

NAYDO WEBINAR

Sponsored by Blackbaud

January 25, 2010
1 hr CFRE credit



Integration of Philanthropy

Visionary Planning Accelerates
Extraordinary Capital Investments

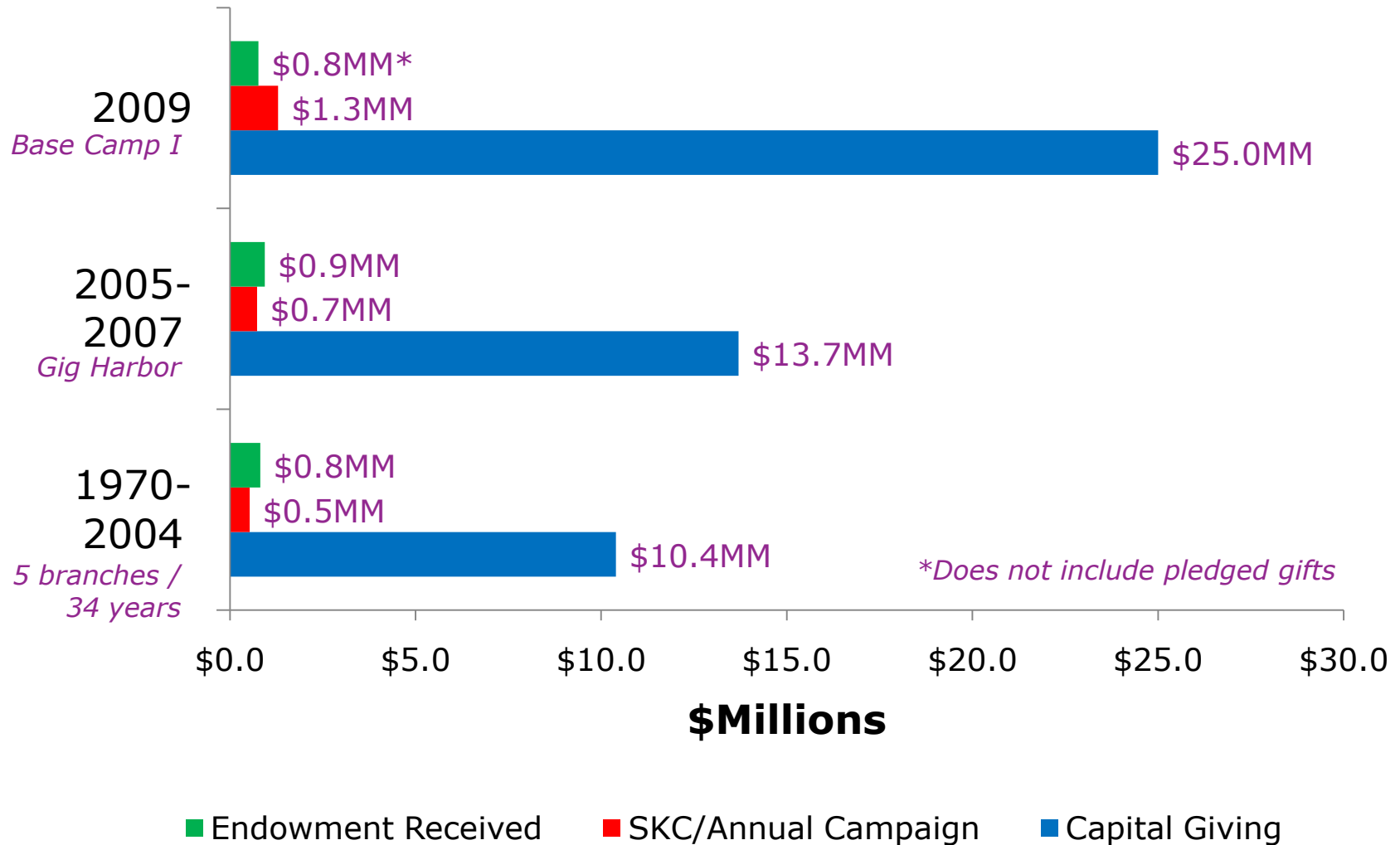


Bob Ecklund
President and CEO



Michelle LaRue
**Communications and
Capital Campaign Director**

Snapshot: 1970 to Present



Studying Needs

- **Planning** – identify critical areas of need and priorities through the year 2020
- **Responding** – take action on requests from community leaders and potential collaborative partners

“As we look at the significant health and recreational needs for families in Kitsap County, we knew we would need partners to meet them. The YMCA brings the expertise and experience we need.”

~ Josh Brown, Kitsap County Commissioner

- **Researching** – determine greatest areas of need and demand for new programs/facilities

“We know the YMCA does things right – they do their homework and we know they are a safe investment.”

~ Brian Boyd, Forest & Sequoia Foundations

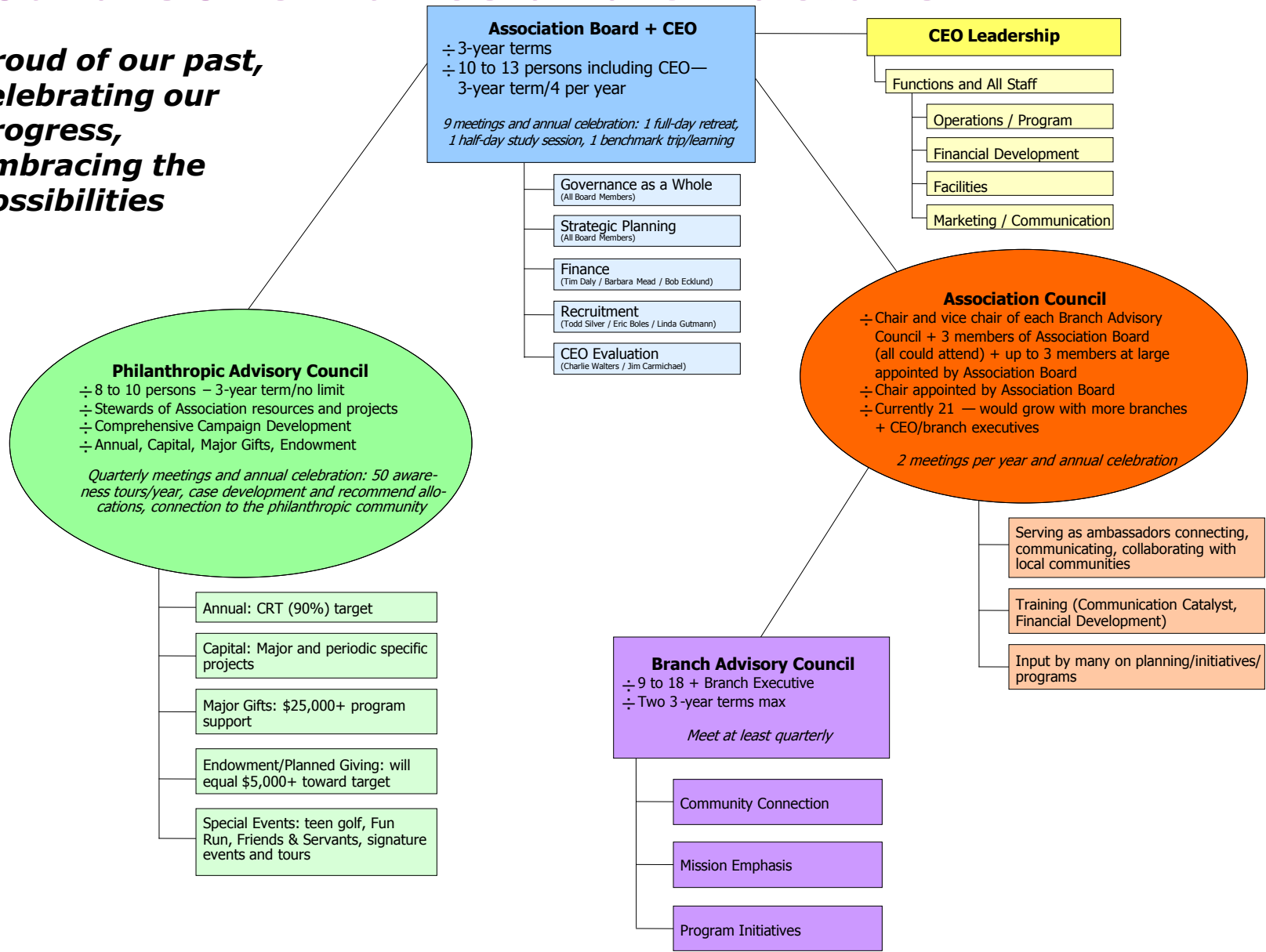
Development Approach

- **Long-term approach** – phasing of projects by 2020
- **Integrated fundraising strategy** – securing funds for scholarships, capital and endowment
- **Balanced source of funds** – between philanthropic donations, governmental support, partnership investments, and internal operations
- **Operating proformas** – developed for each proposed new program/facility to determine sustainability

SETTING THE STAGE:

Board Governance and Structure

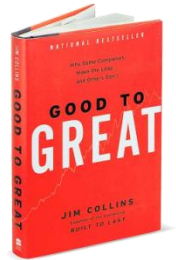
***Proud of our past,
celebrating our
progress,
embracing the
possibilities***



SETTING THE STAGE:

Good to Great Process

Setting the stage for our planning and operations ...



Where we are headed

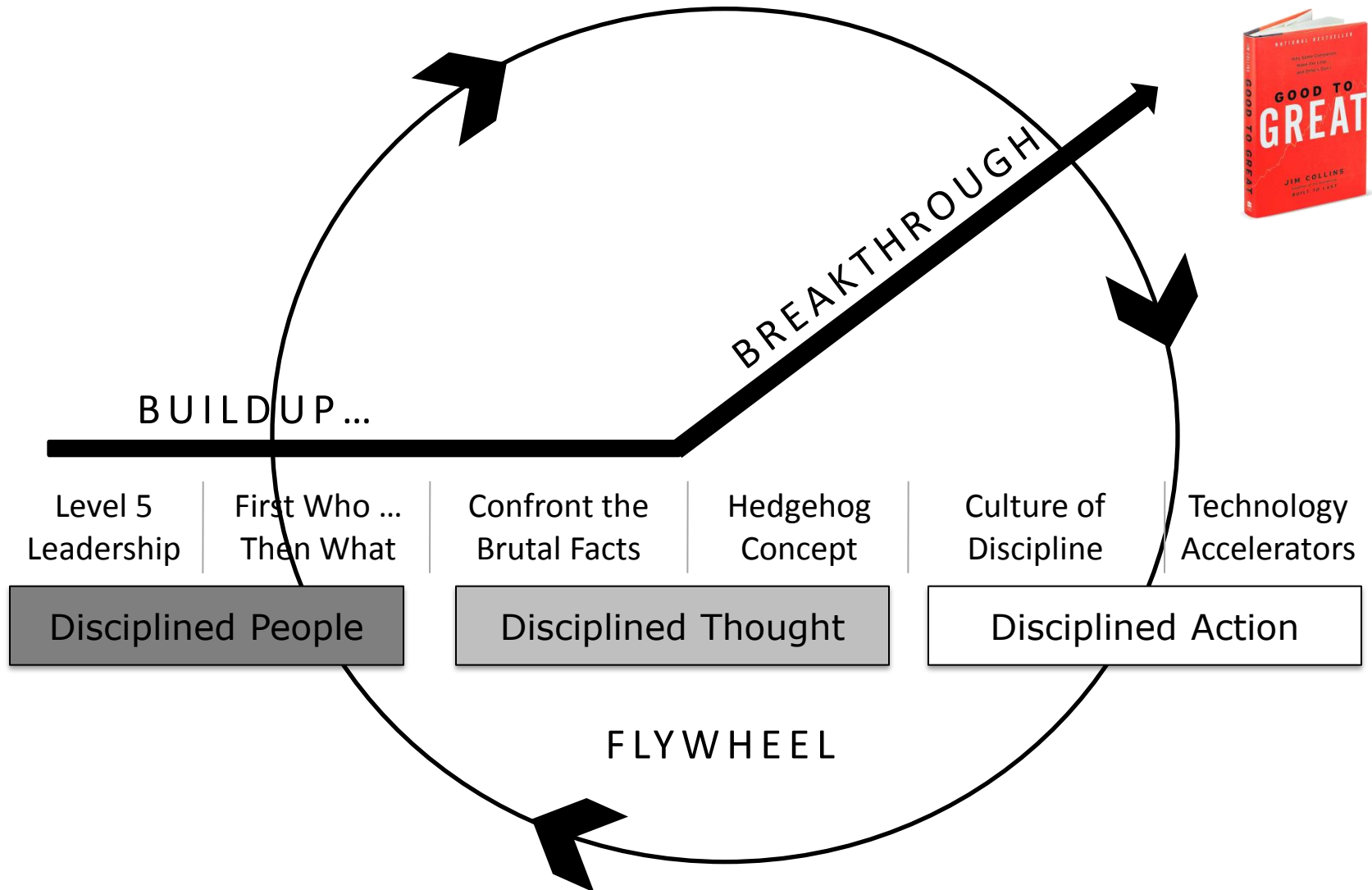
What we will do

When we will do it

Who is accountable

How it will get done

SETTING THE STAGE: Good to Great Model



Collaborations and Partnerships

- MultiCare Health Systems – \$3.1MM
- Harrison Hospital Health Systems – \$2.7MM
- City of Sumner – \$2.5MM
- YMCA of the USA/Harvard/Stanford – Activate America
- PenMet Parks – \$1.5MM, 6-lane pool
- City of Gig Harbor – \$250k, 6-lane pool
- CTED State Grant – \$800k, general funding of community center
- School Districts – 40 school sites
- Armed Services
- Silver Sneakers

2020 Vision Planning Process

External support

- YMCA of the USA
- Triangle2 Partners
- Examples of other YMCA strategic and vision plans

Workshops – February 2008

- Association board
- Association council
- Community forums
- President's council

Looking Toward the Future ...

“Leadership is the capacity to transform vision into reality.”

~ Warren G. Bennis

Our Vision

- The YMCA of Pierce and Kitsap Counties will ensure access to balanced health for all members of our community



Our Guiding Principles

- Focusing on under-resourced communities
- Working through partnerships and collaborations
- Building community through a sense of belonging and fostering relationships



Areas of Focus

- Support youth
- Strengthen families
- Serve and build communities
- Inspire healthier lifestyles



Support Youth

The YMCA commits to provide children with developmental assets needed to support them for a promising future. We will focus on those developmental assets linked to our historical emphasis on spiritual, mental and physical health.

Success measure:

- Increase the *Search Institute Asset Scores* of one in four children, ages 6 to 15, in the Pierce and Kitsap County area



Strengthen Families

The YMCA pledges to support families by increasing the opportunities for parents and children to share in their spiritual, mental and physical development.

Success measures:

- Involve 12% of all people in the Pierce and Kitsap County area annually in programs and activities that build strong families
- YMCA is known as the third place for families in the Pierce and Kitsap County area



Serve and Build Communities

The YMCA will build communities among members, improve access to our programs and facilities, and enhance community programs. We will build communities that are accessible geographically and economically, with emphasis on under-resourced communities.

Success measures:

- A YMCA facility or program center within 15 minutes of everyone in the Pierce the Kitsap County area
- A 5% annual increase in the number of people involved in the YMCA through our financial assistance program
- \$5 million in annual contributions to reach, serve and engage more people



Inspire Healthier Lifestyles

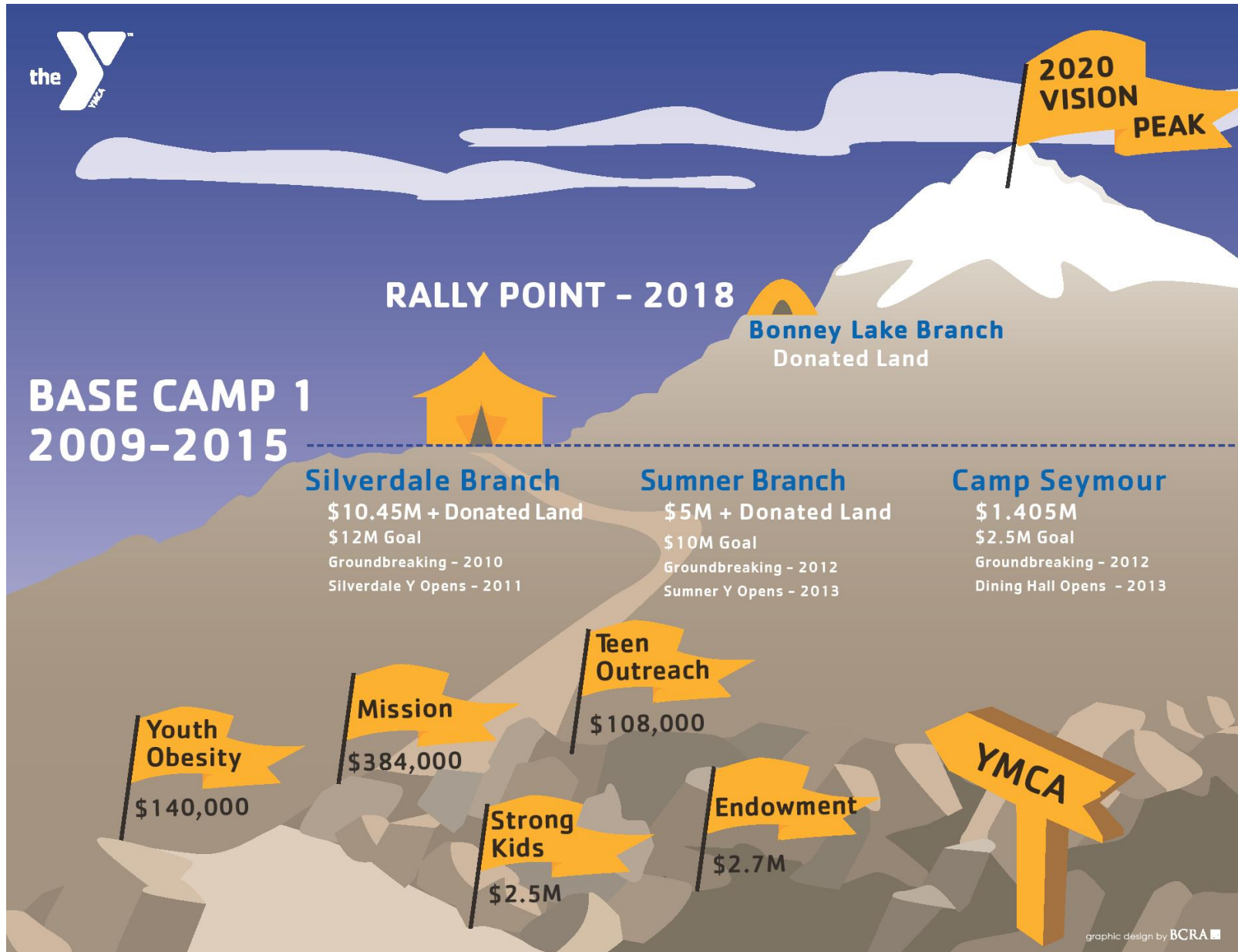
To create healthier lifestyles, research shows communities need to address three key areas: environment, physical activity and nutrition. The YMCA will actively support health seeking youth, adults, families and communities in their pursuit of well-being in spirit, mind and body.

Success measures:

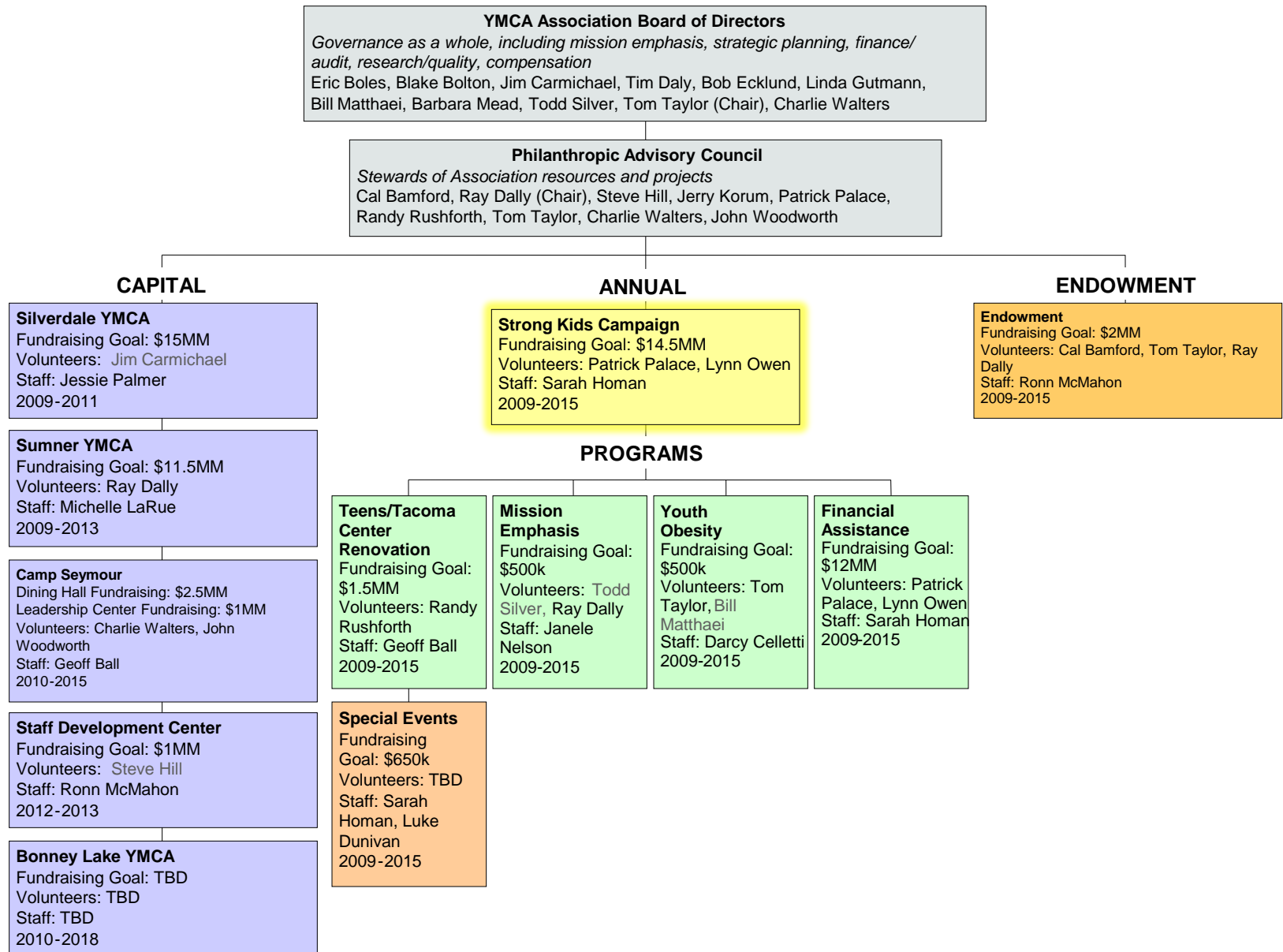
- Reverse the trend of youth obesity by 2015 in the Pierce and Kitsap County area
- Curtail the increasing incidents of chronic diseases (e.g., diabetes, heart disease, stroke, and asthma) in the Pierce and Kitsap County area
- Increase program offerings and participation at all YMCA facilities



2020 Vision: Base Camp I



Financial Development Plan/Structure



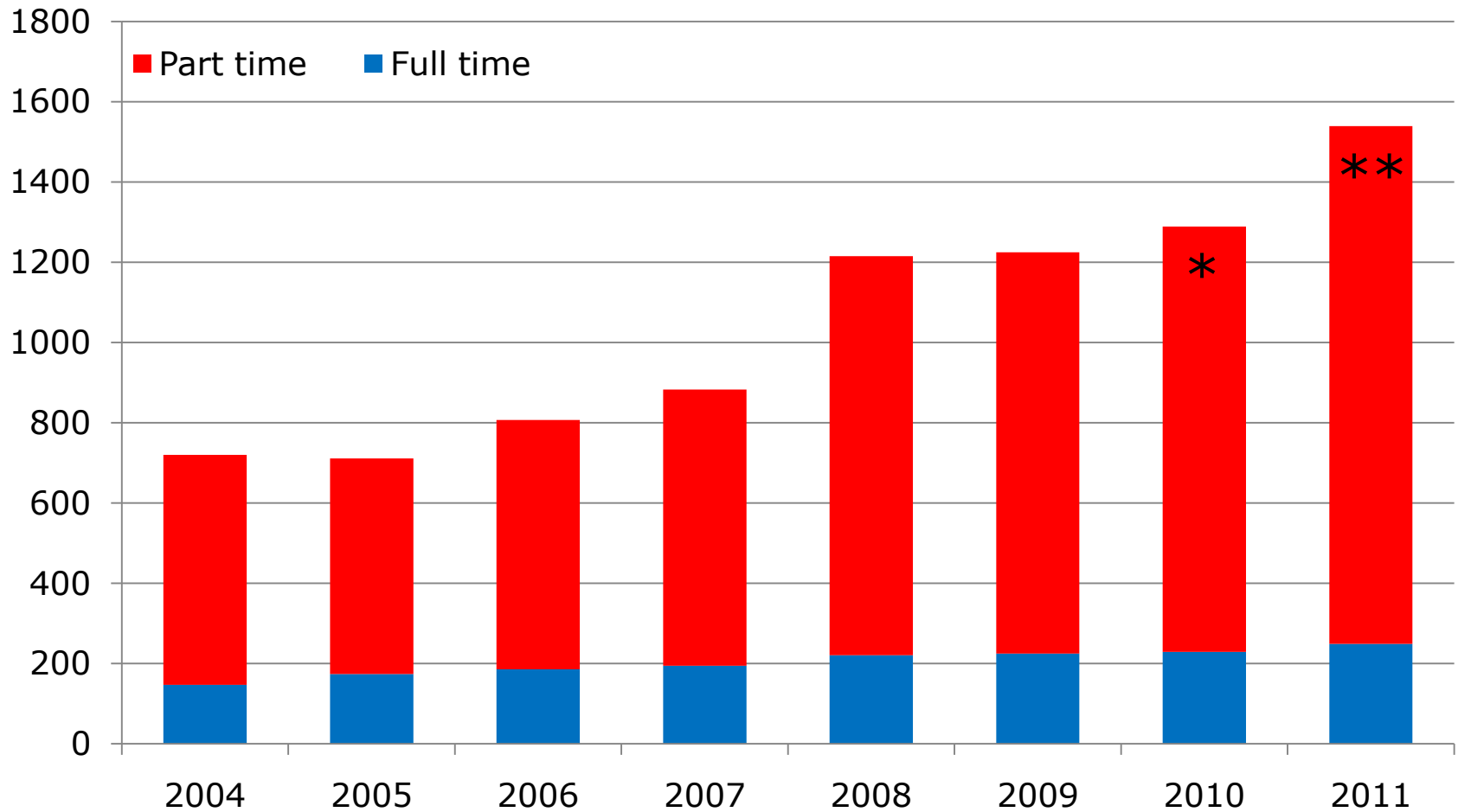
2010 Association Strategies

- Strong operational performance
- Financial development
(capital, grants, endowment)
- Developing leadership
(staff, volunteers)
- Building Silverdale YMCA
- Merging with Bremerton Armed Services YMCA
- Business plans and market research
(core businesses, new initiatives)

2011 Association Goals / All Staff

- Fiscal accountability – 30%
- Staff development and accountability – 20%
- Financial development – 20%
- Program and marketing development – 20%
- Outreach initiatives – 10%

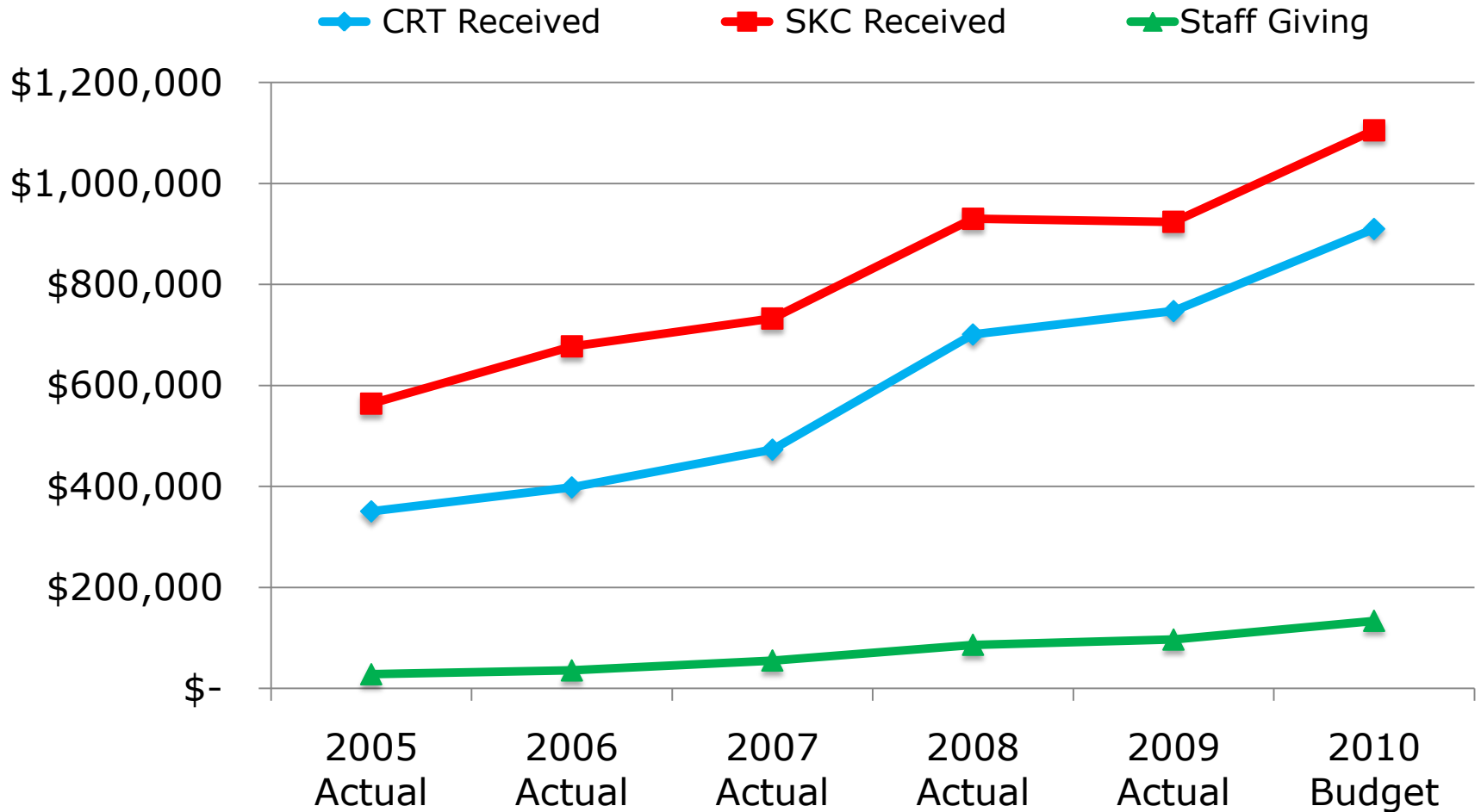
Staffing Trends



* Includes Bremerton staff (as of February 10, 2010)

**Projected; includes Silverdale staff (based on Gig Harbor's 2008 numbers)

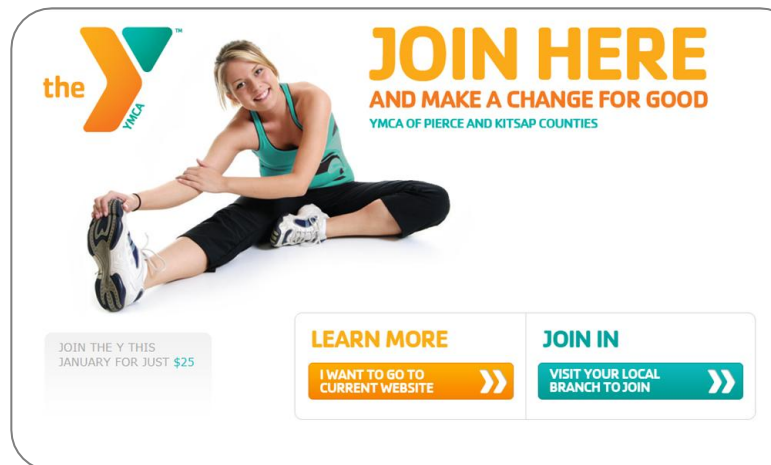
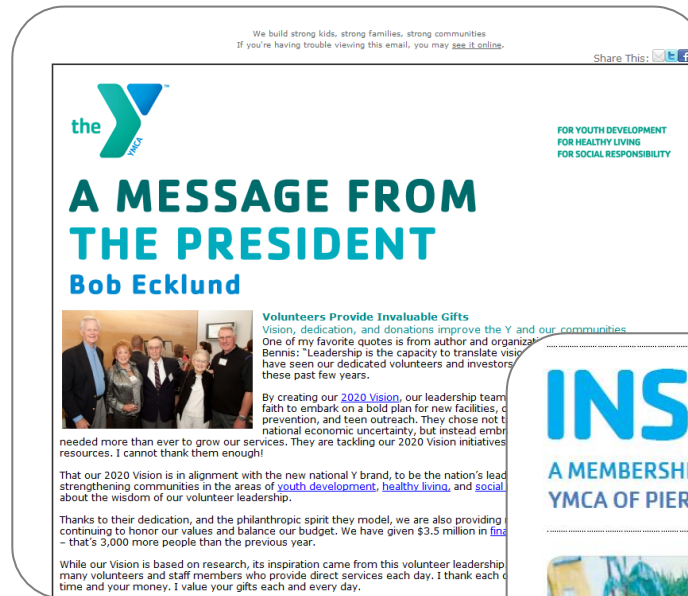
Annual Investments



Key Strategy: Telling the Y Story

Ways of communication ...

- Insights member publication
- President's e-newsletter
- Member newsletters
- Website
- Social Media



Key Strategy: Awareness Tours

- Goals of an awareness tour
 - Get to know donors in an unthreatening environment
 - Raise awareness about the wide scope of the YMCA
- “Friend-raising” vs. fundraising approach

Key Strategy: Awareness Tours

- **Introductions/Meet and Greet**
 - What do you know about the Y? What do you want to know about the Y? What's your YMCA story?
- **Aquatics Center**
 - Member success story
- **Membership desk**
 - This is where lives are changed through financial assistance opportunities
- **Internet Café**
 - Place for people of all ages to gather for building a community
- **Nursery**
 - A safe and fun place for children



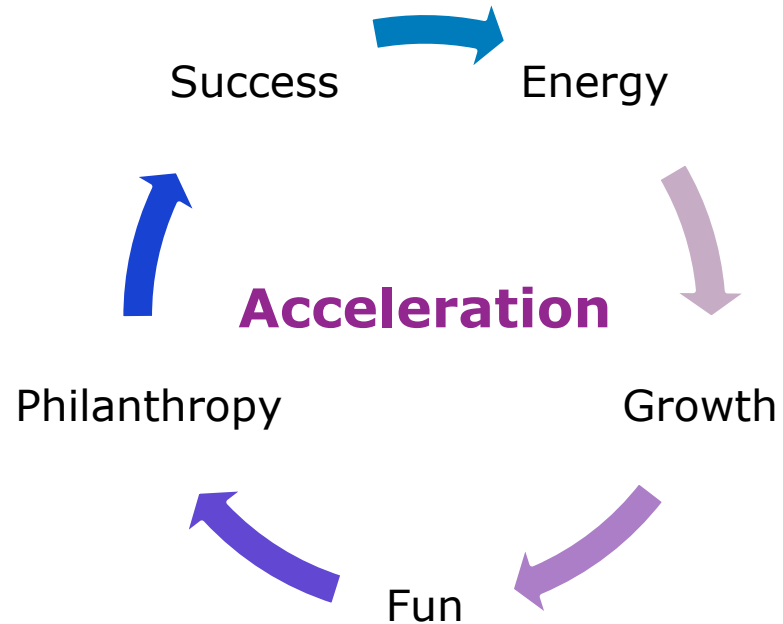
Key Strategy: Awareness Tours

- **Teen Center > Late Nite, Friends and Servants**
 - 85% of teens entering F&S are successful in completing the program, compared to 80% who commit a crime, reoffend and are stuck in a cycle of hopelessness
- **Spirit/Mind/Body Area > 12 Week, Chapel, Library, MultiCare**
 - Journey to Freedom success story; Multi-Care collaboration
 - value of the partnership
- **Multi-purpose rooms and gym**
 - 200 classes/programs every week
- **Community Room > Teaching Kitchen, Family Fitness**
 - Community cooking classes; families get healthy together
- **Birthday Party Room**



Outcomes

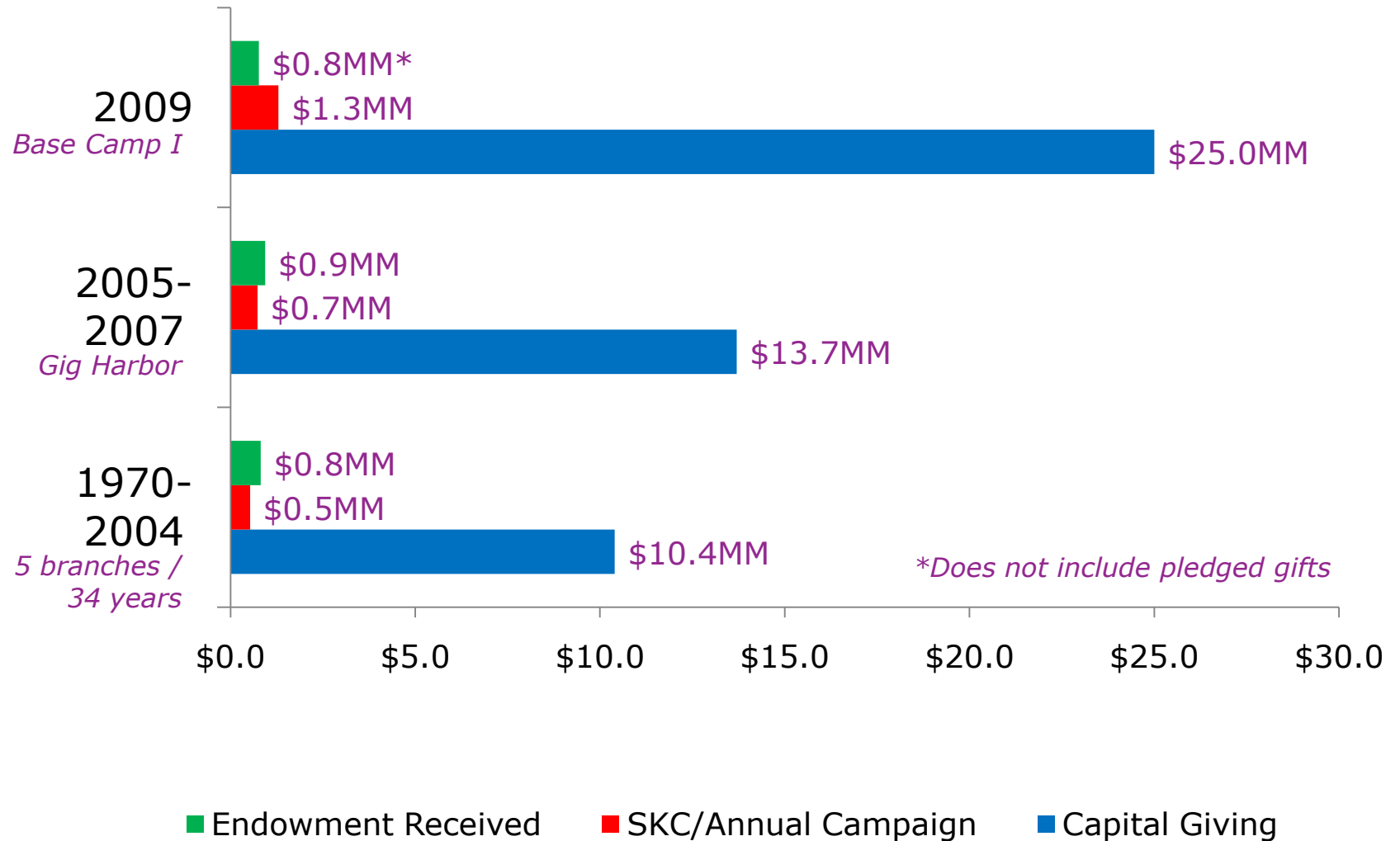
- Operations have grown by 121 percent to \$41.8 million
- Membership has grown by 134 percent to 82,000
- Financial assistance has tripled to \$3.5 million
- We've gone from being venerable to vital and vibrant
- The flywheel keeps spinning ...



Integration

- 2020 Vision
- Annual events
- Philanthropy
- Proud of our past and focused on the future
- Breaking down silos / working together
 - Governing structure
 - Staff
 - Volunteers
- Having a balance of internal awareness and building new external relationships / connectivity

Results



But It's More Than Numbers ...

- Priorities
 - Camp
 - Child care
 - Membership
 - Mission
 - Teen outreach
 - Youth obesity
- Human impact
- Connection
- Community
- Relationships



Questions!