CANADIAN YEARLY MEETING: PUBLICATIONS AND COMMUNCIATIONS COMMITTEE.

BACKGROUND MATERIAL SUPPLIED TO APPLICANTS FOR CONTRACT FOR WEB EDITOR: FEBRUARY 2014.

1) Policy for use of Canadian Yearly Meeting (CYM) Web Site

The purpose of the CYM Web site is to make information available to both Quakers and enquirers about the life (spiritual testimonies and traditions, social witness and other activities, structure and operations) of Canadian Yearly Meeting of the Religious Society of Friends (RSoF) In addition to posting information, the Web site also provides links to key individuals and to other relevant sites.

The CYM Web site, www.quaker.ca, is minded by Publications and Communications (P&C) Committee which includes in its mandate being the managing body for CYM's Internet resources. P&C provides direction to and oversight of the Internet Resources Manager, who is responsible for the day to day operation of all of CYM's Internet resources, including the web site, the domain name(s), email accounts and electronic discussion lists. P&C also provides direction to and oversight of the Web Editor.

P&C has responsibility for approval of all Web site content. P&C has approved the following policy regarding Web site content, and therefore may choose to refuse the posting of material which is not in keeping with this policy.

Web Content Policy

Material submitted should be in keeping with Friends' beliefs and practices.
Material should be in keeping with the purpose of the Web site.
Material serving the personal or business interests of Friends will not be accepted at the present time.

Privacy Policy

CYM is committed to protecting the privacy of all who use the CYM Web Site .CYM prohibits the use of names , addresses, email addresses , phone numbers and fax numbers for soliciting , canvassing, or bulk mailing or other commercial purposes .

All original material, Records and Archives and minutes of The RSoF in Canada are the Property of CYM and may not be reproduced in whole or in part without the written permission of CYM . *Monthly Meetings also own their own records and archives. We will obtain permission and acknowledge content from all sources. We will take immediate steps to remedy any unacknowledged material brought to our attention.*

Personal Information

Information that passes over the internet can not be guaranteed to be maintained secure, confidential or private. Users should keep this in mind when engaging in on line Response Forms, e-mail discussion lists, Web-based Discussion Forums, Registration Forms and similar. In some cases we do require certain information to process registrations / bookings etc. This may include your name, contact information (address, telephone number, and/or email address).
We never disclose information about a guest / user to any other person or organization unless there is an emergency situation that requires it, or we are legally required to do so.

Site Tracking

We use tracking software to monitor traffic patterns and site usage to help us develop content and layout of the site to better meet the needs of users or guests. This information is not shared with any other organization or individual. We do not partner with or have relationships with any ad server companies.
We collect only the referring Internet address (URL) of visitors to our Web pages, and aggregated information on the number of times individual pages are accessed. This data is not associated with any particular user.

Our site tracking software may place electronic images known as Web beacons - sometimes called single-pixel gifs - that allow us to count users who have visited those pages. Web beacons are not used to access Personal Information; they are a technique used to compile aggregated statistics about site usage.

Cookies

We may use cookies to store visitor information to enable us to remember your IP address, for example, so that you won't have to re-enter it each time you make a booking. A cookie is a small text file, which often includes an anonymous unique identifier, that is sent to the user's web browser from a web site's computers and is stored on the user's computer's hard drive. Cookies cannot be used to run programs or deliver viruses to a user's computer.

Security

We use 128-bit industry-standard SSL encryption technology when transferring and receiving information exchanged with our site on pages accessed via the https:// protocol (indicated by the familiar "padlock" symbol on the user's browser. Any pages not showing this symbol do not use secure technologies. We have appropriate security measures in place in our physical facilities to protect against the loss, misuse or alteration of information that we have collected from *the user* at our site.

Links To Other Sites And Advertisements

Our web site contains links to other websites. While we try to link only to sites and services that share our values, standards and respect for privacy, users should understand that we not responsible for the content of, or the privacy practices employed by, other companies or websites.

(First compiled: Mel Earley and Bruce Dienes, April, 2006. Revised: P&C Committee, July 2013.)

2) **PUBLICATIONS AND COMMUNICATIONS COMMITTEE**
   POLICY FOR WEB ACCESS

❷ Full Access to site is limited to: Web 'Editor' (per contract for Maintenance and Updating 2013/4), Internet Resources Manager, Clerk of P&C*

❷ Secondary Access: Quaker Education Program Coordinator, Youth Secretary, Approved part-time Web Editor(s); Others as occasionally designated by P&C.

❷ Access for Blogging, News, Events: Office Administrator; Youth Secretary, Quaker Education Program coordinator (OR Member of Education and Outreach Committee), Others as designated by P&C.

❷ The Clerk of P&C (or designate) will have the final say on material to be uploaded –other than minor updates as described below—and will consult with Clerks of CYM, Trustees, and others as needed.

❷ Minor updates for Find a Meeting, Friends Serving CYM, Minutes, Address Changes, and similar items will be compiled and forwarded weekly (by Clerk or designate) for turnaround time of 2-3 business days.

❷ Other content will be forwarded (by Clerk or designate) as approved, with turnaround time of 3-5 business days following consultation with Web Editor as to how the material fits the site design.

❷ Occasionally material may have to go on in a faster time-line; this requirement should be minimized.

❷ Original content, including art and graphics but other than blogs, submitted for the website will be considered by an Editorial Committee consisting of a member of P&C, a member of the Quaker Learning Series Board, and the Quaker Education Program Coordinator OR a member of Education and Outreach Committee;

❷ Blogs will be moderated separately as arranged from time to time.

❷ Photographic material can be uploaded to the location indicated within the BUSINESS site; photographer must indicate that permission to post on the website has been received from those shown in photograph. For material showing minors under 18: signed permission of parent or guardian must be submitted. No guarantee is made that any or all photos will be used..

❷ See also Website Usage Policy under RESOURCES: POLICIES, updated by P&C July 2013. (*For systems control purposes on behalf of the YM: acknowledging that the Clerk may not have the set of skills for changes to a complex Wordpress multi-site, and will not be making such changes,).

APPROVED JULY 14, 2013.

3)   A DRAFT COMMUNICATIONS PLAN FOR CANADIAN YEARLY MEETING.

PRESENTED TO REPRESENTATIVE MEETING, APRIL 26-27, 2013.

(NOTE: CONSIDERED AT YEARLY MEETING 2013, ADOPTED AS A WORKING DOCUMENT ONLY)

INTRODUCTION:
Sections 1 to 4 below contain Publication and Communication (P&C) Committee's work to date on a Communications Plan for CYM. No decision is expected from Representative Meeting. Circulation to

Committees and Monthly Meetings for discussion is requested, and we hope it will be on the agenda for Yearly Meeting.   In the Conclusion, we consider reasons and ways to forward this work.

SECTION 1: P&C'S PAST WORK AND MANDATE:

In 2008, P&C was separated from Home Mission and Advancement Committee, as part of the Consultation and Renewal process. There was awareness that Canadian Quakers were not communicating or educating effectively enough, inside or outside, the Yearly Meeting, and the same impulse may well have led to creation of the Education Co-ordinator and Youth Secretary positions.

At Reporting and Clearness 2011, P&C considered its twin mandate:
(1) to review how Canadian Friends currently communicate with each other in order to envision how they might communicate with each other in a future of changing technologies and environmental responsibilities;
(2) to ensure that the many detailed responsibilities of publishing *The Canadian Friend* (CF), the Canadian Quaker Pamphlet Series (CQPS), other pamphlets, overseeing the CYM presence on the internet, reviewing reports from Quaker Book Service (QBS) and representing the committee on various other CYM committees (e.g. Finance and Personnel Policy) are carefully managed to provide orderly transitions and continuity in communications and publications.

The second mandate, as well as rebuilding a small committee (6), and undertaking critical work to redevelop the quaker.ca website (ongoing), has consumed our energies to a major degree for the last two years.

Only in late 2012, as a whole committee instead of an Internet Policy Sub-Committee, were we able to return to work requested by Representative Meeting:
*11-4-21 Publications and Communications Committee Report. Bruce Dienes reported. He noted that CYM needs an overall strategy for how we communicate and how we use different communications resources, including electronic, print and other media. We also need to determine what core skills Friends need in order to use these different resources. The P&C Committee is planning to consult widely and would like to have input from any and all Friends. The committee will be devising a list of concerns and possible solutions and asking for the input of CYM on which should have priority in the development of a strategy. They plan to develop a collaborative web site to facilitate this communication. There has been a lot of confusion and misunderstanding about our CYM web site. There has to date been no plan about content or design of our web presence. P&C Committee is clear that it is not responsible for content, but only for how we communicate. Ben Segal-Brown, Michael Kaufman-Lacusta and Bruce Dienes are the Internet Policy Sub-Committee. They are looking for others to consult with the sub-committee. It was suggested that CYM do an extensive consultation with everyone in CYM about the development of Internet Policy, so that we are very clear about our requirements before any significant changes are made. **We remind ourselves and P&C Committee that we need to examine all aspects of electronic communication rather than simply our web site. We remind ourselves that we need to be clear about our goals and strategies before developing the communications strategy. We also need to be mindful that electronic technology is changing so fast that something like a 5-year plan can be obsolete before it is fully implemented, so our plan needs to**

be very resilient and capable of quick adaptation. We suggest that there should be clear time-lines on an implementation plan for development of a strategy. It is suggested that we pay careful attention to accessibility issues and to varying needs of different generations of Friends.

P&C brought the work to the current position at a meeting earlier this month (April 2013).

SECTION 2: P& C PROCESS AND FINDINGS, TO DATE, ON THIS REQUEST.

Strategic Planning for communications requires that three things be known.

- we need to know **what** we want to communicate.

- we need to know **how** we want to communicate.

- we need to be aware of existing and needed policies and procedures that inform and constrain these efforts.

In the frequent cases where part of this knowledge is missing, guidance is needed from the Yearly Meeting.[1]

P&C recognises that we cannot wait for all knowledge and opinions to be settled before moving forward. In fact, it is often by going ahead and trying new things that needed questions emerge. This is an ongoing process.

Publications and Communications Committee (P&C) has been asked to take the lead in this work but cannot by itself develop a comprehensive communications strategy for the whole Yearly Meeting. This will involve extensive communication and consultation across CYM committees, Monthly Meetings, and regional bodies. [2]

Typically a strategic plan has four elements. Each constrains, but yet makes possible, the next.

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[1] For example, in the case of outreach to the general public we know that we want to use our website as one form of communication but we do not have sufficient direction to know *what* to communicate that will express the range of belief and concerns within our Yearly Meeting in a manner that reaches all Friends and enquirers in an acceptable way.

      In contrast, we know *what* we want to communicate in our committee work and other ongoing business but there is not yet have clarity in *how* to use new media to facilitate this work.

      As we have worked on the communication plan over the last year we have found many instances where there is a lack of clear policy to guide us. For example:

      There is an expressed desire for our website to be more interactive and participatory but we do not have policy as to who can participate, who moderates the participation and with what guidelines, and how disputes are resolved.

      Do we value consistency of style and content across our communications or de we value autonomy of individual contributors and flexibility, and how to balance both?

[2] (Currently we are focussing only on communication where CYM entities are the hub, and not looking at Monthly Meetings' communications internally or with other MM's.)

- Vision statement: describes the reason for the organisation's existence.

- Mission statement: describes what the purpose of the organisation is.

- Clear goals identified to support this mission.

- Action plans for each goal which describe how each goal will be met.

As far as we are aware CYM does not have a formal vision statement so we took the liberty of worshipfully discerning one:

"A community grounded in loving kindness seeking the Divine."

Our mission statement for the communications plan is simply:

"To support this community by fostering communication and publications."

In order to frame our process of developing goals, we used a condensed version of *Appreciative Inquiry* to discover our strengths and assets; to brainstorm what could be possible with them; to suggest what will be done; and to think about how to deliver that. This is the process that Friends General Conference used in its recent consultation with its constituent Yearly Meetings and is more effective than traditional Needs Assessments.

It is more productive to look at CYM's various target audiences as the focus for strategies, rather than building a plan around media whether current or future. The Education Program Coordinator helped us find clarity on who these audiences are.

P&C sees five broad areas, each with its own type of audience, and thus a need to tailor approaches:

1. **Outreach to Public: Marketing and Promotion**

2. **Facilitating our Quaker Process**

3. **Education: Internal, and Public**

4. **Networking & Collaboration with Other Bodies (Quaker & Other).**

5. **Communication Between and Among MM's and Individual Friends across our Canadian Quaker community**. *(Note: see previous footnote: this is clearly not within our mandate, yet can hardly be left out of the picture.)*

SECTION 3: BRAINSTORMING AND SUGGESTING : A PROCESS OVER 15 MONTHS.

DISCOVERING WHAT ASSETS/STRENGTHS WE HAVE NOW:

- The Canadian Friend: established & with 100 + years of experience
- Internet: quaker.ca: Web Site, Discussion boards, Blogs, E-lists
- Learning series & pamphlets
- Experienced Staff
- Volunteers with specialized knowledge

- Monthly Meetings willing to take on tasks (e.g. Pamphlet Series)
- A mass of less involved Quakers: critical mass to draw on?
- Ability to draw on resources and experience of other Quaker bodies
- Our Quaker reputation for honesty, fair dealing and effectiveness.
- Significant investments
- Youth development & their knowledge and innovation
- A tradition of listening
- Discernment and communication processes
- Regular meetings on many levels.

DREAMING WHAT COULD BE?

- Less travel, less carbon footprint, less costs
- Better solutions to differences and issues among Quakers.
- More attenders at Quaker meetings
- More involvement of Friends 18-35
- Friends happy to volunteer & be more effective in their work
- Central place to track CYM business: responsible…responsive…knowledgeable.
- Enabling good public/internal knowledge of Quakers in Canada
- Ways of learning Quaker process
- Deepening spiritual connections and friendships.
- Interaction & collaboration between Meetings

DESIGNING: WHAT WILL WE DO AS WE PROCEED?
- Generate a new pool of volunteers (younger or not so overworked)
- New ways to work that inspire volunteers
- Clarify what can/needs to be done by staff and put staff in place
- Training programs in technology, staff relations (HR), Quaker process adapted to available technology
- Process for ongoing evaluation and updating to see what works & what doesn't
- Willingness to change.
- Open to individual needs of MM's
- Identify possible projects, etc, and assist them to achieve their communication goals.
- Need for comprehensive resource to coordinate across CYM including MM's
- Integrate communication platforms, e.g. CF (print, web, interactive)
- Focus on how we make life easier and more impactful for committees.
- Be able to show results from actions.
- Knowledge from successful actions shared.
- Mentoring and transfer of knowledge to willing recipients
- Need to look deeply at the full implications of being a Quaker as part of the membership process.

DELIVERING / INNOVATING: WHAT WILL BE AS WE MOVE FORWARD IN THE PROCESS:

➢ A COMPREHENSIVE CONSULTATION ACROSS THE YM (BASED ON THE RECENT SUCCESSFUL CONSULTATION AND RENEWAL PROCESS) TO DEVELOP SPECIFIC ACTION PLANS (See suggested plans below for a start.)

➢ FORMULATE SPECIFIC PLANS TO ADDRESS THE FIVE AREAS OF FOCUS:
1) *OUTREACH*
2) *QUAKER PROCESS*
3) *EDUCATION*
4) *NETWORKING*
5) *SUPPORTING QUAKER COMMUNITY*

(WITH THE AWARENESS THAT SUCH PLANS WILL CAUSE SHIFTS THAT REQUIRE NEW POLICIES AND POSSIBLY UNCOMFORTABLE CHANGE.)

➢ LEARN FROM BRITAIN YM, FGC, AND OTHER QUAKER COMMUNICATION INNOVATORS. ADAPT THEIR IDEAS TO MAKE THEM SUCCESSFUL IN THE CANADIAN CONTEXT.

SECTION 4: STRATEGIC COMMUNICATION GOALS AND SUGGESTED ACTIONS EMERGING FROM THE VISION AND MISSION OF CYM.

OUTREACH

Goal O-1 Represent Quaker Values Thru Media
Create a representation of CYM that is accurate, attractive/inviting and recognizable

➢ Action 1: Publish *The Canadian Friend* in a timely fashion with excellent material
➢ Action 2: Issue Press Releases on Issues (with Clerks)
➢ Action 3: Broaden Scope of Quaker Learning Series (with QEPC)
➢ Action 4: Build content from multiple perspectives on the web site and enable interactive dialogue on the issues.

Goal O-2: Reach out to Others and Answer that of God in Seekers

➢ Action 1: Produce and distribute Outreach material (with E&O and others)
➢ Action 2: Locate Outreach material from outside sources.
➢ Action 3: Announce and promote Quaker events.

1. *QUAKER PROCESS*

Goal B-1 Build and Sustain our Committees and Yearly Meeting

➢ Action 1   Post and maintain website material: e.g. Minutes, discussions, descriptions of committees' mandates and on-going projects.
➢ Action 2   Promote CYM events widely; e.g. annual sessions, special events (with Program Ctte and others)

Goal B-2: Support Community Action by Facilitating Decision-Making Processes

➢ Action 1: Set up and evaluate trial on-line decision-making
➢ Action 2: Hold regular educational/training processes for members and attenders (with QEPC, Program Ctte)

Goal B-3:   Celebrate the Joys and Challenges of Quaker Practice

➢ Action 1:   Create and/or disseminate existing materials that inform Friends of Quaker business practice (including clerking, recording, decision-making, record-keeping, etc.) and encourage on-line discussion of these.

➢ Action 2.   Encourage on-line discussion and local workshops on Quaker Spiritual Practices (Patricia Loring's books would be a good inspiration). Encourage publication of output of these meetings.

➢ Action 3.   Develop and/or disseminate existing strategies and/or training programs for skills related to leading and participating in virtual business meetings and virtual meetings for worship.

EDUCATION

Goal E-1: Create and Offer Internal Resources

➢ Action 1: Offer annual lecture (SPG) with Program Ctte. And make transcript, audio and video widely available. Same with CYM Quaker Study.

➢ Action 2: Post resources in most appropriate locations/media

➢ Action 3: Track other sources of appropriate resources (with E&O & QEPC)

➢ Action 4: Make core documents easily accessible: Faith and Practice, Organization and Procedure, CYM Minutes, etc.

➢ Coordinate with Goal B-3

Goal E-2:   Reflect the Breadth of Historical and Current Quaker Resources

➢   Action 1:   Maintain records of own publications and websites

➢   Action 2:   Work with Records to build archival requirements for CYM

Goal E-3: Evaluate Work in Light of Vision, Mission Statement and CYM Changing Priorities

Action E-1:   Revisit after three years, and after that, at least 5 year periods.

NETWORKING

Goal N-1: Establish contacts with other Yearly Meetings and Organizations to Collaborate on Developing Content and Evaluating New Media Platforms

➢   Action 1:   Seek permission from Britain YM and FGC to use some of their materials to seed content on the quaker.ca web site

➢   Action 2:   Share and evaluate appropriateness of applying aspects of communications strategies from other bodies to CYM's needs.

SUPPORTING QUAKER COMMUNITY

Goal C-1 Build and Sustain our Communities

➢ Action 1: Provide on-line, print, and face-to-face opportunities for sharing our individual and corporate journeys.

➢ Action 2: Determine in detail what technology is currently available, practical and affordable, what the training needs are, and what the costs in dollars and volunteer or staff time are.

Goal C-2: Truthfully Represent Controversies within Quaker Community

1. Action 1: Open The Canadian Friend and other media to multiple viewpoints expressed appropriately
2. Action 2: Promote Use of Conflict Management Materials (with QEPC)

Goal C-3:   Evaluate Media and Technology, and Introduce for Appropriate Use

➢ Action 1: Develop and promulgate email guidelines
➢ Action 2: Develop and promulgate Twitter guidelines
➢ Action 3: Develop and promulgate Blog/Facebook guidelines
➢ Action 4: Develop use of decision-making software as appropriate.
➢ Action 5. Provide ways for all Friends to interact and learn from one another, even if geographically isolated or in small Meetings.
➢ Action 6: Encourage Friends to create multiple informal spaces for social media interaction that are not under the care of CYM

Goal C-4:   Listen to and Involve Quaker Youth

➢ Action 1: Dialogue with CYFYM re social media guidelines
➢ Action 2: Collaborate with CYFYM re appropriate choices and techniques for virtual community (Facebook, Buddybook, Diaspora, WordPress, Twitter, etc.)
➢ Action 3: Consult with CYFYM about their use of online technology as a platform for meeting, including effectiveness; seek their advice about introducing online technology as a meeting platform for CYM

CONCLUSION:

The lists above were part-generated from one threshing session and elaborated within a very small group and cannot be representative of the creative thinking or the desired actions of the whole Yearly Meeting.

We can further the process at a SIG at CYM 2013, but --as stated before-- we recognise this needs to be part of an ongoing and repeated process. It is a dialogue that will lead the YM to clarity and practical actions as to what, how and why it communicates, internally and externally.

Over the course of the last two years, P&C has had occasion to interact with these committees on an ongoing basis, and expects them all to be important in this process:

Trustees   (Privacy Requirements for the redeveloped website)
CFSC   (Advice on website matters)
CYFYM   (Information on website & assistance with on-line registration)
Finance   (Budgets and special projects)
Contributions   (Premium offering in annual fund-raising letter)

Records   (Guidelines for Archiving)
Discipline Review   (Material for Website)
Nominations   (Need for members for committee)
Education & Outreach (was HMAC) (Financing & common projects)
Personnel Policy   (Many staff matters)
Program   (On-line registration, Bible study on-line, SPG lecture)
Faith & Practice (laid down)   (Digital permissions)
Consultation/Renewal (laid down)   (Website material, consultation).

In addition, we have worked not just with our own staff (Editor *Canadian Friend*, Webminder, Conversion Web Editor) but also the Office Administrator, Bookkeeper, Quaker Education Program Coordinator, and Youth Secretary as well as several Half-yearly and Monthly Meetings.

This has given us the gift of an unparalleled opportunity to work across our national religious body.[3] We have gained several insights that will likely make the communications strategic planning process a priority but harder to carry out.

1) Governments are demanding more of organizations such as Quakers, with additional rules and reduced funding.
2) CYM's most experienced volunteers, from 65 up, are experiencing health and family changes that often make committee work challenging; some need or want to retire.
3) There is a demographic shortage aged 40's and 50's, and YAF's are often unable to take over, for reasons of family formation, income and experience.
4) CYM's financial resources are under strain.
5) In these points, we are similar to other religious and non-profit organizations but perhaps particularly vulnerable because of our small and spread-out numbers. Like many small 'businesses', we are now running hard to stay in place and seem to lack time and energy to train recruits.
6) Exterior growth cannot be depended upon, so it is even more important than before to develop those already inside.

P&C therefore finds it difficult to recommend how to move this planning process forward. Our committee, which is losing 3 members in 2013-14 for health and personal reasons, is unable to take it on in full, or to manage a full consultation while maintaining our direct business (The CF, website, etc.).

There are current matters of personnel, governance and finance needing the attention of Representative Meeting and Yearly Meeting. Do we as a YM have time, energy and money specifically for a communications planning process? Considering our challenges, do we have time not to?

We as Canadian Quakers do not have functional agreement on
• how to present ourselves in electronic media,
• how to use them to do our business in a Quakerly fashion across our broad land,
• how to engage younger persons with Quaker ties, and

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[3] We've also had help from Britain Yearly Meeting, Ireland YM, Australia YM, and other Quaker bodies)

- how to present ourselves to the parts of the public that might be interested in what we have to offer.

So long as that is the case, it's hard to build a communications strategy and move on.

Do we as a YM continue along the path that Consultation and Renewal seems to have started? How will we manage planning and carrying out consultation, and writing up the results? Is it possible that CYM needs to consider the limits of what it can do with volunteers and part-time staff at this time? Should we look for help from consultants skilled in working with our type of organization? Or might CYM consider a new consolidated management position?[4]

P&C understands that this work has been given to us and has striven hard to come to this point where we can too clearly see challenges in moving forward. We will present the redeveloped website at CYM and believe the YM will be pleased with it, but will also see –as we have—the need for content of all types, and ongoing editorship. We will continue with some aspects of the planning process, including some matters that are quite urgent and include email guidelines, education in use of the new website, and will work to assist basic on-line decision-making processes.

We are open to receiving Light on the next steps and feedback from Quakers is encouraged.

Respectfully submitted,
Carol Bradley (Clerk), Chris Barfitt (YAF), Mary Conchelos (CLSB), Chris Hitchcock, Michael Kaufman-Lacusta, Michael Phillips, Adam Newlands, Mark Stanley, Bruce Dienes (Webminder), Sherryll Harris (CF Editor).   April 22, 2013.

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[4] To not only assist Trustees and standing committees but also direct marketing/outreach/education and communication functions, and manage human resources? We have excellent Office Administration and an experienced Treasurer so revival of the General Secretary position is not apparently needed at this time.