



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

REAL-TIME STRATEGIC PLANNING – STRATEGY ROAD MAP

2010 and Beyond

Purpose: *This document serves as a memoir of and rationale for the strategic priorities developed during the July –September 2010 Strategic Thinking Process. This document should be used as a resource in forming operational and programmatic strategies and actions.*

PLANNING COMMITTEE

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► OUR PROCESS

In June 2010 the San Luis Obispo County YMCA Board of Directors commissioned the Strategic Planning Committee to commence the development of the Y's new strategic plan. The committee met for four planning meetings prior to a full-day board retreat to study the unique needs of the San Luis Obispo County area that would help shape our Y's future direction.

From there, we crafted the Y's continuing and future role in our community's well-being. Local and national trends continue to be factors in defining how we will strengthen our capacity to serve our community and explore the opportunities to make it the best it can be. This is a "living" plan; we are committed to long-term impact, recognizing it requires adapting our strategies as our environment changes and opportunities present themselves.

As a collective group, the most important focal areas are:

1. Enrichment
2. Spirit, mind and body (character development, enrichment)
3. Community service
4. Families (youth development, healthy lifestyles, and social development)

► OUR MISSION

The San Luis Obispo County YMCA has been a part of our county for more than 50 years, offering programs to develop the spirits, minds, and bodies of those in our community. We hope our members enjoy being a part of the YMCA where we're building strong kids, strong families, and strong communities.

We strive to develop the total person - spirit, mind and body - through value-based programs. Everyone is welcome and thanks to the generosity of many caring donors, financial assistance is available for those who qualify. We have dozens of programs and services to help our members grow and connect with our community by

volunteering and through other activities.

► **OUR IMPACT**

As a charitable organization, we are committed to strengthening the foundations of our community by nurturing the potential of youth, promoting healthy lifestyles and fostering a sense of social responsibility.

► **BIG QUESTIONS FACING OUR YMCA: STRATEGY SCREEN**

1. What do we do to communicate to existing and potential volunteers to educate and engage them in making a positive community difference?

Strategies: Evaluate efforts from current volunteers.
Increase pool of existing volunteers.
Maximize resources from the community.

2. What relevant activities will inspire youth participation (or development?) in the future?

Strategies: Build alliances in promotion of youth development.
Engage community (providers, youth, and parents) in determination of needs.
Educate participants.
Communicate results.

3. What relevant healthy lifestyle activities will inspire future participation?

Strategies: Develop delivery system that doesn't require Y-owned facilities.
Elevate healthy lifestyle promotion through all programs delivered by the Y.
Educate community about healthy lifestyles..

► **OUR STRATEGIC PLANNING TIMELINE AND MEETINGS**

Laying the Groundwork	Introduction of planning model, process, and development of project charter	June-2010
Committee Meeting 1	Understanding Real-Time Strategic Planning Model, Mission Impact, Initial BIG Questions; Market Awareness and the Implications for Our Y	June-2010
Committee Meeting 2	Feedback from Community Leaders, Developing our Strategic Advantages, Defining our Identity	Aug-2010
Committee Meeting 3	Preparing for the Board Retreat, Finalizing the Planning Documents	Sept-2010
Board Retreat	Strategy Screen, Organizational Strategy Formation	Sept-2010

Committee Meeting 4	Finalizing the Plan, Prepare for Adoption by Board	Oct-2010
Staff Planning Retreat	Programmatic and Operational Strategies	Nov-2010
Board of Directors Meeting	Approval of Plan, Understand Plan Communication and Implementation, Close out of Project Charter	Nov-2010

► **OUR YMCA PROFILE IN 2010**

Membership (12% of total revenues): Membership revenue declined since 2006 due to market conditions but in 2010 as a result of economic conditions a slight increase in overall enrollment occurred. In 2005, the Y made a strategic decision to serve Active Older Adults and has seen steady enrollment increases in Senior and Senior Family categories.

Programs (37% of total revenues): This represents primarily fees paid in licensed child care, sports enrollments or Day Camp operations

Government Funds (37% of total revenues): (Divided between the following operations). The Government funding is allocated on a year by year basis, with future funding incumbent upon politics.

- 73% After School grant operations
- 20% Subsidized Camp or After School Child Care
- 8% Partnerships (City of Paso, Tri Counties & others)

Annual Contributed Support Campaign 2010 (13% of total revenues): Revenues flattened over the last 5 years with an average of \$267,000 raised each year, including sports team sponsorships.

Annual surplus/deficit: On average over the last 5 years the Y has been able to cover its direct costs but has been unable to fund depreciation.

► **OUR TRENDS ANALYSIS**

TREND	DIRECTION OF TREND AND RELATED COMMENTS
Social needs or demands for Y programs and services	INCREASING DEMAND <ul style="list-style-type: none"> • Supporting families (including homeless families) affected by the tough economy • Healthy lifestyle instruction • Creating apprenticeships • Stepping in where schools are becoming defunded • Intergenerational activities • Forming community • Enrichment in afterschool environment that aligns with school day • Preventions: gang involvement, youth crime, and anti-social behavior

<p>Available funding for Y programs and services</p>	<p>POPULATIONS TO SERVE: DECREASING FUNDS</p> <ul style="list-style-type: none"> • Kids: State funding for child care less available. • Seniors: Conservations began pre-measure Y regarding collaboration with City to meet this need. The diversion of those funds for on-going efforts has slowed down those discussions. • Emancipated foster youth: Recognition of the lack of preparedness for self-sufficiency has motivated some funding for these youth post-age 18. • Special needs: mental health funding has increased with Prop 58. Funding for special needs youth is the victim of the state budget crisis.
<p>Other trends affecting our Y</p>	<ul style="list-style-type: none"> • Belief: in 3 years, we will still be experiencing an economic slump • Families cannot afford childcare, and only need 1 to 2 hours per day • Still want enrichment activities (after school care, sports) • Baby-boomers retiring, and have a need to continue to be active. • SLO YMCA's financial shortfall is in membership: facility capacity is 2,000 members (segmented), and we currently operate with 650. The Y of the USA recommends a primary market of 4 to 8 miles; however, given our circumstances, our Y falls between 3 to 5 miles. • National rates of youth obesity remain at unhealthy levels, particularly among minority populations, but the increase seems to be leveling off. • Increasing numbers of YMCAs are offering programs that target either youth or family health and well-being. • As a result of Activate America's Healthier Communities Initiatives, an increasing number of YMCAs are leading their communities in work designed to promote healthy living for youth and adults. • While exact numbers are unavailable at this time, qualitative evidence points to a growing number of YMCAs that are looking outside of the movement to adopt curricula and resources aimed at preventing obesity while promoting a healthy lifestyle for children and families.

KEY COMMUNITY LEADER INTERVIEWS

Observations about role for Y were:

1. Preventative in nature: disease and anti-social behavior.
2. Create enrichment.
3. Promote healthy lifestyles.
4. Address emerging needs (emancipated foster youth, mentally ill youth, intergenerational efforts, apprenticeships).
5. Support struggling families.
6. Public/private partnerships needed.
7. Positive coaches training.

Critical Issues:

1. Future childcare.
2. Healthy lifestyles (need is high, demand is low)
3. Childhood obesity, family activity.
4. Education – drop out rate is increasing, in need of parent involvement.
5. Financial development.

6. Social responsibility - collaborations

Additional areas of need not Y-related:

1. Employment base – people come to San Luis Obispo to retire, not to work; government employees
2. Affordable housing

Funding Challenges:

1. Community giving patterns.
2. Current lack of larger gifts and a need for more donors.
3. Defined giving categories and strategies to secure gifts.

► **COMMUNITY INTERVIEWS**

- **Affordability:** Sources include City of SLO (P&R's), Community Foundation, County, United Way
- **Demographics:** Sources include SLOCOG, City, Chamber, Census, UCSB-economic, Internal data
- **Trends:** Sources include County office of Education, Police Department, Tribune
- **Internal Enrollment:** Sources include our Y, Other Y's, Survey Monkey
- **Impact:** our Y

► **OUR STRATEGIC ADVANTAGES**

Strategic Advantage refers to the ability to produce true social value (having an impact, making a difference) by using a unique asset or having outstanding execution to deliver our mission, and cannot be easily claimed by those with whom we compete. Our strategic advantages are what distinguishes our organization from others and were determined through a thorough analysis of our direct, substitutable and resource competitors. By leveraging these strategic advantages, we will keep our Y vital and thriving:

- Seen as a highly respected nonprofit organization with a solid reputation of integrity and long-standing history of providing valuable programs and services to the community.
- Ability to address broad and diverse range of opportunities for families to be together in a variety of high-quality, values-driven programs that are affordable, accessible, fun and safe.
- An enduring mission commitment to provide financial assistance: no one is turned away due to an inability to pay.
- YMCA's national heritage, unique brand, and rejuvenation of our mission commitment as a cause-driven organization with higher emphasis on social responsibility.
- High credibility to attract appropriate and meaningful community partnerships and collaborations with other leading community organizations.

► **OUR IDENTITY PROFILE**

At the heart of our **Identity Profile** are three essentials necessary to form and implement successful organizational strategies: a sound operating model, keen market awareness, and an understanding of our unique strategic advantages. It gives us a deep understanding of our Y which will strengthen all current and future strategy work.

Identity Statement: Communities engaged in the development of youth, healthy lifestyles, and strengthening the social fabric.

<i>Our mission is to...</i>	Develop the total person -- Spirit, Mind and Body - through values-based programs.
<i>Because we seek to...</i>	Engage communities in the development of youth, strengthening the social fabric and supporting families.
<i>By serving ...</i>	Young people of all ages and seniors.
<i>In the geographic area of...</i>	San Luis Obispo County
<i>Through...</i>	Programs that improve quality of life, provide a foundation of healthy living, build relationships with others, demonstrate positive values and partnering - to provide important benefits.
<i>Emphasizing our mission advantage of.</i>	Developing youth, creating healthy lifestyles and forming community.
<i>With a sustainable operation by...</i>	Program fees, community partnerships, membership dues & charitable giving

► **OTHER BIG QUESTIONS FACING OUR YMCA**

A **Big Question** is an opportunity or threat to which our YMCA must respond. Usually, it is beyond the scope of our organization's current strategies, thus requiring a new one.

- What will services and programs look like in 2020 to support the change?
 - The Y is ready to serve with trained, experienced staff supported by a strong infrastructure:
 - School-age enrichment activities (educational)
 - Active Older Adults Fitness (community building & physical activity)
 - Sports
- What do we want the community to say about the Y?
 - "The Y put me on the right track." – Ray Johnson

► **OUR STRATEGY SCREEN**

Our **Strategy Screen** is the set of criteria we will use to choose whether a particular strategy is consistent with our Y Profile. Following are the criteria that we have determined in advance to assist in the development of strategies that answer our Big Questions now and in the future:

Strategy Screen

1. Does it advance our mission?
2. Does it maximize or capitalize on our competitive advantage?
3. Will communities partner or support the effort?
4. Is someone else better aligned with the need or have a competitive advantage?
5. Do we have the capacity: Financially? Expertise? Personnel? Collaborations?
6. Will the end result produce a quality product?
7. Is it sustainable?



► **OUR STRATEGIES SUMMARY**

Strategy is formed at three levels: organizational, programmatic and operational. It is defined as a “coordinated set of actions designed to create and sustain a strategic advantage in achieving a non-profit’s mission.” Organizational strategies are the means by which we advance our mission, realize our vision and deliver real value to the communities we serve.

<p>Critical Needs</p>	<p>(Strategies)</p> <ol style="list-style-type: none"> 1. New opportunities (should we respond) 2. Comparative challenge (strengthen position) 3. Operating Model Challenge <ul style="list-style-type: none"> o Healthy Lifestyles o Childcare/Enrichment – enrollment and attendance o Further teach/deliver assets, values, healthy lifestyles, communication/socializing o Provide a place/environment for interaction o Responsibilities – collaboration o Active Older Adults – community building and physical activity o Family – develop a community where families want to be
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► **SUPPORTING DOCUMENTS**

- Executive Summary for internal stakeholders
- Communications publication for community leaders, contributors, members, and program participants
- Action Plan – operational and programmatic strategies, goals, accountability and time-line for plan execution