



January 1, 2006

Dear YMCA Members:

It gives us great pleasure to present to you the Sewickley Valley YMCA Five-Year Strategic Plan. After sixteen months of listening to our members and community leaders, data collection, analysis, discussion, writing and revision, we would now like to share with you the plan that was recently approved by the Board of Directors.

The strategic plan is divided into two sections including information about our approach in developing the plan, and then the plan itself. Please note that there are literally reams of information that we have not included so that we can make the plan easier to review. We would, of course, be glad to share this information with you.

Thank you for your involvement in the strategic planning process. Remember, we're all ears - all the time!

Sincerely,

*Susan Nitzberg*

Susan Nitzberg, Chair  
Strategic Planning Committee

*W. Lukens Ward*

W. Lukens Ward, Chair  
Board of Directors

*David Stevenson*

David Stevenson  
Executive Director

## **Sewickley Valley YMCA Approach to the Development of a New Five-Year Strategic Plan**

In the Winter of 2004, Sewickley Valley YMCA volunteer and staff leaders began to plan for the development of a new five-year strategic plan. Specific tasks were identified for completion including:

### **Leadership**

In July 2004, Ms. Susan Nitzberg and Dr. Dan Nadler agreed to co-chair the YMCA Strategic Planning Committee with a goal of creating a new five-year strategic plan. Volunteer and staff leaders were recruited to serve on the committee including Elaine Gustafson (Membership Director), Karen Hallisey (Associate Executive Director), Scott Hull (Director of Property Management), Dan Koett (Director of Development and Communications), Susan Kaminski (Volunteer, and Chair of the YMCA Property Committee), Terry Maier (Director of Human Resources), David Stevenson (Executive Director), Peter Tedesko (Volunteer, Board Secretary, and Chair of the YMCA Board Development Committee), Luke Ward (Volunteer, and Chair of the Board of Directors), Cherry White (Volunteer), and Kathleen Wycoff (Volunteer, and Chair of the YMCA Community Development Committee).

In August 2004, a consulting agreement was signed with the YMCA of the USA whereby Mr. George Babish, YUSA Network Consultant for Western Pennsylvania, was chosen to serve as the facilitator for the strategic planning process.

### **Planning Process and Timeline**

In January 2005, the Strategic Planning Committee reviewed the committee commission, and planning process template and timeline for the completion of a new five-year strategic plan. Also reviewed were the Strategic Planning Committee Commission, the results of the current five-year strategic plan, and the information that would be required to develop a new five-year strategic plan. The committee established a goal of completing a new five-year strategic plan that could be presented to the Board of Directors in the Fall of 2005.

### **Board Resolution Authorizing the Development of a Strategic Plan**

At the January 25, 2005 meeting of the Board of Directors, the board passed a resolution for the initiation, development, and completion of a new five-year strategic plan.

### **Strategic Planning Meetings**

Formal meetings of the Strategic Planning Committee were held beginning in July, 2005 for the purpose of developing a new five-year strategic plan that will be presented to the Board of Directors for review and adoption. Meeting dates included:

- Secure Volunteer Leadership – July, 2004
- Secure YUSA Involvement – August, 2004
- Committee Meeting – January 11, 2005
- Board of Directors Meeting – January 25, 2005
- Committee Meeting – February 23, 2005
- Committee Meeting – March 16, 2005
- Committee Meeting – April 20, 2005

Committee Meeting – May 10, 2005  
Committee Meeting – May 17, 2005  
Board/Staff Retreat – June 18, 2005  
Committee Meeting – September 14, 2005  
Presentation of Five-Year Strategic Plan to  
Board of Directors – September 27, 2005  
Adoption of Five-Year Strategic Plan  
Board of Directors – December 13, 2005

## **Gathering of Information**

A large amount of information was gathered to serve as the foundation for the development of a new five-year strategic plan. Included were:

**Key Informant Interviews** – Interviews were conducted with fifty-three community leaders, or key informants, who offered their insights on the image of the YMCA, major community issues, underserved groups, possible collaborations, how to increase the Y's effectiveness, and how best to serve local communities. Additionally, the names of community leaders who may be able to serve as effective members of the Board of Directors were identified.

**Member Focus Groups** – Many opportunities were offered for members to join a focus group and share their views about the YMCA. A limited response resulted in the completion of six focus group gatherings including a teen focus group.

**Staff Focus Group** – A staff focus group event was conducted including thirteen full-time YMCA employees, eleven of whom were full-time, professional staff members.

**Member Satisfaction Survey** – Seer Analytics completed a member satisfaction survey and report during which a member satisfaction survey was sent to every adult YMCA member (one survey per family membership unit). 3,853 surveys were mailed in January 2005, and 1,095 surveys were returned establishing a response rate of 28% (5% higher than the national average of 23%).

**Staff Satisfaction Survey** - Seer Analytics completed a staff satisfaction survey and report during which a staff satisfaction survey was sent to every YMCA employee. 257 surveys were mailed in October 2004, and 79 surveys were returned establishing a response rate of 31%.

**Primary Market Area (PMA) Analysis** – Seer Analytics completed a primary market area analysis providing comprehensive demographic data about the YMCA's membership.

**Like-Provider Assessment** – Information was gathered about organizations within the YMCA's service area that are providing programs, services, and facilities that are similar to the YMCA's offerings and facilities. Included were health/fitness membership facilities, fitness programs, aquatic facilities and programs, and day care facilities and programs.

**Like-Provider Strategic Plan Review** – Selected strategic plans of organizations within the YMCA's service area that are providing programs, services, and facilities that are similar to the YMCA's offerings and facilities were reviewed.

**National Trend Analysis** – YMCA and societal national trends were reviewed.

***Sewickley Valley YMCA Trend Analysis*** – Sewickley Valley YMCA trends were reviewed.

***Mission Audit*** – The results of the mission audit were reviewed leading to the adoption of a modified Sewickley Valley YMCA mission statement.

***Five-Year Financial Data Review*** – The Sewickley Valley YMCA Five-Year Financial Data Report was reviewed.

***Profile of Organizational Leadership Effectiveness (POLE) Survey*** – The POLE Survey that was conducted with the YMCA Board of Directors was reviewed.

***Capital Readiness Assessment*** – A capital readiness assessment was completed by the Strategic Planning Committee.

***Board/Staff Strategic Planning Retreat*** – A retreat was held including members of the Board of Directors and professional staff during which key goals and objectives were developed and prioritized for the Y's new five-year strategic plan.

## **Strategic Plan Development**

Following extensive review of the information collected, the Strategic Planning Committee completed several exercises to further develop the concepts and philosophy of the Y's new five-year strategic plan.

***Mission Statement Review*** - The first exercise involved a review and confirmation of the Sewickley Valley YMCA Mission Statement. Following a thorough assessment, the Strategic Planning Committee approved a modified mission statement for adoption by the Board of Directors (presented below).

To build healthy spirit, mind, and body based on Christian principles, and to improve the quality of life for children, individuals, and families in the *Quaker Valley and neighboring communities* (language to be removed) *served communities* (language to be added).

***YMCA Strengths, Weaknesses, Opportunities, and Threats (SWOT) Assessment*** – A thoughtful assessment was completed identifying the strengths, weaknesses, opportunities, and threats facing the Sewickley Valley YMCA.

***Paradigm Statements*** – Over the course of two meetings, committee members shared their views on the YMCA's current paradigms related to ten topics, and then shared their views on the “paradigm shift” that would be necessary to achieve an optimal state by the year 2010.

***Vision for the Future*** – All Strategic Planning Committee members completed a thoughtful response to a vision development exercise titled “Where Do We Want to Go?” Following group sharing and assessment, a Vision Story was drafted by the Strategic Planning Facilitator, George Babish, and finalized by the committee.

**Sewickley Valley YMCA  
Five-Year Strategic Plan  
2006-2010**

**Our Mission**

To build healthy spirit, mind, and body based on Christian principles, and to improve the quality of life for children, individuals, and families in the served communities.

**Our Motto**

We build strong kids, strong families, and strong communities.

**Our Values**

At the YMCA, we will demonstrate and teach the values of caring, honesty, respect, and responsibility.

**Our Vision Story**

It is the year 2010, and our Sewickley Valley YMCA has experienced a magnificent renaissance. As we reflect on our accomplishments over the last five years, we are most proud of these high impact achievements:

- Adoption of a world-class, member-centric quality culture
- Growth in market share
- Strengthened youth and communities through the 40 Developmental Assets Model in a proactive alliance with many community partners
- Development of a comprehensive facility replacement and renovation plan
- Opening of the inaugural Moon satellite family wellness center and expanded programs to this service area
- An explosion in philanthropy
- Adoption of best practices by our Boards of Directors and Trustees
- Implementation of state-of-the-art technology used for service excellence

Since 2005, our membership services and program delivery have soared. Our embracing of a total quality culture has led to an improved membership retention rate of 72% earning recognition as one of the finest YMCAs in America. The major thrusts that drove the turn around were listening to, connecting with, and delighting our members. All staff embrace the service attitude. We are “all ears, all the time”. Technology is utilized for continuous and targeted member communications and improved service. The core to our program philosophy, the 40 Developmental Assets, seeks to provide young people with the support and experiences they need to become healthy, caring and productive adults. The proactive alliance with community partners has developed a holistic, systematic approach that involves the entire community. Our Y serves as the community leader in collaborating with hospitals, schools, and other community groups resulting in many new services. Our child care, after-school programs, and youth and teen outreach initiatives have expanded to meet community needs. The Moon and Coraopolis service areas have responded at a higher than expected level to these and other program offerings.

Responding to the national epidemic of youth obesity has made a difference, and reduced the number of kids at risk. There is an emphasis on intergenerational classes. Our targeted recruitment campaign for the adult “ready-to-be-fit market” is successful and growing.

For many years, our building was considered one of the premier facilities in the region. As a result of extensive renovations and an excellent facility maintenance program, YMCAs from around the country make regular visits to benchmark against our fresh, crisp, inviting and contemporary Y. Starting with a warm environment using inviting colors, replacement of aging infrastructure, and focusing on immaculate cleanliness, the facility has been renewed and there is a marked upswing in member usage. Our older members and young families really appreciate the expansion of close-in parking and welcoming lobby. Amenities like a café, sprinkler water park, rock climbing center, specialized exercise area, and expanded senior area have been a huge success. Our facility is now wireless, and we have opted to lease equipment utilizing technology so that we may stay on the cutting edge. Teens and pre-teens frequent our dedicated teen center and participate in Asset-Building activities. They consider the Y the place to be. The expanded use of land has given us tremendous flexibility in our programming. The inaugural 7000 sq. ft. Family Wellness Satellite Center in Moon has attracted 1000 new members.

The way we operate has also changed in significant ways. One-fourth of our members volunteer or donate. Volunteers not only respond to Y needs, but are now addressing community concerns too. Philanthropy efforts have exploded. The YMCA Scholarship Fund is annually funded to fully support all who need important YMCA programs and services, and the capital/endowment development campaign goal was achieved. Our Board reflects diversity and operates under non-profit best practices and policies. Roles and expectations are clearer. Policy makers from around the region know our YMCA, and regularly offer support in many forms. Staff training and satisfaction has increased resulting in higher staff retention. Marketing effectively reaches a larger portion of our service area. Our total membership is now 11,000, and was rebuilt in a rapidly changing environment including the inclusion of the Moon and Cornell School Districts in our service area, the opening of a new YMCA in a neighboring community, and the decision about which Association can best provide Y programs and services in the Ambridge, Aliquippa, and Hopewell School Districts.

Looking back over the last five years, we can proudly and confidently state that we are helping to build strong kids, strong families, and strong communities through innovative and effective strategies. We look forward to the next five years as we continuously measure our impact and plan for the future.

## **Our Goals**

### **Programs and Services**

Goal 1 – The Sewickley Valley YMCA will meet the changing needs of kids and families in the served communities through high quality programs, both innovative and traditional, in the areas of:

- Adult Health & Wellness
- After-School
- Aquatics
- Child Care
- Day Camp
- Family Development
- Older Adult Development
- Volunteer Development
- Youth & Teen Development

Success will be achieved when the YMCA has grown the number of kids, families, and adults currently served through the development of creative and effective partnerships, when the

percentage of members reporting the quality of Y classes and programs as excellent improves by five points every two years (membership satisfaction survey), and has improved targeted scores on the 40 Developmental Assets Survey by five points.

### **Membership**

Goal 2 – Membership at the Sewickley Valley YMCA will be valued as a delightful and important part of one’s life, with a special emphasis on growth in spirit, mind, and body. The service and human interactions experienced by all who enter or contact the YMCA, or one of our extension sites, will be warm, personal, and professional.

Success will be achieved when the percentage of members and staff reporting their overall and connectedness experience as excellent improves by five points every two years (membership and staff satisfaction survey), membership retention has improved by five points every two years, and membership has grown over the past five years.

### **Property**

Goal 3 – All who enter our YMCA, or one of our extension sites, will be impressed by the cleanliness, warmth, convenience, spaciousness, attention to safety, and continually improving facilities and grounds. A new YMCA Center will be leased or built in the Moon Area or Cornell School District to support growing Y programs and services. Member service, staff effectiveness, and facility efficiency will be enhanced through the implementation of cutting-edge technology.

Success will be achieved when the percentage of members rating our facilities and grounds as excellent improves by three points every two years (membership satisfaction survey), and a new membership-based family wellness site is secured and opened in the Moon Area or Cornell School District. Success will also be measured by the board’s adoption of a long-range facility master plan that is properly planned, funded, completed, and evaluated, and the development and implementation of a risk management program resulting in a reduction in insurance premiums.

### **Finances**

Goal 4 – The financial capacity of our YMCA will grow to assure that all are welcome, regardless of an ability to pay, that the Y operates with strong annual operating budgets that support new program and service innovation, that the Y’s buildings and grounds will continually be improved to support the Y’s mission, and that a significant reserve is maintained to support the YMCA in challenging economic periods.

Success will be achieved when the requests for all YMCA scholarships are fully funded through contributions and grants, when annual operating budgets are balanced including full contributions to the reserves, and when a capital/endowment development campaign goal is achieved.

## **Human Resources**

Goal 5 – A strong investment in the recruitment and development of YMCA volunteers, staff, and governing boards will assure the achievement of goals and strategies through effective leadership and staffing of programs, committees, and boards, and continual evaluation and improvement of programs and processes.

Success will be achieved when the percentage of staff reporting their overall job satisfaction, personal satisfaction and recognition, and training and professional growth experiences as excellent improves every two years (staff satisfaction survey), and an assessment for volunteer satisfaction and growth is initiated and completed with acceptable results.

## **Member Feedback, Community Cultivation, and Marketing**

Goal 6 – Dynamic member feedback, community cultivation, and marketing programs will be initiated and sustained leading to a full understanding of member and community wants and needs, a heightened awareness and understanding of the YMCA mission, and full participation in YMCA programs and services.

Success will be achieved when an on-going “We’re All Ears – All The Time” program is developed, initiated and sustained, when changing community needs are identified through twenty-five key informant interviews every year, when the Volunteer and Contributions and YMCA Values measures of the Member Satisfaction Survey improve every two years, and when YMCA programs are operating at a combined enrollment of 95% of capacity or higher.

## **Our Strategies**

### **Programs and Services**

Goal 1 – The Sewickley Valley YMCA will meet the changing needs of kids and families in the served communities through high quality programs, both innovative and traditional, in the areas of:

- Adult Health & Wellness
- After-School
- Aquatics
- Child Care
- Day Cam
- Family Development
- Older Adult Development
- Volunteer Development
- Youth & Teen Development

Success will be achieved when the YMCA has grown the number of kids, families, and adults currently served through the development of creative and effective partnerships, when the percentage of members reporting the quality of Y classes and programs as excellent improves by five points every two years (membership satisfaction survey), and has improved targeted scores on the 40 Developmental Assets Survey by five points.

***Strategies to Assure Success in Achieving Goal 1:***

1. Adult health and fitness programs will be strengthened, developed and marketed focusing on recruiting and retaining the ready-to-be-fit market.

Staff Assignment: Adriane Brandenburg Stoner  
Committee Assignment: Membership/Program Committee

2. Programs will be strengthened and developed at the YMCA, St. Andrew's Church, and elementary schools to assure that all families in the served communities who desire pre-school education, child care, or after-school care will have access to a quality program.

Staff Assignment: Karen Hallisey  
Committee Assignment: Membership/Program Committee

3. Programs will be strengthened and developed at the YMCA and extension sites to assure that all children in the served communities will have access to a quality swimming instruction.

Staff Assignment: Kelly Wagner  
Committee Assignment: Membership/Program Committee

4. Programs will be strengthened and developed at the YMCA and extension sites to assure that all children in the served communities will have access to a quality summer day camp.

Staff Assignment: Marc Smith  
Committee Assignment: Membership/Program Committee

5. Programs will be strengthened and developed at the YMCA to assure that older adults will have access to age-appropriate programs.

Staff Assignment: Older Adult Director  
Committee Assignment: Membership/Program Committee

6. Programs will be strengthened and developed at the YMCA and extension sites to assure that all youth and teens in the served communities will have access to quality youth, teen, and outreach programs.

Staff Assignment: Alan Ficca and Marc Smith  
Committee Assignment: Membership/Program Committee

7. A new initiative will be developed and implemented through which special programs and services are targeted towards youth obesity prevention and reduction.

Staff Assignment: Adriane Brandenburg Stoner  
Committee Assignment: Membership/Program Committee

8. Ten strengthened and new partnerships will be developed to expand capacity for the YMCA to offer YMCA programs and services.

Staff Assignment: David Stevenson  
Committee Assignment: Membership/Program

9. A new initiative will be developed to cultivate community leaders in the Moon Area and Cornell School Districts so that the YMCA will be invited to offer community needs-based YMCA programs and services in Moon, Coraopolis, Crescent and Neville Island.

Staff Assignment: David Stevenson  
Committee Assignment: Membership/Program Committee

10. YMCA youth and teen programs will include curriculum designed to support and strengthen Asset-building (40 Developmental Assets) within kids, families, and the served communities.

Staff Assignment: Karen Hallisey and David Stevenson  
Committee Assignment: Membership/Program Committee

## **Membership**

Goal 2 – Membership at the Sewickley Valley YMCA will be valued as a delightful and important part of one’s life, with a special emphasis on growth in spirit, mind, and body. The service and human interactions experienced by all who enter or contact the YMCA, or one of our extension sites, will be warm, personal, and professional.

Success will be achieved when the percentage of members reporting their overall and connectedness experience as excellent improves by five points every two years (membership and staff satisfaction survey), membership retention has improved by five points every two years, and membership has grown over the past five years.

### ***Strategies to Assure Success in Achieving Goal 2:***

1. All aspects of the YMCA’s Return to Excellence Program will be fully implemented including improvement in the areas of human interaction, systems, and infrastructure.

Staff Assignment: David Stevenson  
Committee Assignment: Membership/Program Committee & Property Committee

#### **A. Human Interaction Improvements:**

1. Use of Members’ Names – It is expected that all staff interacting with members will make a genuine effort to learn and use members’ names.
2. Request/Problem Ownership – It is expected that whenever possible, staff will accept ownership of a member’s inquiry or problem. For example, instead of giving directions to the Warm Water Pool, we will accompany the member to the pool.
3. Member Recognition – We will regularly recognize members for the achievements including length of membership and goals achieved. Programs such as the YMCA Quarter Century Club (recognizing individuals who have been members for 25 years or longer), Member Spotlights

(on bulletin boards), and public address announcements about member achievements (once per hour) will be initiated.

4. Staff Recognition – Using the SMART Program, staff will be recognized and rewarded for demonstrating positive behaviors with members (i.e. using names, “checking in” with members, etc.).
5. Staff Socials – Opportunities for staff socials will be created to maximize teambuilding and recognition.

#### B. System Improvements:

1. Hiring - Hiring practices will be reviewed to assure that we are “hiring for personality”. In other words, we will strengthen our emphasis on hiring individuals who demonstrate enthusiasm and excellent interpersonal skills.
2. Telephones – Our telecommunications system will be reviewed and modified so that we are maximizing the telephone as a sales and member service tool. Additionally, the main switchboard will be relocated so that the staff person greeting members, and accepting membership cards, can offer the visiting member their undivided attention, even if only for a few seconds.
3. Member Feedback – In the spirit of “We’re All Ears”, we will continue to encourage member feedback through the Y’s website, written notes, and regular tours and interactions between professional staff and members. Additionally, we will create an e-mail bank of all interested members through which we can introduce new ideas for member review.
4. Staff Meetings – The mandatory All-Staff Meeting will be held annually so that we can provide a State-Of-The-Y Report for the staff and solicit new ideas to strengthen the YMCA.
5. Staff Recognition – A uniform, association-wide staff recognition program will be developed and implemented focusing on the reinforcement of the desired behaviors.

#### C. Infrastructure Improvements

1. A fresh “look” will be created for the approach to the main entrance of the YMCA including new walkways, steps and handicapped accessibility, removal of the cobblestone, new landscaping, outdoor seating, and new front doors.
2. The Lobby will be renovated to create a fresh “look”, and so that all member service functions are consolidated at one Member Service Desk.
3. A YMCA Café will be established that will include a warm, welcoming environment where members can purchase beverages, and gather in a relaxed setting.
4. A YMCA Youth/Senior Center will be created in the space currently occupied by the vending area and classroom.
5. A graduated plan will be developed whereby a new platform tennis center will be developed on either the north side or west side of the YMCA tennis courts.
6. A graduated plan will be developed whereby a new soccer-sized athletic field will be built on the space currently occupied by the YMCA’s upper parking lot and the current War Memorial Park playground. Prior to construction of the new athletic field, the YMCA’s lower parking lot will be expanded to include the current space currently occupied by the YMCA platform tennis courts and athletic field, thereby improving the proximity and number of spaces available for member parking.

2. The YMCA's membership development effort will be strengthened through a comprehensive membership marketing program including written plans for the recruitment of individuals and families, employee groups, and special populations such as insurance groups.

Staff Assignment: Elaine Gustafson

Committee Assignment: Membership/Program Committee

### **Property**

Goal 3 – All who enter our YMCA, or one of our extension sites, will be impressed by the cleanliness, warmth, convenience, spaciousness, attention to safety, and continually improving facilities and grounds. A new YMCA Center will be leased or built in the Moon Area or Cornell School District to support growing Y programs and services. Member service, staff effectiveness, and facility efficiency will be enhanced through the implementation of cutting-edge technology.

Success will be achieved when the percentage of members rating our facilities and grounds as excellent improves by three points every two years (membership satisfaction survey), and a new membership-based family wellness site is secured and opened in the Moon Area or Cornell School District. Success will also be measured by the board's adoption of a long-range facility master plan that is properly planned, funded, completed, and evaluated, and the development and implementation of a risk management program resulting in a reduction in insurance premiums.

#### ***Strategies to Assure Success in Achieving Goal 3:***

1. The YMCA's cleaning, preventive maintenance, and grounds maintenance programs will be fully implemented, staffed, and funded at the YMCA (including the YMCA home) and St. Andrew's Church.

Staff Assignment: Director of Property Management

Committee Assignment: Property Committee

2. A comprehensive, long-term facility master plan will be completed, adopted by the Board of Directors, funded, and implemented.

Staff Assignment: Director of Property Management

Committee Assignment: Property Committee

3. A risk-management program will be developed and implemented.

Staff Assignment: Director of Property Management

Committee Assignment: Property Committee

4. Driven by program growth, a YMCA Center will be leased or built in the Moon Area or Cornell School District. Special effort will be made to partner with Heritage Valley Health System in securing dedicated program space.

Staff Assignment: David Stevenson  
Committee Assignment: Membership/Program

5. The YMCA's technology plan will be strengthened by assessing the current and optimal states of technology use, and improving the use of technology in the areas of:

A. Membership Support – membership and program management system (Finestri), website (Winning Habits), telephone service (Shared Technologies), e-mail service (Nauticom)

B. Program Support – adult health and fitness service (FitLinxx).

C. Staff Support – land line and cellular telephone service (Shared Technologies, Verizon, Nextel), wireless internet/email service (Nauticom), business machines.

D. Facility Support – HVAC control (Siemens), security/fire protection (Sonitrol)

Staff Assignment: Dan Koett & Director of Property Management  
Committee Assignment: Property Committee

### **Finances**

Goal 4 – The financial capacity of our YMCA will grow to assure that all are welcome, regardless of an ability to pay, that the Y operates with strong annual operating budgets that support new program and service innovation, that the Y's buildings and grounds will continually be improved to support the Y's mission, and that a significant reserve is maintained to support the YMCA in challenging economic periods.

Success will be achieved when the requests for all YMCA scholarships are fully funded through contributions and grants, when annual operating budgets are balanced including full contributions to the reserves, and when a capital/endowment development campaign goal is achieved.

#### ***Strategies to Assure Success in Achieving Goal 4:***

1. *Caring and Sharing* – The YMCA Scholarship will continue to grow and fully fund all requests for financial assistance.

Staff Assignment: Dan Koett  
Committee Assignment: Community Development Committee

2. The YMCA's annual operating budget will balance each year including full contributions to the reserves.

Staff Assignment: David Stevenson  
Committee Assignment: Finance Committee

3. A comprehensive cost and revenue analysis (cost study) will be completed every two years to continually assess the full cost and income of all programs and services, and to identify those programs/services that contribute to overhead, and those that are being subsidized.

Staff Assignment: David Stevenson  
Committee Assignment: Finance Committee

4. A capital/endowment development campaign will be implemented to fully fund the YMCA's Facility Master Plan, and to support the YMCA's on-going operations, particularly during challenging economic periods.

Staff Assignment: Dan Koett and David Stevenson  
Board Assignment: Board of Directors (Capital Campaign) Board of Trustees (Endowment Dev.)

### **Human Resources**

Goal 5 – A strong investment in the recruitment and development of YMCA volunteers, staff, and governing boards will assure the achievement of goals and strategies through effective leadership and staffing of programs, committees, and boards, and continual evaluation and improvement of programs and processes.

Success will be achieved when the percentage of staff reporting their overall job satisfaction, personal satisfaction and recognition, and training and professional growth experiences as excellent improves every two years (staff satisfaction survey), and an assessment for volunteer satisfaction and growth is initiated and completed with acceptable results.

#### ***Strategies to Assure Success in Achieving Goal 5:***

1. The YMCA's staff development practices will be strengthened to assure that we are recruiting developing, and retaining quality staff that will ensure a shift to a culture of enhanced member service through the goals and objectives of the Return to Excellence Program and the five-year strategic plan.

Staff Assignment: Human Resources Director  
Committee Assignment: Executive Committee

2. The work of the YMCA Board of Directors, Board of Trustees, and committees will be strengthened through the development of annual Charts of Work based on the goals and strategies of the 2005-2010 five-year strategic plan.

Staff Assignment: David Stevenson  
Committee Assignment: Chairs of the Board of Directors and Trustees, and Committee Chairs

#### **Action Steps:**

1. Assess the progress being made on fulfillment of the strategic plan.
2. Assess changing membership and community needs through key informant interviews and membership feedback.
3. Identify strategic plan shortfalls.

4. Prepare board goals and committee Charts of Work to manage the process for goal achievement.
5. Evaluate the success of completion of tasks identified in the Charts of Work.

3. The composition and development of the Board of Directors, Board of Trustees, and committees will be continually assessed to assure that they possess the leadership and ability to complete the tasks presented in the Charts of Work.

Staff Assignment: David Stevenson

Committee Assignment: Board Development Committee

4. The composition and development of the Board of Directors and committees will be continually assessed to assure that they reflect the diversity (age, gender, race, income, place of residence/work, profession, background, beliefs, and perspectives) of our membership and the communities that we serve.

Staff Assignment: David Stevenson

Committee Assignment: Board Development Committee

5. An assessment for volunteer satisfaction and growth will be initiated and completed.

Staff Assignment: Dan Koett

Committee Assignment: Community Development Committee

### **Member Feedback, Community Cultivation, and Marketing**

Goal 6 – Dynamic member feedback, community cultivation, and marketing programs will be initiated and sustained leading to a full understanding of member and community wants and needs, a heightened awareness and understanding of the YMCA mission, and full participation in YMCA programs and services.

Success will be achieved when an on-going “We’re All Ears – All The Time” program is developed, initiated and sustained, when changing community needs are identified through twenty-five key informant interviews every year, when the Volunteer and Contributions and YMCA Values measures of the Member Satisfaction Survey improve every two years, and when YMCA programs are operating at a combined enrollment of 90% of capacity or higher.

#### ***Strategies to Assure Success in Achieving Goal 6:***

1. The process that we use to evaluate our YMCA including systematic program assessments, membership and staff satisfaction surveys, practices that enable staff and volunteers to gain and assess feedback from members through the “We’re All Ears, All The Time” program, and annual evaluations of boards, committees, and individual policy volunteers will be strengthened. The “We’re All Ears” program will be constantly refined and improved to serve as a powerful interactive tool between members, the community, and Y leadership. The use of technology to retrieve accurate data from a centralized data base will be improved to provide specific information for evaluation and planning. All evaluation will be conducted in reference to fulfillment of the strategic plan.

Staff Assignment: Dan Koett  
 Committee Assignment: Community Development Committee

2. Twenty-five Key Informants will be interviewed annually to assure that YMCA leaders identify and understand the changing needs of the served communities.

Staff Assignment: Karen Hallisey  
 Committee Assignment: Membership/Program Committee

3. On-going community cultivation and membership/program marketing will be strengthened through the development of a formal plan through which the sharing of the YMCA story will be expanded, and community members will be encouraged to join the YMCA and participate in Y programs and services.

Staff Assignment: Dan Koett  
 Committee Assignment: Community Development Committee

4. A comprehensive membership/program marketing plan will be developed and initiated annually to encourage community members to join the YMCA and participate in Y program and services.

Staff Assignment: Dan Koett and Elaine Gustafson  
 Committee Assignment: Community Development Committee

**Summary of Metrics**

Goal	Core Area	Metric	2005	2010 Goal
1	Programs and Services	A. Grown the number of kids, families and adults currently served.	39,460	39,460+
		B. Increased the percentage of members reporting the quality of Y programs and services as excellent by five points every two years.	31%	41%
		C. Improved targeted scores on the 40 Developmental Assets Survey* by five points.	36%	41%
2	Membership	A. Increased the percentage of members reporting their <u>overall</u> and <u>connectedness</u> (average of five connectedness scores) experience as excellent by five points every two years.	34%/26%	44%/36%
		B. Increased member retention by five points every two years.	62%	72%
		C. Membership has grown over the past five years.	10,670	11,000

Goal	Core Area	Metric	2005	2010 Goal
3.	Property	A. Increased the percentage of members rating our <u>facilities and grounds</u> (average of five facility scores) as excellent by three points every two years.	34%	40%
		B. New membership-based facility is opened in Moon Area or Cornell School District.		Yes
		C. Board adoption of a Long Range Facility Master Plan.		Yes
		D. Implementation of a risk management program.		Yes
4.	Finances	A. Requests for all YMCA scholarships are fully funded.		Yes
		B. Annual operating budgets are balanced including full funding of the reserve.		Yes
		C. Capital/endowment development goal is achieved.		Yes
5.	Human Resources	A. Increased the percentage of staff reporting their <u>overall job satisfaction</u> , <u>personal satisfaction and recognition</u> (average of five personal satisfaction and recognition scores), <u>training and professional growth</u> (average of five training and professional growth scores) experiences as excellent every two years.	37%/39%/36%	Yes
		B. An assessment for volunteer satisfaction and growth is initiated and completed with acceptable results.		Yes
		C. Annual operating plan is approved by the Board of Directors annually.		Yes
6.	Member Feedback, Community Cultivation & Marketing	A. We're All Ears Campaign fully implemented year-round.		Yes
		B. Twenty-five key informant interviews completed yearly.		Yes

<u>Goal</u>	<u>Core Area</u>	<u>Metric</u>	<u>2005</u>	<u>2010 Goal</u>
		C. <u>Volunteer, Contributions, and YMCA Values</u> (average of five values scores) measures improve every two years.	6%/13%/65%	Yes
		D. Combined YMCA programs operating at 95% of budgeted capacity.	90%	95%

\* Targeted 40 Developmental Asset scores include Other Adult Relationships (49%), Community Values Youth (24%), and Adult Role Models (35%).