

YMCA 2008 - 2010 Strategic Plan Scorecard / Assessment
 2008 Status Update: February 2009 Review

Focus Area	Goal / Strategies	2008	2009	2010	Comment:	
Facilities	Implement a facilities plan with a long-term vision that supports the needs of Lenawee County while fulfilling our obligation to provide a safe and welcoming environment, high-level of services, and stewardship of our existing facilities.					
	1) A comprehensive facility improvements and equipment needs priority list is generated on an annual basis, based on the recommendation of the professionally-generated facility needs assessment, and is reflective of those projects that warrant Board awareness and funding consideration.	Successfully achieved by the Building & Grounds Committee in February 2008				The 2008 priority list included: new partitions for the women's locker room, installing sprinklers in men's and women's saunas, obtaining quotes on replacing exterior stucco, obtaining quotes on multi-camera surveillance system, and renovating BSLC is an infant & toddler care center. (Not all projects were funded.)
	2) An interior design plan is developed for the facility, with the assistance of professional expertise, by the second quarter of 2008.	Successfully achieved				Tiffany Kapnick agreed to develop an interior design plan for the YMCA in exchange for her Y membership. This plan was adopted by the YMCA's Building & Grounds Committee and implementation began in the summer of 2008.
	3) A facility usage assessment is conducted, between the second quarter of 2008 and the first quarter of 2009, which accurately depicts interior space utilization (based on the day of week, the time of day, and the season of the year).	Data collection began in the middle of the second quarter.				Program Director, Ted Crockett, and Board members, Tom MacNaughton and Keith Kemner met in the fourth quarter to begin reviewing data.
	4) An energy-efficiency analysis is conducted before the end of 2008 to determine the potential cost-savings that can be realized through equipment replacement, facility improvements, and/or operating modifications.	No progress				Consumer's Energy is to be approached and asked if they provide this type of analysis for their customers.
	5) Plans to refurbish the existing locker rooms and first floor rest rooms are developed by the third quarter of 2008, with the necessary improvements made (to the extent possible) by the third quarter of 2009.	Partial plans have been generated; no funding has been obtained				Between Adrian Mechanical Services and Tiffany Kapnick, some plans for locker room and rest room refurbishment have been developed. Other projects were deemed higher funding priorities. (The BSLC renovation top among these.)
	6) Facility access and security concerns are adequately assessed and addressed prior to the end of 2010.	No progress				The installation of surveillance cameras and also palm or thumb-print scanners was discussed by the members of the YMCA's Building & Grounds Committee.
Program Development	Develop, strengthen, and promote programs that meet the needs of youth, adults, seniors, and families throughout Lenawee County. Leverage YMCA resources in the areas of community needs to our competitive advantage and the benefit of our members.					
	1) The Broadstreet Learning Center is converted to an infant and toddler care center, effectively operating by the fourth quarter of 2008.	Successfully achieved				Funding from the Stubnitz Foundation, Bob Price, the Farver Foundation, the Lenawee Community Foundation and United Bank & Trust make this possible.
	2) Childcare gains accreditation by a state or national association by 2010, following a planned course of action initiated by the third quarter of 2008.	In process				Childcare Director, Stasha Arrequin, is working with State of Michigan officials to obtain accreditation.
	3) An evaluation tool is developed and implemented in 2009 which is used to determine the need for creating new, or maintaining or expanding existing childcare operations in all Lenawee County school districts.	No progress				The creation of this evaluation tool is among those items that are on the chart of work for the 2009 child care task force.
4) Trinexum software is utilized, by the third quarter of 2009, to capture detailed membership and program data, which in turn is then utilized to help guide future programming and marketing decisions and allow for expanded or improved member and program-user communication.	This software, installed in March 2008, has allowed us to achieve this goal.				Membership Director, Monica Walker, and Program Director, Ted Crockett, are already able to capture meaningful data from Trinexum, which has been useful in guiding operating decisions and for expanding communication. (Constant Contact is one example.)	

	5) <i>General membership, corporate membership, and overall membership retention increases by two percent each year, beginning the second quarter of 2009</i>	In process			Meaningful retention figures will not be available until April 2009. The YMCA has experienced overall growth during the past year, due to the MDG campaign and the addition of new corporate memberships.
	6) <i>The YMCA establishes itself as a leader of teen serving, family serving, and seniors serving agencies by working with kindred organizations to increase, from 2008 to 2010, the number of people served in these three specific program areas.</i>	In process			These are among the many initiatives being worked on by Program Director, Ted Crockett, and Outreach Director, Chris Moore.
	7) <i>Membership satisfaction surveys and interest surveys are conducted annually to measure the effectiveness of the YMCA and its programs and to help ensure community program needs are met.</i>	Successfully achieved; on-going			A membership satisfaction survey was conducted in late 2008 and the results were shared at the January 2009 board meeting. Program surveys are conducted all year long.
	8) <i>The YMCA has effectively promoted and communicated to Lenawee County our program offerings, resources, and capabilities.</i>	In process; on-going			The Y continues to promote and communicate through the local media (newspaper, radio, and t.v.), in local schools, through direct mail, and the use of e-mail.
Financial Development	Ensure our financial health through sound stewardship, successful fund-raising, and endowment development.				
	1) <i>The dependency on endowment earnings used to sustain operations is decreased by one-quarter of one percent a year, beginning in 2009.</i>	This is called for in the 2009 budget			The YMCA's operating budget in 2009 projects the use of \$65,000 from the endowment fund. \$72,000 was needed from the endowment fund for 2008 operations.
	2) <i>Funds have been raised to complete those capital/facility improvement projects that have been identified and prioritized annually by the YMCA building and grounds committee.</i>	Some, but not all, of the projects planned in 2008 received funding			The Y received over \$35,000 for capital/facility improvements in 2008, which made it possible to complete many of the priorities identified by the YMCA Building & Grounds Committee. Unfortunately, the \$12,000 grant from the Weatherwax Foundation at year end was half the amount that was asked for.
	3) <i>The donor base of the annual Strong Kids Campaign increases by ten percent each year.</i>	Only 50% of this goal was achieved.			Although total SKC contributions increased by more than \$7,000, from 2007 to 2008 (nearly a 20% increase), the donor base only grew by six total donors for this same time frame (from 122 to 128).
	4) <i>A Heritage Club is established in which no fewer than twenty YMCA friends have either made an outright gift to the YMCA endowment or have designated that they have left a legacy to the YMCA.</i>	No progress			The creation of a formal Heritage Club has been delayed, in part because of other organizational priorities and in part due to current economics.
	5) <i>The value of the YMCA endowment within the Lenawee Community Foundation increases from \$50,000 to \$75,000.</i>	The YMCA endowment lost ground in 2008.			The value of the YMCA's endowment fund dropped significantly in 2008. The portion of this fund invested with the LCF dropped in value from \$50,000 to \$36,000 in the last year.
Staff and Volunteers	Continue to develop, strengthen, and promote mission-driven programs that provide a sense of belonging and an improved quality of life.				
	1) <i>Staff are supported through adequate resources that promote effective job performance, through regular feedback and performance evaluations, and given the opportunity to implement knowledge gained through training.</i>	Successfully achieved; on-going			Staff resources were enhanced in 2008 with the purchase of Trinexum and with equipment provided through a grant from the Kiwanis Club. Performance reviews are conducted and staff are provided training opportunities.
	2) <i>A wage and salary administration plan is in place by the first quarter of 2009 with compensation ranges established for all staff positions that are competitive with local and regional benchmarks.</i>	Successfully achieved			The YMCA Board of Directors formally approved a new Wage & Salary Administration Plan at its December 9, 2008 meeting.
	3) <i>Volunteers understand and support the YMCA mission, they have clearly defined roles and functions, and they are evaluated annually.</i>	Successfully achieved; on-going			While this continues to be an on-going process, those professional staff members who utilize volunteers have implemented training and documentation procedures.

	4) <i>The number of volunteers and the time they contribute to the YMCA increases annually, with special emphasis placed on growing the number of program volunteers through improved recruitment and training efforts.</i>	In process			Program Director, Ted Crockett, and Outreach Director, Chris Moore, are primarily responsible for this goal. A full year of tracking data will be necessary before results are known.
	5) <i>The formal recognition of staff and volunteers is done in conjunction with the YMCA's annual meeting.</i>	Successfully achieved; on-going			This practice has been in place for at least the last five or six years. In addition, the Y's professional staff implemented a "member of the month" and "employee of the month" recognition program in 2008.
	6) <i>The strategic plan is reviewed annually by the YMCA's executive committee and, where necessary, adjusted accordingly at the purview of the Board of Directors.</i>	Scheduled for February 2009			The annual review of the strategic plan is on the agenda for the February 10, 2009 executive committee meeting.
Community Development and Collaboration	Actively partner with others in Lenawee County to deliver excellent service, pursuant to our Mission and Vision, to meet the changing needs of our community in the most effective and efficient manner.				
	1) <i>A community needs assessment is conducted by mid-year 2008, defining what is needed, where, and by whom, as well as sustainability of the needs.</i>	This assessment is pending			The community needs assessment/feasibility study which was commissioned by the City of Adrian in the fourth quarter of 2008, is to be completed within the first quarter of 2009.
	2) <i>The duplication of services is avoided while exploring expansion and growth of program collaboration efforts with the Christian Family Centre, the City of Adrian, and others as appropriate. An action plan is then developed by the fourth quarter of 2008.</i>	No formal action plan is in place.			Although the YMCA' staff continues to both explore and expand its programming through collaborative partner-ships, most notably through its popular After School Advantage program, there is no formal action plan.
	3) <i>Opportunities to define, develop, and deliver services that meet needs in the areas of community wellness, through new and perspective partners, result in actionable plans that are in place by the first quarter of 2009.</i>	On-going			Examples of this would be various Health Fairs that the YMCA participates in, YMCA Field Day held at Adrian College, the Y's Family Fun Walk (with Running with E's), and our own annual Healthy Kids Day event.
	4) <i>Collaborations are in place by 2010, resulting in YMCA programs taking place in two-thirds of Lenawee County's school districts.</i>	In process			Half of this goal will have been successfully achieved by the first quarter of 2009, as the YMCA will be providing programs in Adrian, Tecumseh, Sand Creek, and Onsted schools by that time.
	5) <i>Open and regular communication, in the form of quarterly discussions, are occurring with other interested parties and potential partners, and especially with city and county government officials.</i>	Successfully achieved; on-going			This is not only happening between the Y's executive director and community leaders, but also between other members of the Y's professional staff and prospective partners.
	6) <i>Specific plans for a multi-tenant ULTRA facility are developed, based on the outcome of the community needs assessment and after a subsequent evaluation of the project's feasibility and sustainability indicate that this is the appropriate action to be taken <u>or</u> a plan of action for the current YMCA facility is developed, based on the outcome of the community needs assessment and/or the subsequent evaluation of the ULTRA project's feasibility and sustainability which indicates that this project should not be given consideration.</i>	On-going			The outcome of the community needs assessment is pending. The formal report on this study is to be completed within the first quarter of 2009.
	7) <i>On an annual basis, funding requests are developed which recognize the Lenawee United Way's new approach and emphasis on funding with bias to collaborative efforts.</i>	United Way funding for 2008 and 2009 is in place			Contrary to the wording of this goal, United Way funding is now done on a two-year cycle. The next opportunity for the YMCA to apply for funding will be late 2009 or early 2010.