving and increased utilization of technologies for programming (e.g., Skype with family members), training (e.g., new platforms), day-to-day operations (e.g., conference calls), and fundraising; and an increasing volume of online resources that ARCH volunteers and staff can vet and direct people to. We plan to continue supporting our ARCH network as a primary approach but also plan to adjust and refine this strategy as we pursue our newer program priorities.

During our first decade, we demonstrated a high degree of flexibility and agility, piloting, testing, adjusting, initiating, and terminating activity as we developed a strong model for aging services. As we plan for expanding to harder-to-reach communities and individuals, we will prepare for continued agility in case financial resources do not grow at the desired speed and desired predictability (see Section 8. Financial Plan).

Because we recognize that some meeting communities themselves may encounter life-threatening challenges, we further plan to offer accompaniment to meetings as they discern and address their condition.

Key initiatives under this program priority are:

1. Identify monthly meetings, worship groups, and isolated individuals who could benefit from ARCH offerings and engage with them
 - Prioritize and initiate contact focused on deep listening and education about the ARCH program's offerings
 - For those interested in a relationship with ARCH, assess the individuals' or meeting communities' needs, using needs assessment tools developed for this purpose (see Program Priority #3)
 - Determine appropriate responses and expand programming to these individuals and groups

2. Study the differing needs of prison worship groups, geographically hard-to-reach meetings, meetings feeling disconnected from the Yearly Meeting, meeting communities weakened by

shrinking size and/or an aging population, and isolated individuals, and tailor ARCH approaches and materials to these groups and individuals

- Develop specialized approaches and supporting materials for companionship self-identified graying meeting communities (those meetings who articulate that their capacity to do all that they feel called to is diminished due to the advancing ages of its participants), in coordination with Ministry CC
 - Continue to develop specialized approaches and supporting materials for prison worship groups in coordination with Ministry CC, NYYM Prisons Committee, the Alternatives to Violence Project (AVP), and the Quarterly/Regional and Monthly Meetings under whose care they are
3. Expand and augment ARCH resources in support of this priority
- Recruit volunteers situated in proximity to the harder-to-reach meeting communities and individuals
 - Develop training material in the form of discrete modules and one-on-one mentorship/training that could be taken up individually as needed, and develop an accompanying facilitator's manual
 - Train volunteers to use the specialized approaches and supporting materials, keeping them up-to-date as we adjust and improve our approaches to reflect what we are learning from deeper engagement with these communities

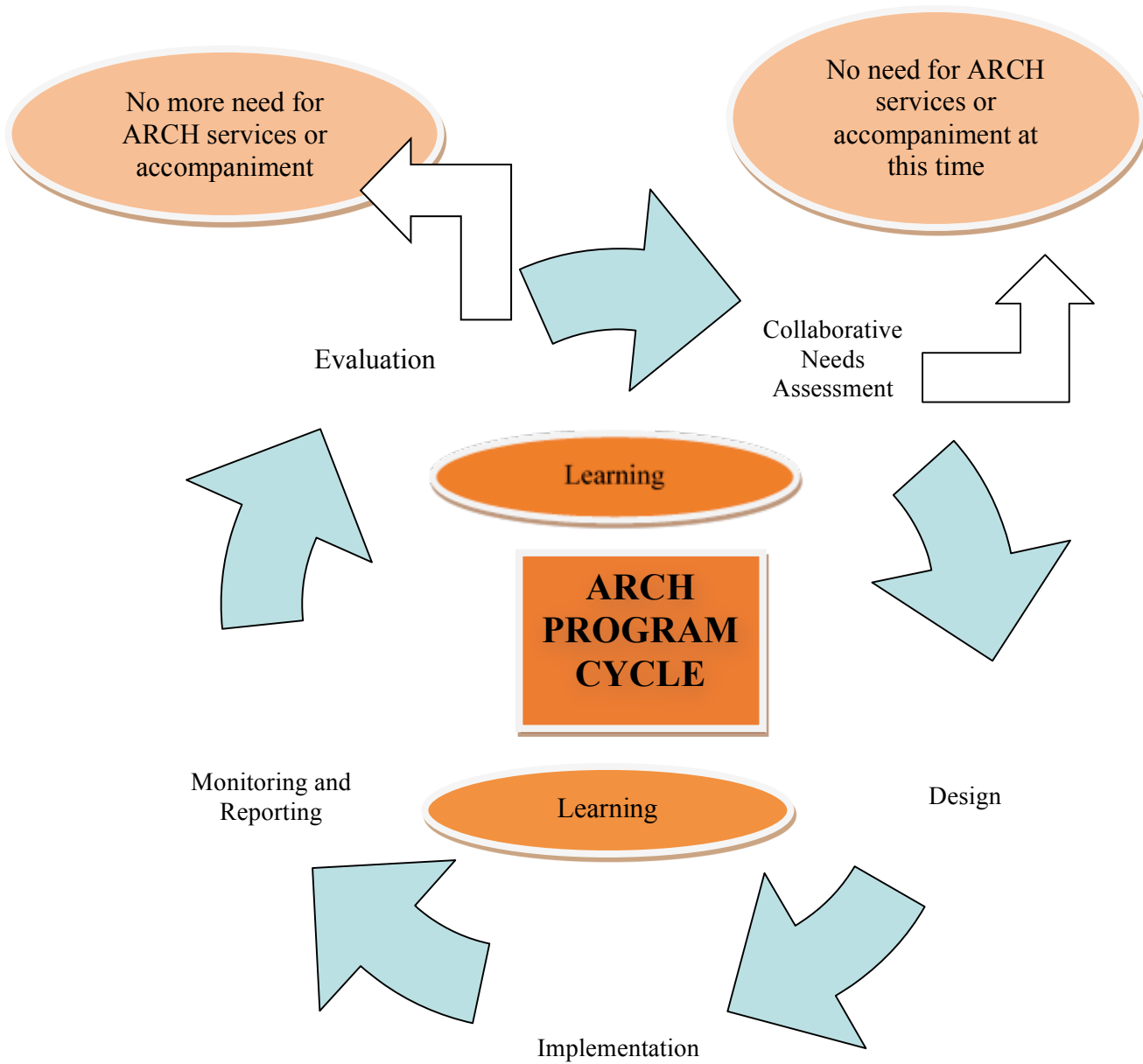
While it may be less cost-effective to serve these, as measured per community/individual reached, we see this priority as driven by our vision and mission of reaching and accompanying all NYYM meeting communities as they would like to be reached and accompanied.

Program Priority #3: Design, Monitoring and Reporting, Evaluation, Learning
Better prioritize program initiatives based on an in-depth understanding of meeting communities' needs and gaps in capacity to meet those needs

During the strategy period, we will test our theory of change and adjust as needed. We will innovate and experiment to identify optimal and sustainable solutions to aging concerns in our Yearly Meeting, and then document and disseminate them. We will prioritize program approaches grounded in the realities of our meeting communities that meet their needs and serve the whole.

In support of these goals, we will develop more rigorous program design utilizing monitoring, reporting, evaluation, and learning processes. In these endeavors, we will collaborate with other NYYM staff and age-specific ministries to the extent possible.

The following diagram illustrates the relationship of needs assessments, program design, implementation, monitoring and reporting, and evaluation to our learning and our ultimate goal, for our services to no longer be needed.



Key initiatives under this program priority are:

1. Develop and implement effective and respectful ways of listening to and assessing the needs of meeting communities and their interest in and capacity for doing aging concerns work
 - Develop a process by which a meeting community and ARCH volunteers and/or staff – and potentially, more broadly, the Yearly Meeting volunteers and staff – could work together to assess the meeting community’s needs and decide on how to best support or accompany that meeting community
2. Increase our ability to monitor our performance and know our successes, and use the results to improve the ARCH program
 - Monitor program implementation more closely to see if the outcomes are as expected with the approaches used, using, for example, participant surveys, NYYM data collection processes, and program evaluations
 - Use learnings to improve program design, including strengthening our network’s model (as applied to training for and responsibilities of volunteer positions), and to design new initiatives
 - Use information on program impact to strengthen reporting to the Yearly Meeting and specific constituents in line with the NYYM Leadings and Priorities’ call for more accountability and transparency
 - Use information gathered to inspire additional funding

Program Benchmarks

- # of trained and active ARCH volunteers in the network
- # of meetings reached with new approaches to sustaining a grounded and loving community, with increased multigenerational engagement and greater sensitivity to aging issues as applied to individuals and to meeting communities themselves
- % increase of NYYM meeting locations that have physical accommodations for aging and differently abled people, as per ADA standards
- # of new/revised modules and workshop templates developed and implemented in support of the program priorities
- # of disseminated articles and other communications that document ARCH experience with supporting a variety of meeting communities
- # of ARCH e-newsletter subscribers and social media contacts (e.g., Facebook and Instagram)
- # of workshops and other programming conducted jointly with those representing other NYYM programs
- # of needs assessment, monitoring, and evaluation tools developed and put into use

7. OPERATIONAL PRIORITIES FOR 2017-2019

In support of our program priorities for 2017-2019, we will pursue full consolidation of ARCH into the New York Yearly Meeting structure and otherwise adjust staffing and operational systems to ensure they are fit for the purpose of achieving our goals. Moreover, we will integrate and coordinate our fundraising efforts with those of the Yearly Meeting. We will add our energy and enthusiasm for the tangible value of our work to the existing paths for funding the work of NYYM. At the same time, we will continue to advocate for and work to inspire gifts and allocations to support aging concerns in particular, to ensure we have the necessary resources to support the mission of the ARCH program in a way that is accountable, transparent, and integrated into the mission of the whole Yearly Meeting.

Operational Priority #1: Structure Fit for Purpose

Consolidate fully the operations of the ARCH program into NYYM's framework of operations and budgeting, reducing redundancies and maintaining integrity of mission

We will pursue full integration of personnel, structures, finances, administration, and especially programming as addressed in our program priorities above. We will carefully plan operational transitions to mitigate any negative impact on the ARCH program.

Key initiatives under this operational priority are:

1. Early in the strategy period, address alignment issues related to personnel and structures:
 - Finish the integration of our staffing, which would include consideration of the ARCH Director's job title, responsibilities, and reporting structure
 - Adjust the role of the Committee on Aging Concerns to reflect this new reporting structure and to continue to advise and support the ARCH staff and liaison or advocate with related NYYM committees (personnel, development, financial services, and the coordinating committees) on aging concerns
2. Integrate procurement and other administrative processes and use of office space and equipment
3. Integrate grant and financial management and oversight, including the budgeting process, bookkeeping, and grant and other financial reporting
4. Establish systematic and logistical coordination of interaction with meeting communities around the Yearly Meeting, including travel
5. Increase coordinated fundraising with the NYYM Development Committee, General Services Coordinating Committee, and the ARCH program, and advocate for the Yearly Meeting as a whole to assume responsibility to the greatest extent possible for all fundraising efforts of NYYM including the ARCH program

Operational Priority #2: Financial Resources for Our Mission

Inspire financial support to achieve our programmatic priorities, with increasingly diverse sources of dependable funding

From its inception and as it expanded over the years, the ARCH program has received generous and increasing core funding from the Friends Foundation for the Aging. In 2015, ARCH staff and the Committee on Aging Concerns launched a major effort to diversify funding for the ARCH program to enhance financial sustainability. The results to date have been significant, with FFA funding as a percentage of all income to the ARCH program falling from over 90% of funds raised in 2013 and 2014 to 86% in 2015 and 59% in 2016.

During this strategy period, a top priority is increasing financial support to implement our program priorities, including modest expansion in NYYM coverage without a commensurate increase in FFA funding. We anticipate some unpredictability with new sources of funding at this stage and have laid out three scenarios for our Financial Plan (see Section 8). We intend to monitor income vs. expenses closely and prepare ourselves for agile contraction and expansion of services.

For our 2017-2019 fundraising, we will collaborate to build the Yearly Meeting's capacity to increase grant funding, gifts from individual donors, contributions from organizational donors, and revenue from the sale of publications and fees for service, as described below. Regarding provision of services to external entities for a fee, we will consider opportunities and their associated opportunity costs on a case-by case basis and seek at least full cost recovery for these activities.

Key initiatives under this operational priority are:

1. Broaden the sources of and increase the overall level of grant funding, reducing dependency on FFA funding
 - Continue to nurture the relationship with FFA with strong communications and improved assessments and data packages
 - Actively seek grants from NY Quaker sources
 - Pursue other sources of grant funding, targeting those with a Quaker focus and those who might be interested in specific programmatic initiatives such as the work in prisons
2. Advocate with appropriate NYYM committees and individuals for maintaining existing avenues and opening up others by which groups and individuals may designate gifts to support aging services, even as NYYM integration proceeds
 - Expand the number of ARCH volunteers who are routinely making effective "soft asks" for contributions for ARCH-facilitated programming and direct service provision
 - Increase the prominence and frequency of "soft asks" through communications such as the NYYM website and the ARCH newsletters
 - Broaden our newsletter distribution beyond ARCH volunteers to others interested within and external to the Yearly Meeting

- Coordinate with the NYYM Development Committee and General Services Coordinating Committee to collaborate on direct appeals by mail and social media (Facebook) and on fundraising events
 - Encourage NYYM to initiate a campaign that publicly advertises opportunities for leaving legacy gifts/bequests to the Yearly Meeting as a whole and to aging concerns as a sub-designation
3. Mobilize general financial support through the NYYM annual operating budget
 - With the Committee on Aging Concerns in the lead, make a strong case for aging services to receive funding as an integral part of NYYM’s annual operating budget and seek modest but steadily increasing amounts for these program initiatives
 - Deepen relationships with component representatives of NYYM, being present for conversations about Yearly Meeting priorities and associated financial priorities and being visible with our stories and data about program activity and impact
 4. Increase revenue from sale of ARCH products and from fees for services provided outside NYYM, to the extent that these support achievement of the ARCH mission
 - Create a new publication every two years, targeting release of one (on housing) in 2018 and starting another in 2019 for publication in 2020 (perhaps on support for aging in prison or in an urban context)
 - Define clearly what services and products ARCH will offer externally and under what conditions, keeping in mind that our primary concern is NYYM meeting communities, while we also value external sharing
 - Communicate clearly that we consider helping family members of those in our meeting communities as central to our mission
 - Develop a list of product prices and a schedule of fees for service that reflect all direct and indirect costs (“fully loaded”); review them annually and update as needed
 - Communicate as appropriate our policy of ensuring fees and other charges do not pose a barrier to reaching our constituents with ARCH offerings
 5. Develop our overall fundraising capacity to support growth in these funding streams
 - Develop materials that present our case in compelling ways, with a combination of explicit statements of the need, compelling stories, and data demonstrating our success (see Program Benchmarks); keep our written and verbal “asks” inviting and dynamic
 - Develop our capacity to engage effectively with individual donors, lifting up the spiritual practices of deep listening and connection with leadings and passions; train supporters to make “asks” and ensure follow-through with thank-you’s

When asked to serve individuals or groups not affiliated in any way with our meeting communities and on behalf of the ARCH program, we will respond only if this is in keeping with our mission. We will not charge a fee for such responses, but will let them know that we do accept donations.

Operational Benchmarks

- degree of ARCH consolidation into NYYM in financial, grant, fundraising, and human resources management, as judged by General Services CC
- # of fundraising avenues available for use by ARCH
- # of grant applications submitted
- # of articles and other written items issued that include soft asks for financial support
- % of ARCH volunteers stating they are comfortable with putting forth the soft ask
- % fully loaded expenses covered by fees paid for services provided outside NYYM

Table 1 provides benchmarks (goals) for fundraising by source of funds.

Table 1. ARCH Fundraising Goals 2017-2019				
Source	2017	2018	2019	Total
Friends Foundation for the Aging	\$74,000	\$69,000	\$64,000	\$207,000
Other Grants (including NYYM trust income)	\$5,000	\$11,000	\$16,000	\$32,000
Individual Donors	\$12,000	\$25,000	\$30,000	\$67,000
NYYM Annual Operating Budget	\$0	\$10,000	\$20,000	\$30,000
Organizational Donors (e.g., Monthly Meetings)	\$5,000	\$5,000	\$5,000	\$15,000
Revenue from Sale of ARCH Products	\$4,000	\$5,000	\$5,000	\$14,000
Fees for Services provided outside NYYM	\$3,000	\$4,000	\$5,000	\$12,000
Total	\$103,000	\$129,000	\$145,000	\$377,000

8. FINANCIAL PLAN FOR 2017-2019

Projected Revenue and Expenses

During the strategy period, the ARCH program will aim to increase total revenue modestly and incrementally as we mobilize broader NYYM resources and decrease dependence on FFA grant funding. This aligns with our program strategy to pursue greater programmatic reach in the Yearly Meeting, and with our strategy to integrate fully into NYYM's operational structure, while continuing our hallmark, volunteer-driven ARCH network. On the expenditure side, the drivers in the financial plan are as follows:

- **Personnel** represents the single largest category, consisting of 70%-80% of budget and reflecting the intensity of the human resource effort in our endeavor. This covers the ARCH Director's salary and fringe benefits and stipends for seven Local Coordinators, up from five in 2017 to round out our geographically distributed team.
- **Program and administrative costs**, which include travel, will initially spike as we implement our program priorities and develop new and revised workshop materials and publications. Expenses related to training and supporting the volunteer network will remain static because costs associated with expansion of new-volunteer training will be offset by savings realized by holding training retreats at meetings in lieu of externally rented facilities. We anticipate static or decreasing expenses for administrative costs such as supplies, reflecting consolidation with NYYM and improved economies of scale.
- We anticipate no change in the **NYYM Administrative Fee** on grants, which is set at 10% of grant income.

Revenue and Expense Scenarios for 2019

One major risk during our implementation period is high variability in funding levels. We aim to ensure we are well prepared to expand or contract the ARCH program to manage such variability and have sketched out three financial scenarios for 2019 to help guide us. These scenarios are built upon several key assumptions:

- We assume a slow-growth economy, without major recession.
- We assume continued growth in the need for aging services.
- We assume broad support for aging services within the Yearly Meeting.
- We assume NYYM's administrative fee on grants will remain constant.
- We assume NYYM's financial handling of contributions designated to the ARCH program will allow for carryover of balances from one year to the next.

As illustrated in **Table 2** below, our three scenarios for 2019 are: (1) the best-case scenario, anticipating growth in all funding sources and solid financial support from NYYM, (2) the modest-case scenario, anticipating a flat financial scenario over the coming years, and (3) the worst-case scenario, under which all revenue streams would be significantly reduced.

Our **best-case scenario** (1) would include a static salary for the full-time director, it would double our Local Coordinator capacity to 1,680 hours a year from 840 hours a year, and increase a specialist or an associate director's time by 20%. This scenario would also increase the additional time that other NYYM staff could devote to aging concerns. In this scenario, we could increase our capacity for travel around our disparate geography, and more quickly ramp up our efforts to reach more meeting communities. We could also allocate funds in support of aging-related and pastoral care retreats at Powell House. Moreover, we could provide volunteers and staff with more professional development opportunities, including those offered by outside providers.

Our **modest-case scenario** (2) would continue the present operational and staffing strategy as laid out in this plan. It also includes a modest increase in funding in the salary and fringe line to reflect direct support provided by other NYYM staff to the Yearly Meeting's aging concerns work. In this scenario, we could increase our capacity for travel around our disparate geography in support of reaching hard-to-reach meeting communities and strengthening our network. We could also allocate modest funds in support of aging-related and pastoral care retreats at Powell House.

Our **worst-case scenario** (3) would require significant changes in our current staffing plan, allowing for only a half-time director, six part-time staff at the same level of approximately 10 hours a month, decreased travel for volunteers and staff, and no option to include other NYYM staff directly in the work related to aging concerns. If cutting the Director position below full-time were forced, as under this scenario, the impact on the program could prove especially detrimental. We would need to shrink the ARCH program's scope from what is detailed in this plan to a level manageable for exceptionally dedicated part-time staff. ARCH volunteers would receive less training and support, and the network would likely shrink. Workshop and consultation offerings within the Yearly Meeting would diminish, and revenue from fees for service and new publications would decrease severely or cease altogether. The program would rely more heavily on other parts of the NYYM structure for operations, and NYYM would likely cede responsibility for the QuakerAgingResources.org website to Philadelphia Yearly Meeting.

Table 2. ARCH Financial Scenarios for 2019

Funding Sources	2016 Actual Revenue	2017 Budget	2019 Revenue Scenarios		
			Best Case	Modest Case	Worst Case
Institutional Grants	\$78,670	\$79,000	\$95,000	\$80,000	\$55,000
Individual Donors, including planned giving	\$39,830	\$11,950	\$45,000	\$30,000	\$10,000
NYYM Annual Operating Budget	\$0	\$0	\$20,000	\$20,000	\$8,000
Organizational Donors (e.g., Monthly Meetings)	\$6,870	\$6,500	\$9,000	\$5,000	\$2,000
Revenue from Sale of ARCH Products	\$5,109	\$4,000	\$8,000	\$5,000	\$1,000
Fees for Services Outside NYYM	\$0	\$1,370	\$10,000	\$5,000	\$0
Total Revenue	\$130,479	\$102,820	\$187,000	\$145,000	\$76,000

Expenses	2016 Actual Expenses	2017 Budget	2019 Expense Scenarios		
			Best Case	Modest Case	Worst Case
Administration					
- Salary and Fringe	\$84,309	\$108,556	\$148,000	\$120,000	\$58,000
Other Administration	\$9,307	\$10,206	\$15,000	\$10,000	\$10,000
Program	\$3,572	\$3,884	\$15,000	\$8,000	\$4,000
NYYM Administrative Fee	\$6,727	\$6,727	\$9,000	\$7,000	\$4,000
Total Expense	\$103,915	\$129,373	\$187,000	\$145,000	\$76,000

Revenue Subtotal	\$130,079	\$102,890	\$187,000	\$145,000	\$76,000
Expense Budget	\$103,915	\$129,373	\$187,000	\$145,000	\$76,000
Net Total for the Year	\$26,564	\$(26,554)	\$0	\$0	\$0
Cumulative Carryover	\$30,402	\$3,848	\$3,848	\$3,848	\$3,848

Important to managing possible variability in financial resources is closer monitoring of revenue and expenditure, which we will accomplish through a new financial reporting system established with the NYYM Treasurer. Up-to-date financial monitoring will allow for timely adjustments where needed on both the revenue and expenses sides.

We continue to move forward with faith that whatever financial scenario we face, we will meet it with grace, a sound strategy, and our best efforts to be good stewards of the work entrusted to us and the funds available to do that work.

9. MONITORING PROGRESS AGAINST 2017-2019 GOALS

This strategic and business plan will shape and guide New York Yearly Meeting's accomplishments in the area of aging concerns over the coming 2½ years. It provides a clear framework for building on the solid base laid by the ARCH program over the past decade and tapping opportunities to sustain long-term, innovative, meaningful, and successful engagement by NYYM in aging services.

On an annual basis prior to operational planning for each year, the ARCH team will conduct a strategic review in which we will assess progress on the program and operational benchmarks. Based on the results of that review, and in consultation with those charged with oversight of the ARCH program, we will make course corrections as required to maintain a relevant and ambitious roadmap as articulated in this plan. With this annual review, we will continue our pursuit of our mission that older and differently abled persons throughout our Yearly Meeting receive helpful and appropriate care within their faith communities.

*“ I am convinced
it is a **great art** to know
how to **grow old gracefully**,
and I am determined
to practise it... ”*

– Hannah Whitall Smith, 1903