



## **BHFH Application to Friends Foundation for the Aging - Executive Summary**

Beacon Hill Friends House (BHFH) is applying for \$40,000 of grant funding for a two-part project: \$28,000 for a Vocational Discernment Program for Older Adults, and \$12,000 for a Digital Pastoral Care resource program.

Older adults need spaces to discern how they are called to act in the world as they enter new seasons of their lives. Beacon Hill Friends House plans to expand our vocational discernment workshop curriculum and companion workbook to specifically support aging adults. We plan to fully update our materials, then pilot age-specific workshops across multiple geographies and branches of the Society of Friends, to ultimately create a new resource that BHFH and others can continually use in supporting aging adults as they hold questions about their calling.

Additionally, one of the significant barriers we have seen continually with older participants across all our programs is how introducing new technologies can limit some older adults from participating fully in programming. We propose creating a Digital Pastoral Care program consisting of a yearlong set of events to help us develop and test shareable resources for Meetings and other organizations to provide pastoral care around technology and spirituality to help older adults engage more fully in community.

### **Project Details**

#### **Expanding the *Living Your Call: Vocational Discernment Program* for older adults**

In 2020, we (Jen Newman, Program Director at Beacon Hill Friends House, and Greg Woods, a Quaker minister) discerned that there was an unmet need in the Quaker world concerning vocational discernment. This concern led us to create the *Living Your Call: Vocational Discernment Program*. As a new initiative of the Beacon Hill Friends House, with additional financial support from the Forum for Theological Exploration and the Lyman Fund, Jen and Greg developed and refined a four-hour workshop, which holds space for considering the meaning of vocation, with time for personal reflection, small group reflection, and an abbreviated, structured clearness committee process for every participant. The workshops engage Quaker principles such as Inward Teacher and testing a leading, and Quaker practices like clearness committees, to help participants discern what they are led to do with their lives. With the help of Quaker artist Joey Hartmann-Dow, we created a 40+ page companion workbook we use in the workshop but is also available for personal use.

The workshop curriculum takes a holistic view of vocation — which may or may not align with a job or career. As theologian Frederick Buechner said, your calling is about “where your deep gladness and the world’s deep hunger meet.” We shape our understanding of calling as a lifelong process, where vocation may take different forms given the containers it fills (such as a job, career, or service) or change entirely in different seasons of life. We set up the vocational journey as one of asking questions and engaging in continued discernment that benefits from community support. We use Quaker principles and practices in language accessible to both Quaker and non-Quaker audiences to help participants leave with discernment tools for their lifelong process.

Since 2020, we have led 16 workshops for more than 150 participants at Beacon Hill Friends House and across the country, including Earlham College, Guilford College, Lewis and Clark College, George Fox University, Haverford College, West Hills Friends Church (Portland, OR), First Friends Meeting (Greensboro, NC), Quaker Experiential Service & Training (QuEST), Friends Camp, and Lyndale United Church of Christ

(Minneapolis, MN). In addition, we have led presentations about our program to the Friends Association of Higher Education and the Quaker Religious Education Collaborative.

Over the past three years, we have learned a lot — and one of the major lessons most surprising to us has been the eagerness of many older adults for this sort of content. At one of our first workshops, we had a recently retired Quaker join us out of curiosity about how she might bring this program to support college students near her Quaker Meeting. After the program, she shared, “I wasn’t expecting to be impacted and have my path illuminated, but I feel I made some discernment progress!”

At a workshop this fall, we had several older adults attend. Our registration forms ask: “What are you hoping to get out of the retreat?” Here are responses from two of the older adults who attended:

- *Recently retired at a relatively young age, I’d like to discern my next steps to leading a meaningful life of service to others.*
- *I am hoping to get a sense of how to discern ... how I can serve in the senior years of my life. I will be 75 in November and keep feeling drawn to do something, serve in some way, but realistically what might that path be?*

These desires echo our experience interacting with older adults in our Meetings and elsewhere. In an article on the National Career Development Association’s website, Nick Gowen writes: “Finding meaning in life can often hinge in part on the benefits that work provides, such as feeling useful and exercising one’s skills and talents. Retired older adults, then, must find new ways to conceptualize and achieve these benefits of work in retirement.”<sup>1</sup> The BHFH vocational discernment program aims to help people with exactly these things: How to feel useful in the world through using one’s skills, gifts, and leadings.

With support from FFA through this grant, we propose to update the curriculum workbook with a clear aging perspective. In leading this work, Greg Woods will: (1) Solicit written personal perspectives about aging and vocation from past workshop participants and others to include as quotes throughout the workbook to add depth to the insights presented (2) Add queries related to aging and vocation to existing activities we offer in the workbook (3) Add language and activities that directly draw on people’s past experiences/careers to help participants discern what they want to do with the next phase of life — more deeply honoring the existing vocational and life experiences each participant is bringing to the workshop.

After this work, pilot workshops with this expanded curriculum will be held at Beacon Hill Friends House and in different areas of the country with concentrations of older Friends and Friends Retirement Communities. We will also offer hybrid and virtual workshop options to reach people in other areas.

We have successfully presented the workshops in various formats: in-person, virtual, and hybrid. We will continue offering multi-format programs to accommodate different preferences and ease in accessing virtual technology. An added benefit to presenting workshops across different geographies will be engaging participants across different branches of the Society of Friends.

The workshops will be led by Greg Woods and Jen Newman, with support from Beacon Hill Friends House staff if needed (and at no cost to participants). Greg has a background as a lifelong Friend. Through years of working in ministry with Friends organizations, including the former William Penn House (now Friends Place), Pendle Hill, Guilford College, and the Friends Meeting at Cambridge, he is a skilled facilitator. He has led workshops and presented plenaries for Friends schools, Friends colleges, and monthly, quarterly, and yearly Meetings. He has a passion for helping people connect with their vocations. Jen is a dynamic and experienced

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<sup>1</sup> Gowen, Nick. “Vocational Wellness in Older Adulthood: Research and Practice.” National Career Development Association. Last modified August 1, 2018.

[https://www.ncda.org/aws/NCDA/pt/sd/news\\_article/180133/\\_PARENT/CC\\_layout\\_details/false](https://www.ncda.org/aws/NCDA/pt/sd/news_article/180133/_PARENT/CC_layout_details/false)

facilitator, program designer, and sought-after leader and consultant in the Quaker world about effective hybrid worship and event facilitation. A member of Beacon Hill Friends Meeting (NEYM) and a graduate of Vanderbilt Divinity School, in her three years as Beacon Hill Friends House's Program Director, she has presented or organized more than 200 events for thousands of participants.

We will prioritize collecting detailed participant feedback during and immediately following each workshop and will use the results to improve the workshop curriculum and workbook further. In addition to seeking this FFA grant, Beacon Hill Friends House plans to seek funding from the Obadiah Brown Benevolent Fund for printing additional workbooks and paying honoraria to people writing personal perspectives for the workbook. We are also in conversation with the Quaker Religious Education Collaborative about exploring funding together to further develop this program for parents and to develop related multi-generational weekend retreats.

### **Digital Pastoral Care Program**

As a Quaker center for community, one of the significant barriers to participation we have noticed across the hundreds of events we've organized is how introducing new technologies without conscientious support can limit some participants — most often older adults — from participating fully. BHFH has been on the leading edge of Quaker hybrid programming that connects people across distance (and even across language!) to connect around spiritual deepening and collective action. Over the last three years, we have hosted hundreds of interactive online and hybrid programs that have engaged and connected more than 1,500 participants.

Part of our success with hybrid and online programming has been our ability and willingness to experiment with online platforms and tools. However, we also know from experience that as we explore these new ways of connecting online, we need to bring our audience along — not just the “digital natives.” For nearly every program we have run, Jen or another staff member has provided direct technical support to at least one participant. Sometimes, this support looks like helping a participant in their 60s learn (and overcome apprehension about using) an online learning platform for the first time. Other times, this looks like supporting a frustrated participant in her late 70s in taking her iPad out of High-Contrast Mode — which she enabled with an accidental click. Still other times, it's explaining the concept of breakout rooms on the phone to a participant in her 90s who left because she was scared of what might happen next or supporting a program facilitator in his 70s with how to toggle his screen after a software update changed the Zoom user interface.

We have heard many older adults express frustration at finding technical support that is friendly, accessible, personalized, and neither overly technical nor ambiguously condescending (e.g., offered for “dummies”). Furthermore, we notice that the support people need is not just technical (e.g., “this is where the closed captioning button is in Zoom”) but also pastoral in nature — accompanying someone through the ways that new or changing technology can feel disconnecting and scary. (Imagine if you tried to come to your Meeting House and the front door was no longer in the same place!)

The alienation that older adults experience with digital technology is not solely about using apps or software; it is also about feeling displaced and disconnected in settings that revolve around tools and frameworks that are foreign to a person's existing life experience. The tension we've heard in many Meetings around discussions of whether or how Meeting for Worship should continue in hybrid form is an example of this: a technical question that is really about deeper questions of belonging and identity.

Dr. Welling Hall, currently serving as a Quaker Fellow with Beacon Hill Friends House, has supported much of our programming this year, providing real-time pastoral care to participants as they use online meeting technology — informed by her experience writing about the digital revolution and teaching digital literacy skills to college students and older adults since the early 1990s. Welling and Jen have been working together this year to strengthen our practices for supporting “digital literacy” among our event participants and, in turn, older adults' ability to participate in spiritual community. We believe that what is needed, beyond BHFH's

programming, is an expanded approach to strengthening digital literacy in aging adults that goes beyond understanding any particular feature to engage the root issue of comfort in adapting to technological and societal change and considers the spiritual and community components of this work. We also believe that pathways for peer support can be a critical element of this work, creating community around shared experience, learning, and spiritual development.

Our proposal is to pilot and test effective models for peer support and spiritual accompaniment (i.e., pastoral care) for aging adults around the use of digital tools and adapting to technological (and other!) changes. Led by Welling Hall, this work will involve facilitating free weekly meeting spaces (some drop-in, some cohort-based) for Friends over the age of 65. The meetings will include time for relationship-building among participants, addressing specific questions or issues that participants bring, instruction on a technological tip or trick of the week, and worship sharing or other structured time for reflection. As we have done for many of our past programs, we will collect written feedback from participants (including midway through any multi-session cohort programs) to help us revise our approach and adjust the model to be most effective. In particular, we will assess changes in participant comfort in embracing and exploring new technologies, the effectiveness of each part of our program content, and how incorporating peer-support elements of the program is useful in helping participants build skills to navigate issues around technology and adapting to technological change.

Based on what we learn in these weekly groups, and our continued experience with our ongoing other programming, we will also create a lasting resource guide to help others replicate the practice of Digital Pastoral Care in other settings. Audiences we imagine for this resource spans groups such as Meeting leaders, the FFA-funded NEYM ARCH program, and anyone helping Friends or others grow their comfort and ease in using digital technology to connect with others in their Meetings and beyond. Finally, we will compile the recorded instructional content from our weekly sessions into a resource library to accompany the resource guide. Combined, these project outcomes will provide technical support tuned to the needs of older adults that honors their humanity and supports the community and spiritual dimensions of using new technology.

### **About Beacon Hill Friends House**

Beacon Hill Friends House is an intergenerational and diverse intentional community organized around Quaker practices and principles, established in 1957. Our mission is: "To embody the Quaker principles of faith, simplicity, integrity, community and social responsibility in order to nurture and call forth the Light in all of us."

Our frequent online and hybrid public programs cultivate community, nurture spiritual deepening, and empower collective action. We frequently partner on programming with many Quaker organizations (Pendle Hill, New England Yearly Meeting, Quaker Voluntary Service, American Friends Service Committee, Friends Committee on National Legislation). We have a proven track record of running successful grant-funded programs and sustaining our programming over time through a combination of grant funding, program fees, and general fundraising. We are currently stewarding six-figure grants from the Shoemaker Fund and the City of Boston Community Preservation Commission. We have successfully completed projects funded by the Forum for Theological Exploration, Obadiah Brown's Benevolent Fund, the NEYM Legacy Fund, and more.

### **BHFH Alignment with FFA Values**

As an organization dedicated to supporting community, intentionality, and Quaker values, Beacon Hill Friends House is committed to ongoing attention to issues of diversity, equity, inclusion, and belonging across our areas of work. This manifests in many ways, including how we interview prospective residents, the use of sliding scales and financial aid to improve financial accessibility across our program areas, our choice of facilitators, and the professional development opportunities we provide for staff and community members.

We are excited about the strength of the alignment we see between FFA's articulated values and both parts of the project we present in this application. Both of our proposed programs are designed to **support**

**populations that are diverse** across many dimensions, including diverse geographies and cultural contexts within and outside the Society of Friends. With regard to the **potential to create change**: Both parts of this application's work are grounded in an optimistic view of older adulthood, rooted in the deep belief in the potential, viability, and possibility inherent in older adults no matter their age: to discern, to carry a vocation, to be of service and impact, and to understand and to be capable users of new technologies. We are excited about the potential of our projects to **leverage other resources**, both our own prior work that these initiatives build upon, and our existing connections to other Quaker organizations with which we see many opportunities for **collaboration** (including NEYM's new ARCH program established with funding from FFA). Both projects in this application center the **engagement of participants** — as inherently interactive programs, and through our planned mechanisms for collecting feedback on participant experiences and using that feedback to iterate and improve our programming. These projects also **integrate service** to multiple facets of participants' lives, including aspects of their physical, emotional, spiritual, intellectual, and social needs. Finally, we will eagerly seek any opportunities for **continued engagement with FFA** to help distribute and raise further awareness and engagement of both Quakerism-grounded resources for older adults (for vocational discernment and digital pastoral care) that we propose to develop under this grant. FFA's position as a nexus of information and support of older-adult concerns and the Society of Friends makes it a perfect partner to put these resources in front of more people whose lives may be improved by them. Likewise, input from FFA's expertise during the development of these resources will also be further supportive of our shared goals.

Program Budget - Expenses		
Vocational Discernment Program		
Item	Amount	Description
Greg Woods	\$19,200	Stipend for curriculum and workbook re-development, outreach to Meetings, workshop planning and facilitation
Printed Materials	\$1,000	Estimated cost for booklet printing (200) and other workshop materials
Travel	\$2,500	Costs of travel to site locations for pilot workshops across diverse geographic and vocational contexts - tentatively Boston area, Philadelphia area, North Carolina, Indiana
BHFH Stafftime Covered by FFA	\$5,300	BHFH staff time for curriculum feedback, workshop promotion and facilitation, and overall project support and administration
<b>Total</b>	<b>\$28,000</b>	
Digital Pastoral Care Project		
Welling Hall	\$10,500	Stipend for Welling Hall's time: preparation and facilitation of weekly digital pastoral care sessions, resource development, and outreach
BHFH Stafftime Covered by FFA	\$1,500	BHFH staff time for in-house video recording and editing, and overall project oversight and administration
<b>Total</b>	<b>\$12,000</b>	
Totals		
<b>Total Requested</b>	<b>\$40,000</b>	

#### Additional Funding:

We plan to apply to Obadiah Brown's Benevolent Fund for \$10,000 for additional content production and printed materials costs for the Vocational Discernment curriculum.





U. S. TREASURY DEPARTMENT  
INTERNAL REVENUE SERVICE  
WASHINGTON 25, D. C.

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MAR 30 1959

Beacon Hill Friends House, Inc.  
6 Chestnut Street  
Boston 8, Massachusetts

Gentlemen:

It is the opinion of this office, based upon the evidence presented, that you are exempt from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code of 1954, as it is shown that you are organized and operated exclusively for religious, educational and charitable purposes.

Accordingly, you are not required to file income tax returns unless you change the character of your organization, the purposes for which you were organized, or your method of operation. Any such changes should be reported immediately to the District Director of Internal Revenue for your district in order that their effect upon your exempt status may be determined.

You are required, however, to file an information return, Form 990A, annually, with the District Director of Internal Revenue for your district so long as this exemption remains in effect. This form may be obtained from the District Director and is required to be filed on or before the fifteenth day of the fifth month following the close of your annual accounting period.

Contributions made to you are deductible by the donors in computing their taxable income in the manner and to the extent provided by section 170 of the 1954 Code.

Bequests, legacies, devises or transfers to or for your use are deductible in computing the value of the taxable estate of a decedent for Federal estate tax purposes in the manner and to the extent provided by sections 2055 and 2106 of the 1954 Code. Gifts of property to or for your use are deductible in computing taxable gifts for Federal gift tax purposes in the manner and to the extent provided by section 2522 of the 1954 Code.

Beacon Hill Friends House, Inc.

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No liability is incurred by you for the taxes imposed under the Federal Insurance Contributions Act (social security taxes) unless you have filed a waiver of exemption certificate in accordance with the applicable provisions of such Act. In the event you desire social security coverage for your employees or have any questions relating to the filing of a waiver of exemption certificate you should take the matter up with your District Director of Internal Revenue.

Your attention is called to the provisions of section 501(c)(3) of the Internal Revenue Code of 1954 under which your exemption will be revoked if any substantial part of your activities consists of carrying on propaganda, or otherwise attempting, to influence legislation, or if you participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of any candidate for public office.

Failure to file the required information return or to otherwise comply with the provisions of section 6033 of the Code and regulations applicable thereto may result in the termination of your exempt status.

Any reference herein to a provision of the 1954 Code shall be deemed a reference to the corresponding provisions of the 1939 Code.

The District Director of Internal Revenue for your district is being advised of this action.

Very truly yours,

J. F. Mowley  
Chief, Exempt Organizations Branch

Identification number under Section 501(c)  
04-2240610