

Rogue Valley Family YMCA Strategic Plan 2008 - 2012

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Mission Statement

The Rogue Valley Family YMCA is dedicated to enriching people's lives through opportunities and resources for spiritual, mental, physical and social growth.

Vision Statement

The Rogue Valley Family YMCA will be the leader in our community for youth and family programming. Our YMCA will be viewed as the top organization in our community that enhances family life. Our facilities, programs, schedules, overriding philosophy and decision-making process will embrace this on every level.



Operating Principles

- **Purpose:** We are mission driven and vision focused. The values of caring, honesty, respect and responsibility guide us.
- **Participants:** We are here to serve our members and program participants, and we work hard to exceed their expectations. We learn from and celebrate the cultures and diversity in our community.
- **Partners:** We are a relationship-based organization and our success is dependent on the strong bonds we create with individuals, members, businesses and organizations.
- **Programs:** We provide programs and opportunities for youth and families to reach their highest potential.
- **Planning:** We make decisions in an ethical and fiscally responsible manner. We continue to strengthen our fiscal health with operational controls that will allow us to increase our net operating income.
- **Price:** We continually create a culture of philanthropy securing donations that ensures no one is turned away based on the inability to pay membership dues or program fees.
- **Philanthropy:** We will improve our fundraising efforts to provide increasing contributed income along with our earned income.
- **Promotion:** We listen and communicate by telling our charitable stories internally and externally.
- **Place:** We strive to ensure our facilities are safe, comfortable and attractive to our members and the community.
- **Personnel:** We believe our staff members and volunteers are our most valuable resource. We will develop and maintain diverse, informed and active board, staff and volunteers.

Strategic Planning Process

Our strategic plan was conducted in a comprehensive nine month process completed by board and staff, facilitated by consultants from the YMCA of the USA. Process components included the following:

- Interviews with key community stakeholders identified by board, staff and volunteers.
- Input from partner organizations and community focus group discussions.
- On-site visits by YMCA of the USA program, fundraising and facility experts.
- On-line survey to current YMCA members, donors, volunteers and staff.
- Research studies on critical issues identified that could pose roadblocks to successful implementation.
- Evaluation of strengths, weaknesses, opportunities, and threats (SWOT analysis).
- Current demographic studies of Southern Oregon with special focus on West Medford.
- YMCA Board of Directors approval of results and recommendations, June 2008.

A summary of supporting data and key findings for all age groups and program areas is available.

Executive Summary

Over the past two years our YMCA has been in the process of evolving into a financially stable operation after a decade of financial challenges and setbacks. We have been effective in addressing the many community needs set before our organization but not without struggle in developing the financial resources to meet those needs. Recognizing the emergence of new leadership and positive direction of the Rogue Valley Family YMCA, the YMCA of the USA stepped forward to lend technical support and expertise to facilitate the strategic planning process.

The strategic planning process has ushered board, staff and volunteers to take action with the following tasks: develop a debt reduction plan, complete a facility assessment, increase visibility, concentrate on board development, establish new financial assistance guidelines and most importantly, develop this strategic plan.

Several themes surfaced in the strategic planning process. First is that the YMCA should continue its focus and efforts around strengthening families. Secondly, the YMCA should focus on improving and enhancing its current main location before considering moving or developing another location. And finally, greater financial resources are needed to move forward. Therefore, the committee was left with determining goals and strategies that would address the immediate needs of the YMCA, while taking a long-term look at how to position itself to be the premier family-focused organization in the Rogue Valley.

Strategic Goals

1. **Buildings and Properties** - The YMCA will maintain clean and safe facilities while aligning current and future program space that encourages opportunities for participation of youth and families.
2. **Stewardship** - The YMCA will approach its work with a commitment to fiscal and philanthropic stewardship by efficiently and effectively managing resources.
3. **Community Development** - We will foster a sense of community by connecting people with programs, collaborating with strategic partners and communicating the charitable work of the YMCA.

Option Selected - Stay, Focus and Act

The YMCA has made great strides in reducing its account payables, meeting payroll requirements and improving its public image. However, the YMCA remains vulnerable with a one million dollar debt load which is mostly decades old mortgage liability. Therefore, the committee recommendation is that in order to meet the strategic objectives of becoming the number one family organization, we should focus on continuing to serve the needs of Medford, improving our current facility while simultaneously improving our fiscal health.

Phase 1, 2008-2010. Campaign to invest in the YMCA and retire the mortgage: Once the debt load has been significantly reduced and critical building needs are addressed, move to Phase 2.

Phase 2, 2010-2012. Financial reinvestment: Invest in programming and non-critical building needs, while allowing the YMCA to begin studying future options.

The following chart outlines our plan of action:



1. Buildings and Properties	Phase 1 - 2008-2010	Phase 2 - 2010-2012
• Main Facility	Conduct comprehensive infrastructure study	Invest in facility improvements and family program space
• Collaborative Space	Strengthen existing collaborative spaces	Outreach to Central Point, Phoenix/Talent, and Upper Rogue Area
• Technology	Identify critical needs	Invest in hardware and software
• Capital Equipment	Upgrade equipment and analyze lifespan	Invest in new program equipment
2. Stewardship	Phase 1 - 2008-2010	Phase 2 - 2010-2012
• Fiscal Leadership	Debt reduction	Reinvestment of available cash
• Financial Development	Strengthen fundraising efforts	Conduct market and capital feasibility studies
• Volunteer Development	Strengthen Board for a capital campaign	Continue to strengthen volunteer involvement
• Staff Development	Regional training and community involvement	National training and initiatives including Activate America
3. Community Development	Phase 1 - 2008-2010	Phase 2 - 2010-2012
• Membership	Improve member retention	Focus on membership growth
• Programs	Maintain current programs	Expand family programs and outreach efforts
• Public Image	Increase key messages about YMCA	Continue key messages about kids and families
• Collaborations	Strengthen existing partnerships	Align with new strategic partners

Options Considered

Same Course:

This option would require the YMCA to maintain its current programming mix, while struggling with an aging facility and the lack of resources to deal with the debt load. Under this model, the debt would be significantly reduced by 2012, however the YMCA would remain vulnerable to an episodic building event that could require resources that aren't currently available. Because of the high risk of this plan, it was not our recommended course of action.

Capital Expansion at the Howard Property:

This option considered maintaining the current programming at the main facility, while looking to expand with a new facility on the Howard property. Although this plan presents partnership opportunities and great appeal, it doesn't address the immediate needs of the YMCA in dealing with cash flow and an aging facility. The 15 million dollar price tag for a new facility would require capital funding that would be difficult for the YMCA and other organizations to raise, so it was not our recommended course of action.