



UNITING
FOR A
BETTER
US

YMCA OF GREATER ROCHESTER

2024-2029

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, 2024-2029, 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 2024-2029

GOALS

COMMUNITY CONNECTIONS

- Association of One: Suburban, Urban, Rural
- Expanding Our Reach
- Our City Commitment & Collaboration Strategy
- Philanthropic Support

YMCA EXPERIENCE

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

OUR PEOPLE

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

OUR FUTURE

- Mission Awareness
- Facility Optimization & Excellence
- Leading-Edge Technology
- Financial Sustainability

KEY IMPACT MEASURES

- Grow service to reach 14% of the population in service area.
- Increase people served within the City of Rochester from 10K to 20K.
- Solidify or Strengthen Partnerships with 5 Organizations.
- Raise \$35M

- Secure grants to fund memberships for underrepresented groups.
- Unique Insurance Pay Scans increase 3% annually.
- Retention & NPS Score to Both Exceed 70%
- 40% Growth in Youth Served

- Increase Representation and Retention by 25%
- Annual Engagement Survey Response at 50%
- Increase Diversity of Volunteer Stakeholders
- Launch Intercultural Employee Development

- Continuously refine strategic brand awareness efforts.
- Invest \$5M in Facilities
- Improve Technology Efficiency & Ease of Use
- Financial Health: Rev \$76M → 19% Growth
- Implement Balance Sheet Metrics



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	OUR CITY COMMITMENT & COLLABORATION STRATEGY	PHILANTHROPIC SUPPORT
STRATEGIES	<p>Margin Distribution & Methodology</p> <hr/> <p>Interbranch Connections & Programming</p>	<p>Community Needs Assessment: By branch and zip code for new community connections and outreach</p> <hr/> <p>Target Populations: Targets for underserved, immigrants, diverse abilities</p> <hr/> <p>New YMCA Relationships: Outside service area</p>	<p>Growth of participation at all Centers 10% annually, including focus on families and seniors</p> <hr/> <p>Funding increase for urban programs</p> <hr/> <p>Five Key Partnerships to strengthen ability to provide access to quality programming, food and medical services</p> <hr/> <p>Leader in water safety for youth and adults</p> <hr/> <p>Expand offerings on the West side of the City</p>	<p>Volunteer partnerships to achieve philanthropic goals</p> <hr/> <p>Annual Campaign designed for specialized membership opportunities and programs</p> <hr/> <p>Association Philanthropy Team approach as Association of One YMCA</p> <hr/> <p>Expanded donor research and prospect pool of donors through relationships</p> <hr/> <p>High impact operational cycle of prospects to donation to engagement</p> <hr/> <p>Government Funding Assessment/Plan</p>
IMPACT MEASURES	<p>A methodology will be created and implemented by 2025 that ensures the equitable sharing of resources within the Association.</p> <hr/> <p>All overnight camps, retreat centers, outdoor centers and suburban branches will have developed programs for utilization and support of urban programs by 2029.</p>	<p>Grow service to reach 14% of the population in service area.</p> <hr/> <p>Increase people served within the City of Rochester from 10K to 20K.</p> <hr/> <p>New outreach programs are launched each year to reach the previously unserved.</p>	<p>Triple city youth and teens in YMCA programs by 2029</p> <hr/> <p>Five Key Partnerships</p> <hr/> <p>Access to swim lessons and water safety instruction for all YMCA youth and teen participants in the City of Rochester by 2029</p>	<p>\$12.5M raised in annual support highlighted by \$3M total in 2029</p> <hr/> <p>\$10M total raised in grant support for programs & capacity building</p> <hr/> <p>\$12.5M in capital contributions for needs across the Association</p> <hr/> <p>Add 50 new members to the George Williams Society: \$2.5M to \$5M</p>
CHAMPIONS	<p>Staff: Ernie Lamour Paul LeFrois Mike Stevens</p> <hr/> <p>Volunteer: Maureen Mulholland</p>	<p>Staff: Ernie Lamour Sr. Team</p> <hr/> <p>Volunteer: Dan Burns</p>	<p>Staff: Mike Stevens George Warren</p> <hr/> <p>Volunteers: Twyla Cummings Tim Tindall</p>	<p>Staff: Andy Powers Kate Pellett</p> <hr/> <p>Volunteers: Jurij Kushner Nicole VanGorder</p>



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

Communicate impact on people served and outcomes of Y Experience (esp. those with Specialized Memberships)

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

Workforce readiness incorporated as area of focus in our youth development portfolio

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 high-performing program YMCAs in support of continuous benchmarking

IMPACT MEASURES

Track Specialized Membership Opportunities by Zip Code

Secure grants to fund memberships for underrepresented groups

Define new program outcome metrics

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 by 2029

Youth Leadership Structure in place by 2025

Two programs funded by Program Innovation Fund

Fee-based programs to grow 10% annually

Visits to 3 high-performing Y's by 2025

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
George Warren
Terrence McElduff

Volunteer:
Rachel Baranello

Staff:
Mike Stevens
Pam Cowan
Chris Mangone
George Warren

Volunteer:
Tarek Eldaher



OUR PEOPLE

GOALS	STAFFING EXCELLENCE	STRENGTHENING PEOPLE & CULTURE	GREAT VOLUNTEERS & GOVERNANCE	ADVANCING EQUITY
STRATEGIES	<p>Staffing model and job structures for Association and branches</p> <hr/> <p>Centralized Recruiting with a broader pool of candidates through strategic partnerships</p> <hr/> <p>HR model for compensation, recruiting, employee performance management and retention</p> <hr/> <p>Competency-based leadership development and succession plan</p> <hr/> <p>Increased recruitment, development, retention of underrepresented staff</p>	<p>Define shared behaviors and accountability that demonstrate our values</p> <hr/> <p>Elevate voice of employees</p> <hr/> <p>Build trust and co-create solutions</p> <hr/> <p>Develop and implement Association Policy and Practices Manual</p> <hr/> <p>Strengthen employee engagement and culture</p>	<p>Association Board Development Plan</p> <hr/> <p>Branch Board of Management Development Plan</p> <hr/> <p>Authority & Policy Manuals to define expectations and uniformity</p>	<p>Strengthen Cultural Competency of Staff and Volunteer Leaders</p> <hr/> <p>Broader learning opportunities for staff, to support advancement of equity and skills for all</p> <hr/> <p>Leverage a DEIB infrastructure to advance equity work with staff and board volunteers</p>
IMPACT MEASURES	<p>Increase representation and retention by 25% for all candidate pools through strategic partnerships</p> <hr/> <p>Development plans for 50% of eligible staff</p> <hr/> <p>Career and opportunity plans for 100% of high potentials</p>	<p>Employee engagement survey participation 50%</p> <hr/> <p>300 World Café participants</p> <hr/> <p>75% annual retention rate across all ERG members (FT & PT)</p>	<p>Increase the diversity of volunteer stakeholders across the Association</p> <hr/> <p>Track program volunteer functions by Association and branch</p> <hr/> <p>Creation of Association board portal and scorecard</p>	<p>20% pulse survey response rate</p> <hr/> <p>Pre/post IDI assessment progress</p> <hr/> <p>Representation increase of 10% in leadership succession</p>
CHAMPIONS	<p>Staff: Talethea Best Deanna Rose Kate Pellett</p> <hr/> <p>Volunteer: Erick Bond</p>	<p>Staff: Talethea Best</p> <hr/> <p>Volunteer: Tashanda Thomas</p>	<p>Staff: Ernie Lamour Mike Stevens Chris Mangone Kate Pellett</p> <hr/> <p>Volunteer: Helen Zamboni</p>	<p>Staff: Talethea Best</p> <hr/> <p>Volunteers: Twyla Cummings Sady Alvarado-Fischer</p>



OUR FUTURE

GOALS	MISSION AWARENESS	FACILITY OPTIMIZATION & EXCELLENCE	LEADING-EDGE TECHNOLOGY	FINANCIAL SUSTAINABILITY
STRATEGIES	<p>Continued implementation and refinement of Integrated Communications and Marketing Plan</p> <p>Develop and deliver consistent internal communications as one YMCA through multiple voices</p> <p>Achieve enhanced market positioning on the YMCA mission through differentiation of Y from 'competitors'</p> <p>Enhance stakeholder loyalty on YMCA's purpose and impact</p>	<p>Association Master Plan/Timetable (REDAO) and Facility Investment Strategy</p> <p>Finalized plans: Carlson and Eastside Child Care Center</p> <p>Enhanced Facility staffing and compensation structure and systems for Association and branch</p> <p>Scalable outdoor facility model to be utilized in multiple locations</p>	<p>Develop an integrated set of secure, predictable and resilient systems, services and solutions that can be scaled</p> <p>Implement robust data analytics/data visualization system to support all aspects of YMCA</p> <p>Invest in training and development advancement plans to upskill existing employees</p> <p>Form strategic partnerships with technology vendors and industry leaders to access cutting-edge solutions and expertise</p>	<p>Proforma (5-year) model by branch</p> <p>Transparency and accountability in financial reporting</p> <p>Plan for Reserves Reinvestment - Capital or Program: \$2M to \$3M/year</p>
IMPACT MEASURES	<p>Continuously refine strategic brand awareness efforts.</p> <p>Lower Return on Investment (ROI) for membership acquisition year over year (beat \$5 ROI on Flash Sales; \$20 ROI in January).</p> <p>Cultivate and train four new thought leaders and establish a cadence of quarterly leadership communications.</p>	<p>Overall Facility usage grows by 5% annually.</p> <p>Association Overall Net Promoter Facility Satisfaction Scores of 70%.</p> <p>Total dollars reinvested in facilities will exceed \$5 million by 2029.</p>	<p>Develop comprehensive risk management and cybersecurity strategies to protect against threats.</p> <p>Improve efficiency and ease of use of both member facing and staff facing technology.</p> <p>Create a sustainable staffing model that incorporates training to advance overall technological roadmap.</p>	<p>Financial plan for growth and sustainability by fiscal year: FY25: \$64M; FY26: \$69M; FY27: \$73M; FY28 \$75M; FY29: \$76M Gen/Adm/FR Ratio<35%</p> <p>Reserve reinvestment (capital, program, etc.) \$2M per year.</p> <p>Timely reporting and supporting MD&A narrative.</p> <p>Balance Sheet Metrics: Current Ratio 1:1 or Higher, Days Cash on Hand > 90 Days, Debt Ratio 1:35:1 or Higher</p>
CHAMPIONS	<p>Staff: Pam Cowan</p> <p>Volunteers: Matt Kilmer Maureen Mulholland</p>	<p>Staff: Mike Stevens Chris Marks Chris Mangone</p> <p>Volunteer: Mary Ockenden</p>	<p>Staff: Pam Cowan Paul LeFrois Chris Lerch</p>	<p>Staff: Paul LeFrois Kelly Mitchell</p> <p>Volunteers: Margaret Dugan Ed Kay</p>



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.