

YMCA ALUMNI
2018-2021
STRATEGIC PLAN



**PRESENTED TO THE YMCA ALUMNI
BOARD OF DIRECTORS**

JUNE 2018

Foreword

There is the urban myth that strategic plans have the history of consuming large amounts of time to develop just to be adopted and placed on the shelf never to be referred to again. However, when the plan is constructed to directly respond to the needs of the membership rather than the corporate wishes of the organization, the strategic plan becomes alive and an integral part of setting the future path for the organization. A properly constructed strategic plan becomes a comprehensive marketing strategy involving the totality of the organization's human and financial resources.

The 2018-2021 YMCA Alumni Strategic Plan fulfills that principle. It has been formulated to guide the organization and support the priority needs of the membership. All the typical planning steps were followed. A task force was appointed, a work schedule was established, past data was examined, surveys were conducted, current internal and external trends were considered, multiple drafts were developed, and finally, a draft of the plan was shared with the organization's leadership and opened for input and discussion at 48 Hours in May.

The result is the final draft being presented to the YMCA Alumni Board of Directors for approval and implementation. A Master Plan Task Force has been appointed by President Dale Packer to monitor and report the progress made on the plan to the board on a trimester basis. The plan is structured for success including assigned responsibility, target dates for completion, measurement and priority levels.

Now the work begins ...

YMCA Alumni Strategic Plan Task Force

Phil Wortman, Chairman
Lou Falk, East Region Vice-President
John Green, West Region Vice-President
Laura Slane, Central Region Vice-President
Jean Carmichael, Secretary
Bill Hoosen, At-Large
Paul Anderson, At-Large
David Paterson, At-Large
James Kirschner, YRF Chief Strategy Officer

YMCA Alumni Strategic Plan Structure

The following structure and indices were used in the formation of the strategic plan:

- Mission Statement – Formal public statement of purpose of the organization.
- Strategic Plan Goal – The ideal outcome of the implementation and execution of the Strategic Plan.
- Operational Goal (OG) – Provides the planning umbrella. Not measurable, but establishes primary areas of focus.

- Operational Objective (OO) – Action to accomplish the operational goal. One to three years in length, measurable, assigned responsibility, and target date for completion.
- Expected Outcomes (EO) – That which will occur upon the successful execution of the operational goals and objectives.
- Target completion dates:
 - ✓ TBS – To be scheduled. Objectives that require additional input for setting T-Dates.
 - ✓ Active – Objectives with ongoing measurement indices.
 - ✓ T-Date – Objectives that have a specific completion date.
 - ✓ Multiple T-Dates – Objectives that reoccur.
- Responsibility – Responsibility is assigned for the tracking, reporting and execution of the operational objective within established measurable criteria.
- Priority levels:
 - ✓ I – A must do! Top priority! These items are essential to the organization’s future success.
 - ✓ II – Critical to be done. These items are the foundation groundwork of the plan.
 - ✓ III – Important. These items form the functional portion of the plan.
- Implementation Principles:
 - ✓ Whenever a decision must be made the order of precedence will be the (1) interests of the member, (2) chapter and (3) national organization.
 - ✓ The strategic plan will become a “living document” responding to the ever changing needs and position of the organization.
 - ✓ Individuals responsible for an operating objective will develop target action steps or benchmarks that outline the actions to be taken to successfully complete the objective, and become the measurement indices for the generally phrased objectives.

The 2018-2021 YMCA Alumni Strategic Plan

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 Plan Goal: To Connect, Travel and Serve through YMCA Alumni

Operational Goals, Objectives, and Expected Outcomes

1. **Operational Goal: CONNECT** – Facilitate formal and informal interaction and communication to build organizational engagement between the national organization, its membership, chapters and present/future alumni.

Operational Objectives to achieve this goal are:

- 1.1 **“The Connection”** *To publish and distribute 12 issues of “The Connection” per year: 4 postal issues (8-12 pages); and, 8 electronic issues for the months without postal issues. (Active/ Altschul/Priority I)*

- 1.2 **Facebook Page** *To maintain, keep current and interactive the Facebook page with regular postings. (Active/Altschul/Priority II)*
- 1.3 **ymcaalumni.org** *To maintain the ymcaalumni.org web page as a high quality, current and interactive electronic source for organizational information. (Active/Altschul/Priority I)*
- 1.4 **YPN/YUSA relationship** *To strengthen the connection and mutual awareness of functions and membership activities of YMCA Alumni, YPN and YUSA through communication, and collaboration in programs and publications. (Active/Packer/Priority II)*
- 1.5 **Chapter Newsletters** *To instruct chapters in the best practices of newsletter preparation and distribution to its membership encouraging the publication of 4 issues per year. (May 2018/Green-Altschul/Priority I)*
- 1.6 **YMCA Retirement Fund Relationship (YRF)** *To maintain a positive and collegial relationship with the YRF and its designated liaison to include:(Active/Packer/Priority I)*
 - 1.6.1 **Monthly Lists** *Receiving and distributing the monthly list of new and deceased retirees from the YRF to the chapters and designated recipients; (Active/Packer/Priority I)*
 - 1.6.2 **Communicating** *Seeking to collaborate with the YRF to communicate with those who are currently active contributors to the Fund, and/or those who are currently receiving annuities; and, distribution of the YMCA Alumni welcome letter with the YRF's mailing of the initial annuity check. (Active/Packer/Priority I)*
 - 1.6.4 **YMCA Retirement Fund Liaison** *Continuing an advisory and collegial relationship with the YRF's designate to attend quarterly board meetings and provide an invaluable connection with the Fund. (Active/Packer/Priority I)*
- 1.7 **Chapter Membership** *To provide and encourage chapters to utilize the designed and produced membership materials to address the tasks of: (Active/Region Vice Presidents/Priority I)*
 - 1.7.1 **New Retiree Contact** *Making initial contact with new retiree name received from the YRF; (Active/Region Vice Presidents/Priority I)*
 - 1.7.2 **New Member Contact** *Making initial contact with individual who has returned the "Free New Membership" form to the national office; (Active/Slane/Priority I)*
 - 1.7.3 **Membership Renewals** *Executing an annual membership renewal process in conjunction and collaboration with the national membership renewal process. (Active/Carmichael/Priority I)*
- 1.8 **Membership Marketing Strategy** *To develop and execute a comprehensive membership marketing strategy to include: (Active/Slane-Carmichael/Priority I)*

- 1.8.1 **Membership Data** *Maintaining membership data in a manner that provides current and reliable data that can be accessed and utilized for membership development; (Active/Carmichael/Priority i)*
- 1.8.2 **Membership Renewal** *Developing and executing an organizational wide membership renewal process; (Active/Carmichael/Priority I)*
- 1.8.3 **Membership Campaign** *Developing and executing an annual electronic membership solicitation via a “The Connection Special Edition”) that encompasses all non-member YMCA retirees. (Annual-September/Wortman/Priority II)*
- 1.8.4 **New Retiree Contact** *Contacting each new YMCA retiree via a YMCA Alumni piece enclosed in the postal mailing of the initial YRF annuity; and, sending a hand signed welcoming letter and brochure to the new retiree within the primary target market providing additional information and alerting them of an upcoming personal phone call from the YMCA Alumni Ambassador. (Active/Packer/Priority I)*
- 1.8.5 **Current YMCA Personnel** *Developing and executing a marketing strategy specifically for currently employed YMCA personnel for increased visibility to include brochures, electronic communication and interaction, and attendance at relevant YPN and Y-USA gatherings. (Active/Slane/PriorityII)*

Expected Outcome: Communication between the national organization, its membership, chapters and pre-retirees will be enhanced impacting the growth of YMCA Alumni.

- 2. **Operational Goal: TRAVEL** – To provide members the opportunity to have travel experiences with YMCA colleagues and friends at a reasonable cost; to add value as a benefit to membership; and, to provide extended opportunities for connecting within the organization.

Operational Objectives to achieve this goal are:

- 2.1 **Travel Club Committee** *To provide and promote an annual selection of multiple travel experiences for YMCA Alumni members, family and friends to include: (Active/TCC Chairman TBA/Priority I)*
 - 2.1.1 **International Trips** *Providing and promoting a minimum of two international travel experiences per year recommended for member participation; (Active/TCC Chairman TBA/Priority II)*
 - 2.1.2 **USA Trips** *Providing and promoting travel experiences within the United States recommended for member participation; (Active/TCC Chairman TBA/Priority II)*
 - 2.1.3 **Chapter Gatherings at Destination Points** *Promoting through organizational means, chapter events wherein the gathering is held*

at a desirable travel destination point; (Active/TCC Chairman TBA/Priority II)

2.1.4 **Member-led Trips and Special Excursions** *Encouraging the development of member-led travel experiences and special excursions. (Active/TCC Chairman TBA/Priority II)*

2.1.5 **World Alliance Alternative Tourism (WAAT)** *To establish an awareness of the WAAT travel experiences available to YMCA Alumni membership through organizational communication, and through the YMCA Alumni Travel Club information. (Active/TCC Chairman TBA/Priority III)*

Expected Outcome: Travel opportunities at the national and chapter levels will add value and become a perceived benefit of membership in the organization.

3. **Operational Goal: SERVE** – Assist in providing the membership and chapters a variety of opportunities for service to enhance the lives of others through person-to-person contacts and national/chapter projects.

Operational Objectives to achieve this goal are:

3.1 **National Service Projects** *To continue to support existing activities and projects that respond to human needs nationally and internationally, and to develop additional avenues of service wherein the chapters and membership can participate by: (Active/Falk/Priority II)*

3.1.1 **EAF** *Maintaining the relevance and continuing the financial contributions of YMCA Alumni to the Emergency Assistance Fund to be able to respond to the charitable needs of our members in crisis; (Active/Havlick/Priority III)*

3.1.2 **World Service** *Continuing to advance the values of World Service, and encourage chapter and membership contributions to fund its work internationally. (Active/TBA/Priority III)*

3.1.3 **Task Force** *Appointing a task force to identify and/or develop service focused activities and/or projects for utilization by chapters. (Active/Falk/May 2018/Priority II)*

3.2 **Chapter Service Projects** *To encourage chapters to institute a service focused project involving chapter member participation; or, to actively participate in existing service projects instituted by other chapters. (e.g., New England Dominican Republic House Building; Upper Midwest Middle East Teen Outreach) (Active/Falk/Priority II)*

3.3 **World Fellowship of YMCA Retirees (WFYR)** *To continue to develop the governance structure of WFYR and its relationship to YMCA Alumni and determine the best organizational structure for future operations. (Active/Packer-Hastedt/Priority III)*

- 3.4 **World Brotherhood Fund (WBF)** *To maintain and execute a process to formally manage the investment and programmatic aspects of the fund as they relate its stated purpose. (Active/Hastedt/Priority III)*
- 3.5 **International Senior Service Corp (ISSC)** *To increase ISSC funding, visibility, service opportunities and participation. (Active/Falk-Packer/Priority III)*

Expected Outcome: Opportunities for service will assist the organization to effectively execute its charitable mission, strengthen the organization and enhance the lives of others.

4. Operational Goal: OPERATIONS – Establish fiscal, administrative and marketing strategies to effectively manage and grow the organization.

Operational Objectives to achieve this goal are:

- 4.1 **Marketing Strategy Task Force** *To develop a progressive and comprehensive marketing strategy to implement the core programmatic thrust of Connect-Travel-Serve to enhance and expand the organization’s membership base. (Active/Wortman/Priority I)*
- 4.2 **Fiscal Responsibility** *To operate the organization in a responsible fiscal manner providing financial integrity and stability through: (Active/Packer-Hastedt/Priority I)*
 - 4.2.1 **Balance Sheet** *Developing and establishing policies and guidelines pertaining to managing the various accounts on the Balance Sheet; (TBS/Hastedt/Priority I)*
 - 4.2.2 **Budget Projections** *Projecting the organization’s annual revenue and expenditures for a three year period to be able to analyze and plan forward for fiscal stability. (TBS/Hastedt/Priority II)*
 - 4.2.3 **Audit** *Submitting the accounts for a financial review by a qualified CPA, per the YMCA Alumni Bylaws, Article IX (FINANCES) Section 2. (TBS/Packer-Hastedt/Priority II)*
- 4.3 **Officers’ Responsibilities** *To function within the manner prescribed by the “YMCA Alumni Board Job Descriptions” providing the leadership to achieve organizational growth and stability. (Active/Packer/Priority I)*
- 4.4 **National Events** *To formulate a schedule of national and regional reunions ensuring chapter leadership in the planning and execution, and offer training to enhance the overall operations of the organization by: (Active/Packer/Priority I)*
 - 4.4.1 **2019 Reunion** *Effectively using the chapters of the Central Region in the promotion and successful execution of a YMCA Alumni Reunion in 2019 for fellowship, education, and service to YMCAs, YMCA Alumni chapters and membership at large; (October 2019/Slane/Priority I)*

- 4.4.2 **Chapter Leadership Symposium** *Conducting an annual national leadership symposium involving chapter leadership and other representatives. (May2018, 2019, 2020/Packer/Priority I).*
- 4.5 **Sustaining Fund Appeal** *To execute the Annual YMCA Alumni Sustaining Fund Appeal during the early summer including the solicitation of corporate gifts to meet the stated goal. (Summer 2018, 2019, 2020)Fish/Priority I)*
- 4.6 **Master Plan Task Force** *To appoint a Master Plan Task Force comprised of the three regional vice-presidents and chairman to monitor and report the progress of the implementation of the strategic plan to the board on a trimester basis. (Active/Packer-Wortman/ Priority II)*
- 4.7 **Chapter service areas re-design** *To assign a task force to analyze the current chapter service areas as to efficiency of service and contact with the membership to improve chapter-member interaction and chapter growth. (TBS/Packer/Priority III)*

Expected Outcome: The organization will have fiscally solvent practices that focus on serving its membership and chapters.

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