



2021-2024 Strategic Plan

A brief history of YMCA Alumni

1922 – The Veterans International Secretarial Fellowship was started as a part of the YMCA International Council. All YMCA Retirees were considered members.

1928 – The McCoy Chapter was founded

1930 – “Old Guard News” (OGN) was included in the Employed Officers Alliance mailings by E M Willis, Alliance secretary.

1934 – After EM Willis death, OGN was included in the YMCA Retirement Fund mailings.

1936 – International Association of Retired Secretaries (IARS) was founded at Silver Bay as a section of Association of Secretaries (AOS)

1972 – Change in professional title from ‘secretary to “director” in the organization’s name changed to International Association of Retired Directors (IARD).

1995 – The organization was renamed North American Fellowship of YMCA Retirees (NAFYR)

1995 – Incorporated as a 501 c 3 organization by the state of Illinois.

1999 – Ted Hawkins began the conversation about registering for membership due to the concerns of 501 c 3 requirements.

2003 – Y retirees were considered registered members if they filled out and returned a form. No fee. Jim Lipscomb

2007 – Copeland Budge Chapter serving Canada withdrew as a member and became a separate organization.

2008 – A website was initiated by David Bast

2009 – The association was rebranded to become the Association of YMCA Retirees (AYR)

2009 – World Brotherhood Fund (WBF) was assigned to AYR with fiduciary responsibility of \$345,000. Harold Smith was the investor.

2009 – A \$25 membership fee was instituted to keep membership records

2009 – “Old Guard News” name changed to “AYR Reports” and assigned to Craig Altschul + Associates (ca+a)

2010 – The website was assigned to Craig Altschul + Associates (ca+a), and redeveloped and later rebranded as www.ymcaalumni.org

2010 – The Website was assigned to CA&A

2014 – All chapter members were required to pay National dues and become National members.

2016 – All National members were required to be a chapter member and pay chapter dues.

2017 – Association rebranded to become YMCA Alumni (YA)

2017 – Core program components, Connect-Travel-Serve, were adopted

2017 – “AYR Reports” name changed to “The Connection”

2018 – A newsletter for our Travel “Going Places” was started.

Opening Comments for the 2021-2024 Strategic Plan

The following groups have been involved in developing the Plan:

YMCA Alumni Board of Directors

YMCA Alumni Chapter Presidents

YMCA Alumni Resource Group

YMCA Alumni Committee Leadership

The following persons are the Strategic Plan Task Force:

Jim Weaton – VP of the Central Region

John Green – VP of the West Region

Larry Gavin – VP of the East Region

Jean Carmichael – President of YMCA Alumni

G. Dale Packer – Past President

The groups involved in producing the Plan met more than once to do their part in putting the plan together and encouraging the many Goals and Objectives in this Plan. A total of 43 persons in leadership positions with YMCA Alumni have worked to put this together and I thank them for their time and talents. No plan is worth anything unless it is measured and evaluated many times through the life of the Plan. It will be the task of the members of the task force to see that it is a living Plan. Due to the change of the Treasurer position in June 2021, our plan will be active until June of 2024.

Again, thanks for all who were and are involved!

Accepted by the YMCA Alumni Board of Directors on June 10, 2021

G. Dale Packer, Chair



YMCA Alumni Strategic Plan 2021-2024

Mission Statement: The mission of YMCA Alumni is to enable members to promote a nurturing worldwide Christian fellowship that provides educational, social and charitable opportunities.

Strategic Planning Goal: To Connect, Travel and Serve through YMCA Alumni.

Strategic Goal: Connect: To Connect our members through Newsletters, electronic means (Zoom), Chapter and National events, and informal cluster gatherings.

Operational Objectives to achieve this Goal are:

1. Purchase annual Zoom accounts and encourage their use by chapters, committees, and the Board. (Altschul)
2. Maintain our Facebook Page and ymcaalumni.org Website with links in The CONNECTION and chapter newsletters encouraging their use and upgrading as needed. (Altschul)
3. Publish and distribute twelve electronic issues of The CONNECTION per year. (Altschul)
 - 3a. Publish quarterly chapter activities in The CONNECTION by highlighting a chosen chapter. (Carmichael)
 - 3b. Publish Y/USA information in The CONNECTION quarterly. (Packer)
 - 3c. Publish affiliates such as YFR, EAF, WFYR, and WS information in The CONNECTION. (Packer)
1. Have events in chapter, cluster and regional groupings throughout the year. (VPs)
 - 4a. Request chapters to have two events annually, person to person or via Zoom. (VPs)

4c Region VPs will support the development of mini-cluster groups and events in each chapter to maximize connection with members. (VPs)

1. Organize a Task Force of persons with good computer skills available to answer member questions on Zoom, word, email, excel and other uses members may have and publish the persons available to help with contact information in The CONNECTION and ymcaalumni.org.

(Weaton)

Expected Outcome: Communication between national, chapters, and members will be enhanced.

Strategic Goal: Travel: To design and execute affordable travel opportunities, both national and international, for our members with reputable travel firms

Operational Objectives to achieve this goal are:

1. The Travel Club will continue to plan national and international trips for our members, family and friends in small groups as opposed to larger groups. (Hooson)

1a A minimum of two national and two international experiences will be planned per year following the relief of the pandemic restrictions.

1b. YMCA Alumni hosts will be recruited for our trips and are encouraged to engage with the local Y in the countries they are traveling for a more international experience.

1. Continue to distribute six electronic issues of "Going Places" on a subscription basis. (Altschul)

2. Design and Implement additional trips for retirees who have little group travel experience. (Hooson)

3. Design and implement additional trips for retirees who have limited resources for travel. (Hooson)

Expected Outcome: Travel opportunities will be designed for membership to enjoy while enhancing the membership benefits.

Strategic Goal: Service: To support our National Service Project, the International Service Corp (ISC), chapter service projects, and national programs while giving support to affiliates of YMCA Alumni.

Operational Objectives to achieve this goal are:

1. Engage in the National Service Project (NSP) selected with chapter involvement as a chapter service program including recruitment of time, money, and talents of our members. (Falk)
 - 1a Conduct a fund raising campaign each year for the NSP. (January through March).
 - 1b The NSP committee will enlist volunteers to work on the project physically in its location.
 - 1c Report quarterly to the membership the project progress through The CONNECTION.
2. Assist the work of the International Service Corps (ISC) by identifying retirees with specific talents to serve in foreign countries that have a need for the talent. (Uhrig)
3. Support affiliates as needed (WFYR/EAF/WBF). (Board)
 - 3a. Respond and provide requested assistance to the World Fellowship of YMCA Retirees (WFYR). (Dwyer)
 - 3b. To assist the Emergency Assistance Fund (EAF) through articles in The CONNECTION and by identifying YMCA Alumni members in need. (Havlick)

Expected Outcome: Service opportunities will strengthen the organization and execute its charitable mission.

Strategic Goal: Membership: To use the “Best Practices” in our chapters to retain and increase the membership base.

Operational Objectives to achieve this goal are:

1. Retain members with “Chapter Best Practices” distributed as needed to the chapter leadership and found in the Chapter Handbook in ymcaalumni.org. (Patterson)
2. Design a “contact tree” for member to member contact encouraging early involvement in the chapter. (Patterson)
3. Identify and solicit new members through the use of the listing of new retirees sent monthly from YMCA Retirement Fund to our chapter leadership. (Patterson)

3a National will provide to the Chapter Membership Chairperson the list of new retirees and supplies designed to contact potential members.

3b New Member meetings via Zoom will be conducted on a quarterly basis designed by the National Membership Chairperson with chapters being encouraged to have new members attend.

2. Chapter Membership Chairs will be trained through Zoom meetings on an annual basis and as needed. (Patterson)

3. Design and implement a program to enlist “Ambassadors” for each state to conduct mini clusters and design affinity groups to increase participation and decrease travel distance. (Morgan)

4. Continue the letter sent by the YMCA Retirement Fund to new retirees with the initial annuity check and continue the relationship with the YMCA Retirement Fund Liaison. (Carmichael)

5. Design and implement a new recruiting strategy for YMCA program and support staff to get away from the “YMCA Alumni Executives Club.” (VPs)

6. Design and enlist a Speakers Bureau for chapter programs both Zoom and person to person meetings. (VPs).

7. Schedule and attend four Y/USA State Alliance meetings per year to recruit and provide awareness of YMCA Alumni to current employed staff. (VPs)

Expected Outcome: Membership connection and opportunities will enhance the membership and help grow the organization.

Strategic Goal: Administration: To be fiscally responsible for our operations and to serve the chapter needs as suggested by the chapter.

Operational Objectives to achieve this Goal are:

1. Evaluate the structure of YMCA Alumni. (VPs/Carmichael)

1a Enlist a Task Force to study the model of other like retirement groups and/or organizations.

1b Evaluate chapter boundaries of the current structure for accessibility of members to a given area.

2. Design and conduct chapter leadership meetings biannual via Zoom. (VPs)

3. Be fiscally responsible of YMCA Alumni assets. (Hurst)

- 3a A Balance Sheet will be presented to the Board quarterly.
- 3b An audit for the years 2018-2020 will be conducted in the fall of 2021 by a Certified Public Accountant selected by the Board.
- 3c An annual budget will be presented for the upcoming year for Board approval in November.
- 4. Meet the needs of emergency assistance and unsecured retirement of world-wide YMCA colleagues through management of the World Brotherhood Fund (WBF) according to the adopted policy statement. (Packer and Kaboth)
- 5. Conduct a National Reunion every two years hosted by a region of chapters on a rotation basis. (Carmichael)
- 6. Conduct an Annual Contributing Campaign in June with a goal in 2021 of \$32K (May through June are the blackout months). (Packer)
- 7. Conduct a Chapter Leadership Event each year for chapter presidents and other chapter leadership. (Carmichael)
 - 7a. Annually a “ 48 Hours” leadership training and General Council meeting will be conducted if travel is available and recommended or by Zoom if travel is limited.
- 8. Print and Distribute the Presidents Letter monthly to keep the chapter leadership apprised of Board actions and newsworthy items. (Carmichael)

Expected Outcome: The organization will have good practices to support the chapters and members.