



UNITING
FOR A
BETTER
US

YMCA OF GREATER ROCHESTER

2024–2028

STRATEGIC PLAN REPORT

DEAR FRIENDS, MEMBERS, PARTNERS & SUPPORTERS

A LETTER FROM THE PRESIDENT & THE CHAIRMAN

We hope you've had an amazing 2023. All year we have been spending time with various stakeholders, laying out the future steps for our organization, and gaining valuable insights to help inform our strategic plan.

The YMCA of Greater Rochester believes in strengthening the foundations of our communities, something we've been doing for nearly 170 years. In serving the community, we must aim to understand the current issues and anticipate the future needs of our children, seniors, adults, and families we serve. These are all the reasons why a strategic plan is imperative for our Y and community.

Our process in developing this strategic plan, co-chaired by two board members, Tarek Eldaher and Tim Tindall, took several months and included valuable input from volunteers and staff. We surveyed community leaders, key partners, and stakeholders, to better understand and assess our internal and external strengths, weaknesses, opportunities, threats, and current impact.

From the surveys and many meetings, we then took feedback about opportunities and unmet needs. Our emerging ideas were then tested against a strategy screen to ensure we select the most meaningful and mission-driven work.

The YMCA of Greater Rochester's new five-year strategic plan — "Uniting for a Better Us" — will be a powerful tool to assist us in our decision making as we prioritize ways to best grow and measure our impact in the urban, suburban, and rural communities we serve. During the next five years, 2024-2028, this roadmap will help guide us as we:

- Deepen **COMMUNITY CONNECTIONS** by expanding our reach and deeper collaborations in purposeful partnerships that will serve more people with intentionality.
- Further enhance the **YMCA EXPERIENCE** by providing better opportunities to engage and belong from cradle to career with a focus on innovative, quality programs centered around accessibility and deeper impact.
- Grow and develop **OUR PEOPLE** by being a leader in workplace culture and development of staff and board with an emphasis on KPIs, great governance structure, and Diversity, Equity & Inclusion.
- Determine **OUR FUTURE** by further enhancing our mission in community by continuing to be fiscally responsible and innovative in our pursuit of better service to all.

Our highly dedicated and capable staff team and volunteers are committed to doing the work that matters in serving the community and helping to bring positive change. We are excited about our new strategic plan and the role the Y can play in strengthening the foundations of our community.

Ernie Lamour
President & CEO

David Riedman
Chairman of the Board of Directors

UNITING FOR A BETTER US

STRATEGIC PLAN 2024-2028

GOALS

COMMUNITY CONNECTIONS

- Association of One: Suburban, Urban, Rural
- Expanding Our Reach
- Leadership in Community: Partnerships & Collaborations
- Enhanced Urban Services: Our City Commitment
- Philanthropy Success: \$35-\$40M

YMCA EXPERIENCE

- Accessibility for All
- Engagement & Belonging
- Youth Development: Cradle to Career
- Program Quality & Innovation

OUR PEOPLE

- Staffing Excellence
- Best People & Culture
- Great Volunteers & Governance
- Advancing Equity

OUR FUTURE

- Mission Awareness & Communications
- Facility Optimization & Excellence
- Leading-Edge Technology
- Fiscal Health & Sustainability

KEY IMPACT MEASURES

- Increase People Served: From 90K → 150K
- Double People Served in City of Rochester: 10K → 20K

- Increased Opportunity for Specialized Membership
- 3% Core Membership Growth Annually & Retention Exceeding 70%
- 40% Growth in Youth Served with Measurable Outcomes

- Staff Diversity up 25%
- Volunteer Diversity & Engagement
- Employee Cultural Competency
- Employee Voice

- Community Awareness of Mission
- Capital Investment
- Technology Usage
- Financial Health: Rev \$76M → 19% Growth
- Balance Sheet/ Investment



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

YMCA OF GREATER ROCHESTER



COMMUNITY CONNECTIONS

GOALS

ASSOCIATION OF ONE YMCA: SUBURBAN, URBAN & RURAL

EXPANDING OUR REACH

LEADERSHIP IN COMMUNITY: PARTNERSHIPS & COLLABORATIONS

ENHANCED URBAN SERVICES: OUR CITY COMMITMENT

PHILANTHROPY: \$35 TO \$40M OVER FIVE YEARS

STRATEGIES

Margin Distribution & Methodology

Authority & Policy Manuals

Interbranch Connections & Programming

Community Needs Assessment: By branch and zip code for new community connections and outreach

Target Populations: Targets for underserved, immigrants, diverse abilities

New YMCA Relationships: Outside service area

Transformational Issues: Lead/ collaborate on plans for two transformational issues: Health and Education

YMCA as a Community Hub: Community activities at all branches on health and wellness

Community Unity through Purposeful Partnerships

Triple city youth and teens in YMCA programs

Growth of participation at all Centers 10% annually, including focus on families and seniors

Funding increase for urban programs

Five Key Partnerships with City of Rochester, Foodlink, Rochester City School District, University of Rochester, and United Way

Leader in water safety for youth and adults

Volunteer partnerships to achieve philanthropic goals

Annual Campaign designed for specialized membership opportunities and programs

Association Philanthropy Team approach as Association of One YMCA

Expanded donor research and prospect pool of donors through relationships

High impact operational cycle of prospects to donation to engagement

Government Funding Assessment/Plan

IMPACT MEASURES

Margin Distribution

Overall revenue to expense plus % of annual revenue

Number of multi-branch and camp exchange programs/ participants

Increase people served from 90K in Standard Metropolitan Statistical Area (SMSA) 8% to 150K 14%

Increase people served within the City of Rochester from 10K to 20K

Number of branch outreach programs to meet new needs

Transformational Issue: Health/ Education Improvements

Number of community events by branch

Number of Association and branch partnerships and impact

Five Key Partnerships

5,000 in youth enrichment programs, with health and swimming offered by 2028

Increase total YMCA and partner participants to 20K in all four quadrants of Rochester, with west side focus

\$12.5M raised in annual support highlighted by \$3M total in final year of strategic plan

\$10M total raised in grant support for programs & capacity building

\$12.5M in capital contributions for needs across the Association

Add 50 new members to the George Williams Society: \$2.5M to \$5M

Government Funding

CHAMPIONS

Staff: Ernie Lamour

Volunteer: Maureen Mulholland

Staff: Ernie Lamour

Volunteer: Dan Burns

Staff: Ernie Lamour

Volunteer: David Riedman

Staff: Mike Stevens
George Warren

Volunteers: Twyla Cummings
Tim Tindall

Staff: Andy Powers

Volunteers: Jurij Kushner
Nicole VanGorder



YMCA EXPERIENCE

GOALS

ACCESSIBILITY FOR ALL

ENGAGEMENT & BELONGING

YOUTH DEVELOPMENT: CRADLE TO CAREER

PROGRAM QUALITY & INNOVATION

STRATEGIES

Expand Specialized Memberships opportunities to grow and diversify membership for those in need

Identify and increase private funding for Specialized Membership to expand impact in community

Define and communicate impact on people served and outcomes of YMCA experience

Realtime feedback/ response protocols

Year-round membership attraction and retention strategy, with a focus on families

Positive branch environment/ access to promote engagement

Robust senior programs scaled across the Association

Expanded youth/teen capacity in Day Camp, Overnight/Retreat Camp, Child Care, BASP

Portfolio of youth/teen programs, with focus on education, social/ emotional skills, and workforce readiness (and YMCA career ladder)

New Youth Development Leadership structure at Association and branches

Association curriculum and standards for Early Learning Child Care and BASP

Program innovation fund

Program Portfolio for Youth and Adults: Audit, Criteria, Standards, Program Leadership Teams

Universal Program Evaluation and Impact Questionnaire

Visits to three to five high-performing program YMCAs

IMPACT MEASURES

Track Specialized Membership Opportunities by Zip Code

Secured private funding for Membership

Measure success through numbers and impact (storytelling)

Net Promoter Score to exceed 70%

Unique insurance scans increase 3% annually

Individuals enjoying a YMCA experience to increase by 5% annually

Core membership units to grow 3% annually with Association retention exceeding 70%

Youth served increase by 40%

Youth/Teen Program Outcomes/ Universal Standards

Camp, Early Learning Child Care, BASP at 90% of capacity

Youth Leadership Structure in place

Innovation fund programs

Fee-based programs to grow 10% annually

Continuous program benchmarking

CHAMPIONS

Staff:
Pam Cowan

Volunteers:
Matt Kilmer
Maureen Mulholland

Staff:
Pam Cowan
Chris Mangone
Mike Stevens

Volunteers:
Jurij Kushner
Nicole VanGorder

Staff:
Chris Mangone
Mike Stevens

Volunteer:
Rachel Baranello

Staff:
Mike Stevens

Volunteer:
Tarek Eldaher



OUR PEOPLE

GOALS

STAFFING EXCELLENCE

PEOPLE & CULTURE

GREAT VOLUNTEERS & GOVERNANCE

ADVANCING EQUITY

STRATEGIES

Staffing model and job structures for Association and branches

Centralized Recruiting with a broader pool of candidates through strategic partnerships

HR model for compensation, recruiting, employee performance management and retention

Competency-based leadership development and succession plan

Increased recruitment, development, retention of underrepresented staff

Define shared values, behaviors and accountability: Caring, Honesty, Respect, Responsibility, Inclusion

Elevate voice of employees

Build trust and co-create solutions

Develop and implement Association Policy and Practices Manual

Association Board Development Plan

Branch Board of Management Development Plan

Expanded Volunteer Program as a Social Responsibility Program

Strengthened Cultural Competency of Staff and Volunteer Leaders

Broader learning opportunities for staff, to support advancement of equity and skills for all

Leverage a DEIB infrastructure to advance equity work with staff and board volunteers

IMPACT MEASURES

25% Increase in staff diversity through 25% increase in candidate representation and 20% increase in key staff retention for people of color

Development plans for 50% of all staff

Overall staff performance

Employee engagement survey participation 50%

300 World Café participants

Part-time engagement surveys achieve 10% participation

Increase diversity and engagement of Association and Branch Boards

Track and increase

Program volunteers by Association and branch by function

Employee engagement in cultural competency survey

Pre/post IDI assessment progress

Representation increase of 10% in leadership succession

CHAMPIONS

Staff:
Talethea Best
Deanna Rose

Volunteer:
Erick Bond

Staff:
Talethea Best

Volunteer:
Tashanda Thomas

Staff:
Ernie Lamour

Volunteer:
Helen Zamboni

Staff:
Talethea Best

Volunteer:
Twyla Cummings

OUR FUTURE

GOALS

AWARENESS & COMMUNICATIONS

FACILITY OPTIMIZATION & EXCELLENCE

LEADING-EDGE TECHNOLOGY

FISCAL HEALTH & SUSTAINABILITY

STRATEGIES

Continued implementation and refinement of Integrated Communications and Marketing Plan

Develop and deliver consistent internal communications as one YMCA through multiple voices

Achieve enhanced market positioning on the YMCA mission through differentiation of Y from 'competitors'

Enhance stakeholder loyalty on YMCA's purpose and impact

Association Master Plan/Timetable (REDAO) and Facility Investment Strategy

Finalized plans: Carlson and Eastside Child Care Center

Enhanced Facility staffing and compensation structure and systems for Association and branch

Develop an integrated set of secure, predictable and resilient systems, services and solutions that can be scaled

Implement robust data analytics/data visualization system to support all aspects of YMCA

Develop comprehensive risk management and cybersecurity strategies and conduct regular audits

Invest in training and development advancement plans to upskill existing employees

Form strategic partnerships with technology vendors and industry leaders to access cutting-edge solutions and expertise

Financial Plan for Growth and Sustainability

FY25: \$64M; FY26: \$69M; FY27: \$73M; FY28 \$75M; FY29: \$76M Gen/Adm/FR Ratio<35%

Talented, diverse and adaptive workforce excellence and staffing models

Plan for Reserves Reinvestment - Capital or Program: \$2M to \$3M/year

Balance Sheet Metrics: Current Ratio 1:1 or Higher, Days Cash on Hand > 90 Days, Debt Ratio 1:35:1 or Higher

Timely Reporting for Management Discussion and Analysis

IMPACT MEASURES

Earned, owned and paid MarComm statistics on reach and engagement

ROI for membership and programmatic acquisition

Survey stakeholders (internal and external) on awareness of YMCA Mission

Facility usage grows by at least 5% yearly

Net Promotion Facility Score 70% or higher

Annual Capital Investment exceeds \$5M over five years

Assess information technology systems and platforms to obtain efficiency for all users (internal and external)

Develop and utilize data dashboards that aid in decision-making to meet operational objectives

Create a sustainable staffing model that incorporates training to advance overall technological roadmap

Financial 5 Year Proforma Model by Branch

Transparency and Accountability in Financial Reporting

Reserves for Sustainability

Policy for Reinvestment for Capital Program/ Operations

CHAMPIONS

Staff: Pam Cowan

Volunteers: Matt Kilmer
Maureen Mulholland

Staff: Mike Stevens

Volunteer: Mary Ockenden

Staff: Pam Cowan
Paul LeFrois, Jr.

Volunteer: Tim Sheehan

Staff: Paul LeFrois, Jr.

Volunteers: Margaret Dugan
Ed Kay



YMCA OF GREATER ROCHESTER

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MISSION

The YMCA of Greater Rochester is a charitable, cause-driven organization that strengthens community and improves lives through Christian principles, impactful programs, and purposeful partnerships that serve and connect all.

VISION

The YMCA of Greater Rochester will be a leader in our communities; creating space and maximizing access for all to positively impact lives through youth development, healthy living and social responsibility with the highest quality programs, partnerships, people, and places.

As an Association of One YMCA, we commit to equitable sharing of resources and investment, demonstrated through our staffing, fundraising, and financial management practices.

CORE VALUES

Caring, Honesty, Respect,
Responsibility, Inclusion

DIVERSITY, EQUITY, AND INCLUSION

We are committed to being an Antiracist Multicultural Organization where we actively work to oppose racism and racist behaviors and systems in a way that strengthens inclusion and leverages our collective impact to address social inequities.