

GREATER LOWELL FAMILY YMCA

2008-2013 STRATEGIC PLAN-FINANCIAL GOALS

GOAL STATEMENT: We will provide for the long-term fiscal health of our association to ensure the continued delivery of quality services into the future.

- ✓ We will develop practices and engage volunteers to increase contributed income to 8% of the total income by plan’s end.
- ✓ We will develop a plan to ensure that on an average 5% of revenue is retained for reserve funding purposes exclusive of scheduled depreciation.

ANNUAL OBJECTIVE/STANDARD	ASSIGNMENT	DUE DATE	RESOURCES NEEDED
<ul style="list-style-type: none"> - Increase contributed support by 5% each year for the life of the plan. - Establish at least one new foundation partner each year. - Increase board awareness regarding the importance of philanthropy resulting in greater board engagement in annual fund raising. - Recruit five new YMCA members each year to work on the annual YGive campaign. - By plan’s end establish a formal planned giving program. - Conduct annual prospecting with new potential major donors. - Enhance internal controls to track monthly departmental variances. - Increase our United Way involvement with the goal of raising our United Way contributions from 1% of total budget to 2% of budget. - By plan’s end to have investment income comprise more than 1% of annual revenue. - To have membership revenue comprise 32% of total revenue by plan’s end. - To control personnel costs so that the percentage of total costs does not exceed 62%. 	<p>Board Members & Joseph (Jodi) White Ray Adams/Board Members</p> <p>Joseph White & Executive Staff</p> <p>All Director Staff Joseph Meehan Ray Adams/Board Members Kevin Morrissey & Dianna Beauchesne</p> <p>Ray Adams</p> <p>Ray Adams & Board Members</p> <p>Adele Tsoukaris</p> <p>Executive & Director Level Staff</p>	<p>Yearly Yearly</p> <p>Yearly</p> <p>Plan’s end 2012 Yearly 2009</p> <p>2011</p> <p>Plan’s end</p> <p>Plan’s end</p> <p>2010</p>	

GREATER LOWELL FAMILY YMCA

2008-2013 STRATEGIC PLAN-STAFF & VOLUNTEER GOALS

GOAL STATEMENT: We will attract, retain, develop and nurture the absolute best staff and volunteers to help the YMCA’s mission come alive.

- ✓ We will attract and engage a wide variety of community leaders in multiple volunteer roles that will position the association to deliver the many core services of our mission.
- ✓ We will develop recruitment, training and retention practices that will develop the Greater Lowell Family YMCA’s staff team to it’s fullest potential.
- ✓ We will adopt strategies to develop and educate part time staff about the impact of the overall YMCA movement and also to engage them in their current roles as well as to encourage them to consider the YMCA as a viable career option.

ANNUAL OBJECTIVE/STANDARD	ASSIGNMENT	DUE DATE	RESOURCES NEEDED
<ul style="list-style-type: none"> - Increase Board diversity by adding three new ethnically diverse Board members by plan’s end and having Board membership comprised of at least 15% of individuals of a minority background. - Identify community leaders to help us recruit and engage volunteers within minority communities. - Establish a relationship with “One Lowell” to help us ensure that new volunteers are provided with an atmosphere that will encourage and foster their engagement. - Conduct a biannual staff satisfaction survey process. - Annually gather local data to ensure a competitive compensation schedule. - We will enable and encourage all leadership staff to pursue professional training opportunities by establishing annual goals that will allow them to be recognized as a Senior /Professional Directors by the YMCA of the USA. -Develop an educational program for part time staff to educate them further on the mission of the YMCA and to encourage them to consider the YMCA as a potential career. - Provide part time staff with opportunities to participate in activities that will educate them further (attend staff meetings/have input in budgeting etc.) - Establish a part time staff leadership committee. - Develop a biannual assessment that will monitor & enhance board performance. 	<ul style="list-style-type: none"> Joseph White Joseph White & Ray Adams Ray Adams Dianna Beauchesne Ray Adams All Directors Kevin Morrissey & Dianna Beauchesne Director Level Staff Director Level Staff Joseph White/Current Board Chair 	<ul style="list-style-type: none"> Plan’s end Yearly 2010 Yearly Yearly Yearly 2010 2009 2010 Biannually 	

GREATER LOWELL FAMILY YMCA

2008-2013 STRATEGIC PLAN-MEMBERSHIP/PROGRAM GOALS

GOAL STATEMENT: We will position our association to serve the most people possible while maintaining high standards of quality in all aspects of service.

- ✓ We will adopt and implement a plan to increase total membership units by 5% each year resulting in a 25% total increase by plan’s end. We will develop new programs and enhance existing programs to provide for a 5% growth each year emphasizing continued and improving quality.

ANNUAL OBJECTIVE/STANDARD	ASSIGNMENT	DUE DATE	RESOURCES NEEDED
<ul style="list-style-type: none"> - Develop a more effective process to seek out and process member input. - Initiate a secret shopper program to regularly audit the level of customer service. - Conduct a formalized member service-training program. - Develop a formal membership retention plan. - Conduct a biannual membership satisfaction survey. - Expand family emphasis by adding one new family program each year. - Establish procedures to ensure that each tour is conducted by a trained well informed staff member. - Develop a shepherds program to ensure that new joins are contacted within their first six months of membership. - Develop a comprehensive preventative maintenance plan by the end of year two of the plan. - Replace all cardio equipment in the main wellness center every three years. - Develop a plan to address the repair or replacement of existing parking lots by plan’s end. 	<p style="text-align: center;">Adele Tsoukaris</p> <p style="text-align: center;">Adele Tsoukaris/Ray Adams Adele Tsoukaris Director Level Staff</p> <p style="text-align: center;">Adele Tsoukaris Director Level Staff</p> <p style="text-align: center;">Adele Tsoukaris/Ray Adams</p> <p style="text-align: center;">Director Level Staff</p> <p style="text-align: center;">Daniel Morency</p> <p style="text-align: center;">Ray Adams/Gia Saraceni</p> <p style="text-align: center;">Ray Adams/Daniel Morency</p>	<p style="text-align: center;">2009</p> <p style="text-align: center;">2010 Yearly</p> <p style="text-align: center;">2012 Biannual</p> <p style="text-align: center;">Yearly</p> <p style="text-align: center;">2009</p> <p style="text-align: center;">2009</p> <p style="text-align: center;">2009</p> <p style="text-align: center;">2009</p> <p style="text-align: center;">Plan’s end</p>	

GREATER LOWELL FAMILY YMCA

2008-2013 STRATEGIC PLAN-MEMBERSHIP/PROGRAM GOALS - CONTINUED

GOAL STATEMENT: We will position our association to serve the most people possible while maintaining high standards of quality in all aspects of service.

- ✓ We will adopt and implement a plan to increase total membership units by 5% each year resulting in a 25% total increase by plan's end.
- ✓ We will develop new programs and enhance existing programs to provide for a 5% growth each year emphasizing continued and improving quality.

ANNUAL OBJECTIVE/STANDARD	ASSIGNMENT	DUE DATE	RESOURCES NEEDED
<ul style="list-style-type: none"> - Develop new middle school programs by plan's end. - Develop one new senior program each year. - Develop one new off-site program each year. - Incorporate a character development component in every program for children. - Further develop aquatic management services adding at least two new sites each year. - To aggressively pursue acquisition of the existing leased Camp Massapoag property. -If the feasibility of a Camp Massapoag purchase becomes unrealistic, determine alternatives to continue rural traditional camp program at an alternate site. - Engage community leaders in Groton and Dunstable to help us maintain programming in their communities. 	<ul style="list-style-type: none"> Kevin Morrissey/Director Level Staff Gia Saraceni Kevin Morrissey/Director Level Staff Kevin Morrissey/Director Level Staff Laura Darling/Kevin Morrissey Trustees/Board of Directors/Ray Adams Trustees/Board of Directors/Ray Adams Ray Adams/Kevin Morrissey 	<ul style="list-style-type: none"> Plan's end Yearly Yearly 2012 Plan's end Plan's end 2012 2011 	

GREATER LOWELL FAMILY YMCA

2008-2013 STRATEGIC PLAN-COMMUNITY VALUES

GOAL STATEMENT: The Greater Lowell Family YMCA will become a leading agency in adding value to our community.

- ✓ By plan’s end we will have increased community awareness with regard to the Greater Lowell Family YMCA’s mission, programs, impact and financial assistance.
- ✓ We will develop and nurture new relationships with specific neighborhood groups, cultural groups, city leaders and political leaders that position the Greater Lowell Family YMCA to be a significant resource in solving community problems through collaborations that engage multiple entities.

ANNUAL OBJECTIVE/STANDARD	ASSIGNMENT	DUE DATE	RESOURCES NEEDED
<ul style="list-style-type: none"> - Develop a mission impact brochure. - Establish a stronger relationship with the Lowell Sun resulting in YMCA exposure on a regular basis. - Translate flyers into other languages. - Enhance current web site and explore on-line registration. - Develop a mission impact pocket guide for Board members and other YMCA advocates. - Develop a quick reference guide for the basics of existing strategic plan to assist Board and staff in sharing the information with others. - Study and reallocate existing/new bulletin board space to enhance communication. - Develop the email newsletter growing our registered participants by 250/year adding 1250 recipients by plan’s end. - Develop at least one relationship per year with specific cultural groups. - Each Director (staff and volunteer) will reach out to one community leader semi-annually. - Host at least two local/state/national political leaders each year for additional exposure and education. - Develop at least two new relationships each year with school administrators (School Board members/Superintendents/Principals) - Establish two new collaborative relationships each year - Contact at least two ethnically focused agencies each year. 	<p>Director Level Staff/Dianna Beauchesne</p> <p>Director Level Staff Director Level Staff Adele Tsoukaris</p> <p>Adele Tsoukaris</p> <p>Director Level Staff</p> <p>Adele Tsoukaris</p> <p>Adele Tsoukaris</p> <p>Director Level Staff</p> <p>Board of Directors/Director Level Staff</p> <p>Ray Adams</p> <p>Kevin Morrissey</p> <p>Director Level Staff/Board of Directors Ray Adams/Kevin Morrissey</p>	<p>2009</p> <p>Yearly 2011 2010</p> <p>2010</p> <p>2009</p> <p>2009</p> <p>Yearly</p> <p>Yearly</p> <p>Yearly</p> <p>Yearly</p> <p>Yearly</p> <p>Yearly</p> <p>Yearly Yearly</p>	