
YMCA OF METROPOLITAN MILWAUKEE

WE'RE HERE FOR GOOD

EST. 1858

2019-2020 ANNUAL REPORT



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

COMMUNITY IMPACT YMCA 2019-2020

The Y is a MISSION: that we have a commitment to keep alive and that we continually revitalize. We are honored that many people think of the Y as a hub, convener, and community pillar. Our organizational promise is to deepen our community impact safely and responsibly and to promote diversity, inclusion, and equity in all we do.

In our COVID 19 response, we learned to better incorporate data that reflects the communities we serve and the people who depend on us. In creating our smart strategy, we worked alongside the Center for Disease Control, Wisconsin Health and Human Services, local Health Departments, and major health providers. Below are examples of our COVID response:

- **EMERGENCY RESPONSE CAMPS:** Protecting families on the front lines - 60 children through 4 partnerships with leading medical providers (and still growing)
- **SAVING SUMMER FUN:** Respite for families who depended on the Y to be there for them - 289 Licensed day campers and 774 Camp Minikani day campers
- **REINVENTING THE CLASSROOM:** Relief for parents facing a dilemma regarding home care and virtual schooling -30+ schools and 4 brand new extended learning academies.
- **PROTECTING OUR MOST VULNERABLE:** A lifeline against isolation for our seniors - 3,614 personal connections, 2 new health programs, and 18 nutrition videos
- **EXPANDING FOOD ACCESS:** Covering necessities amidst economic devastation - distributing 2,700+ healthy food boxes & recipes, 14,000+ views on our latest cooking video
- **REACHING INTO THE COMMUNITY:** Modernizing to meet our members where they are - 6,081 digital logins since March, 48 new health classes were added to our virtual platform

Coupled with our long-standing commitment to diversity, inclusion, and equity, we have reinforced the Y's social responsibility platform. The renewed dedication responds to the social and civic unrest in our community caused by systematic racism and the lack of equity prevalent in our society. To support this area, we have hosted active listening sessions with hundreds of community players including board, staff and volunteers to help guide our future endeavors.

Six months into the crisis, our current strategies are: to continue pivoting our programs; to safely serve the public; to comply fully with all governmental directives; and to align our programming with the national Y movement and other thought leaders across the country.

The Y

***Forever Adapting
Forever For a Better US!***

YMCA OF METROPOLITAN MILWAUKEE

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BOARD CHAIR
Bruce Miller
PRESIDENT AND CEO
Carrie Wall



FOR YOUTH DEVELOPMENT
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December 3, 2020

Dear Donor,

We thank you for your past generosity to the YMCA of Metropolitan Milwaukee. In light of what has transpired locally and across the country in the past seven months, we want to provide you with an update on the Y, how we met community needs once COVID 19 began impacting our region, and our plans to adapt our programming going forward to address gaps in the nonprofit social network in a way that only the Y is positioned to do.

The Y has remained a trusted voice in a time of uncertainty. We are a role model to others including nonprofits, businesses, and even government agencies in COVID-19 safety. We piloted some of the first childcare programs and helped shape state & national standards. In creating our smart strategy, we worked directly alongside the Center for Disease Control, State of Wisconsin Health and Human Services, local Health Departments, and major health providers.

We are honored that many people think of the Y as a hub, convener, and community pillar. Our organizational promise is to deepen our community impact safely and responsibly and to promote diversity, inclusion, and equity in all we do. The Y is here for all of us in greater Milwaukee, and we firmly believe that **we are stronger together**.

In support of our diversity, inclusion, and equity platform, we reinforced our commitment to one of the Y's three pillars - social responsibility. The renewed commitment responds to our efforts internally to become an anti-racist, multicultural organization. To support that goal, we hosted active listening sessions with important community leaders including board, staff and volunteers and gathered community input to help guide our future endeavors.

The YMCA of Metropolitan Milwaukee is helping to lead the national YMCA movement. Here's how we keep forging that path:

In our immediate response to COVID 19, the Y changed its direction through several innovative emergency programs including licensed Emergency Responder Camps for First Responders, wellness check-ins with seniors, and virtual live exercise classes and healthy cooking demonstrations.

Our COVID 19 response incorporated input from partners including health care systems related to what the needs truly are and how to provide an appropriate response. We learned to better incorporate data that reflects the communities we serve and the people who depend on us.

Seven months into the crisis, our current strategy goes beyond simply pivoting our programs. We want to intentionally respond to the current situations in the neighborhoods



we serve and look down the road at current trends so that we are ready for whatever the future brings.

Some highlights of the last few months at the Y include:

EMERGENCY RESPONSE CAMPS

Protecting families on the front lines - 60 children through 4 partnerships with leading medical providers (and still growing)

SAVING SUMMER FUN

Respite for families who depended on the Y to be there for them - 289 Licensed day campers and 774 Camp Minikani day campers

CLOSING THE ACHIEVEMENT GAP

Educational programs, including high-tech skills - such as 20 pilot TinkRworks Science Technology Engineering and Math kits

REINVENTING THE CLASSROOM

Relief for parents facing an impossible dilemma regarding home care and virtual schooling - 25+ schools and 6 brand new extended learning academies that serve more youth daily in licensed care than any other Milwaukee childcare provider.

PROTECTING OUR MOST VULNERABLE

A lifeline against isolation for our seniors - 3,614 personal phone connections, 2 new health programs, and 18 nutrition videos

EXPANDING FOOD ACCESS

Covering necessities amidst economic devastation – distributing 3,100+ healthy food boxes & recipes, 14,000+ views on our cooking videos

REACHING INTO THE COMMUNITY

Modernizing to meet our members where they are – more than 10,000 digital logins since March, with more than 50 new health classes added to our virtual platform

The YMCA of Metropolitan Milwaukee, in partnership with Y-USA, is continuing to develop and roll out a multi-phase marketing effort to guide us through the complexities of keeping people connected to and engaged with the Y during these challenging times.

The YMCA of Metropolitan Milwaukee also hired an outside consulting team to conduct listening sessions, one of which focused exclusively on older adults. The resounding message in these focus groups was that people of all ages, including youth and seniors missed "my Y" and wanted to return in full force in the near future. They also expressed regrets that they couldn't easily socialize with their many Y peers with whom they have grown so close to since they became actively involved in their local Y branch, center, or program.



Our re-engagement strategy leads with the headline message: “FOREVER Welcoming. For a better us.” This message includes a reminder to the public that the Y always was – and always will be – here to help everyone learn, grow and thrive. With a message rooted in inclusivity, community and equity for all, our member and participant resources explain all points of the reopening spectrum, which is continually changing.

The strategy also includes easy to use guides to let individuals know that it is safe to return to Y facilities. If they don’t feel comfortable doing so, they are encouraged to visit our website where they are able to access numerous at any time of the day. These videos which include healthy cooking demonstrations and workout videos, have proven to be very popular, with some visitors re-watching certain segments multiple times.

We are very excited that our Y, along with nearly 200 Y’s around the country, recently launched the STRONG Challenge, with the intended goal of reengaging with members and welcoming new members into the Y movement. The YMCA of Cincinnati first piloted this campaign and generously shared their resources. Y’s around the country took on this 6-week challenge We have already surpassed our enrollment goal of 500 members, staff, and community participants.

While we have already reopened facilities and resumed programming, we are not yet operating at 100% of capacity. As communities begin to open up, our next focus will be the acquisition of new members, program participants, and volunteers with a “get involved” call to action. We will seek to re-engage with our members and neighbors, inspire public confidence to rekindle their involvement, and communicate that the Y is a safe place and space where everyone can find connection and community.



A sustainable future requires bold action — and smart financial strategy directly from the Y’s Board and leadership team. The financial planning process includes financial modeling and reimagining our physical locations.

The national trend among Y’s and fitness providers is smaller boutique centers and integration of technology throughout a facility. While we recently closed our Downtown Y, our commitment to Downtown Milwaukee (where we have maintained a space for 162 years) continues, and we are considering several new locations that will be more cost efficient, technology rich, and inviting. The multiple real estate developers who want us to locate the new Downtown Y in their properties was unexpected, and the Board will decide in the coming months from the many options. COVID has placed a strain on every aspect of our organization (and we know that we are not alone in this challenge). For example, we are required to run our youth development programs at lower staff/child ratios and lower capacities, need lots of Personal Protective Equipment for staff and youth, and continually resupply basic items to eliminate sharing. Additionally, we invested in technology upgrades so kids can log-in to their virtual school activities and commit to providing healthy snacks and meals that must be individually served and not provided family style.

Like you might imagine, many children and families were affected economically by COVID 19, and they need the Y more than ever. Every week, more members, families, and program participants ask for access assistance because they love their Y; however, they cannot afford the full price for the essential services because of changed economic situations.

Your gift helps guarantee the Y's programs are available **for all to grow in mind, body and spirit!**

We believe our vision, mission, and strategic plan will guide us into a bright future in greater Milwaukee.

The Y:

**Forever Adapting
Forever For a Better US!**

Sincerely,



Carrie Wall
President and CEO
YMCA of Metropolitan Milwaukee





FOR YOUTH DEVELOPMENT
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YMCA OF METROPOLITAN MILWAUKEE PROGRAMS

Y programs align with our three pillars: Youth Development, Healthy Living, and Social Responsibility.

YOUTH DEVELOPMENT: For youth development, the Y focuses on licensed programming for children birth to 18. The Y currently provides licensed in-person care and educational support and mentoring for youth 5-17 years of for students in virtual school or a hybrid calendar.

HEALTHY LIVING: The YMCA of Metropolitan Milwaukee's Community Integrated Health programs aim to intentionally strengthen the relationships between traditional health care systems and community-based organizations (like the Y) in order to help all community members, live their healthiest lives. Community Integrated Health benefits include increased access to care, lowered costs, prevention and reduction of chronic disease, and reduced effects of some social determinants of health.

SOCIAL RESPONSIBILITY The Y is working to bridge divides and create common ground among people of all age groups and backgrounds. Our commitment to our diversity, inclusion, and equity supports our efforts to become an anti-racist, multicultural organization. Representation matters and we strive to ensure that our staff and volunteers are culturally competent and represent and reflect the rich diversity of the communities we serve.

STRATEGIC PLAN: The YMCA of Metropolitan Milwaukee's "Strengthening our Community" Strategic Plan has guides our work, even with COVID 19.

The Y was historically and now still is and a network—an interconnected system of people and spaces united by a common purpose: to strengthen our community. That premise is inclusive of all our branches, staff, and volunteers, and all groups and funders.

We recognize the need to build and document the desired infrastructure, in order that we might achieve our vision of developing new locations and new generations of changemakers who will, along with our existing centers and programs, create a Milwaukee community we all want to live in.

Our overall objective relates to transforming people and neighborhoods by working towards systems change, bridging social divides, and giving back to their community and others. Our shared vision centers on creating cohesive communities where all individuals achieve a high level of health, confidence, connection, and security at every stage of life.

We hope to be an even stronger Y in 2021— one where everyone achieves their social, physical, and spiritual goals, and one that rises to meet and adapt to the needs of our ever-changing Milwaukee community.



FOR YOUTH DEVELOPMENT
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Financials
YMCA of Metropolitan Milwaukee
Fiscal Year 2020
September 1, 2019 to August 31, 2020

2021-2022 Statement of
Activities

Contributions & United Way Government & Private Grants	3,067,877 850,174
Membership Dues	1,568,728
Program Fees	5,753,893
Service & Sales	247,456
All Other	<u>301,716</u>
Total Revenue	11,789,844
Program	8,493,521
Administration	2,402,957
Fundraising	<u>316,080</u>
	11,212,558
Operating Surplus	577,286

Balance Sheet

Cash	4,430,015
Endowment Assets	4,436,591
Receivables	1,296,372
Capital Assets	7,761,698
Other	<u>2,181,322</u>
	20,105,998
Current Liabilities	5,453,263
Capital Lease Obligations	51,426
Other	<u>1,664,491</u>
	7,169,180
Net Assets	12,936,818
Total Liabilities & Net Assets	20,105,998



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YMCA of Metropolitan Milwaukee Corporate and Foundation Funding Sources

Fiscal Year 2020

September 2019 - August 2020

United Way of Greater Milwaukee & Waukesha County	\$ 375,862
YMCA of the USA	\$ 148,068
Northwestern Mutual Foundation	\$ 126,000
Charter Manufacturing Company Foundation	\$ 50,000
Bader Philanthropies	\$ 40,000
The Richard and Ethel Herzfeld Foundation	\$ 40,000
Advocate Aurora Healthcare	\$ 32,100
Greater Milwaukee Foundation	\$ 32,100
We Energies Foundation	\$ 25,000
Welcoming America	\$ 25,000
Johnson Controls	\$ 15,000
Potawatomi Hotel & Casino	\$ 15,000
Henry H. Uihlein & Marion (Polly) S. Uihlein Foundation	\$ 15,000
Bel Air Cantina	\$ 12,710
James B. and Jane R. Bradford Endowment Trust	\$ 11,586
Froedtert Health	\$ 10,500
Rockwell Automation	\$ 10,500
Kohl's	\$ 10,278
Associated Bank	\$ 10,000
GE Healthcare	\$ 10,000
Old National Bank	\$ 10,000
Lutz Family Charitable Trust	\$ 8,000
Eaton Corporation	\$ 7,000
National Insurance Services	\$ 7,000
WEYCO Group	\$ 6,000
Children's Wisconsin	\$ 5,500
Baird Foundation	\$ 5,150
BMO Harris Bank	\$ 5,000
Evan and Marion Helfaer Foundation	\$ 5,000
Marquette University	\$ 5,000



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YMCA OF METROPOLITAN MILWAUKEE BOARD OF DIRECTORS 2020-2023

Updated 11/9/2020

OFFICERS:

CHAIR:	Bruce A. Miller (2012-2021), National Insurance Services President/CEO
VICE CHAIR:	Jeffrey J. Lueken (2006-2022), Northwestern Mutual Mgmt. Co. Senior Vice President - Investments
SECOND VICE CHAIR:	Gregory M. Wesley (2011-2023), Medical College of Wisconsin SVP Strategic Alliances and Business Development
TREASURER:	Chris Marschka (2018-2021), PNC Bank Head of Commercial Banking
SECRETARY:	Jessie Lochmann (2011-2023), Foley & Lardner LLP Partner
IMMEDIATE PAST CHAIR:	Richard L. Schmidt, Jr. (2008-2020), C.G. Schmidt President/CEO
PRESIDENT & CEO:	Carrie M. Wall

MEMBERS:

Anne C. Ballentine	2016-2022	Rogers Behavioral Health, VP - Communications
Richard J. Canter	2006-2023	Wheaton Franciscan Healthcare, SVP – Strategy & Corp. Affairs (Retired)
Tina Chang	2006-2021	Syslogic, Inc., CEO
Michelle Frazier	2020-2023	Advocate Aurora Health, CCO
Angela Johnson	2020-2023	Children’s Wisconsin, CISO and VP IS Infrastructure
Diana Kegel		Rite-Hite Board Chair - FIS, VP Client Relations Executive
James Klauck	2018-2021	Froedtert and Medical College of WI, Sr. Vice President
Glenn Margraff	2019-2022	Wintrust Financial Corporation Town Bank, Group Senior Vice President
Drew Maxwell		Camp Minikani Board Chair – MIAD, Executive Director MIAD Innovation Center
John W. Mellowes	2012-2021	Charter Manufacturing, CEO
Hon. Derek Mosley	2018-2021	Milwaukee Municipal Court, Judge
Kevin Newell	2018-2021	Royal Capital Group, President
Mary E. Panzer	1998-2021	Panzer Public Affairs Consulting, President
Jill G. Pelisek	2004-2022	UWM Sheldon B. Lubar School of Business, Adjunct Professor
Rachel Roller	2016-2022	Aurora Health Care, SVP Community & Government Relations
John F. Steinmiller	1991-2021	Milwaukee Bucks, EVP of Community Affairs and Social Responsibility
Cynthia Stokes-Murray		Northside Board Chair - Brooks Brothers, Supervisor

MEMBERS EMERITUS:

Jack M Blank	Jon D Hammes	Ted D Kellner
John J Stollenwerk	Bruce E Jacobs	Edward J Zore
Robert Venable	Richard Schmidt	

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BOARD CHAIR
Bruce Miller
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Carrie Wall

YMCA OF METROPOLITAN MILWAUKEE LEADERSHIP

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