

**WOOLMAN HILL RETREAT CENTER**  
**STRATEGIC PLAN 2018-2021**  
*Approved June 16, 2018*

The Board of Directors is guided by Woolman Hill's Mission and Statement of Purpose:

**Mission Statement** (since the founding of Woolman Hill in 1954)

*To foster, develop and strengthen the testimonies of the Religious Society of Friends by securing and maintaining suitable premises for holding Meetings for Worship, meditation and study, for retreats, conferences, seminars and other religious and educational activities.*

**Statement of Purpose** (approved by Board in 2017)

*Woolman Hill is a Quaker retreat center, open to all, on a beautiful New England ridge-top. We create opportunities for people to connect with the Divine in themselves, in others, and in the natural world.*

*Woolman Hill provides simple, comfortable facilities for individual retreats and group gatherings. We offer programs which nurture spiritual growth and foster the values and practice of peace-making, simplicity, integrity, equality, social responsibility, and stewardship of the earth.*

**The Board's ongoing work of discernment throughout 2016 and 2017 around possible site improvements, together with visioning discussions done at the October 2017 Board Meeting for Strategic Planning, provided clarity around two principles that now guide the spirit of this strategic plan:**

**Sustainability  
and Right Relationship**

Commit to sustainability principles in assessing ongoing operations and new endeavors to ensure that they are in right relationship with our spiritual, financial, environmental and human resources.

Commit to long-range planning to sustain our facilities and programming.

**Accessibility  
and Welcome**

Commit to ensuring Woolman Hill is more easily accessible to those with limited mobility.

Commit to increasing Woolman Hill's financial accessibility and welcome to a wide range of people.

## **STRATEGIC GOALS and ACTION STEPS**

### **Strategic Goal #1: Launch Capital Campaign to Improve Facilities and Financial Accessibility**

Recognizing the essential role that our buildings and grounds play as part of the spiritual container for Woolman Hill, we understand the imperative of lovingly caring for our physical plant through thoughtful planning and choosing to undertake larger improvement projects that align with our vision and organizational priorities.

We also recognize the critical role of our fiscal and human resources in maintaining an environment that is truly welcoming, including our ability to deliver dynamic programming and to make our facility financially accessible to a diverse range of people.

Thus, we commit ourselves to a **capital campaign** that will enable us to increase the number of sleeping accommodations with access to bathrooms for around 10 additional guests, including at least one or more accessible bedrooms and bathrooms; and to enhance our ability to offer facilities and programming that are financially accessible and welcoming to a wide range of people.

To support a capital campaign we will:

1. Train the Board in developing a “community of sharing” and their role in helping the campaign be successful.
2. Develop some options for improvements, write a case for support, and then test donor interest in supporting the campaign by speaking with our top dozen or so supporters and Board members. Based on our learning, we will set realistic fundraising and construction goals.
3. Apply good practices in running a successful capital campaign, using 5 phases of fundraising: planning, leadership, quiet, public, and celebration phases.

### **Strategic Goal #2: Strengthen our Board and Build a Community of Sharing**

The Board of Directors provides the leadership to uphold the mission of Woolman Hill and ensures that the right resources are in place to fulfill that responsibility. After extensive discernment, our clarity to see that Woolman Hill is sustainable and accessible has led us to conclude that we must build additional accessible accommodations with easy access to bathrooms, and that we need to secure adequate finances to responsibly steward our facility and programming.

Recognizing the need for additional resources, we the Board are prepared to learn the skills and develop the abilities required to help raise the funds needed for these capital improvements and long-term organizational stability. We envision that as a Board we will become more “outward” focused, engaging more with the community as we seek support for improvements

at Woolman Hill. The natural outcome will be creation of a “community of sharing,” wherein this Board builds relationships with and inspires a wider community to embody Woolman Hill’s purpose and values through sharing their money, time, and energy. We understand this to be a mutually beneficial and regenerative process for the Board, Woolman Hill, and all of our constituents.

Thus we commit to strengthening our skills and **governance practices**, with a priority given to three key areas:

1. applying best practices for recruiting and supporting new and current Board members,
2. seeking training and support to help us effectively fundraise for the Capital Campaign and understand our ongoing role as fiscal stewards, and
3. ensuring that prudent and required Board-approved non-profit policies are up-to-date and in practice.

### **Strategic Goal #3: Create Projected Business Model and Define Staff Support**

#### **Create a Projected Business Model based on Organizational Priorities:**

We will take the time to articulate who we envision serving and why, and reflect on the mix of people who come here through rentals, retreats, and programming. We will clarify and define (with the Board and staff) the organizational priorities we wish to apply when facing conflicting choices about who uses Woolman Hill, or when considering proposals for new endeavors. After making our best assumptions about the mix of groups using Woolman Hill and sources of income we expect over the next five years, if there are still large areas of uncertainty, we will test these assumptions through market research with sister organizations.

Assuming an increased number of accessible guest accommodations are constructed, and using the assumptions defined above, we will create a five- to ten-year projected business model that demonstrates financial sustainability.

#### **Examine staff support for fundraising and our ongoing work:**

In our eagerness to build additional guest accommodations, we will remain aware of the ongoing needs of guests, volunteers and staff. We must pay attention to how we provide staff support for our additional fundraising efforts so that it does not pull too much focus away from our current commitments and core purpose. Thus, we will examine current staffing levels, and implement a plan for additional support. We will keep in mind the need for increased human resources long-term in order to sustain a healthier and more viable staffing structure for Woolman Hill’s ongoing operations.

Thus we commit ourselves to strengthen our **business planning and human resources** by:

1. Discussing our assumptions and objectives around who we serve and why;
2. Creating a projected business plan based on our assumptions; and
3. Assessing our staff and volunteer needs to support and sustain our strategic plan and ongoing operations.

## VISION STATEMENT

Our vision is to provide a welcoming sanctuary where people come to be restored and inspired, and leave with the strength to act out of love, sowing seeds of peace that lead to a world transformed.

### Conclusion:

We thank the Loving Spirit that blesses Woolman Hill and guides us. We seek to offer the beautiful setting and spiritual grounding of Woolman Hill in order to encourage authentic interaction and to equip people with the strength to act out of love and faith rather than fear. As we embark on this strategic plan, we strive to model and invite others into right relationship with spiritual, financial, environmental and human resources. Wishing to honor those who have come before us, including the Pocumtuck people who first lived on this land, and to respect future generations beyond our sight, **we dedicate ourselves to the continuity of and loving care for Woolman Hill.**

**June 16, 2018: The Board approves this plan and vision statement with the understanding that this should be a living document that we return to from time to time over the next three years to update and adjust to our living experience of the work, while keeping true to our mission, vision, guiding principles of the plan, and goals.**

### Woolman Hill Board members:

David Ahlfeld, Clerk	Tammy Forner
Heidi Babb	Dan Hoskins
Virginia Barker	Avery Johnson
Dave Bittner	Paula Rossvall
Wayne Boulton	Fric Spruyt
Kathryn Cranford	Ben Tousley
Scot Drysdale	Nina Weyl

### Creation of the Strategic Plan was supported by Members of the Strategic Planning Group:

Tammy Forner (SPG Clerk and Board Member)  
Margaret Cooley (Executive Director)  
Paula Rossvall (Board Member)  
Mary Lee Morrison (Former Board Member)  
Julia Riseman (Consultant)

*This work was aided by the contributions of recent former board members who were significantly involved in discernment leading up to strategic planning, including:*

*Patricia Higgins, Greg Melville, Maureen Flannery, Pat Wallace, Mary Link, Suzette Snow-Cobb, Bain Davis, Honor Woodrow, Peter Bishop, Tom Powers, Bruce Kay, Rick Keller and Tom Hoskins.*