STRENGTHENING OUR COMMUNITY

STRATEGIC INITIATIVES • 2018 – 2021
YMCA OF METROPOLITAN MILWAUKEE
2018–2021 STRATEGIC PLAN
By 2021 the YMCA of Metropolitan Milwaukee plans to double the number of people we positively impact through youth development, healthy living and social responsibility.

WE SEE STRENGTH IN OUR COMMUNITY
The Y believes that everyone deserves a chance to succeed—no matter their background or income—and we have learned that can happen only when we unite to nurture the best in all of us. That is why our cause is strengthening community through youth development, healthy living and social responsibility.
OUR MISSION
To put Christian principles into practice through programs that build a healthy spirit, mind and body for all.

OUR VALUES
Our core values of caring, honesty, respect and responsibility will guide our behaviors.

OUR AREAS OF FOCUS

YOUTH DEVELOPMENT:
Nurturing the potential of every child and teen for a path of success.

HEALTHY LIVING:
Improving the health and well-being through partnerships with health care.

SOCIAL RESPONSIBILITY:
Foster a greater sense of engagement to provide support to our neighbors.

OUR VISION
To become recognized as a leading community collaborator in Milwaukee County that achieves bold results in the areas of youth development, healthy living, and social responsibility, with an emphasis on youth, families and the aging population.

OUR COMMITMENT TO DIVERSITY, INCLUSION & EQUITY
We believe the Y must continue to lead the way to a brighter future by following our belief that we are stronger when our doors are open to all. Our policies, practices and programs must advance our organizational commitment to diversity and inclusion. We must sustain our support for newcomers and immigrants, in partnership with our colleagues at Ys in 120 countries. We must ensure that all people — across all dimensions of diversity — feel welcome and valued as part of the Y family.
INCREASING OUR COMMUNITY IMPACT

The YMCA of Metropolitan Milwaukee seeks to pursue financial sustainability, maintain our relevance with families, and to deepen our community impact with a priority in the city of Milwaukee.

COMMUNITY IMPACT: as we move toward the year 2021, we will focus on three strategic priorities:

1. YOUTH DEVELOPMENT:
   To be the primary place for youth during out of school time.

2. HEALTHY LIVING:
   To be a key stakeholder that influences health and well-being for all.

3. SOCIAL RESPONSIBILITY:
   To strengthen community by addressing critical issues and increasing organizational capacity so all segments of society can have access and thrive at the Y.
TABLE OF CONTENTS

COMMUNITY IMPACT:
Initiatives for Youth Development .......................... 6

COMMUNITY IMPACT:
Initiatives for Healthy Living .............................. 7

COMMUNITY IMPACT:
Initiatives for Social Responsibility ....................... 8

CAPACITY BUILDING:
Initiatives for Sustainability .............................. 10

CAPACITY BUILDING:
Initiatives for People ...................................... 10

CAPACITY BUILDING:
Initiatives for Mission Advancement ...................... 11

CAPACITY BUILDING:
Initiatives for Membership and Programs ............... 11

OUR RESEARCH ............................................. 12

STRATEGIC ADVANTAGES ................................. 13

OUR PROCESS ............................................... 14

COMMITTEE .................................................. 15
YOUTH DEVELOPMENT

Nurturing the potential of every child and teen

At the Y, we believe that all kids have amazing potential. The values and skills learned early are vital building blocks for life, and young people deserve an opportunity to discover who they are and what they can achieve. From the youngest in our child care programs to the teens in our leadership development initiatives, the Y gives kids and teens a safe place to belong, build confidence and learn positive behaviors grounded in our core values of caring, honesty, respect and responsibility.

OUTCOME: To be the primary place for youth during out of school time.

STRATEGIES:

- Create a safe and secure community and model that supports youth and strengthens families.

- Expand the Y’s early learning readiness program in a holistic approach to our work.

INDICATORS:

- Increase the number served through youth development programs.

- Families indicate they are satisfied with our programming.
HEALTHY LIVING

Improving the nation’s health and well-being

At the Y, we believe that being healthy means more than simply being physically active. It is about maintaining a balanced spirit, mind and body. The Y is a leading voice on health and well-being issues—and a leader in fighting chronic disease—and is committed to empowering people to lead fuller lives. We bring families closer together, promote healthy living and foster connections through fitness, sports, fun and shared interests. As a result, thousands of youth, adults and families receive the support, guidance and resources they need to become and stay healthy.

INITIATIVES:
FOR HEALTHY LIVING

OUTCOME: The Y is viewed as a key stakeholder that influences health and well-being for all.

STRATEGIES:

- Expand healthy living programs that address community health needs through partnerships with local and national organizations that have cost-effective, inclusive and accessible programs.

- Create and provide approaches to our healthy living work through various intervention types.

INDICATORS:

- Increase the number served through healthy living programs.

- Increase health collaborations and partnerships with local and national organizations.
SOCIAL RESPONSIBILITY

Giving back and providing support to our neighbors

At the Y, we believe that when we work together, we move individuals, families and communities forward. Since 1858, the Y has responded to society’s most pressing needs by developing innovative, community-based solutions and uniting people from all walks of life to participate in and work for positive social change. Whether providing job training to a newly single parent, advocating for affordable, healthy food options for underserved communities, or helping newcomers transition into their new neighborhoods, the Y is committed to empowering people with the resources and support needed to live healthy, connected and secure lives.

INITIATIVES: FOR SOCIAL RESPONSIBILITY

OUTCOME: To strengthen community by addressing critical issues and increasing organizational capacity so all segments of society can have access and thrive at the Y.

STRATEGIES:

- Convene and collaborate with organizations to fill gaps and remove barriers on key issues facing our community.
- Research and develop new and diverse markets.

INDICATORS:

- Expand Y partnerships with organizations that support our mission.
- Ensure diverse, isolated and underserved communities feel supported by the YMCA.
CAPACITY BUILDING

INCREASING OUR ABILITY TO DO OUR WORK

As we move towards 2021, we will invest in our capacity as an organization in the four following strategic priorities.

1. SUSTAINABILITY:
   Achieve a higher level of status where the organization is respected and thriving.

2. PEOPLE:
   Encourage staff and volunteer growth and greater connection to the Y mission.

3. MISSION ADVANCEMENT:
   Attract and re-engage donors by sharing our organization’s community impact.

4. MEMBERSHIP AND PROGRAM:
   Ensure that the organization stays relevant for families.
INITIATIVES: FOR SUSTAINABILITY

OUTCOME: To achieve a higher level of status where the organization is respected and thriving.

STRATEGIES:

- Leverage tools to be more effective and efficient in the way we work and engage others.
- Develop a plan to improve our financial Y of USA benchmarks.

INDICATORS:

- Improve net margin annually.
- Grow revenue.

INITIATIVES: FOR PEOPLE

OUTCOME: To encourage staff and volunteer growth and greater connectedness to the Y mission.

STRATEGIES:

- Develop and maintain diverse and sustainable staff, volunteers and donors to become cause-driven leaders.
- Model the principles of diversity and inclusion in their leadership, staff, programs and strategies.

INDICATORS:

- Staff have participated in leadership development opportunities.
- Volunteers and staff are recognized as strong advocates for the YMCA mission.
INITIATIVES: FOR MISSION ADVANCEMENT

OUTCOME: To attract and re-engage donors by sharing our organization’s community impact.

STRATEGIES:
- Increase our visibility as a cause-driven, charitable organization.
- Re-kindle the Y’s brand and position in the community.

INDICATORS:
- Annually increase contributions.
- YMCA of Metropolitan Milwaukee is recognized as a charity of choice.

INITIATIVES: FOR MEMBERSHIP AND PROGRAM

OUTCOME: To ensure that the organization stays relevant for families.

STRATEGIES:
- Connect and engage families for membership and programs.
- Increase the member acquisition and member retention rates.
- Deepen our commitment to Out of School Youth programming.

INDICATORS:
- Grow membership and program revenue annually.
- Increase member satisfaction.
- Grow Out of School youth programs.
THE NEED IS GREAT...

Our strategic planning process included research, interviews and working sessions to understand our starting point and strength, and to identify where we need to focus our future efforts. Our Leadership team came together to identify the key constituents to conduct a community needs assessment. Over a seven month period, our leadership staff interviewed 475 diverse community stakeholders that represent communities we serve; including, YMCA members, program members, staff, CEOs, non-profits, hospitals, businesses, donors, partners, elected officials, school district leaders and representatives from public and private sectors through electronic surveys, branch round tables, and one-on-one in-person interviews.

These are the key community needs that emerged from stakeholder feedback.

- Achievement gaps
- Food insecurity
- Mental health
- Lack of teen services
- Opioid epidemic
- Racial divide
- Affordable housing
- Transportation barriers
- Support for Aging Adult social isolation
- Chronic disease support
- Need for healthy lifestyle options for families
- Partnerships and collaborations are critical
- Role modeling diversity & inclusion
STRATEGIC ADVANTAGES

As part of our research we identified six Strategic Advantages.

1. National Brand
   • Strong Local Reputation

2. Programming
   • Our breadth and scope of program variety which incorporates all ages, ability, and diverse groups

3. Legacy
   • For 160 years the Y has been a well trusted collaborative organization within the community
   • For almost 100 years Camp Minikani has been dedicated to helping youth build confidence and realizing their best self

4. Safety Around Water (Swim Lessons)
   • YMCA locations in 6 communities
   • Serves Milwaukee County
   • 4500 registrations in 2017
   • 25,000 lessons given in 2017

5. Out of School Time (all programs)
   • YMCA locations in 12 communities
   • Serves Milwaukee County
   • 44 locations (Schools/Y’s)
   • 2,465 youth served

6. Y without Walls
   • Provide programming onsite at 62 companies
   • Provide programming in 60+ schools
   • Provide programming in 5 County Parks
OUR PROCESS

September 28, 2017
DEVELOP
Orientation, process, identification of Critical Social Issues and Communications Plan development of Strategic Planning process and responsibilities.
Strategy Team, Y-USA Resource Director

November 15, 2017
AGREE
Stakeholder input and Strategic Advantages and Drafted Strategic Priorities

December 12, 2017
REFINE
Present and Strategic Priority Framework, create Impact Statement and Build Strategy Screen.
Board and key leadership Staff

February 22, 2018
APPROVE
Strategic Plan Presented to Board of Directors for Final Approval.
Strategy Team and Board of Directors

May, 2018
CREATE
Branch and Department Action Plans (April – May).

July–August, 2018
BUDGET
Develop a 2018–2019 Budget.

October 30, 2017
IDENTIFY
Strategy Team identified internal data, Critical Social Issues, Strategic Advantages and Organizational Strategies.
CEO and Leadership Staff Team, Y-USA Resource Director

December – January
INPUT
Collect Community Stakeholder Interviews, Community Forums and Focus Groups.
CEO, Staff, Board, and Strategy Team Members

December 18, 2017
BUILD
Continue to Refine Priorities and Build Success Measurements and Outcomes.
Key Leadership Staff

April, 2018
DEFINE
Develop Association Goals and Objectives.

June, 2018
PLAN
Develop Annual Operating Plans.

September, 2018
ACT
Develop and implement Performance Plans and SMART Goals.

Ongoing
SHARE
Connect to key stakeholders and share our strategies.
THANK YOU
A special thank you to the volunteers and staff on our Strategy Planning Committee.

STRATEGY TEAM
Deb Allen, Chair
Richard Canter
John W. Mellows
Mary Panzer
Rachel Roller
Richard Schmidt, Jr.

STAFF
Carrie Wall
Shanée Jenkins
VP Social Responsibility & Strategic Partnerships - YMCA of Metropolitan Milwaukee
TR Yow

OFFICERS
Richard L. Schmidt, Chair
C.G. Schmidt, Inc.
Jeffrey J. Lueken, Vice Chair/Treasurer
Northwestern Mutual
Jessie Lochmann, Secretary
Foley & Lardner LLP
Richard J. Canter, Immediate Past Chair
Carrie M. Wall, President & CEO
YMCA of Metropolitan Milwaukee

MEMBERS
Debbie Allen
Anne C. Ballentine
Jack M. Blank*
Tina Chang
Jon Hammes*
Kalan Haywood
Bruce E. Jacobs*
Burleigh E. Jacobs*
Ted D. Kellner, C.F.A.*
Chris Marschka
PNC Bank
John W. Mellowes
Charter Manufacturing Co., Inc.
Bruce A. Miller
National Insurance Services

Kevin Newell
Royal Capital Group
Mary E. Panzer
Pancer Consulting
Jill G. Pelisek
UWM School of Business Admin.
Rachel Roller
Aurora Health Care
John F. Steinmiller
Milwaukee Bucks
John Stollenwerk*
Robert V. Venable
Charter Manufacturing Co., Inc.
Gregory M. Wesley
Medical College of Wisconsin
Edward J. Zore*

* Emeritus Members

YMCA OF METROPOLITAN MILWAUKEE BOARD OF DIRECTORS

COMMITTEE