

2014 ANNUAL REPORT

Development work is community building work, and over the last year this was more clear than ever to the Development Committee. The Committee has been tasked with the creation and oversight of a comprehensive development plan for the Yearly Meeting. But for that to be successful it must not just be numbers. The Committee needs to make clear to Meetings and individuals the role of apportionment funds as well as individual gifts in BYM's annual budget. Beyond raising needed funds, the Development Committee has an important role in empowering others so their good works come to fruition through a stronger, more vibrant Yearly Meeting.

The Yearly Meeting was without a full-time development director for more than seven months -- from mid-June 2013, when former Director Robinne Gray resigned, until the beginning of February 2014, when our new Director Ann Venable joined the staff. During this period, the Yearly Meeting took time in October for a "listening session" at which some 40 Friends considered the need for a full-fledged BYM development program. The thoughtful consideration of a series of queries, offered by Development Clerk J.E. McNeil, led those assembled to reach unity that such a program indeed was necessary to assure the financial health and stability of our growing Yearly Meeting, and that having a full-time staff person to lead the program was a necessity. The position then was posted and three candidates were interviewed. In December the Interview Committee, which included representatives from Supervisory, Stewardship & Finance, Trustees, the two camp committees, and General Secretary Riley Robinson came to unity on the selection of Ann Venable as our new Development Director.

2013 Budget: Better Than Expected

While the process of discernment was going on, the Committee had plenty of other work. In the fall, it prepared the annual year-end appeal letter, mailed in November to some 6,310 Yearly Meeting households. The Committee followed up in early December with a phonathon allowing us to talk to those in our community who have made significant gifts in the past to thank them and ask for their continued support. At year-end the Committee also sent an email appeal which got a good response from a number of younger, more tech-comfortable Friends. For fiscal year 2013, Development revenues totaled \$188,605, compared to \$171,842 in 2012. While higher than the prior year, 2013 income was less than the budget goal of \$222,875. However, YM expenditures for the year were lower than budgeted since the director position was vacant for six months.

As of early June 2014, the Development Program had raised \$51,435, including a \$5,000 unrestricted gift and more than \$4,000 from a special personal appeal for camper tuition assistance. This compares to \$37,099 in individual and Monthly Meeting gifts in the same five-month period in 2013. For 2014, the program has a budget revenue goal of \$226,102.

2013 Development Budget

Revenues	<u>2013 Actual</u>	<u>2013 Budget</u>	<u>%Raised/ Expended</u>
General Fund	93,560	101,375	92.3%
BYM Camps			
Camp Operating	76,726	55,000	139.5%
Morley Endowment	2,690	NA	NA
Camp Capital	10,640	60,000	17.7%
All Other Gifts	4,990	6,500	76.8%
Total	188,605	222,875	84.6%
Expenditures	73, 670	128, 541	Cost to raise \$1= \$0.39

New Director Strengthens Program

The Committee feels that the Development Program has been substantially strengthened with Ann Venable's appointment as its new Director. Ann has a strong background in development, having worked for eight years at Wilmington College, a small Quaker liberal arts college in Ohio, first as director of advancement services and then as director of planned giving. Joining the staff at the beginning of February, Ann hit the ground running, tackling needed upgrades to the BYM website's "giving" pages, developing a new planned giving brochure and other development materials and leading Committee members in a tutorial on planned giving. She has visited all three camps, including on work weekends. In March, she also went with other BYM staff to the American Camp Association's regional convention.

In an effort to introduce Ann to the wider BYM community, individual Committee members this spring hosted a series of "Meet the Director" events in their homes or

Monthly Meetings. These “teas” were held with Friends from Bethesda, Stony Run (including Homewood and Gunpower Friends), Adelphi, and Charlottesville and additional ones are planned for Friends Meeting of Washington, and Herndon, and another in Baltimore. Conversations ranged from general fundraising advice to “what does BYM do for me?” And people seemed to enjoy meeting Ann.

This year's spring email appeal was “segmented,” focusing on the separate constituents of each of the three camps with the theme of purchasing the needed construction components for a new camp cabin for “their” camp. A separate email appeal also went to the wider Yearly Meeting membership featuring the various services and support that BYM provides to its Monthly Meetings and members.

Planned Giving: Many Options

The Development Program rolled out new “planned giving” pages on the BYM website in late June. The site now offers easy-to-follow information on creative ways that donors can support the Yearly Meeting with a substantial gift while preserving resources for their own financial security and for their heirs. Check out ways of using your Individual Retirement Account (IRA), gifts of stock or other appreciated securities, or an annuity plan to both benefit the Yearly Meeting and you and your family at www.bymrsf.plannedgiving.org. Contact Ann Venable if you have questions about these various options, or want to make such a planned gift.

Capital Campaign Looks Promising

An exciting new campaign is on the horizon which will make it easier for us to bring witness to our stewardship of the Earth. The Development Committee is coordinating closely with Camp Property Management Committee and Camp Program Committee and their respective staff on a multi-year capital plan to maintain and upgrade all the camp properties as well as the BYM office building. The plan, first unveiled in 2013, incorporates a number of “green” features, including solar power for the Yearly Meeting office and structures at Opequon and Catoclin. The plan is projected to cost between \$760,000 and \$1 million, more than half of which will be used for green elements. The needed funds are to be raised over the next five years. In January, Development Committee members for the first time participated in a joint meeting of CPC and CPMC where moving forward with the plan was discussed. Ann attended that meeting by phone, although she had not yet officially joined BYM. Refinement of the capital plan are now well underway.

As stewards of the Earth, timely maintenance of all of our properties must be a priority for the Yearly Meeting and green features need to be a part of that in future maintenance and upgrades. This is not only environmentally responsible but will save us money over the long term. Through this capital campaign the Committee, working with CPMC and others, expects to create by 2021 a camp infrastructure that is safe, attractive and sustainable and which demonstrates environmental stewardship. Our camp properties will be venues in which campers can receive an educational experience in being good stewards of limited natural resources. The committee will be sharing more information about the campaign as well as opportunities for Friends to join in supporting it during Annual Session. Stay tuned.

Grants Policy Forthcoming

In 2013, the Yearly Meeting received, through the efforts of Youth Programs Manager Alison Duncan, more than \$11,000 in grants for the Camp Diversity Program. In 2014, Alison and members of the Camp Diversity Working Group worked with Ann on the submission of a grant proposal to the Shoemaker Foundation for a \$225,000, three-year grant to expand and strengthen the Camp Diversity Program. The Yearly Meeting learned in early June that the proposal had not been accepted. Ann and Alison will be meeting with a Shoemaker official to review the grant application and how it can be strengthened for re-application in the fall.

In line with its responsibilities as delineated in the Manual of Procedure, the Development Grants Policy Subcommittee also is preparing a grants policy to be followed in preparation and submission of future grant proposals. The Committee expects to review and approve the final draft of this policy in the near future and to present it for consideration at fall Interim Meeting.

If you have any questions about BYM Development, please contact Director Ann Venable or any member of the Committee. We look forward to seeing you at Annual Session in August. **And as always, we are very grateful for your continuing support of BYM!**