

Strategic Plan for FY 2019 through FY 2023

Elsie K. Powell House Inc.



1. INTRODUCTION

This Strategic Plan for FY19-FY23 will guide Powell House's staff, governing body, and other volunteers as we pursue new and refined initiatives to optimize what the conference and retreat center of New York Yearly Meeting can contribute to NYYM, the Religious Society of Friends, and the society at large. The plan provides 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, as we seek *to foster spiritual growth after the manner of Friends and to strengthen the application of Friends' testimonies in the world.*

Building on nearly 60 years of service to Friends and others, effective implementation of this plan will allow Powell House to continue playing a critical role in the lives of individuals and in the spiritual life, ministry, and witness of Quaker and compatible communities. With a long-range view, we are setting the stage for Powell House to offer dynamic programming fit for the world in which we live today, while preserving and enhancing the facilities and stabilizing the finances.

Powell House conducted strategic planning in order to set a strong, shared vision for achieving organizational goals for the coming five years. The process, running the course of a year, involved multiple steps to produce fundamental decisions for the future and to address fundamental challenges that Powell House faces. We researched the needs and desires of our stakeholders and analyzed relevant societal trends, we assessed the state of our facilities, and we examined how current and future programs might optimally fit with our mission while attracting larger numbers of those we aspire to serve. We sought to align with and support the broader NYYM vision as laid out in [New York Yearly Meeting's Leadings and Priorities](#) (May 27, 2014).

With these in mind, we reworked statements of our mission, vision, and values and articulated our theory of change, which describes the causal linkages between our activities and achievement of our mission. Then we searched for the nexus between our strengths and opportunities for the future, and developed key priorities for the coming five years. These efforts culminated in this FY19-FY23

strategic plan, which the Powell House Committee endorsed in January 2018 for implementation beginning April 2018, the start of FY19. The plan lays out **three program priorities**:

1. Strengthen our programming that grounds individuals in our Quaker faith
2. Prepare and support those who apply Friends' testimonies in the world
3. Deepen local connections

To support these program priorities, we will build our organizational capacity, giving highest attention to **four operational priorities**:

1. Preserve and enhance our facilities
2. Communicate effectively in support of our goals
3. Institutionalize planning, monitoring, and evaluation
4. Mobilize significant funds in support of these strategic priorities

Successful implementation of this plan will broaden our capacity to provide timely and relevant spiritual and other services to an increasingly diverse population. It will strengthen and increase our resources to carry out our mission among both individuals and groups. It will preserve Powell House's facilities to welcome people for decades to come. And, it will bring us closer to our aspiration to be the place of heart-felt welcome where all are empowered to live authentically in the world and to recognize truth and call it forth from one another.

1. THE PLANNING CONTEXT

Powell House was established by New York Yearly Meeting in 1960 as the result of a gift of residential property from Elsie K. Powell, Sr. This property, with subsequent additions and improvements, now consists of Pitt Hall, the Anna Curtis Center (ACC), a director's residence, a youth directors' residence, and 57 acres of land with a campground and two wildlife ponds. A decade ago, Powell House completed a major renovation of the ACC using \$760,000 in donations to better meet the needs of the youth retreats and rental groups, provide greater access to differently abled people, and reduce Powell House's carbon footprint.

Powell House is used primarily for spiritually focused conferences and community-building gatherings of groups in New York Yearly Meeting. It is also used for meetings of Yearly Meeting committees or conferences sponsored by them. Best known for our stellar youth program serving children in grades 4-12, the full portfolio of programs includes a wide variety of educational, inspirational, and organizational activities for youth and adults related to the religious, benevolent, and social concerns

of the Religious Society of Friends. The facilities are made available for use by affiliated Friends' organizations and other religious or educational groups having interests compatible with those of Friends. Several Friends Schools bring cohorts of students on a regular basis.

Powell House currently has 16 staff members: 2 co-executive directors, 2 co-youth directors, office administrator, bookkeeper, food service manager, housekeeping manager, cooks, and facilities support staff. It is managed by a membership corporation, Elsie K. Powell House, Inc, and members of the corporation, called the Powell House Committee (or PoHoCo), are appointed by the Yearly Meeting for terms of five years. Periodically, youth are co-opted to represent youth conference participants at meetings of the corporation. The corporation appoints from its membership a Board of Directors who function as trustees in the management of the property and as an executive committee in directing the affairs of the corporation. The Powell House Committee currently has 22 appointees from seven Quarters and Regions of NYYM and one co-opted from Philadelphia Yearly Meeting.

In recent years, Powell House has hosted an average of 70 conferences and retreats serving 2,500 people and operated on an annual budget of \$450,000. Sources of income include guest fees, contributions solicited from supporters and Yearly Meeting members, the Yearly Meeting operating budget, grants, and investment income.

Even without the benefit of rigorous analysis of program impact, we know Powell House has been successful in developing leadership skills among our youth and young adults. We have seen the positive effects the spiritual nature of Powell House has had on rental groups using the facility. We have experienced the formation of loving, joyful communities over the span of a few days. We have received positive written evaluations from participants attending our events and heard countless anecdotes of important contributions Powell House has made in attendees' lives.

With this foundation and with momentum to respond to today's and tomorrow's needs, we look to the future with optimism.

1. ENVIRONMENTAL ASSESSMENT

SWOT Assessment

For this multi-year plan, we analyzed trends affecting individuals, Quakers, and the broader society in our rapidly changing world. We discussed frankly the internal **strengths** and **weaknesses** of Powell House and documented the most salient, which are noted below. We described to the best of our

ability the conditions within which we will be operating in FY19-FY23 and the factors that might affect us, and identified them as **opportunities** and **threats**.

Two points garnered the most attention as we considered strategic planning for the coming five years:

- The strength of potential and existing users' longing for spiritual, deeper connections, for which we can offer a warm and welcoming atmosphere
- The inadequacy of our facilities with respect to accessibility and comfort, reflecting a lack of funding for this area of operation

Stakeholder Engagement

During the first half of 2017, we conducted surveys of users/non-users, parents, major donors, PoHoCo committee members, and user/non-user institutions and received a combined total of 233 responses. The results were compiled, analyzed, and studied, and then referenced extensively in development of program and operational strategies for FY19-FY23.

The surveys raised several key points across the board that we considered critical to PoHo's future:

- Quakers are aging and have decreased numbers.
- People prefer private accommodations, want hot showers.
- Service/learning trips are important for youth, often concretizing Friends' testimonies for them.

We have designed our five-year strategies keeping in mind this light-touch market analysis, the results of the SWOT assessment, and the extensive input from our various stakeholders about what they desire in life, how Powell House might fulfill those desires, and what barriers to attendance they face. We have built the plan upon our identified strengths and matched them with opportunities we anticipate will be present in our dynamic context, and we have designed strategic and practical approaches to overcome and mitigate challenges, for an optimal way forward.

4. MISSION, VISION, AND VALUES

Powell House is the conference and retreat center of New York Yearly Meeting of the Religious Society of Friends (Quaker).

Our Mission

To foster spiritual growth after the manner of Friends and to strengthen the application of Friends' testimonies in the world.

Our Vision

To be the place of heart-felt welcome where all are empowered to live authentically in the world and to recognize truth and call it forth from one another.

Our Values

Friends believe there is that of God in every person. Each of us has the capacity to experience and respond to the movement of Spirit in our lives. We honor the upwelling of Spirit and its expression in one another, including children, the aged and all in between. Grounded by this Spirit, we:

- recognize the dignity of every person
- accept our responsibility to care for the earth and all its inhabitants
- reject violence of any kind
- strive to conduct ourselves with integrity and to focus on what is essential, and
- embrace community through active listening, shared work and joyful connections

5. THEORY OF CHANGE

As part of developing this strategic plan, we sought to describe the causal linkages between our activities and achievement of our mission. What assumptions are we making when we implement activities with confidence that they will effect the change articulated in our mission and vision statements? We will use this “theory of change” to help us maintain our focus, to design and test innovative and more effective programs, and to guide how we measure the effectiveness of what we do.

The Powell House Theory of Change:

Powell House is the conference and retreat center of New York Yearly Meeting.

IF we invite people in such a way that they want to come to Powell House

And if we make Powell House accessible to them in terms of personal finances, scheduling, transportation, and accessible facilities

And if we create a space where people who come

- Listen to one another
- Experience Quaker practices, values, and testimonies in action
- Learn about the issues that insult our sense of justice in the world (“smudges on the Soul of Humanity”)
- Find a place of refuge, healing, and inspiration
- Experience spiritual growth and renewal
- Engage compassionately with people who hold different beliefs

And if we create a space where groups can

- Experience the Spirit
- Gather in a safe and supportive environment
- Experience joyful connection

And if we enable people and groups to

- Explore topics and issues of current concern to them, and then
- Develop ways of living into their intentions, and then
- Acquire skills in Quaker practices and other realms, and
- Access tools and other resources in support of these

THEN we'll have more resilient people and stronger groups and communities

Then we'll have people who have a sense of global unity, who experience interrelatedness of the spiritual, natural, and human dimensions, and who can more skillfully reach across the divide

Then God will open minds and expand awareness, so that people (seekers) and groups can transform the issues of our day and time

And then we'll contribute to creating agents of change – people and groups who are empowered to live authentically in the world and to recognize truth and call it forth from one another.

6. PROGRAM STRATEGIES FOR FY19-FY23

With this Theory of Change expressing our understanding of our potential to foster spiritual growth, strengthen application of Friends' testimonies, and empower individuals and groups, we considered a

wide range of program opportunities for FY19-FY23 and selected three major program strategies for the time period.

Program Priority #1: ***Increase our focus on supporting individuals (seekers) in being deeply grounded in the practice of our Quaker faith***

Program Priority #2: ***Increase opportunities for individuals and groups to gain specific skills and otherwise prepare to apply our faith, values, ministry and witness in our daily lives***

Program Priority #3: ***Develop and implement a strategy to deepen our local connections and ground us in place***

These priorities intentionally align with and support [New York Yearly Meeting's Leadings and Priorities](#) (May 27, 2014), summarized herewith:

- We Envision a Yearly Meeting Deeply Grounded in the Practice of Our Faith.
- We Envision a Yearly Meeting Made Up of Strong, Vital Monthly Meetings.
- We Envision a Yearly Meeting Gathered Together into One Body.
- We Envision a Yearly Meeting that Nurtures Our Children, Youth, and Young Adults.
- We Envision a Yearly Meeting that Witnesses to the World on Our Behalf.
- We Envision a Yearly Meeting that Is Accountable and Transparent.

Interwoven Themes for Programs

We will weave throughout our program strategies several themes of deep importance during this strategy period:

- **Groundedness** – Offering multiple ways into being spiritually grounded and cultivating an awakening of the Divine within us
- **Creation of the new society** – Serving as a cultivator and incubator for change – for transforming power – that brings about a more compassionate, loving, and just society and faces the reality of climate change
- **Diversity** – Taking measures designed to increase the diversity of attendees from non-privileged backgrounds – from our program offerings and facilitators selected to placement of advertisements, messaging to target audiences, and collaboration with other entities who reach a more diverse population

- **Financial advantage** – Giving serious consideration, when deciding on new program initiatives and continuing old ones, to the degree to which they are financially advantageous to Powell House

Note about the Youth Program: Powell House has offered a stellar youth program for decades and intends to continue to do so. This FY19-FY23 plan does not contemplate major new strategies or separate strategies for the youth program for children in grades 4-12. Rather, we intend to continue learning from, experimenting with, building upon, and modeling the dynamic approaches of the youth program in ways that best serve those youth while also strengthening Powell House programming for other cohorts.

Program Priority #1: Strengthen our programming that grounds individuals in our Quaker faith
Increase our focus on supporting individuals (seekers) in being deeply grounded in the practice of our Quaker faith

Over the coming five years, we will continue to address spiritual hunger and nurture gifts. We will more consciously and proactively support people to support themselves sustainably and be joyfully grounded in their lives. With a stronger vision for Powell House and more agility in programming, we will increase the number of attendees between 18 and 50 years old. We will seek more and stronger linkages with the broader Religious Society of Friends for mutual benefit through tapping an expanded pool of resources and economies of scale.

Key initiatives under this program priority are:

1. Create a more dynamic, contemporary portfolio of program offerings
 - Tailor programs that appeal to and attract people in middle stages of life, such as 30- to 40-year-olds
 - Offer more variability in program timing and duration, as well as amount of advanced scheduling, e.g., through single-day workshops and week-long retreats
 - Provide fresh opportunities for spiritual deepening, where participants explore together common concerns and interests
 - Provide support and assistance on living one's faith in daily life
2. Collaborate with other NYYM staff and with representatives of other yearly meetings and Quaker umbrella organizations to provide enhanced support, resources, and programming for individuals of all ages and for monthly meetings
3. Promote higher program quality through providing technical guidance and support to facilitators in event preparation, execution with optimal use of the Powell House facilities, and post-event reflection on lessons learned

Program Priority #2: Prepare and support those who apply Friends' testimonies in the world

Increase opportunities for individuals and groups to gain specific skills and otherwise prepare and be supported to apply our faith, values, ministry and witness in our daily lives

Over the coming five years, we will help individuals, groups, and formal communities learn specific skills of use *in the present*, shifting what we do even as the Religious Society of Friends, the broader U.S. society, and the world continue to evolve at a rapid pace. We will support responses to urgent concerns that arise, helping individuals and groups to stay inwardly grounded as they take outward action.

We seek to cultivate an awakening of the Divine within those who come, to provide a Spirit-filled crucible where they can experience truth revealed. We expect these experiences will energize attendees to take steps on their Spirit-led journeys, expressing their faith in actions, and applying Friends' testimonies to live out our vision of a compassionate and just society.

Key initiatives under this program priority are:

1. Offer training and opportunities to engage in issues of the day
2. Provide space and, where appropriate, process to groups actively creating the new society
3. Increase use of Powell House by Friends-affiliated organizations, including Friends Schools, for a broader range of purposes
4. Host gatherings for Quaker and other likeminded workers to come together (AFSC, QUNO, etc.), as was done after September 11, 2001
5. Provide respite for those engaged in the work of creating the new society

Program Priority #3: Deepen local connections

Develop and implement a strategy to deepen our local connections and ground us in place

We have a desire to be grounded and present where we are. We want to be visible and known. We'd like to know better the spiritual and other needs in our local environment, so we can respond as appropriate. We want more developed interfaith connections in the local community to make us stronger and offer our resources. These desires stem in part from a place of integrity, transparency, and authenticity, a desire to live out our values beyond Powell House's walls, and a desire to help our neighbors and stand up for truth and love in the world.

In addition, there are practical reasons for deepening our local connections. In our local community where we experience strong political and economic divisions, we hope to gain trust that our small institution seeks to serve local residents as well as visitors from other places. Furthermore, our programs will benefit from staff's engagement as agents of change in the local context, gaining

experience and pursuing ideas and opportunities that emerge from that engagement. We anticipate increasing the proportion of attendees at Powell House who come from a closer distance, taking advantage of shorter travel times, lower transportation cost, and easier transportation means. We also anticipate increased attendee numbers associated with an expanded network and more targeted programming for the local population, and we expect this to be financially advantageous to Powell House. We envision increased use of our facilities as locally targeted events fill schedule slots that are rarely used otherwise.

Key initiatives under this program priority are:

1. Increase use by local individuals and groups by offering an affordable, grounded space to experience the Spirit, a sense of connectedness, and a positive self-value
2. Launch individuals and groups into increased engagement with local community groups that are doing witness work that aligns with those of our Quaker constituencies, e.g., organizing participation in demonstrations or attendance at vigils
3. Receive and welcome local activist individuals and groups into Powell House's spiritual space, a vessel where they will find support, learn, and plan for future witness work
4. Put on promotional events open to the public (e.g., World Quaker Day, interfaith picnic, PoHo 60th anniversary celebration) and structured in ways that strengthen our profile in the community while attracting new and additional demand for Powell House programs and rental of our facilities

Program Benchmarks

Baseline numbers for each benchmark will be established in FY19, and targets set for each year of the strategic plan. Semi-annual reports on progress in achieving the targets will be produced by staff and reviewed by the Powell House Committee.

- % increase in # of attendees, disaggregated by new attendees and returning attendees, by age cohort, by type of program, and by locality
- % increase in # of entities with which Powell House is collaborating and partnering, disaggregated by Quaker and non-Quaker
- % increase in the # of community groups renting Powell House
- % increase in attendees reporting they have made life changes because of attending Powell House events this year, e.g., changes to how they think and live (inspired work) or increased engagement in local meetings and other Quaker bodies

7. OPERATIONAL STRATEGIES FOR FY19-FY23

In support of our program priorities for FY19-FY23 and to ensure Powell House's facilities are sustained for those five years and beyond, we will prioritize these operational efforts:

Operational Priority #1: *Preserve our **facilities** and enhance them to support program goals, meet our guests' needs and expectations, and reduce long-term stress on staff and financial resources, and in accordance with our values*

Operational Priority #2: *Implement an effective **communications** plan in support of our program and fundraising strategies and achievement of our mission*

Operational Priority #3: *Institutionalize program and financial **planning, monitoring, and evaluation** systems to strengthen program, fiscal, and operations management*

Operational Priority #4: *Conduct a **capital campaign** that prioritizes funding for preserving and enhancing key aspects of Powell House's physical plant and bolstering investment income to meet programmatic and operational needs*

Interwoven Themes for Operations

During the strategy period, we will weave throughout our operational strategies several themes important to stewardship of Powell House and the planet.

- **Stewardship of our property** – Holding the reality that Powell House is a precious treasure and we have the good fortune to have Powell House, beloved by many of us and vital to the life and well-being of our Yearly Meeting – and exercising thoughtful stewardship of our buildings and the campus on which they are situated
- **Accessibility** – Moving into compliance with accessibility standards set by the American with Disabilities Act (ADA), starting with making all program areas physically accessible to those with limited mobility
- **Greening of our facilities** – Committing to considering “green” options first and using them if they are financially feasible, with attention to projected cost savings and to identifying sources of designated funding for these purposes
- **Financial advantage** – Giving serious consideration, when deciding on new operational initiatives and continuing old ones, to the degree to which they are financially advantageous to Powell House

Operational Priority #1: Preserve and develop our facilities

Preserve our facilities and enhance them to support program goals, meet our guests' needs and expectations, and reduce long-term stress on staff and financial resources, and in accordance with our values

Among the infinite possibilities for preserving and developing Powell House's buildings and grounds, we will prioritize Pitt Hall as a central part of Powell House's facilities, with modest attention as well to HoGo, the youth directors' home and associated garage. The Anna Curtis Center was recently remodeled; Knoll House has seen a lot of work; and the campground facilities are currently sufficient. Pitt Hall, on the other hand, has manifested significant problems which need to be addressed if Powell House is to reach its potential; moreover, neglect of HoGo at this stage would be unwise. We will prioritize several characteristics as we modernize and develop these facilities:

- ***Safe and Accessible:*** We want to offer safe spaces that are welcoming to all comers. We want our facilities to be compliant with ADA standards.
- ***Functional:*** We want our buildings to fully support our programs and other activities, the spiritual and social needs of the Yearly Meeting, and the needs of our staff.
- ***Green:*** We will give attention to the choices we can make to diminish our negative environmental impact, including choices about the materials we select, the equipment we replace, and the modifications we make.
- ***Attractive and Comfortable:*** We want people to want to come to Powell House. We want them to be comfortable when they do come. We will do our best to preserve the historic character of Pitt Hall as we upgrade the building.
- ***Maintainable:*** We want things to work and be kept working without inefficient use of staff time, without unexpected expense, and in ways that help control operating costs.

We heard that a portion of our constituents would appreciate greater privacy at Powell House and will keep this in mind as we implement our facilities development strategies, looking for opportunities to increase sound barriers and provide more private bathrooms and rooms for our guests.

Key initiatives under this operational priority are:

1. Prevent deterioration and disintegration of our buildings
 - Replace the roofs on Pitt Hall, HoGo, and the ACC Game Room
 - Address the dampness in the Pitt Hall basement (which has a brook running through it) with a vapor barrier and concrete floor
 - Address HoGo deterioration from moisture and animal infestation

2. Manage risks associated with health and safety concerns in Pitt Hall
 - Bring the ramp and the front entry porch into ADA compliance
 - Retrofit the ground floor to comply with ADA standards for accessible design
 - Reduce risk posed by fire (e.g., bring fire exits into compliance with building code, install exit windows to code, install additional emergency lighting and fire alarm pull stations, and improve electrical wiring, outlets, and junction boxes)
 - Assess other environmental and remediation issues and address the most significant of these

3. Improve the operational efficiency and greening of Pitt Hall, while enhancing the guest experience
 - Renovate bathrooms (showers, shelves/towels racks, standardize fittings)
 - Improve the water system with water storage tanks
 - Replace the heating system
 - Research alternative energy sources and proceed if specific funds are raised for this

4. Improve the operational efficiency and greening of HoGo, while enhancing the youth directors' living experience
 - Install new heating system and water heater, selecting energy-efficient options
 - Upgrade the kitchen with a new stove and cabinets
 - Redo all the floors

Operational Priority #2: Communicate effectively in support of our goals

Implement an effective communications plan in support of our program and fundraising strategies and achievement of our mission

During the planning process we began considering new and improved strategies for reaching key audiences with effective messages using optimal tools (e.g., testimonials, photo essays) and channels (e.g., print, email, Facebook). Our communications strategies for FY19-FY23 will target seekers whom we have not yet met, current attendees, and those who previously attended Powell House. While our geographic priority is the geography covered by New York Yearly Meeting, we will

also reach into other parts of Connecticut and New Jersey, as well as neighboring Massachusetts and Vermont.

Successful achievement of this priority will, on the one hand, require increased allocation of staff time and other resources to communications and will, on the other hand support the marketing and fundraising efforts critical to successful execution of this strategic plan.

Key initiatives under this operational priority are:

1. Develop a multi-year communications plan that articulates the individuals and groups we aim to reach for what purposes
2. Upgrade IT systems to effectively track individuals and groups we seek to reach with our messaging
3. Complement IT upgrades with written protocols for data entry and manipulation and staff/volunteer training in their use
4. Define branding and other key elements to use in Powell House messaging, highlighting those aspects most likely to resonate with our audiences
5. Conduct testing of modes, messages, style, and packaging (including titles of conferences) to learn what works better (A vs. B), and apply learnings to improve the effectiveness of Powell House communications
6. Exploit synergies with other New York Yearly Meeting communication strategies, such as “NYYM Connects,” and enhance Powell House’s profile on the NYYM website

Operational Priority #3: Institutionalize planning, monitoring, and evaluation

Institutionalize program and financial planning, monitoring, and evaluation systems to strengthen program, fiscal, and operations management

Because of the nature of its work, Powell House faces an ongoing challenge with generating more income per event than the cost to put on that event. One part of this equation, on the income side, is mobilizing enough attendees for each event. Greater understanding is needed to more accurately predict the popularity of an event and to better gauge when to cancel an under-enrolled event. Another part of the equation, also on the income side, is offering a maximum number of events with optimal timing, for which greater research and analysis might yield better results. On the cost side of the equation, Powell House has begun tracking costs per participant for different types of events and will need to monitor these more closely to decide what events to hold, how to contain program-related costs, and what level of fees to charge.

During this plan’s five-year period, Powell House will strengthen and institutionalize planning, monitoring, and evaluation systems to help with that financial piece, but also to ensure consistently

high-quality programming. We will monitor program quality more explicitly and take appropriate measures to boost it where needed.

Key initiatives under this operational priority are:

1. Program Planning: Identify and use tools to predict interest and popularity of events and probable attendance levels, looking at the topics/content, marketing, and length and timing of events
 - Communicate regularly with other Quaker and non-Quaker entities offering similar services, to keep abreast of what is working for them at the moment, and to coordinate schedules and avoid competition
 - Building on stakeholder surveys conducted for strategic planning, conduct follow-on surveys to inform decisions about discontinuing, changing, or adding certain programs or types of programs

2. Program and Operational Reporting and Analysis: Track key benchmarks (such as disaggregated attendance numbers proposed under [Program Benchmarks](#) above), study trends and major anomalies, and take timely action in response to what is learned
 - Programs: Create a plan for regular reporting and analysis of program success and use new and improved tools to implement that plan
 - Finances: Use improved financial reporting to analyze income and expense as well as profit and loss trends and anomalies, and use the analysis to support timely decision-making about programming, financial management, facilities, and other operations
 - Fundraising: Conduct full cost-benefit analyses of fundraising initiatives and use the results to prioritize future activity
 - Communications: Make regular use of Google analytics to inform website improvements that aim to drive up hits and online registrations, payments, and donations

3. Evaluation of Program Impact: Determine excellence in execution through a broader program evaluation system
 - Implement distinct evaluation systems for different types of use of Powell House (e.g., one for community rentals that asks more about how well the facilities met their needs)
 - Hone the use of participant evaluation forms, modifying them to provide data for tracking progress against this strategic plan's benchmarks
 - Introduce mechanisms for facilitator reflections and host evaluations, with an eye on improving program quality in the long term
 - Conduct in-depth evaluations on a biannual basis to determine program impact, utilizing interviews, surveys, and other tools recommended by experts

Operational Priority #4: Mobilize significant funds in support of our strategic priorities
Conduct a capital campaign that prioritizes funding for preserving and enhancing key aspects of Powell House's physical plant and bolstering investment income to meet programmatic and operational needs

As discussed under Operational Priority #1, Powell House has a clear and pressing need to undertake significant facilities work, first and foremost for Pitt Hall, for which major financial resources must be mobilized. Using the construct of a capital campaign, we will give this highest priority while also requesting support for other major capital projects and for growing our reserve funds. Bolstering Powell House's financial reserves is critical to the institution's financial stability, yielding an important stream of steady income and offering the possibility of softening financial shocks, such as those posed by unanticipated major expenditures or drops in guest fees.

Key initiatives under this operational priority are:

1. Planning:

- Set up a Capital Campaign Committee
- Review the successes and lessons learned from the previous capital campaign
- Create a preliminary budget for conducting the campaign and obtain the funds
- Identify and hire outside expertise to perform a feasibility study, conduct prospect screening, recommend the campaign timeline and goal, write the case statement, etc.
- Train PoHoCo members and other volunteers to take part in donor cultivation and asks
- Put tools (IT) in place to support the campaign, e.g., to tailor fundraising approaches to the interests and needs of sub-groups

1. Execute the campaign

Operational Benchmarks

Baseline numbers for each benchmark will be established and targets set for each year of the strategic plan. Semi-annual reports on progress in achieving the targets will be produced by staff and reviewed by the Powell House Committee as described in [Section 9. Monitoring Progress Against FY19-FY23 Goals](#).

- New Pitt Hall roof completed
- % reduction in costs associated with fossil fuels
- % increase in the reach of Powell House communications (to be defined)
- % reduction in the number of events canceled due to low registration
- % increase in the proportion of Powell House events where income exceeds costs
- % increase in # of donors
- % of capital campaign goal achieved

8. FINANCIAL PLAN FOR FY19-FY23

Projected Revenue and Expenses

During the strategy period, Powell House will aim to increase total revenue at an average annual pace of 5%, with steady growth in contributions, guest fees, and other revenue categories. This aligns with our strategy to increase income through higher guest fees and draw larger numbers of guests. Expenditures are projected to increase at an average annual pace of 3% with focused effort on containing both program-related and operational costs.

The main drivers in the financial plan are as follows:

- **Guest Fees** represent the single largest income category, accounting for 61% of revenue. Community programs represent roughly half that amount, making up just over 30% of total annual income.
- **Investment Income** plays an important role in the early years of the strategy period, representing 15% of total income in FY19, and tapering to 5% in FY22. Meanwhile, other non-fee sources of income – most significantly **Contributions** – will see growth from various initiatives included in this plan.
- **Personnel** represents the single largest expenditure category, consisting of 68% of annual expenditure and reflects the intensity of the human resource effort required to run Powell House. No major additions or reductions in staff position are anticipated.
- The combined fixed costs of **Buildings & Grounds** and **Housekeeping** account for a steady 20% of annual expenditures over the five-year period.

Assumptions and Risk Management

The financial scenario for the coming five years rests on multiple assumptions. On the income side, this plan assumes:

- *Contributions*: The proposed capital campaign will bolster giving outside the campaign (the above figures do not include resources mobilized through that campaign).
- *Adult Program Guest Fees*: Efforts early in the planning period will enhance program quality and create a program portfolio that better aligns offerings with people's needs ("jobs they want to accomplish") and is more diverse and dynamic. These aspects along with a strong communications strategy will boost attendance, which in turn will boost income.

- *Youth Program Guest Fees:* Income from programs for 4th-12th grade will stay flat, with modest variation in number of events offered, attendance, and fees and scholarship needs.
- *Community Programs Guest Fees:* Stronger marketing and more local outreach will drive a return to income levels of FY14-FY17.
- *Sojourning/Camping Guest Fees:* Stronger marketing and better facilities may increase this revenue line item modestly.
- *NYYM Allotment:* Powell House leadership will successfully press the Yearly Meeting to increment the Powell House allotment annually
- *Other Revenue:* Grant funding not associated with the capital campaign will increase to 6-8 grants annually.

On the expense aside, the plan assumes:

- *Adult Program:* More funds will be directed to attracting excellent facilitators.
- *Capital Campaign Costs:* Funds raised during the capital campaign will cover the campaign's costs.
- *Other Operational Costs:* Powell House leadership will give attention to containing costs in these operational areas.
- *Personnel:* All staff will be paid a living wage and will receive small annual cost-of-living increases. New and expanded competencies required for strategic plan execution will come primarily from modest reallocation of existing human resources and from tapping volunteers and consultants.

Powell House's financial situation is generally stable, with relatively predictable income and expenses and with a buffer of nearly \$1 million in reserve funds. Still, the organization operates on a tight budget with periodic cash-flow challenges. Financial risk is ever present, and we have built our financial plan upon several key assumptions about external factors:

- We assume a slow-growth economy, without major recession and with relatively steady investment earnings.
- We assume continued and even increased demand for the type of services we offer.
- We assume continued broad support for Powell House within New York Yearly Meeting.

To mitigate the risks we face, we will continue to manage our reserves prudently while also closely monitoring our finances and watching external trends and using that information to make timely adjustments to programs and operations.

9. MONITORING PROGRESS AGAINST FY19-FY23 GOALS

This strategic plan will shape and guide Powell House's accomplishments over the coming five years. It provides a clear framework for building on 57 years of cherished service to New York Yearly Meeting and beyond and will tap a gamut of opportunities to provide a deeply spiritual space where more individuals and groups experience the Spirit and develop ways of living into their intentions.

On an annual basis prior to operational planning for each year, Powell House 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 a check on changes in our operating environment, we will make course corrections as required to maintain a relevant and ambitious plan. With this annual review we will continue pursuit of our vision, to be the place of heart-felt welcome where all are empowered to live authentically in the world and to recognize truth and call it forth from one another.