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**A Healthy Y for A Healthier Central Maryland:
Spirit, Mind and Body**

A Vision for 2015

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Section I. The Challenge and the Opportunity

We live in times of both exhilarating opportunity and abundance in the United States and Central Maryland, but these are also times that are fraught with serious dangers to our families and communities. The list of challenges is daunting, among them: the inevitability of globalization, the deterioration of our natural resources, a growing income gap, the continuing segmentation of our society, increasingly unhealthy and inactive behaviors leading to an alarming national public health crisis, academic performance and drop-out rates that threaten our children's and country's future, to name just a few. These issues, which are complex and well-documented, underscore the need for much stronger community assets for individuals and families, coupled with personal responsibility, to improve the prospects for a better life and an ability to contribute to a healthier, more enriching and well-rounded community.

An Unhealthy Landscape for Children in Maryland

As our society and family life have become more and more sedentary, as public and school recreation options continue to decrease, and healthy and nutritious food has become less prevalent in people's lives (either by choice or by lack of access), obesity and alarming health problems are becoming epidemic. This issue is touching people across the socio-economic spectrum, and Central Maryland is no exception. While approximately 15% of the population remains strongly focused on their health and fitness, the majority of people and families struggle to achieve a healthy lifestyle despite an underlying desire to do something positive about the problem. Those "Health Seekers" are looking for affordable, accessible, welcoming environments and opportunities for them and their families to change the rhythm and reality of their lifestyle.

The statistics are troubling:

- Childhood and adolescent overweight prevalence has more than tripled in the past 4 decades
- Over 27% of children, ages 5–10, have one or more adverse heart disease or diabetes risk factors
- Over 60% of overweight children, ages 5–10, have one or more adverse heart disease or diabetes risk factor
- By age 10, 30–60% of youth will exhibit at least one risk factor for heart disease
- Less than 50% of children ages 5–8 have adequate cardiovascular endurance
- More than 35% of all youth do not participate in vigorous physical activity

- Approximately 29% of public high school students are overweight or at-risk (37% in Baltimore City)
- 28% of children aged 2-4 in Maryland's WIC program are overweight or at-risk.

According to Jeffrey Kaplan of the CDC, "overweight and physical inactivity account for more than 300,000 premature deaths each year in the U.S., second only to tobacco-related deaths. Obesity is an epidemic and should be taken as seriously as any infectious disease epidemic. Obesity and overweight are linked to the nation's number one killer--heart disease-- as well as diabetes and other chronic conditions."

Keeping Our Aging Population Active and Engaged

Today, seniors (defined as those aged 65 and above) comprise 12 percent of the total population. By 2050, the senior population will increase by 147 percent. Keeping seniors active and engaged in their communities is both a health care and social imperative. Shopping malls, casinos and even senior centers do not necessarily have the kind of stimulating and healthy environments that seniors deserve. Seniors need to socialize and stay active to maintain a healthy life. A country that shutters its older citizens off to environments in which they see and interact almost entirely with those their own age is a country that wastes one of its most valuable assets – the wisdom and vitality of its older generations. Keeping generations connected and active is both a moral and social imperative.

Senior citizens living alone should interact often with others if they want to maintain their ability to communicate, a new University of Michigan study showed. Furthermore, the study showed that lifestyle with organized activities seems to provide the best social opportunities for the elderly, according to University of Michigan's Deborah Keller-Cohen. Approximately 40% of people aged 70 and older report not performing any type of exercise at all. Benefits to exercise are not only limited to improved balance, and therefore the prevention of falls, but also to good cardiovascular health, an improved sense of well-being and control over life's many obstacles.

The Strain on Central Maryland's Families

Overwhelmingly, research and common sense tells us that the presence of strong and loving families is a critical, but fragile factor, in the health of individuals and communities. However, many societal factors contribute to the growing strain on families in Central Maryland, including, but not limited to: the growing prevalence of (and financial necessity for) both parents working, the

continuing increase in the divorce rate, the increasingly “over-scheduled” nature of family life, and decreasing amount of time that families spend together in productive, healthy activity.

Over two-thirds (68%) of women cite financial strain as a major threat to the American family, followed by divorce (48 percent), loss of faith/spirituality (47 percent), and the impact of dual wage earner household (28 percent). Six in ten women are concerned about being able to pay their bills each month - especially high among single mothers with children under 18 (80 percent). Most research also indicates that for all families, but especially when both parents work full-time jobs, the need for a work/life balance is essential for an enriching home environment.

Increasing Amounts of Unsupervised Out of School Time for Youth

Sadly, a significant and growing percentage of Maryland children of working families lack the kind of supervised, active and enriching forms of out of school time (after school and summer) that are critical to supplementing their in-school activities. According to the Afterschool Alliance, of Maryland children of working families:

- More than 25% are unsupervised in the afternoons
- Only 11% are in afterschool programs
- An alarming 28% are “latchkey children” with no adult supervision in the afternoon

Not surprisingly, children who do not participate in afterschool activities are:

- At greater risk of being victims of crime
- More likely to participate in anti-social behaviors.
- 49 percent more likely to use drugs
- 37 percent more likely to become teen parents than those participating in after-school activities

A recent survey of high school students, for example, revealed that students in after-school programs had greater expectations for the future and were more interested in school than their peers. Juveniles are at the highest risk of being a victim of violence between 2 p.m. and 6 p.m. The peak hour for juvenile crime is from 3 p.m. to 4 p.m., the first hour that most students are dismissed from school.

Significant Levels of School Drop-out

About 27,000 Maryland students in 2007 failed to graduate from high school. The state's overall graduation rate is about 76% percent, but urban graduation rates are well below 50 %. The divide between urban and suburban graduation rates in Maryland is the highest in the nation. In 2007, Baltimore city school's graduation rate was only 35%, compared to 81.5% in Baltimore's suburbs. Among the nation's 100 largest school districts, Baltimore has the 98th lowest graduation rate.

However, research tells us that the critical time for youth is during the middle school years, when the behaviors and academic habits are formed that ultimately determine whether one stays in school and gets to high school and eventually graduates.

In a recent Baltimore Sun article, Maryland's State schools Superintendent Nancy S. Grasmick, stated that "dropping out is a process that does not begin in high school, it begins very early on." Teachers as early as elementary school could predict that a student will struggle later, she said. "We have a responsibility to intervene early and provide services at the very beginning of a student's academic career." The transition from ninth to 10th grade marks "the greatest falloff for students," Grasmick said. According to the Baltimore Sun, "Grasmick pointed to the primary indicators of problems by the end of sixth grade: poor attendance and behavior, and failing math and English. Students showing those signs have a 10 percent chance of graduating on time and a 20 percent chance of graduating a year later, she said - and those who repeat middle school are 11 times more likely to drop out."

The Y: A Primary Catalyst for a Healthy and Connected Community

The Y of Central Maryland has been serving this region for almost 160 years, and has played an important role in the lives of people from all walks of life. The Y has evolved and its programs have looked very different over that period of time, as the social and economic fabric of the community has changed in an almost breath-taking manner. At its core, the Y exists to contribute to the healthy and holistic development of individuals, families and communities – in spirit, mind and body. At our best, the Y continuously innovates to remain leaders in that development process, meeting people, families and communities where they are and providing enriching experiences that serve as catalysts for individual and collective improvement.

The Y's mission compels us to serve the broadest and most diverse range of the community possible, regardless of income or circumstance. Our unique scope and scale not only allows us to accomplish things that others cannot, it also means that we have the responsibility to do so. To continue to be a strong asset to the community, the Y must work to provide programs and build facilities that can bring together the entirety of the community. As our increasingly heterogeneous society has continued to stratify and isolate itself into relatively homogenous sub-communities, the Y seeks to break down those walls and artificial divisions, creating healthy and engaging opportunities for people and families to come back together and to experience what community truly means.

In order to achieve this bold mandate, to build a healthier and more connected community, the Y of Central Maryland must itself be bold and willing to change, becoming healthier and more connected, and willing to further innovate and invest in those assets which will yield the highest return to the community while ensuring the long-term viability of the organization. We must examine everything we are doing and not be afraid to change, to confidently engage the community and make the case that a healthy, vibrant Y will strengthen a community in a profound manner. We must change our fundamental financial resource model. We must aggressively seek out like-minded community partners in all we do. We clearly must grow substantially to have a significant impact, and we must embrace and build around the core idea that Y membership for all is our ultimate goal.

With a population of roughly 2.4 million people, the Y's current membership of 47,500 and our total of 75,000 participants are heartening but incredibly insufficient to achieve our mission, given that our current participation level represents only 3.3% of the total population. We've been far too modest in our ambition, too limited in our thinking and too myopic in our vision. However, that is changing and significantly so.

Led by a committee of volunteer leaders across Central Maryland, the Y of Central Maryland has developed a bold vision, and has committed to achieving that vision by 2015, only six short years from now.

Section II. A Vision For 2015

Vision Statement

Reaching over 240,000 people, the Y will be a primary catalyst for Central Maryland's families and individuals to achieve their full potential in spirit, mind and body. It is only once we begin to actually influence lifestyle choices and build sufficient developmental assets in our community on a significant enough scale that we will have lasting, residual influence on the health and well-being of children, youth, adults and families. We will provide experiences and programs that are memorable, unique and enriching, which foster family and community bonds, build character and promote success for all. By doing so, we will fundamentally enhance the quality of life in the communities in which we operate.

To achieve our vision, we will focus on **five mission strategies**:

1. We will make Y membership for all our core objective, as broad-based membership in the Y will lead to a healthier and more connected community.
2. We will make a measureable impact on the success of Central Maryland's children and youth through purposeful asset development programs.
3. We will energize the community to be highly engaged and invested in the Y's mission and success.
4. We will become an employer of choice with an exceptional culture.
5. We will ensure that the Y is financially viable and sustainable.

We will accomplish our vision and mission strategies by:

- Inspiring healthier lifestyles
- Deepening member and community involvement
- Providing inspiring programming and opportunities for families, youth and seniors
- Increasing access for all
- Remaining focused on and becoming exceptional at what we do
- Measuring our progress
- Ensuring the sustainability of our community, environment and organization

We will actively promote our mission, commitment and values as a means to communicate our work.

Our Mission

The Y of Central Maryland is a charitable organization dedicated to developing the full potential of every individual through programs that build healthy spirit, mind and body for all.

Our Commitment

At the Y, we are committed to providing family-oriented, affordable, high quality programs that lead to:

- An enhanced quality of life in the communities in which we operate
- Every family building stronger bonds, achieving greater work/life balance and becoming more engaged with their communities
- Every child and youth deepening positive values, their commitment to service and their motivation to learn

The Y is a place for everyone. People of all races, ages, faiths, gender, abilities, backgrounds and incomes are welcome and financial assistance on a sliding scale is available to those who would otherwise be unable to participate.

Our Values

All of our programs and services are infused with four positive character values: **Caring, Honesty, Respect** and **Responsibility**. We are committed to challenging our members, staff and volunteers to accept and demonstrate these values.

Our Key Principles

In all we do, we will use a key set of operating principals to guide our work and the fulfillment of our mission:

- All programs are infused with our four positive character values of Caring, Honesty, Respect and Responsibility
- Our programs will always be of high quality, and priced so that affordability and accessibility are paramount
- As a community-based organization, we will seek to partner with others who share our values and mission. We fundamentally believe that strong partnerships are an invaluable means to broaden and deepen our impact

- We will measure the impact of our work; it is our belief that what gets measured gets done
- We will operate in a manner that is environmentally and financially sustainable

Section III. A Five Part Strategy for Success

Mission Strategy #1:

We will make Y membership for all our core objective, as broad-based membership in the Y will lead to a healthier and more connected community.

We intend to make membership in the Y a rich, deep, meaningful and memorable experience that helps people and families reach their full potential in spirit, mind and body. We seek to serve as diverse a population as possible, recognizing that our core focus is on serving families, youth and seniors. By focusing on those segments, we will make whatever fundamental programmatic changes that will strengthen our primacy with those groups. Enhancing the membership experience and increasing the percentage of our revenue that comes from membership has to be our number one priority from both a mission and a financial perspective. We will be intentional in our membership program and facility design to ensure that our Ys become true community centers – a real “third place” for families, individuals and the community.

Growing and Upgrading our Physical Capacity

We will commit that, by 2015, our network of family center Ys will be capable of delivering an exceptional membership experience to, in aggregate, at least 125,000 individuals. To achieve that goal, there is much more work to do, both in growing capacity and redeveloping old and inadequate Ys.

Only 4 of our current 10 family centers can be considered modern and designed to deliver a fully-rounded membership experience:

- Dancel Family Center Y in Ellicott City (renovation completed in 2009)
- Perry Hall Family Center Y (opened in 2009)
- Walter & Betty Ward Family Center Y in Abingdon (opened in 2007; aquatics center to be added by 2010/2011)
- Harry & Jeanette Weinberg Family Center Y in Waverly, Baltimore City (opened in 2004)

Another 2 of those 10 are modern and well-designed centers that can deliver a full range of aquatics programming to families, children, adults and seniors:

- Y Randallstown Aquatics Center, a partnership with Baltimore County (opened in 2009)
- Y Dundalk Aquatics Center, a partnership with Baltimore County (opened in 2009)

The 4 others that are not modern and not designed to deliver a fully-rounded membership experience will be either renovated or repurposed:

- Carroll County Family Center Y (to be renamed the Hill Family Center Y) – A redevelopment/expansion plan will be finalized by mid-2009 and implemented by no later than 2010
- Catonsville Family Center Y – A plan is in place to rezone and redevelop the 20 acre site in partnership with St. Agnes Healthcare and Bremner Duke, with a new 40,000 square foot Y and a 90,000 square foot medical office building, projected to be completed in late 2011
- Druid Hill Family Center Y – This venerable Y in a very challenged Baltimore City neighborhood is being repositioned as less a traditional membership-based Y and more of a community asset in which significant Youth Asset Development programming becomes a more prominent activity (i.e. Success Academy, New Horizons, others to follow)
- Towson Family Center Y – A plan is in place, in partnership with Baltimore County Department of Recreation and Parks, to redevelop the 16 acre site with a new county recreation field and a new LEED-certified, 45,000 square foot Y, projected to be completed in 2011

With only 10 family center Ys in a region with 2.4 million people, we do not have nearly enough capacity in Central Maryland to achieve our vision.

Therefore, we will commit to adding an additional 4 family center Ys over the next 6 years, which will give us 14 Family Center Ys. Based on market research and the current gaps in our service area, our priorities are as follows:

- The general location of two of the four new family center Ys has been determined:
 - **Western/Central Anne Arundel County** – The current lack of a family center Y in this county is a significant service gap. In concert with our local volunteers, we have committed to making this happen in the western/central part of the county

by 2012 and have begun exploring several different locations and development strategies

- **Downtown Baltimore** – The lack of a Y somewhere in the downtown of the region's largest city and the center of its commercial activity hurts the Y from a community presence, branding and connection to the business community. We are committed to rectifying this issue by 2015.
- The other two (or more) locations for family center Ys will be selected from among the following list (all of which are relatively equal in appeal at this point):
 - **NW Baltimore County (Owings Mills)**
 - **North Central Baltimore County (Hunt Valley)**
 - **Southern Anne Arundel County**
 - **Northern Harford County**
 - **Western Howard County**
 - **SE Baltimore County (Dundalk)**

The financing of these projects will require significant capital fundraising leadership and support from the community and our volunteers, creative partnerships (all future projects will inevitably involve at least one significant co-development partner), consideration of rental models, and smart management of the existing balance sheet. These issues will be discussed in greater detail under Strategic Goal #5.

In order to deepen our relationships in the community, bring even greater value to a Y membership and reduce our capital requirements, we will seek to partner with other like-minded community organizations. This year, we will open two new membership-based Y aquatics centers that have been built by Baltimore County. These centers, located in Randallstown and Dundalk, will provide valuable physical outlets to those local communities while also extending the Y's network of aquatics options to our current membership base. We will continue to explore further partnership opportunities with Baltimore County and other municipalities

Redefining and Rounding out the Membership Experience

We have much work to do to ensure that a Y membership experience is something that truly allows individuals and families to reach their full potential in body, mind and spirit, and builds a more connected and healthier community.

On a visceral level, a Y membership will be about belonging in a time when people have fewer and fewer places where they feel they truly belong. This is

something you just know. It's a gut thing that says, "I fit here. I am welcomed and accepted." It's also a fluid and dynamic thing. In the beginning it might be about losing weight or staying in shape. As time goes on, it will come to mean more:

- Connecting with other members and being a more engaged part of a community
- knowing your neighbors
- opportunities to grow, learn new things and challenge yourself
- reinforcing who you are as a human being
- feeling a part of something bigger and more important than just you
- being rewarded for giving back
- demonstrating your values to your children, friends and neighbors
- improving in spirit, mind and body
- strengthening your family unit
- volunteering and giving back to the Y and the community at large

As a result of an on-going, long term commitment to one's health and well-being, an opportunity for on-going relationships (with other Y members, staff and volunteers) occurs. While for most, the initial motive for becoming a member is self-focused; as members' lives are impacted (in spirit, mind and body), they become far more focused on giving back and investing in their community. Because membership in the Y of Central Maryland is available to all, regardless of age, race, religion, gender, income or any other difference that may divide us, Y membership is a crucial asset that keeps one connected with the larger community.

From a practical, "commercial" perspective, membership represents the financial transaction which includes monthly (or annual) dues and may or may not include a joiner's fee. The financial transaction may occur between the member and the Y or between the member, a donor and the Y.

A membership to the Y provides the following benefits:

- Access to all Family Center Y's in Central Maryland (and across the country through the "Away" program)
- The right to participate in individual (cardio, strength equipment, lap swimming, basketball) and group (ex. Studio Cycling, Body Ball, Super Step) exercise programs at no additional cost
- The right to participate in "add-on" programs at a reduced rate (versus non-members). Examples include Pilates, Yoga, swim lessons, Camp

To achieve this vision, we will need to complete the **Membership Product Development project**, which is designed to reinvent our current membership model so that it has a sharper and unique focus on meeting the needs of families and seniors. We need to more overtly make the Y brand synonymous with **Membership** and **Community**. The Y brand should be synonymous with:

- Affordability
- Accessibility
- High quality
- Core values (Caring, Honesty, Respect, Responsibility)
- Acceptance/belonging
- Great people who help you achieve your potential
- Empowerment and confidence
- Community Engagement

As such, the new membership product design seeks to round out the product beyond the “body” (what is currently most commonly understood to be part of a Y membership – fitness, aquatics, group exercise, basketball, etc.) to include programming aimed at developing the “mind” (book, chess and travel clubs) and “spirit” (parenting classes, meditation, etc.). It seeks to accomplish all of that within the context of a community-enhancing model – i.e. bringing people together around common interests who may have never known each other if it wasn’t for the Y. In the end, the member’s experience becomes fuller and more meaningful. Additionally, it is very important that a Y membership offer programming for families that provides both individual and collective experiences that make trips to the Y a family affair. Members who see the Y as a true “third place” are more committed to the Y, its mission and core values, and see the Y as the embodiment of what’s best about their community. They become invested in the Y, are more likely to volunteer, to donate to the annual campaign, and to recruit others to become members and supporters as well. Deeply committed members understand the importance of the Y’s need for long-term sustainability and for future generations to have the benefit of a robust Y in their community.

A major aspect of this will be enhanced programming for seniors—both the facilitation of opportunities to socialize as well as intentional programming that enhances physical and mental functioning.

To accomplish this rather significant shift, we will make changes to our approach, programming, design, pricing and staffing. Namely, we will:

- Make a strong and clear commitment to **families and seniors** (Phase I) and then teens (Phase II) through stronger and more extensive membership programming
- Reinvent what a Y looks and feels like, with not only enhanced health and wellness spaces, but more multipurpose space, more community gathering space, warmer colors, and filled with more amenities that cater to helping people relax, stay healthy and reduce stress in their lives. Be environmentally responsible in design, construction and on-going operations – show leadership in this area and be known for it
- Reassess programs and activities that don't create meaningful relationships with participants and/or don't lead to membership, putting less emphasis on "pay as you go" programs that are fundamentally disconnected from Y membership and our ability to build strong relationships and communities

Mission Strategy #2:

We will make a measureable impact on the success of Central Maryland's children and youth through purposeful asset development programs.

As the largest provider of child care programming in Central Maryland, the Y has a unique and central role to play in the development of children and youth in this region. For many reasons (including, but not limited to, historically poor marketing, a decentralized structure and a lack of a holistic and coherent strategy), the Y's longstanding programming leadership in this area has been little understood and poorly communicated. In truth, there has not been a unifying strategy to child and youth development, but rather a loosely connected network of programming that was of varying quality and with widely divergent approaches.

Going forward, the Y of Central Maryland intends to adopt a far clearer, stronger and more positive strategy for all its programming with children and youth. This strategy, which we call **Youth Asset Development**, will be focused on partnering with parents, schools, and other key players in the holistic development of children and youth. We believe that childhood is a journey toward adulthood. The question is: what kind of experiences, role models and assets will one have along the path to adulthood?

The Y's continuum of programming for children and youth seeks to provide the appropriate level of support, encouragement, enrichment, responsibility and developmental assets as children make their journey from early childhood, through their youth and teens and into adulthood. That's why our Youth Asset Development strategy operates under the sub-brand called **Y Journeys for Children and Youth**. Our continuum of programming guides children through

their individual journeys to achieve a happy, productive and balanced life. We provide the tools and expertise to equip children to successfully manage and enjoy life's journey throughout every stage of their development.

By providing high quality programming that is built around the **Search Institute's Developmental Assets model**, our clear focus along that journey will be to intentionally increase and enrich the developmental assets present in children and youth's lives with strong emphasis on reinforcing the Y's core values and promoting healthier, more active lifestyles.

This strategy will be carried out under the following program segments:

- Y Journeys in Enrichment Before and After School: In schools, at Y family centers and at third-party sites
- Y Journeys in Camping Fun: Summer
- Y Journeys in Early Childhood Development: Pre-School (in partnership-based traditional pre-school and Head Start sites)

In all of our Youth Asset Development programming, we will structure our curriculum and activities around the Search Institute's model and focus on measureable outcomes to ensure that our strategies are working. Those measurements will include:

- Increased school attendance
- Increased school promotion rates
- Increased graduation rates
- Reduced obesity rates
- Reduced teenage pregnancy rates
- Increased number of youth assets (as defined by the Search Institute's Asset Development model)

As a result of this strategic shift and clearer focus we will look to do enriching youth asset developmental programming across all of Central Maryland. It's our fundamental belief that all children and youth are at-risk if families and the larger community don't pay attention to providing an asset-rich environment. While we will continue to operate significant youth asset development programming in Baltimore City, that work will now be consistent with and integral to our larger work with all children and youth. We will work harder to provide more intentional programming for children and youth in our centers, and do everything we can to use membership as the ultimate asset that allows our impact to go beyond the short-term and simply "transactional." As such, all families whose children participate in our youth asset development programs

will receive a Y family membership for three months upon the completion of their program.

Y Journeys in Enrichment Before and After School: The Cornerstone of the Y's Out-of-School Time Youth Asset Strategy

The most compelling programming for the Y to engage in our quest to partner with families and schools to provide safe, engaging, healthy and enriching out-of-school time experiences for children and youth is our before and after-school programming. The leader in Central Maryland in such programming, with 45 parent-pay sites across the region and 10 grant-funded BOOST sites in Baltimore City, the Y is recognized by many school districts and thousands of parents across Central Maryland for our high-quality programming.

The Y Journeys in Enrichment Before and After School programming is built around an intentional, asset-rich set of programmatic elements, namely:

- **Character Development** - Incorporating values into play, learning and social activities
- **Homework Support** - Staff provide a time and support in helping children complete homework
- **Literacy** - We support reading, writing, speaking, gathering information, using information, thinking critically, understanding others, and expressing one's self.
- **Arts and Humanities** - Drama, art, music, crafts, art history and poetry provide creative forms of self-expression and teach confidence
- **Science and Technology** - Age appropriate science and technology activities teach children to understand the world, the choices they make, how these choices affect the earth and the quality of life for others
- **Health and Fitness** - Health and physical activity stimulate the mind, build confidence for success and contribute to reducing obesity in youth and children
- **Service Learning** - Encourages civic responsibility, volunteering, leadership skills, character development
- **Social Competence, Conflict Resolution** - Teaches strategies for dealing with conflict and development of socially acceptable ways of interacting with one another

It is our intention to significant increase the number of school sites and children we impact by 2015. We will work harder to market our unique programming and commitment to affordability and accessibility (as evidenced by our providing of scholarships to those who are unable to pay), clearly

differentiating ourselves through the “Journeys in Enrichment Before and After School” branding. We will move away from thinking of and marketing Before and After School programming as “childcare,” and adopt a more enrichment-oriented “club model,” which we believe is more in tune with what both parents and children want and need. While much before and after-school programming remains the purview of local principals and PTAs, we will build stronger relationships with district administrators to ensure that they better understand the Y’s unique offering. Of course, we will spend the majority of our time working with local principals and PTAs, continuously refining our offering based on their needs.

Virtually all current Y of Central Maryland before and after-school programming occurs in elementary schools. Our core programmatic elements (listed above) have served children in grades K-6 very well, and we are committed to continue to grow the number of our elementary school sites, providing parents and caregivers the kind of nurturing and engaging programming they have come to expect from the Y. However, **our mission and desire to impact the lives of youth in the critical middle school years compels us to expand our after-school programming to middle schools.** As such, we will develop a unique program offering for that age group that combines the Y’s core values and strengths but that is clearly tailored to the needs, interests and developmental issues of middle school-aged youth. To that end, we are working with world-renowned pediatric neurosurgeon and the founder of the Carson Scholars foundation, Dr. Benjamin Carson, to launch an after-school model for middle-schoolers that focuses on enhancing interest in science and math in a fun, engaging and active manner. Given the dwindling number of college students in the United States who are majoring in science and math (and related fields like engineering, technology, etc.), and the uneven level of science and math instruction occurring in the schools, we believe that working with partners like Dr. Carson and others and focusing on a “STEM” related middle school after-school initiative makes tremendous sense.

At the **high school level**, we will work with youth to supplement their academic and extra-circular activities in a more selective manner. Clearly, traditional after-school programming is not a relevant programmatic option. As such, we will emphasize two longstanding Y programs in our work with high school youth: **Youth in Government** and **Youth Achievers**. These programs, different in so many ways, provide meaningful and in-depth opportunities for young adults to explore the possibilities of the next stage of their lives, whether that means college or work, by building confidence, reinforcing the Y’s core values and providing hands-on experience with the larger responsibilities of citizenship and adulthood. We will work to expand both programs. We will collaborate with our Y colleagues across Maryland to build a stronger, larger

and more sustainable statewide Youth in Government program. We will focus our efforts on building stronger relationships with high school social studies departments, particularly at those high schools in and around Y family centers, and expanding our volunteer base. Our Youth Achievers program will be more center-based in its orientation and continue its primary focus – which is to provide a career focus and leadership opportunities to high school-aged at-risk youth.

With our commitment to improve our membership product, as well as to both upgrade and expand the number of family centers, we will work more intentionally to ensure that our before and after-school programming leads to a broader Y impact on those children, youth and their families. It will be our goal to move a large percentage of those families to full-fledged Y memberships, which we know will provide a fuller and more meaningful Y experience. As mentioned above, we will provide a free trial family membership to the Y to all families with children who participate in a school year experience.

Y Journeys in Camping Fun: Good Old-Fashioned Fun with a Larger Purpose

Fundamental to our focus on engaging children and youth during key out of school time periods, the Y's longstanding commitment to providing fun and memorable summer camp experiences at an affordable price to as many children and youth will remain central to our mission and strategy. We will affirm our renewed focus on our core and historically successful camp programming, which is based on the simple notion that children should have summers filled with fun, exploration, simplicity, and friendship. It's our belief that children should get to play hard, get wet, be silly, make new friends, learn new skills and tackle new challenges. Camp is, in a strategic and programming sense, an extension of the Y's before and after-school programming.

Currently, the Y offers 17 different camp sites to over 3,300 campers across Central Maryland; a mixture of sites tied to family center Ys, as well as those operating in school sites, at county parks and one residential camp. Our commitment is to significantly expand the number of camp sites, from 17 to 30, while growing enrollment in existing camp sites. The Y will generally not attempt to compete in the specialty camp niche, unless a significant specialty demand from our core constituency has been identified and a partner with content expertise can be secured. We will largely focus on our traditional camp model, keeping our pricing highly affordable and extending our offering to more communities.

While our primary focus will remain on day camps, we will look to develop a more extensive residential camp experience. That will not come through

attempting to purchase and own a residential camp site, but rather by working through one or more partners. We will look for opportunities to either manage an existing residential camp site, or develop a long-term agreement with an existing camp that affords us a more extended residential experience for our campers. There are many organizations, inclusive of other Y associations, that may have significant interest in partnering with us, and we will pursue those opportunities aggressively, as long as they fit both our mission and financial requirements.

Y Journeys in Early Childhood Development: More Focused and Financially Sound

While early childhood development has been an important part of the Y's mission for many years, the current environment has changed considerably over the years. Our recent attempts to operate pre-school programs in market-rate facilities and/or without strategic partnerships have been largely unsuccessful. That has put a significant strain on us financially and operationally. It has also left us looking like a stand-alone provider, undifferentiated from commercial, for-profit providers. We will not do that anymore and will exit, when appropriate (based on current commitments and/or lease conditions), those sites. Going forward, we will re-focus our pre-school activities in a more strategic, mission-oriented and financially sound manner.

We will run consumer (i.e. parent-pay and scholarship funded) pre-school programs only when the following conditions exist:

- We have developed and secured a unique partnership with an organization that shares our values and appreciates the Y's unique programming (i.e. JHU at Weinberg pre-school; UMBC and Harford CC on-site pre-schools);
- the partnership provides a "below-market" cost structure that allows us to provide a financially sustainable program

As such, the following current pre-school sites will continue to remain an integral part of our mission and strategy:

- Harford "Campus" – An on-campus pre-school site in Bel Air, in partnership with Harford Community College, serving the HCC constituency and the broader community
- Harry and Jeanette Weinberg Pre-School – A pre-school site attached to the Harry and Jeanette Weinberg Family Center Y, funded partially by Johns Hopkins University, serving the JHU constituency and the broader community

- UMBC – An on-campus pre-school site in Catonsville, in partnership with University of Maryland Baltimore County, serving the UMBC constituency and the broader community
- Carroll County “Chipmunks” – An enrichment-oriented pre-school program operated out of a church in Finksburg, this program provides a several-days a week experience to pre-schoolers rather than a full-day, five days a week, licensed child care program

We will look to selectively expand these types of pre-school models, as long as they meet the aforementioned criteria.

The following current pre-school sites will continue to be operated for the time being, but we will begin to work on finding community-based partnerships for the future in order for them to be sustainable long-term:

- Catonsville – We will continue to operate this successful pre-school until the Catonsville Family Center Y is redeveloped (targeted for 2011/12). Before that time, we will look to find a local community partner on an alternative site in Catonsville to continue this operation under a “partner” model.
- Towson - We will continue to operate this successful pre-school until the Towson Family Center Y is redeveloped (targeted for 2011). Before that time, we will look to find a local community partner on an alternative site in Towson to continue this operation under a “partner” model.

The following current stand-alone pre-school sites, which do not lend themselves to the partnership model and are financially marginal (or worse) will be phased out, based on lease and other operational considerations, as soon as is practical:

- Highlands – Discussions have recently been completed to convert this pre-school from a parent-pay model to a federally funded Baltimore County Head Start site. As such, we will continue to manage this site (given that we are the federal grantee for Baltimore County Head Start), but in a manner that is far superior for the community and the Y. Owen Brown – This stand-alone preschool site in Columbia suffers from being situated in an unsatisfactory location, with little street visibility, a significantly onerous, one way lease, and a chronic under-enrollment situation. The lease doesn't expire until 2015, and there are no early-exit clauses. As such, we will continue to look for either a new pre-school provider to assume the lease and operations, or some sub-lease arrangement for a non-pre-school provider. For reputational and financial reasons, we will not simply

close it prior to 2015 without either of those arrangements being concluded.

- Paca – This stand-alone pre-school site in Edgewood sits in a non-descript commercial area. Enrollment levels have swung up and down depending upon economic conditions and other factors. We will look to relocate this pre-school to a location that is more suitable and that allows us to formally partner with another organization. Otherwise, we will likely discontinue this program.

Head Start: A More Strategic and Financially Sound Approach

The Y has been a leader in Central Maryland in Head Start since the early 1980s, helping to prepare young, economically disadvantaged children for success in school and life.

The Head Start programs are located throughout Baltimore County and in the northwest sector of Baltimore City. In Baltimore County, the Y is a full partner with the county as the direct grantee of the federal government, running 9 program sites serving 572 children. In Baltimore City, the Y is a sub-grantee of the city's Housing Authority, as one of 14 delegate agencies, albeit the largest one with 6 program sites serving 321 children. Combined, we are serving 893 children, receiving over \$6.8 million in direct funding and generating over \$1.6 million in in-kind funding.

The Head Start program contains many critical developmental assets for young children (quality early childhood experiences; comprehensive services to children including health, nutrition, education, and social services along with family and community involvement). However, it is a challenging program to manage on many levels. Some of those challenges include:

- As a federal program, it's highly regulated
- Very labor-intensive: Significant % of grant dedicated to staffing expenses:
 - 68% County Head Start
 - 80% City Head Start
- Cumbersome governance structure (requirement of a Parent Policy Council with significant authority over important program and staffing decisions as well as veto authority on any changes to association-wide HR policies)
- Federally-mandated hard cap of 15% of revenue on administrative expenses (overhead), but in neither case does the Y receive even that much:

- EPJ Baltimore City Head Start: (2.6% of revenue)
- Baltimore County Head Start: (9.0% of revenue)
- 20% In-kind match required
- Flat federal funding for two years
- Salary administration practices for Head Start are different than that of all other Y employees, necessitating several sets of HR rules across the Y of Central Maryland workforce

Going forward, the Y will continue to run Head Start programs when we are in a true partnership with the municipality involved (meaning that we have significant input into curriculum design, site selection and overall program governance). As the largest provider of child care in the region, we believe we've earned that right. Additionally, we will set 10% as the minimum amount of overhead that we accept, ensuring that we can run the program with the appropriate level of management direction and quality. At that level of overhead, the Y comes close to breaking even financially on the grant.

Currently, the above-stated criteria are substantially being met with our Baltimore County Head Start program, but not in Baltimore City. We will work hard to correct those deficiencies in Baltimore City, first by focusing on rectifying the financial shortfall. If that issue is addressed, we will then move to insist on having a more substantial (i.e. partner-like) role in the overall management of the city's Head Start program and pushing for far more transparency in decision-making regarding the program. If we cannot accomplish both of those objectives, then we will exit participation over the next several years.

Finally, we will also move to mitigate our legal risk and protect our overall organizational and governance structure by creating a separate, subsidiary legal vehicle to house all Head Start operations.

Extending our Work with At-Risk Youth to the Entire Region in a More Focused and Integrated Fashion

In partnership with schools and like associates, the Y of Central Maryland will work to provide intentional, focused, and impactful out-of-school programming for youth in highly at-risk environments. This work, which has historically been centered in Baltimore City, will now be Central Maryland-wide in scope. The short term goal is to increase and enhance developmental assets for youth; the long term goal is to support high school graduation rates and character development. Youth Asset Development programs for highly at-risk youth complement and enhance the work of like-minded partners by providing measurable outcomes and values-based programming in an asset rich environment.

According to a recent Baltimore Sun article, experts say gang activity in suburban and more affluent communities, prevalent since the early 1990s, is expected to peak in coming years as the population of the most susceptible youths, ages 14 to 17, booms. "The suburban gang trend is on the uptick," said Dan Korem, author of *Suburban Gangs: The Affluent Rebels*. Suburban teenagers join gangs for reasons similar to their big-city counterparts, experts say. They tend to be at-risk youth struggling with family problems, such as divorce or separation, physical abuse or dysfunctional parents. The biggest factor, according to Korem, is that children don't have an adult to turn to for guidance.

This important shift in focus will result in an immediate change in our approach. We will narrow our focus programmatically while broadening it geographically. While we will continue to do a significant amount of grant-funded work in Baltimore City, we will begin immediately to move outside those boundaries to extend this work into all corners of Central Maryland, with specific emphasis on those communities in which we have a family center Y. The facilities, staffing, volunteer base and programming that a family center Y building affords provide a far more sustainable platform for our work with at-risk youth.

More specifically, the key elements of our newly focused strategy for at-risk youth asset development are as follows:

Target Population:

- Primary: Elementary and Middle School Youth
- Secondary: High School Youth

Programmatic Focus:

All youth asset development (YAD) programming utilizes the Y's mission and core values to provide:

- Positive, strength-based approach to programming for youth ages 6-18;
- Proactive, intentional actions with resulting demonstrable outcomes;
- Relationship focus on youth, families, staff, community;
- Shared vision, strategic partnerships, integrated strategies with key partners;
- Long-term commitments to youth and families
- Physical activities that improve youth fitness and encourages lifelong physical fitness

A Positive, Strength-Based Approach:

- We empower young people by fostering leadership potential and character development through traditional Y programming.
- We utilize Developmental Assets to provide a positive, strength-based and measurable approach to youth and family development.
- We speak on behalf of young people and families to act as strong advocates for them.

Proactive, Intentional Action:

- The Y's mission and core values will be the foundation for YAD programs.
- We work to create strategic partnerships in communities where there is a Y Center.
- We seek opportunities to provide youth with Y experiences where there is no Y Center, through creating alliances with other divisions within the Y (health & wellness centers, camp, school age).
- We create programs and practices that result in young people forming positive, long-term relationships with caring adults and peers.
- We see the integral role that families play and are intentional about including families in all aspects of programming. We build assets in adults since we know that asset-rich adults build asset-rich young people.

Relationship Focus:

- We emphasize how asset building is larger than a program and is about relationship building.
- We purposefully engage youth and families with Y Centers and ensure that our centers encourage positive interactions between adults and young people.
- We encourage all staff members and volunteers to build relationships with young people.
- We include in our programs and practices activities that build and deepen relationships.
- We provide concrete ways for adult members to reach out to young people at our Y.

Shared Vision, Strategic Partnership and Integrated Strategies:

- We integrate asset building and core values into all aspects of our programs and practices.
- We incorporate asset building into our hiring practices, management practices, and fundraising.
- We integrate asset building into our existing partnerships and collaborations.
- We form strategic partnerships that value an asset-building focus.
- We participate (or take the lead) in a community-wide, asset-building coalitions.

- We identify ways that organizations and individuals can become asset builders for all young people.

Long-Term Commitment:

- We train all staff members (including Y Center staff) and volunteers on a regular basis on how to build assets. We work to move at-risk youth and families toward membership and other asset-rich Y programs.
- Expansion to new sites will only be considered when the initiative reflects a shared vision and partnership;
- The Y's component of the project requires our core services; what we do best;
- The project has clear outcomes and measurements;
- Funding is secure for no less than two years.

The Y will continue to seek grant funding to support this work, but we will be more discerning in the grants we pursue. On a macro-level, the Y of Central Maryland cannot continue to be as highly dependent on grant revenue as it has historically. Such revenue can be unpredictable and highly variable, and if it constitutes a significant percentage of all revenue (which it does – approximately 30%), it can provide a shaky financial foundation. Ultimately, we believe that the right level of grant funding is approximately 15% of all revenue..

We will seek to find grant opportunities that fully fund both direct program costs and the real cost of administrative overhead. Historically, the Y has run numerous programs that were not fully funded, with the hope and/or expectation that annual giving funds could be raised to bridge the gap. Unfortunately, that hope was not well founded, and the Y has run most of its grant-funded programming at a significant loss. Going forward, preference will be given to grant programs that are fully funded (both direct and indirect costs) and sustainable for a minimum of two years. From a more fundamental standpoint, we will view this work as a way to extend our core youth asset development (primarily before/after-school and camp) and membership programming to highly at-risk populations. We will cease to view it as work that is different from our core mission and programming. In all of our youth asset development programs (within the urban environment and across the entirety of Central Maryland), we will create and deepen partnerships with like-minded organizations who have clear missions and share our commitment to outcomes and core values. Just as importantly, we will exit relationships that are not partnerships and in which we are simply vendors/ contractors for another entity that doesn't share our mission, vision and values.

As such, over the coming years, we will adopt a new set of priorities in evaluating grant opportunities, namely:

- the program is consistent with our youth asset development strategy
- the program has clear and measureable outcomes
- the partner shares our values and mission and views us as an equal partner in the program's development and implementation
- the funding from the grantee covers direct program costs plus the full indirect cost burden (currently that's 14%)
- the funding is multi-year (to ensure sustainable impact)

Mission Strategy #3:

We will energize the community to be highly engaged and invested in the Y's mission and success

The Y is one of the truest and longest lasting "community-based" organizations in the United States. However, Ys can build strong communities only if communities embrace, support, participate in and volunteer for the Y. The Y has a rich history in Central Maryland, having been founded and led by a volunteer board in 1853. Since then, tens of thousands of volunteers from all corners of the community have played a critical role in the Y's continued success, impact, evolution and, most importantly, in its ability to help individuals and families reach their potential in spirit, mind and body.

Today, over 125 association and community advisory board members and over 250 program volunteers provide guidance, financial support and critical program support to the Y of Central Maryland. Roughly 100,000 people are served, in some capacity, by the Y and close to 500 people donate to the Y's annual giving campaign. While those numbers are heart-warming, in truth, they don't really come anywhere close to the kind of community engagement that will be required to carry the Y of Central Maryland forward. In fact, the Y of Central Maryland ranks at the bottom of the list on most key philanthropic and community engagement metrics when compared to other large metropolitan-area YMCAs:

- Annual giving dollars raised
- Capital campaign dollars raised
- Endowment
- % of volunteers contributing to the annual campaign
- % of members contributing to the annual campaign

Clearly, there is much work to do to engage the community and to make the Y a significant charity of choice in Central Maryland. Increasing volunteerism and philanthropy in the Y is actually an essential means to one of the core

elements of our mission: it brings people together from different parts of the community and connects them to each other and to the community at large. It is actually our responsibility, in our community building process, to create opportunities, through activities like volunteerism and philanthropy, in which members can invest in the Y and leave a legacy to the Central Maryland community, to their families and to themselves. Our current relatively low levels of giving and community support, validated by recent market research, would indicate that the Y hasn't yet captured the "hearts and minds" of enough people across the region. Our community engagement and philanthropic strategies and tactics need to change if we are to become a charity of choice. We cannot continue on as is.

What will success look like? By 2015, we believe that the following goals can and must be achieved:

- Tripling our annual giving results (from \$800k a year to at least \$2.4m) in order to fund Y experiences for 3X as many people
- 100% participation by association and community advisory board members in annual giving campaign
- Increasing membership giving from less than 3% to 10%
- Increasing United Way designations from \$53k to \$200k per annum; from 81 total designations to over 300
- Increasing the number of program volunteers from 250 to 750
- Achieving our combined current and projected capital campaign goal of \$18.5 m
 - Anne Arundel (\$5m)
 - Catonsville (\$5m)
 - Towson (\$5m)
 - Ward – Aquatics Center (\$3.5m)
- Creating a modest endowment fund of \$2m supporting future capital needs and critical mission programs on an annual basis

Our current level of volunteer engagement and philanthropic activity will not allow us to achieve those results, which are relatively modest compared against other large metropolitan Y associations. As such, several things will need to change and improve. The current volunteer structure (association board and community advisory boards) appears insufficient to move the Y to the forefront of Central Marylander's charitable giving priorities.

Board Volunteers

Board leadership is a significant and critical element to the Y's success as a charitable, community-based organization. The Y is fortunate to have many

generous and engaged board volunteers, all of whom are the foundation upon which stronger volunteer engagement will be built. However, given the issues discussed above and the obvious need to find a better approach to engage all board volunteers, a few adjustments to our board volunteer structure will be implemented. It's our expectation that these adjustments, while relatively minor, can provide a higher level of community engagement, more focus to our volunteer efforts, a better change to match our volunteers' interests with a more relevant volunteer role, and a stronger structure for fundraising. :

- **Association Board** – The Y of Central Maryland's governing entity, responsible for its adherence to its mission, strategic direction, financial viability, and the quality of its executive management. The board, which should optimally be about 25 to 30 in number (with a maximum of 40 based on the by-laws), should represent a diverse cross-section of Central Maryland's business and community leadership.

Upon completion and approval of this strategic plan, the following committee structure is recommended to ensure good governance and adherence to and progress against the strategy:

- **Executive Committee** (the board's leadership that can act on behalf of the board and provides more direct oversight of the executive management's performance and the organization's overall progress against its strategic plan)
- **Membership Experience Committee** (provides oversight of and input into the accomplishment of the Y's Mission Strategy #1: We will make Y membership for all our core objective, as broad-based membership in the Y will lead to a healthier and more connected community)
- **Youth Asset Development Committee** (provides oversight of and input into the accomplishment of the Y's Mission Strategy #2: We will make a measureable impact on the success of Central Maryland's children and youth through purposeful asset development programs)
- **Community Engagement Committee** (provides oversight of and input to the accomplishment the of the Y's Mission Strategy #3: We will energize the community to be highly engaged and invested in the Y's mission and success)
- **Talent & Leadership Development Committee** (provides oversight of and input to the accomplishment of the Y's Mission Strategy #4: We will become an employer of choice with an exceptional culture)

- **Finance Committee** (provides oversight of and input to the accomplishment of the Y's Mission Strategy #5: We will ensure that the Y is financially viable and sustainable)
- **Governance, Nominating and Executive Compensation Committee** (provides oversight of the overall governance structure and process, adherence to the association's by-laws; ensures that the highest quality people are recruited and oriented to the board; provides oversight of and ensures the adherence to the Y's Executive Compensation philosophy and strategy)

These committees will be led and populated by Association board members (all of whom will serve on at least one committee), as well as Community Advisory board members (participation on an association board committee being encouraged but optional) and "at-large" members of the community with specific expertise and interest in the committee's work. All association board committees will have at least two community advisory board members and one "at-large" member to ensure the broadest possible community engagement in the accomplishment of the Y's long-term strategy. For governance reasons, the exception to that approach will be the Executive Committee (which will include only Association Board members). A member of the Y's Senior Leadership team will be assigned as the staff lead/support for each committee.

- **Community Advisory Boards** – These boards serve as the Y's advocates within the seven communities of Central Maryland in which the Y operates: (Anne Arundel County; Baltimore City; Carroll County; Harford County; Howard County; Northern Baltimore County; Southern Baltimore County). The primary roles of the Community Advisory boards (and the committees that they use to carry out their responsibilities) are:
 - **Philanthropy** (drives the success of the Y's annual giving campaigns to ensure that sufficient scholarship funds are available to provide Y programming to all in their community who need financial support; when necessary, provides leadership and direction to capital campaign fundraising when Y building and/or endowment campaigns are required in their community)
 - **Community Outreach** (reaches out to the local community to communicate the Y's mission and community impact, as well as to ensure that the Y is partnering with like-minded organizations to further its mission and to provide Y experiences to those who otherwise wouldn't be able to

participate; provides feedback from the local community to Y leadership)

- o **Board Development** (in collaboration with the Association Governance and Nominating Committee, ensures that a diverse cross-section of the local community's business and community leadership is recruited to the board, and that the Y's governance requirements are met; ensures active board engagement in local committee work and, where appropriate, association committees)

It is the clear expectation that all association and community advisory board members will be highly engaged, as evidenced by being a member of the Y, strong attendance and enthusiastic participation in meetings, 100% participation in the annual giving campaign, and an on-going ability to find ways to better connect the Y to organizations and people within the community who can help us further our mission.

Program Volunteers

Volunteerism through service on boards and committee is critical to the Y's governance and community effectiveness, but are obviously not of interest for a lot of people who still want to volunteer their time to support the Y's mission. That opportunity exists, and is vitally important to the Y's mission and sustainability, in the form of program volunteerism. Although the Y of Central Maryland currently utilizes program volunteers, the truth is that we haven't in any way managed this opportunity to its fullest. Going forward, we will establish a clearly defined and effectively communicated set of program volunteer opportunities, and designate both an association-level coordinator, as well as a local coordinator at each family center Y. Additionally, we will incorporate specific program volunteer opportunities in our grant-funded youth asset development program area.

In fundamentally changing our approach to program volunteers, we believe that we further our charitable mission, engender stronger community engagement and support, and reduce our expenses – allowing us to keep our prices as affordable and our programs as accessible as possible. Many roles throughout the Y lend themselves very well to program volunteerism, including (but not limited to):

- Coaches and instructors for youth sports
- Group exercise instructors

- Membership services
- Camp activity leaders
- After-school program mentors
- “Career Day” speakers for various youth asset development programs
- Pre-school aids
- Special event coordinators
- Senior mentors

We currently have approximately 250 program volunteers across the association, which we believe is insufficient to achieve our goals. As such, we will look to at least triple that number to 750 by putting in place the plan and infrastructure to ensure that it becomes an organizational priority. Many Ys across the country have been very effective at this, and the results have been obvious.

Mission Strategy #4:

We will become an employer of choice with an exceptional culture

As an organization that is fundamentally about helping people, families and communities reach their full potential in spirit, mind and body, there can be little debate that the mission of the Y cannot be accomplished without exceptional people and organizational culture. An exceptional culture is only possible if there is an intentional and clear plan to do some difficult but essential things.

While there is much that is right about the Y's historical culture and people, much will need to fundamentally change about our human resources practices and systems in order to achieve our strategy. Our recruitment, on-boarding, talent management, leadership development, compensation and other key HR practices must be re-thought and aligned with our new strategy. Great organizations and cultures are not simply an organic out-growth of having the right strategy and strong senior leadership. Rather, great organizations and cultures are a by-product of a serious, systematic and intentional strategy that develops and constantly improves its human resources systems to assure that the right people are in the right place, at the right time with the right resources and skills to deliver exceptional experiences for its customers.

The Y's historical culture has been, perhaps, too internally-focused; often preserving the status-quo and resisting outside talent at higher levels. While

hiring from outside the Y network has always been a significant part of filling out the Y's roughly 1,500 person roster, virtually all key management roles had historically been filled by those whose entire careers have been spent within the Y. While many of those people have done extraordinary work, such lack of receptivity to hiring from outside the Y created a culture that had been relatively unreceptive to new ideas and best practices from other organizations, the marketplace's voice and the idea that change is not only healthy but necessary for survival and success. Over the past several years, the culture has changed significantly, and we intend to accelerate that change. Going forward, the Y's **culture** and people are committed to:

- Being member-centric in all we do
- Defining and marketing the Y employment brand
- Hiring and developing exceptional leaders at all levels
- Living and demonstrating our core competencies and values everyday
- Striving for a diverse workforce and workplace – in all ways (diversity of background, thought, experience and perspective)
- Measuring what matters and being fully accountable to our members, the community and each other for our outcomes
- Maintaining a healthy work place; one that encourages our people to be healthy in spirit, mind and body
- Recognizing and rewarding exceptional performance
- Being externally focused and building deep relationships and strong community partnerships
- Working in collaborative ways and spaces
- Striving to get better at what we do every day
- Having fun – taking our work seriously, but not ourselves
- Being an attractive and rewarding place for program volunteers
- Acting, thinking and working as one Y

In order to facilitate a fundamental change in the culture and a more systematic approach to the recruitment, development and assessment of talent, the board Talent & Leadership Development committee initiated a process to define the core competencies that all Y employees needed to be successful in the organization moving forward. External benchmarking was done, and a process was developed to evaluate a wide range of potential competencies. The Y's current leadership team, many of whom have either been hired over the past three years or been moved into new roles, were deeply involved in the process.

Ultimately, **eight core competencies were identified as being the most essential:**

- Accountability
- Analytical Thinking
- Change Management
- Customer-Focused
- Innovation
- Integrity
- Resilience
- Teamwork

These competencies will be the foundation upon which all human resources and talent systems and practices will be built. It is clearly understood that a thorough examination of all aspects of how we recruit, assess, develop, reward, promote and communicate with people is required if we are to become the kind of organization that can achieve the ambitious vision we have set forth.

Recent talent assessment work has revealed the following talent and organizational priorities:

- **Strengthen the leadership “bench”**
 - Through development of existing staff and selective recruitment of new talent, all leadership positions should have a clearly identified back-up – both short and long-term
 - Focus on identifying multiple “high-potential” talent at all levels of the organization, and ensure that such talent is challenged, mentored and given opportunities to further develop
 - Ensure that key behavioral attributes are identified for leadership positions, and that talent is properly matched to position based on both skill and behavioral fit
 - Continuously update succession plans, ensuring that all positions with impending retirements and other forms of turnover have clear succession plans in place
 - Make leadership talent reviews apart of the annual board governance process
- **Make leadership diversity a priority**
 - Increase the diversity of the leadership and broader management team through both promotion of existing talent and the selective recruitment of external talent
 - Focus on diversity in all of its forms – diversity of background, race, gender, perspective, industry, etc.

- Establish mentorship program focused on pairing minority staff with members of the leadership team for individualized career development.
- Ensure that the talent acquisition strategy supports the development of a diverse workforce
- Lead by example
- **Be strategic about our hiring & development**
 - View every open position as an opportunity to import talent and future leadership
 - Develop and implement behavioral interviewing practices across the organization
 - High potential members of the team to receive customized development plans to be ready for promotion
 - Establish a disciplined development plan to ensure rotation of jobs, special assignments to tasks and projects, etc. that support the development goal
 - Develop an organization wide framework/process to acquire the right people, and implement a "hire for tomorrow's job" approach.
 - Continuously recruit for talent – find "bench" roles to bring in talent at mid-levels to build depth
- **Raise the bar for performance expectations and reward superior performance**
 - Develop a more rigorous performance assessment process based on core competencies and achievement of objectives aligned to strategy
 - Establish a more highly differentiated compensation approach to ensure that base and bonus decisions are more precisely aligned to performance and that Y becomes a true meritocracy
 - Require stronger performance improvement plans for low performers with tighter deadlines
 - Move on decisions/action plans for people with low performance/low potential
 - Require mid-year check-in to ensure action and follow-through on performance issues and development plans

Mission Strategy #5:

We will ensure that the Y is financially viable and sustainable

Perhaps the most important responsibility for any board and senior leadership team of a Y is to ensure that the organization has the financial stability and an economic model that will carry it forward and allow it to thrive over time.

Carrying out the Y's mission is only possible when there's confidence that the Y will be around for future generations. The reality is that the Y of Central Maryland's historical financial model was and is not sustainable, and is in the process of being significantly altered to allow the Y is to fulfill its mission and vision for the future.

Historically, the shortcomings with the Y's model have resulted in:

- An over-dependence on non-recurring grant funding
- Insufficient annual and capital fundraising
- An infrastructure (facilities, capital, technology and people) that was insufficient to support the ability to grow and serve strong membership levels
- A dependence on one-time sources of revenue
- A lack of understanding of the underlying financial inadequacies of key program areas
- Long-term lease commitments that are onerous and not supported by sufficient revenues
- De-centralization of key administrative functions, leading to higher costs and lower efficiencies
- A weak balance sheet with no reserves for the future

As we look forward, and consider the changes to our financial strategy that will need to occur in order to accomplish our strategic plan, we know that much work needs to be done. The fragility of the current balance sheet, the weakness of our current operating performance (which has improved substantially over the past several years) and the challenges of the existing credit markets will require us to make very prudent decisions moving forward and to be as innovative as possible in our financing strategies – all while ensuring that we strengthen the balance sheet, meet our debt covenant agreements and continue to improve our operating performance.

We have to change the way we do business – the historical approach has not put us on a strong footing. Enhancing the membership experience and increasing the percentage of our revenue that comes from membership has to be our number one priority from both a mission and a financial perspective. To that end, it's imperative that we achieve our plan to increase the number of family center Ys from 10 to 14 and overall membership from 47,500 to 125,000. If we can accomplish that, we will move from only 34% of our revenue coming from membership to close to 50%. Our financial plan would also increase our operating revenue from \$38.6m in 2009 to \$60.8m in 2015, with much higher quality and more predictable revenue. Most importantly, from a financial operating standpoint, we would increase our gross operating margin from 3% in

2009 to 17% in 2015, and our net operating margin from -3% to +4%. That would mean that we would have the ability to both fund depreciation (a real necessity for a capital-intensive organization like the Y) and generate a surplus on an annual basis, providing capital and resources for future investment in people, programs, infrastructure and the community.

As stated, our balance sheet will require significant focus from our board and senior staff. We have significant debt on the balance sheet today (over \$20m), an amount that is not unmanageable, but enough to restrict and/or temper our near-term financing options. We need to continue to find ways to invest in membership assets and be creative doing so. We believe that owning significant amounts of real estate may not necessarily be in the best interest of the Y long-term, as it may tie up capital and leave us with assets that aren't always in the optimal locations down-stream. In today's environment, we believe that the Y is better off partnering with real estate developers and other long-term holders of real estate and finding below-market deals to locate family center Ys in areas that need them. Those partnerships, when done correctly, will allow us to be located with other organizations and entities that have complimentary missions and programs. Examples have and will include: health care providers, human services non-profits, governmental municipalities, schools, recreation providers, churches, and others.

Additionally, we will do the following:

- Actively pursue sale/leaseback opportunities with certain current assets to generate additional capital
- Pursue long-term lease models on future assets
- Finalize development and financing strategies within next 6 months on Catonsville, Towson and Carroll
- Approach development activities with the assumption of no additional debt will be available through the next 9 to 15 months
- Continue to pay down on our \$3m credit line (currently \$1.7m into \$3m line) over the next 24 months through:
 - improved cash flows to reduce our interest expense and increase our financial flexibility
 - vigilant management of receivables
 - continuing to centralize purchasing and taking advantage of our scale
- Closely monitor our adherence to our existing debt covenants and manage our operations and expenses prudently
- Have the financial discipline to not proceed with any capital project until pledges for more than 50% of the capital campaign goal are in hand with

a clear indication that a plan is in place for 100% of the campaign goal to be achieved

The following top-line operating projections for the years 2009 through 2015 provide more specific details on the financial performance the Y can reasonably expect if we execute our strategy. There are obviously a substantial number of imbedded assumptions in these numbers, some of which have been explicitly provided in this strategic plan. These numbers are, by their very nature, speculative at this point and cannot nor will they take the place of actual year-to-year budgets that reflect the reality of the Y's financial situation or decision-making as the next six years play themselves out. However, they do underscore that the strategic plan provides a substantially more stable and sound financial model for the Y, allowing us to better fulfill our mission, expand to meet growing needs, and ensure our legacy for the long-term.

Y of Central
Maryland
Projected Income
Statement

	Budget	Projected	Projected	Projected	Projected	Projected	Projected
	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>
Revenue							
Health & Wellness	15,530	17,086	18,957	22,061	25,137	29,594	33,017
Childcare	11,427	12,358	12,692	13,035	14,069	15,031	16,064
Grants	10,885	9,468	9,318	9,318	9,318	9,318	9,318
Annual Giving	750	830	880	1,200	1,600	2,000	2,400
	38,592	39,742	41,847	45,614	50,124	55,943	60,799

Expenses							
Health & Wellness	12,933	13,731	14,361	16,254	18,462	21,661	22,477
Childcare	8,870	9,575	9,844	10,120	10,904	11,648	12,482
Grants	10,259	8,748	8,748	8,748	8,748	8,748	8,748
Annual Giving	0	0	0	0	0	0	0
Shared Services	5,243	5,363	5,810	6,304	6,493	6,688	6,688
	37,305	37,418	38,763	41,426	44,606	48,745	50,395
Operating Income	1,287	2,324	3,084	4,188	5,517	7,198	10,404
Miscellaneous Income	1,000	100	150	200	200	200	200
Interest Expense	(1,055)	(1,055)	(1,831)	(1,893)	(2,462)	(3,053)	(2,945)
Depreciation	(2,299)	(2,399)	(2,999)	(3,099)	(4,499)	(5,049)	(5,249)
Net Income	(1,067)	(1,030)	(1,596)	(605)	(1,244)	(704)	2,410
P&L Cash flow	1,232	1,369	1,403	2,494	3,255	4,345	7,659
% of Revenue from Membership	34%	37%	39%	41%	43%	45%	46%

Section IV. Strategic Outcomes – Measuring our Progress

CATEGORY A: CAPACITY	Goal 2015	Current 2009
Strategic Imperative #1: MEMBERSHIP		
Family Centers	14	10
Redeveloped/ Expanded Centers	4	
Number of Members	125,000	47,500
Quality/Net Promoter Score	70%	61%
Strategic Imperative #2: YOUTH ASSET DEVELOPMENT		
School Sites	75	55
Camp Sites	30	17
Total Number of Youth Participants	30,000	16,829
Number of Youth Assets (as defined by Search Institute) of Y participants	30	n/a
Quality/Net Promoter Score	70%	66%
Strategic Imperative #3: COMMUNITY ENGAGEMENT		
Annual Giving	\$2.4 m	\$0.8m
Number of Annual Giving Donors	5,000	1,000
Number of Major Gift Donors (\$1k or greater)	400	86
% of Members Giving	10%	3.1%
Association Board Member Giving	100%	85%
Community Advisory Board Member Giving	100%	45%
Average Number of Gifts Secured by Board Members	5	<1
United Way Designations	\$200,000	\$53,000
Number of Scholarship Recipients		
Capital Fundraising (Cumulative)	\$18.5 m	\$0.5m
Endowment	\$2 m	\$0.0
Number of Program Volunteers	750	250
Volunteer Net Promoter Score	70%	N/A
Strategic Imperative #4: EMPLOYER OF CHOICE		
Staff Net Promoter Score	70%	11%
Turn-over rate – FT Employees	15%	36%
% of FT Employees making an AG contribution	75%	25%
% of positions filled through employee referral	50%	30%
% of leadership positions with one back-up	100%	39%
Strategic Imperative #5: FINANCIAL VIABILITY		
% of Total Revenue from Membership	50%	34%
Revenue – all sources	\$60 m	\$36.3m
Annual Gross Operating Margin %	17.0%	3.3%
Annual Net Operating Margin %	4.0%	-2.8%

Debt Covenant Coverage (1.25 required)	2.0	1.27
Debt to Operating Margin Ratio (Leverage Ratio)	4 to 1	17 to 1
Total Participants	240,000	89,260

CATEGORY B: COMMUNITY IMPACT

One Approach: Empirical Data Measurement Method

	Y participants	Total Community
Youth Obesity Rates		
School Attendance Rates		
Middle School Graduation Rates		
High School Graduation Rates		
Teen Pregnancy Rates		
Youth Delinquency Rates		
Youth Drowning Rates		
Adult High Blood Pressure Rates		
Adult Obesity Rates		
Adult Diabetes Rates		
Adult Heart Disease Rates		

CATEGORY B: COMMUNITY IMPACT

Another Approach: Attitudinal Measurement Method

	Y participants	Total Community
I feel like I lead an enriching life		
I feel like I am part of a caring community		
I feel like my family has the support services we need		
I feel like I lead a balanced life		
I feel like I have ample opportunities to stay healthy		
I feel tighter bonds with my family and community		
I feel my children have positive values, a commitment to service and motivation to learn		

Section V. Board Strategic Planning Committee

The Y of Central Maryland's strategic planning process has been a product of the work of a highly engaged volunteer committee made up of association and community advisory board members. The process was launched on November 18, 2008 at a half-day off-site open to all association and community advisory board members (and attended by over 40 volunteers), in which a wide range of external and internal data was presented and discussed. Additionally, the CEO of the YMCA of Greater Kansas City, Gene Dooley, presented to the group the story of the turnaround of the Y in that community.

Thereafter, the strategic planning co-chairs, Gary Foss and Bonnie Phipps, led the committee through seven sessions of three to four hours in length in which every aspect of the Y of Central Maryland's mission, programs, organization, governance, finances, and impact were examined. The fourteen member committee (listed below), was highly engaged and constructive in their review. Data, perspectives and recommendations were presented by the Y's senior leadership team (listed below), and the strategy emerged in an organic and clear manner.

Volunteer Leadership

Co-Chairs:

Gary Foss (President, GFoss Consulting), Vice Chair, Association Board, Chair of Governance & Nominating Committee, Member of Talent & Leadership Development Committee

Bonnie Phipps (President & CEO, St. Agnes Health System), Association Board, Member of Finance Committee

Committee Members:

Tom Crawford (SVP, Provident Bank), Association Board, Member of Finance and Strategic Development Committees

Greg Cross (Partner, Venable LLP), Association Board, Member of Philanthropy Committee

Bill Graeff (Retired, former Verizon executive), Member of Howard County Community Advisory Board, Chair of Howard CAB Community Engagement Committee

Ruth Heltne (Director, Station Marketing & Development, WJZ-TV), Association Board, Member of Marketing Committee

John Holman (Agent, State Farm Insurance), Member of Northern Baltimore County Community Advisory Board, Chair of Northern Baltimore County CAB Community Advisory Committee

Mo Jishi (Group VP, M&T Bank), Association Board, Member of Governance & Nominating Committee

Janese Murray (Executive Director, Corporate Diversity, Constellation Energy), Association Board, Chair of Talent & Leadership Development Committee

John Pearson (Chairman & CEO, The Baltimore Life Companies), Chair of Association Board, Chair of Executive and Executive Compensation Committees

Art Palaia (Retired, former finance executive at Random House), Member of Carroll County Community Advisory Board, Member of Strategic Development Committee

Jeff Richardson (Executive Director, Mosaic Community Services), Chair of Southern Baltimore County Community Advisory Board, Member of Strategic Development Committee

Sharon Webb (SVP, Director, Health & Welfare Division, RCM&D), Association Board, Member of Strategic Development Committee, Chair of Baltimore City Community Advisory Board

Donna Wilson (SVP, Communications & Strategic Planning, Injured Workers' Insurance Fund), Association Board Member, Chair of Marketing Committee

Staff Participants

Chris Ader-Soto (VP, Family & Childhood Development)

Michelle Becote-Jackson (VP, Operations – Childcare & Camp)

Bob Brosmer (Chief Operating Officer)

John Hoey (President & CEO)

Sara Milstein (Chief Marketing Officer)

Gene Oaksmith (VP, Strategic Development)

Marianne Reynolds (Director, Operations - Youth Asset Development)

Margie Ripalda (VP, Human Resources)

Sherrie Rovnan (Chief Financial Officer)

Jeff Sprinkle (Chief Philanthropy Officer)

Mario Trescone (Director, Marketing & Business Strategy)

Troy Weaver (VP, Operations – Health & Wellness)

Section VI. The Search Institute's Developmental Assets

Many references are made throughout this strategic plan to the Search Institute's work on Developmental Assets. The Search Institute has worked for over 50 years on promoting positive change for children and youth. Their research has been extensive, but their most well-known and actionable work is in the area of Developmental Assets. This work, which has become a national model for Ys across the country, has been invaluable in shaping how the Y of Central Maryland approaches all of its programming for children and youth.

The information provided below is from the Search Institute's website (<http://www.search-institute.org/>) and is provided as a resource and reference to readers of this strategic plan.

What Are Developmental Assets?

Building Blocks for Raising Healthy Children and Youth

Since its creation in 1990, Search Institute's framework of Developmental Assets has become the most widely used approach to positive youth development in the United States.

Background—Grounded in extensive research in youth development, resiliency, and prevention, the Developmental Assets represent the relationships, opportunities, and personal qualities that young people need to avoid risks and to thrive.

The Power of Assets—Studies of more than 2.2 million young people in the United States consistently show that the more assets young people have, the less likely they are to engage in a wide range of high-risk behaviors (see table below) and the more likely they are to thrive. Assets have power for all young people, regardless of their gender, economic status, family, or race/ethnicity. Furthermore, levels of assets are better predictors of high-risk involvement and thriving than poverty or being from a single-parent family.

The Gap—The average young person experiences fewer than half of the 40 assets. Boys experience three fewer assets than girls (17.2 assets for boys vs. 19.9 for girls).

Percentage of 6th- to 12th-Grade Youth Reporting Selected High-Risk Behavior Patterns, by Level of Developmental Assets*

High-Risk Behavior Pattern	0–10Assets	11–20Assets	21–30Assets	31–40Assets
Problem alcohol use— Has used alcohol three or more times in the past month or got drunk once in the past two weeks.	45	26	11	3

Violence—Has engaged in three or more acts of fighting, hitting, injuring a person, carrying or using a weapon, or threatening physical harm in the past year.

62

38

18

6

School Problems—Has skipped school two or more days in the past month and/or has below a C average.

44

23

10

4

* Data based on aggregate Search Institute sample of 148,189 students across the United States surveyed in 2003.

The Search Institute has a unique list of developmental assets by age group. For illustrative purposes, their list for the children ages 8 to 12 is provided below. As one would expect, there are many assets that appear on multiple lists.

40 Developmental Assets for Middle Childhood (ages 8–12)

EXTERNAL ASSETS

SUPPORT

Family Support | Family life provides high levels of love and support.

Positive Family Communication | Parent(s) and child communicate positively. Child feels comfortable seeking advice and counsel from parent(s).

Other Adult Relationships | Child receives support from adults other than her or his parent(s).

Caring Neighborhood | Child person experiences caring neighbors.

Caring School Climate | Relationships with teachers and peers provide a caring, encouraging environment.

Parent Involvement in Schooling | Parent(s) are actively involved in helping the child succeed in school.

EMPOWERMENT

Community Values Youth | Child feels valued and appreciated by adults in the community.

Children as Resources | Child is included in decisions at home and in the community.

Service to Others | Child has opportunities to help others in the community.

Safety | Child feels safe at home, school, and in the neighborhood.

BOUNDARIES AND EXPECTATIONS

Family Boundaries | Family has clear rules and consequences and monitors the child's whereabouts.

School Boundaries | School provides clear rules and consequences.

Neighborhood Boundaries | Neighbors take responsibility for monitoring the child's behavior.

Adult Role Models | Parent(s) and other adults in the child's family, as well as nonfamily adults, model positive, responsible behavior.

Positive Peer Influence | Child's closest friends model positive, responsible behavior.

High Expectations | Parent(s) and teachers expect the child to do her or his best at school and in other activities

CONSTRUCTIVE USE OF TIME

Creative Activities | Child participates in music, art, drama, or creative writing two or more times per week.

Child Programs | Child participates two or more times per week in co-curricular school activities or structured community programs for children.

Achievement Motivation | Child is motivated and strives to do well in school.

Learning Engagement | Child is responsive, attentive, and actively engaged in learning at school and enjoys participating in learning activities outside of school.

Homework | Child usually hands in homework on time.

Bonding to School | Child cares about teachers and other adults at school.

Reading for Pleasure | Child enjoys and engages in reading for fun most days of the week

POSITIVE VALUES

Caring | Parent(s) tell the child it is important to help other people.

Equality and Social Justice | Parent(s) tell the child it is important to speak up for equal rights for all people.

Integrity | Parent(s) tell the child it is important to stand up for one's beliefs.

Honesty | Parent(s) tell the child it is important to tell the truth.

Responsibility | Parent(s) tell the child it is important to accept personal responsibility for behavior.

Healthy Lifestyle | Parent(s) tell the child it is important to have good health habits and an understanding of healthy sexuality.

SOCIAL COMPETENCIES

Planning and Decision Making | Child thinks about decisions and is usually happy with results of her or his decisions.

Interpersonal Competence | Young person has empathy, sensitivity, and friendship skills.

Cultural Competence | Child knows and is comfortable with people of different racial, ethnic, and cultural backgrounds and with her or his own cultural identity.

Resistance Skills | Child can stay away from people who are likely to get her or him in trouble and is able to say no to doing wrong or dangerous things.

Peaceful Conflict Resolution | Child seeks to resolve conflict nonviolently.

POSITIVE IDENTITY

Personal Power | Child feels he or she has some influence over things that happen in her or his life.

Self-Esteem | Child likes and is proud to be the person that he or she is.

Sense of Purpose | Child sometimes thinks about what life means and whether there is a purpose for her or his life.

Positive View of Personal Future | Child is optimistic about her or his personal future.

This list is an educational tool. It is not intended to be nor is it appropriate as a scientific measure of the developmental assets of individuals.

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