

Dear UDMM Friend,

*At the March 21, 2021 Meeting for Business we will be discussing a proposal to prepare a 3 year Strategic Plan for UDMM. This will involve applying for a Grant to fund it, and securing our own funding as a match for the Grant.*

### **Need For A Strategic Plan:**

In order to ensure that UDMM survives (and thrives) into the next decade and beyond, we must assess our current Inreach, Outreach, administrative organization, and technology efforts and develop a strategic plan for our future. Like many meetings UDMM is very small (with 21 active members) and we do not have a deep bench of members and attenders to rely on for such a planning effort. Our current members & attenders do not have the bandwidth (amount of free time and subject expertise) to dedicate to this effort. Therefore, we are looking to hire a consultant to develop and implement such a plan.

### **Objectives of the Strategic Plan:**

The main objectives of the strategic plan will be to :

- Increase the awareness of our meeting in the surrounding community
- Streamline internal and external communications
- Develop strong educational, inreach and outreach programs
- Ensure we have the updated technology and online presence to reach members, attenders and seekers
- Grow the number of members and attenders
- Improve and expand community partnerships
- Ensure we have the building and grounds well maintained and in good operating condition
- Ensure we have a strong financial plan to support the above efforts and remain financially sound

### **Current Situation at UDMM:**

Upper Dublin has already made progress on some of these initiatives in the last couple of years...mostly due to the efforts of Susan Vorwerk. Susan, a member of UDMM was hired to develop a strategic plan for Byberry Monthly Meeting. In her free time, Susan labored on our behalf to include UDMM in some of the major developments at Byberry. UDMM has benefitted from Susan's efforts & generosity in the following ways:

- UDMM now has a website with an array of information about the meeting, Quakerism in general and a 'members only' section with a UDMM calendar, meeting agendas, minutes, etc.
- We had Banners installed outside the meetinghouse for our neighbors to see
- We were going to host a speaker series commemorating the passage of the 19th amendment... (before Covid)
- We have Zoom meetings for worship 3 times per week, a monthly book club, and are included in many online activities with other AQM meetings.
- We acquired an "Owl"-- technology used for remote access to meetings by members and attenders.

- We received funding from AQM to repair the graveyard wall
- We've conducted a "When to Consider Applying for Membership" Zoom session
- We've participated in 2 "Quakerism 101" Zoom sessions
- We added two new members and several new attenders to our community

All of these initiatives are wonderful, but UDMM really needs to develop a strategic plan of our own, specific to our needs, in order to make real progress.

(Also we feel there is some inequity in expecting Susan to continue her efforts on behalf of UDMM without being properly compensated for her time and expertise, when Byberry is compensating her properly. Expecting to piggy-back on another Meeting's strategic plan is not sustainable and not practical going forward.)

### **Proposal For a Strategic Plan for UDMM:**

1 . We will apply to the Shoemaker Fund for a Grant ( 1 or 2 year- \$30,000 or a 1 year \$60,000). This grant will cover the cost of hiring a consultant to design and implement a 3 year strategic plan for UDMM, and many of the expenses for marketing materials, technology, etc. required to implement this plan.

2.The Shoemaker Fund strongly encourages grant applicants to have "skin in the game" by matching the funds applied for from the foundation. Therefore UDMM must find a source to fund about \$30,000 ...beginning before the grant application in May and the potential grant award in November 2021. Eventually we hope to have Abington Quarterly Meeting cover 1/2 of that \$30,000 per year as other meetings too will benefit from this strategic planning effort. This would reduce UDMM's annual contribution down the road.

Right now in addition to the funds UDMM has in our Money Market, Checking Account and General Fund, we have \$250,000 in the "Baer Fund" with no restrictions.

(The original Baer bequest to UDMM in about 2014 was \$125,000. UDMM members previously agreed to reinvest half the returns from this investment and use the other half for "educational purposes" such as funding member's childrens attendance at JFCC etc.)

We feel the most reasonable source for UDMM's portion of the strategic planning funding is to consider a "draw down" from the Baer Fund in the amount of \$30,000.

**This will NOT affect our annual budget which is funded by member's & attender's contributions.** We no longer have any children in the meeting to send to educational programs, and we could still easily fund the occasional adult education request from this fund. The Baer funds have grown and almost doubled in size since we received that generous gift...but unfortunately, our meeting has not. We feel a draw down of 12% from this fund to ensure the future survival of UDMM is worth the investment...what value is there to having a fund if we have no meeting to benefit from it?

The funds from the Shoemaker Grant, and a Baer Fund draw down would enable us to develop and implement a much needed 3 year Strategic Plan for UDMM