

t2 Performance Management Quarterly Review
SAMPLE

Priority Area	What We Said We Would Do	What We Plan to Do in 2009	Quarterly Results
People We Serve	<ul style="list-style-type: none"> ❖ Transform lives of children and teens ❖ Increase Community Awareness and participation ❖ Provide programs and services that exceed expectations ❖ Improve access to YMCA services 	<ul style="list-style-type: none"> ❖ Expand YMCA services into 91 new neighborhoods. ❖ Increase member retention by 2.3%. ❖ Increase market penetration by 3%. ❖ Increase member satisfaction excellent rating by 6%. ❖ Serve over 300,000 children and teens. ❖ Implement 50 intergenerational programs involving 2000 children and 250 adults. ❖ Align apartment outreach programs to models. ❖ Develop a comprehensive Camping services and Outdoor activities strategy. 	<ul style="list-style-type: none"> ❖ Started programs in 7 Middle Schools, 5 Elementary, and nine community outreach sites. ❖ Retention currently at 63.1% or slightly below last year. Staff is focused on developing and implementing a retention strategy. ❖ Market penetration will be available in April. Indicators are favorable for meeting this target. ❖ Membership Satisfaction surveys are being conducted in the month of Feb and March, results will be available in April. ❖ 74, 540 children have enrolled in one or more of our core programs. ❖ Two Grandparents, one mentoring program launched involving 30 adults and 50 children. ❖ Apartment programs have been branded as Caring Communities. Program models developed and audits are being conducted to increase quality and effectiveness. ❖ Camping Services task force has meet, Consultant has been engaged to conduct research and guide the process.
Stewardship	<ul style="list-style-type: none"> ❖ Optimize financial resources and sustainability ❖ Attract, cultivate and retain right collaborations 	<ul style="list-style-type: none"> ❖ Produce \$40,000,000 of contributed income to support capital projects. ❖ Develop 88 new collaborations. ❖ Raise \$5.4 million dollars in Partners. ❖ Add 32 new Heritage Club members exceeding \$150,000 in new planned giving value. 	<ul style="list-style-type: none"> ❖ \$16.9 million in cash and pledges secured ❖ 16 new Collaborations Reporting: 3 Churches, 1 Court System, 3 government agencies, 2 Community groups, 7 schools ❖ \$3.2 million raised to date ❖ A Leadership council is being formed to assist Centers in Heritage Club enrollment.

<p>Stewardship (continued)</p>	<ul style="list-style-type: none"> ❖ Improve allocation of funds based on priority 	<ul style="list-style-type: none"> ❖ Strengthen pricing strategies ❖ Secure long term funding partners to support the Bridge Blueprint. ❖ Improve productively ratio of staff cost to revenue. ❖ Improve community awareness of the YMCA's mission and vision. 	<ul style="list-style-type: none"> ❖ No Progress to date. Will be incorporated into the 08/09 budget development process. ❖ Appropriately \$500,000 has been secured to support Bridge initiatives. A full time Financial Development officer has been assigned to assist in developing long term sustainable funding sources ❖ Will have benchmarks and management tools to measure by end of second quarter. ❖ Image Study conducted by independent resource, staff is developing a set of recommendations for Committee approval.
<p>Business Processes</p>	<ul style="list-style-type: none"> ❖ Improve and expand service delivery ❖ Improve knowledge management ❖ Optimize business workflow ❖ Improve external communications and collaborations 	<ul style="list-style-type: none"> ❖ Implementation new member relationship management tools and protocols. ❖ Implementation of time and attendance tools and protocols. ❖ Strengthen quality control systems and protocol for programs and services. ❖ Develop recruiting strategy and staffing plans for all Center Groups. ❖ Create an office of Volunteer management. ❖ Improve internal communications. ❖ Increase YMCA presence in Spanish speaking media ❖ Centralize telecommunications, hardware and technology purchases. ❖ Standardize and centralize donor management systems and processes. 	<ul style="list-style-type: none"> ❖ Business fit analysis completed. Implementations of Class solution to begin in April with first Centers to go live in July. ❖ Kronos implementation scheduled to be completed April 1 currently 16 Centers are using the system to schedule, track and process payroll information. ❖ Leadership Groups have been organized with fully developed charts of works for each major program area. ❖ X of Centers have staffing plans developed. The reminders are scheduled for the next two months. ❖ Volunteer management has been placed under the Sr. Vice President of Operations. A comprehensive plan will be developed in the second quarter. ❖ Internal Communication strategy is in draft form. Intra net site is being redesigned and re-tooled to be the primary communication source. ❖ Hispanic Marketing Director hired. Hispanic relationship strategy including media relations to be presented to committee in April. ❖ IT department reorganization complete. Partnership with IBM, ATT finalized. Discover and survey work on telecommunications, hardware completed by May. ❖ Raiser Edge has been updated, Association staff hired trained and data entry has been centralized.

<p>Volunteer and Staff</p>	<ul style="list-style-type: none"> ❖ Improve Tools and Business systems ❖ Improve the development of staff and volunteers ❖ Improve staff and volunteer recruitment ❖ Retain highly collaborative staff and volunteers 	<ul style="list-style-type: none"> ❖ Empower 1175 staff and volunteers with the skills and knowledge needed to implement the developmental asset framework in daily activities. ❖ Provide Coaching and relationship building training and mentoring for all Center Executive level and above staff. ❖ Successfully open the Perry Facilities. ❖ Implement mentoring program and diversity training in accordance with the Diversity Plan. ❖ Manage 21 construction projects. ❖ Improve orientation process for volunteer and staff leadership. ❖ Create on line educational experiences. ❖ Improve our web presence and capability. 	<ul style="list-style-type: none"> ❖ Leadership pathway has been developed. All Senior level staff have completed the first step Investment in Excellence. Center Executive level scheduled to complete in April. Second step listening first and coaching techniques are being implemented. ❖ Facility opened ahead of schedule. ❖ Program design completed, sign off by Leadership Development Committee, implementation to begin in April. ❖ Construction projects have been delayed by financial markets. ❖ Board orientation and development kits have been distributed to Centers. Staff orientation design is being revisited to include the way of work and information related to our leader's pathway. ❖ Emphasis shifted to cultural awareness and building capacity in the areas of people relations skills. ❖ Study completed, strategy team being assembled.
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