

### BELONG >> TO SOMETHING GREATER

YMCA OF GREATER WAUKESHA COUNTY

2022 ANNUAL REPORT





Dear YMCA Friends.

As we reflect on 2022, we are thankful for the opportunity to make an impact in the broad and diverse communities we serve. Every day, our community partners, members, donors, and staff work together to deliver the promise of strengthening our communities by connecting all people to their potential, purpose, and each other.

We have been determined and steadfast in uncertain times throughout the last few years, and working together, we have had a strong recovery. Over the last year, our membership and programs had significant growth as we create opportunities for people to find their why and be a part of all we do.

Our Board of Directors guides a great deal of the Y's success. They have stayed the course over the last several years, helped position the Y for growth in the rebound of the pandemic, and supported our staff to carry out the needed and valuable work. In addition, our donors continue to support our mission that allows the Y to provide financial assistance, subsidize program fees and address community needs. The Y is a valuable community resource and is respected and trusted. With this comes high expectations and responsibility; we recognize the significance of what we do every day, and our dedicated staff teams are up for the challenge.

The YMCA looks forward to the year ahead with continued growth, defined strategic initiatives that drive our impact, developing new avenues of service and partnerships, and continued support from our YMCA friends.

The Y is so much more than words; it's about people and the stories and impact that come together. It is a place where people come together to believe in something good and belong to something greater than themselves. Enjoy the pages in this report that capture the true spirit of the YMCA of Greater Waukesha County.

Thank you for walking alongside us on this journey.

Scott Naze
CHIEF VOLUNTEER OFFICER

Chris Becker
CHIEF EXECUTIVE OFFICER

### >> SPIRIT OF SERVICE AWARD SCOTT NAZE

In every successful organization you will find key individuals who create positive change and inspire growth. The Board of Director's established the Spirit of Service Award to honor those who significantly impact our organization, exemplify our mission, and provide outstanding leadership with the commitment to serve all.

This year's recipient, Scott Naze, has been a cause-driven leader and has provided outstanding leadership and vision as the Chief Volunteer Officer for the last two years. Scott joined the Waukesha YMCA Board in 2006 and soon became involved on several committees. He was also involved in developing the organizational model with the addition of the Mukwonago YMCA in 2011 and provided leadership in the 2014 acquisition plan that significantly expanded our community reach. Scott also serves on the YMCA Foundation Board, which governs the long-term financial investments and needs of the organization.

Scott became Vice-Chief Volunteer Officer in 2019 and successfully chaired the Board Governance Committee. During his tenure, we deepened board engagement and strengthened committee involvement, especially related to progressing our strategic plan across all branches. Scott assumed the Chief Volunteer position in 2021 and developed key strategies that have resulted in strong operational performance recovery over the last two years. The CVO and CEO commitment to invest in YMCA staff and create additional full-time positions proved crucial in our ability to expand

programs, grow membership, and register record high marks on satisfaction surveys. Scott also created the future facility planning committee, which is conducting work to identify growth opportunities within our expansive service area. His commitment and vision will ensure the YMCA is set up for future success. Scott grew up spending a lot of time at the Y with family and friends taking part in many of the great activities that are offered. Scott says, "I saw firsthand the positive impact the Y had on my family and others in our community and wanted to be a part of seeing that continue in the greater Waukesha area. My board experience has only increased my passion and commitment to the Y and our ongoing efforts to help strengthen our local communities through the services and programs the Yoffers."

Thank you, Scott, for your significant leadership. Your support will have an everlasting positive impact on the YMCA of Greater Waukesha County.

### PREVIOUS AWARD RECIPIENTS

2021 Rick Andritsch 2020 Rick Swan 2019 Rick Kalscheuer 2018 Jim Wagner 2017 Ron Deabler 2016 Cheryl Berg 2015 Stan Riffle

2022 Darren Horndasch

2013 Lorraine McAdams 2012 Doug Hastad 2011 Tim Colombe 2010 Rick Frowein 2009 **Roger Pascavis** 2008 David Schmidt 2007 Ken Riesch

2014 Bob Lombardi

2006 Monte McCormick 2005 Donald Fundingsland 2004 Larry Soukup 2003 David Bahl. Sr. 2002 Martin Frank 2001 Tom Czarnecki 2000 Terry Inman 1999 John Nevins

1998 Tom Dalum Don Taylor 1996 Agustin Ramirez 1995 Carl Taylor 1994 Mike Hansen 1993 **Geraldson Family** 1992 Warner Kerr 1991 Anthony Bryant

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### INSPIRING IMPACT AWARD KATHY WESTPFAHL

As a non-profit organization, we are fortunate to have many Y champions who are willing to dedicate their time, energy, and passion to help us create a stronger community. The Inspiring Impact Award recognizes an outstanding individual who has inspired others in support of the life-changing programs and services at the Y.

When you attend a staff rally, you will find a very enthusiastic Kathy hyping up the YMCA retirement plan. But it does not stop there; Kathy's enthusiasm for life and the Y carries through her day-to-day interactions with everyone she meets at the Y. It is not only Kathy's enthusiasm that is contagious but her work ethic and her passion for financials and program planning.

Kathy started her Y career immediately after college at the Marshalltown, Iowa YMCA in 1984, where she was hired as the Physical Director after a college internship at the YMCA in Waterloo, Iowa. Kathy states, "I learned so much from inspiring leaders. A host of other hardworking, fun-loving professionals embraced me, welcomed me as part of their team, and saw potential in me. I thought I would be a recreation director on a cruise ship. But then I found the Y."

Kathy moved to Wisconsin and continued her career as Physical Director at the Waukesha YMCA under Bob Jurci, Executive Director, in December 1986. She led the fitness department and was introduced to the noon volleyball crowd. She played volleyball with the guys every Thursday and experienced traveling with them on many occasions. This is one of Kathy's fondest memories of her career with the Y

Her dedication and passion for Y programming and operations advanced her to the Program Operations Director before she accepted a position as Associate Executive Director at the West Suburban YMCA in June

of 1997 and back to the Waukesha YMCA in March of 1999 as Associate Executive Director under Chris Becker, CEO.

Kathy worked closely with Chris during several milestones for the Waukesha Y, including the Mukwonago YMCA and the Tri County, West Suburban, and Southwest YMCAs purchase. Kathy's positive work ethic and attention to detail were valued during this time. She was promoted to District Executive Director in 2014, overseeing Waukesha, Carroll, Camp Double Eagle, and Y Children's Academy.

"The Y provides opportunities to grow professionally, has taught me valuable life skills, is inter-generational, and has introduced me to lifelong friends. The Y gets in your blood. It has made a lasting impression on me, and I'm thankful for the opportunities I've had to help others. Our work is rewarding, and no two days are alike, making work more exciting."

During Kathy's tenure, you would have seen her involved with the volleyball group, early bird exercise group, golfing, or spending her downtime on the boat with her husband at their favorite location, Lake of the Ozarks. Now that Kathy has announced her retirement to commence at year's end, we expect her to spend more time golfing and boating.

Kathy, thank you for inspiring us all and making a lasting impression on all you encountered during your Y career.



### CAUSE-DRIVEN LEADER AWARD

The Cause–Driven Leader Award is given to leaders from each branch who have gone above and beyond their responsibilities to support the goals of the YMCA of Greater Waukesha County. They exemplify our values of honesty, respect, caring, and responsibility in all areas of their work. Each person has positively impacted their team, members, and participants, and significantly impacted the Y. We are proud to acknowledge their contributions and showcase those who are truly living our cause.



**Brett Engelking**MUKWONAGO



Mary Melka TRI COUNTY



**Shayla Kaatz** NEW BERLIN



**Elizabeth Russell** WAUKESHA



**Dale Moore** SOUTHWEST



**Ryan McCumber** WEST SUBURBAN

## NVEST IN VALUE

### CONDENSED STATEMENT OF FINANCIAL POSITION

AS OF DECEMBER 31, 2022

### CONDENSED STATEMENT OF ACTIVITIES

FOR THE YEAR ENDED DECEMBER 31, 2022

### **ASSETS**

Cash & equivalents	\$ 2,163,154
Certificates of deposit	214,991
Other assets	121,182
Accounts receivable, net	1,104,379
Pledges receivable, net	12,504
Property & equipment, net	40,749,064
Total assets	\$ 44,365,274

### **LIABILITIES & NET ASSETS**

Payables & accrued expenses	\$	587,929
Deferred revenue		798,588
Refundable Advance		
Capital lease obligations		
Notes payable		4,408,021
Total liabilities	\$	5,794,538
Total net assets	3	8,570,736
Total liabilities & net assets	\$4	4 365 274

### **OPERATING REVENUE**

**Total operating expenses** 

**CHANGE IN NET ASSETS** 

**GAIN ON SALE OF FIXED ASSET** 

Public support		
Contributions & special events	\$ 528,725	2.69%
United Way	59,183	.30%
Membership revenue	8,838,348	44.90%
Program revenue	8,431,041	42.83%
Government Grants	1,529,646	7.77%
Other	298,904	1.51%
Total operating revenue	\$19,685,847	100%
OPERATING EXPENSE		
Youth development	\$10,698,396	53.21%
Healthy living	5,689,041	28.29%
Social responsibility	225,770	1.12%
Management & general	3,288,468	16.35%
Fundraising	206,174	1.03%

\$20,107,849

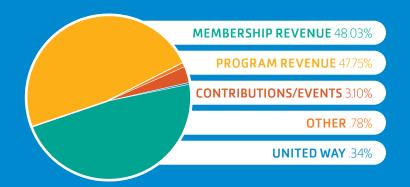
\$7,700 \$ (414,302)

### CONDENSED STATEMENT OF ACTIVITIES – OPERATING FUND

FOR THE YEAR ENDED DECEMBER 31, 2022

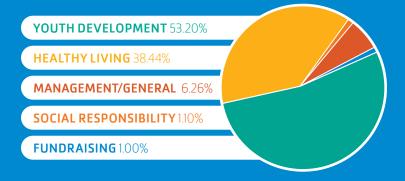
### **REVENUE**

Public support		
Contributions & special events	\$ 547,562	3.10%
United Way	59,183	.34%
Membership revenue	8,479,609	48.03%
Program revenue	8,431,041	47.75%
Other	138,113	.78%
Total operating revenue	\$17.655.508	100%



### **EXPENSE**

Youth development	\$ 9,182,035	53.20%
Healthy living	6,634,429	38.44%
Social responsibility	189,854	1.10%
Management & general	1,080,552	6.26%
Fundraising	172,595	1.00%
Total expenses	\$ 17,259,465	100%
CHANGE IN NET ASSETS	\$ 396,043	





### ANNUAL CAMPAIGN FUNDRAISERS

Through the generous support of individual, corporate, and foundation donors to our Annual Campaign, we are building a stronger community.

To support our Annual Campaign efforts, each branch holds an annual fundraising event where everyone comes together to learn, celebrate, and give back to the Y.

With each golf swing or muddy footprint, participants help us break down the financial barriers in our community, allowing the Y to serve more children, adults, and families.

All together, the members, friends, and donors who attended our 2022 Annual Campaign events helped raise \$146,000. The proceeds from each event stay directly in the Y's community and support individuals by providing financial assistance for Y membership and programs.

### Thank you to our 2022 lead event sponsors.

Alto Sham Merit Asphalt
Dillett Mechanical Nassco
Festival Foods Next Electric
Freemotion Fitness Precor
Hot House Tavern Spectrum

### **FESTIVAL FOODS TURKEY TROT**

As a charity partner, the Y provided volunteers, runners, and support for the Thanksgiving Day 5-mile run. 2-mile fun run. or 2-mile walk.

### MUKWONAGO MUD RUN

The annual Mud Run hosted at the Mukwonago High School featured a 2-mile run with muddy obstacles, family-friendly inflatables, and photo stations.

### **SOUTHWEST GOLF OUTING**

Attendees who participated in the Golf Outing enjoyed 18 holes of golf, lunch, and dinner, followed by a 19th hole reception with auctions and prizes.

### TRI COUNTY SPORT SHOOT

At the Sport Shoot, participants enjoyed a welcome reception, practice round, a traditional sporting clays course, flurries, lunch, raffle prizes, awards, and more.

### **WAUKESHA GOLF OUTING**

The annual Golf Outing invited golfers to 18 holes on one of southeastern Wisconsin's premier golf courses. The day included lunch, appetizers, raffles, and silent auction.

### **WEST SUBURBAN 3K RUN & RAFFLE**

There was fun for the whole family at the 3K Run & Raffle with a family-friendly 3K run, a raffle for amazing prizes, a basketball contest, live music, delicious food, and more.

### **OUR MISSION:**

TO PUT CHRISTIAN PRINCIPLES INTO PRACTICE THROUGH PROGRAMS THAT BUILD HEALTHY SPIRIT, MIND & BODY FOR ALL.

### **OUR CAUSE**

We are a powerful association of dedicated leaders joined together by a shared commitment to nurturing the potential of kids, promoting healthy living, and fostering a sense of social responsibility.

### **OUR IMPACT**

We are a cause-driven organization focused on strengthening the foundations of community by developing the potential of youth, promoting healthy living, and encouraging social responsibility.

### **OUR VISION**

We are a cornerstone for empowering individuals and families of all backgrounds and at all stages of life to learn, thrive, and improve our community.

### **WELL-BEING FOR ALL**

The Y will provide an environment that supports physical, mental, and social well-being. We are uniquely positioned to be a total wellness resource. A healthier community is a stronger community.



### 55,559 PEOPLE

grew in spirit, mind, and body through Y membership and programs.



### 1,426 YOUTH

were inspired to learn, play, and grow in our before and after school programs.



### 1,799 KIDS

found a safe place to explore and build fundamental skills at Summer Day Camp.

### **EMPOWERED TO SERVE**

The Y will create an inclusive culture committed to serving through leadership. We believe our people are our greatest asset. More than facilities, equipment, programs, it's our people who make a difference in the lives we serve.



### **309 VOLUNTEERS**

devoted time, energy, and heart to serving others.



### **887 STAFF**

worked with purpose to positively impact people in our community.



### 2,622 **HOURS**

spent strengthening our community through the dedication of volunteers.

### **MAXIMIZE IMPACT**

The Y will increase our internal capacity and emphasize external collaborations for the betterment of all. We believe that community comes first and the Y, as it strives to make every community a better place to live, must continually evolve to fulfill our mission.



### 11,843 **SENIORS**

actively maintained a healthy lifestyle and built meaningful relationships.



### 12 ORGANIZATIONS

were supported by members, participants, and staff through donations of food and essential items.



### 33 SCHOOLS

partnered with the Y to receive early learning, before/after school, and camp programming.

### **COMMUNITY BENEFIT**

The Y will make our community healthier, stronger, and safer by providing critical programs through philanthropic support. We are a cornerstone for social change, empowering individuals and families of all backgrounds and at all stages of life to learn, play, and thrive.



### **1,073 DONORS**

ensured Y programs and services were available for all.



### \$476,160

provided in financial assistance to families and individuals who need us most.



### 355 INDIVIDUALS

made lifestyle changes by participating in evidence-based Healthy Living programs.



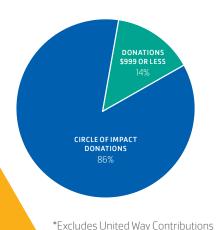
### CIRCLE OF IMPACT GIVING SOCIETY

Our Circle of Impact Giving Society celebrates the significant generosity of our donors, highlighting the philanthropic spirit that drives our growth and propels our vision. Yearly, these donors fuel sustainability by delivering the Y's mission in our community through critical programs and services for young people, adults, and families who need us most. In 2022, we launched the Circle of Impact to recognize these donors with a goal of raising \$250,000 in 2023.

### **TOTAL DONATIONS**

AS OF DECEMBER 31, 2022

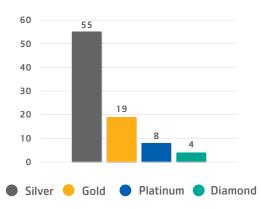
<b>Donations</b> \$999 or less	\$ 31,690.46	
Circle of Impact Donations	202,882.54	
Total Donations*	\$234,573.00	



### CIRCLE OF IMPACT DONORS

AS OF DECEMBER 31, 2022

	NUMBER OF DONORS	AMOUNT DONATED	PERCENT OF DONORS	PERCENT OF \$ DONATED
<b>Silver</b> \$1,000+	55	\$62,130.00	64%	31%
<b>Gold</b> \$2,500+	19	\$55,196.99	22%	27%
<b>Platinum</b> \$5,000+	8	\$43,555.55	9%	21%
$\textbf{Diamond}~\$10,\!000+$	4	\$42,000.00	5%	21%
2022 Total	86	\$202,882.54	100%	100%





We are deeply grateful for the generousity of our community. You are instrumental to helping ensure the Y is available for all.

### **DIAMOND** (\$10,000+)

Anonymous William N. and Janice V. Godfrey L&A Crystal Services, LLC Nancy Mathiowetz PEPSICO Bottling Group, LLC United Way of Greater Milwaukee & Waukesha County Wisconsin Vision

### **PLATINUM** (\$5,000+)

Joseph Brien Fibreform Containers. Inc. Dave & Jan Griffin Tony & Beth Lupo Jeffrey Martin Lynch Mukwonago Francis Wagner

### **GOLD** (\$2.500+)

Anonymous The Andritsch Family Steven & Kathy Baptie James Bellin Atlas Belting Scott & Jennifer Campbell Ron & Susan Clayton Karen Cluppert Paul Ewig Suzanne Frank Jim & Bridgett Keal Terrance McAdams Scott Naze Robert & Kelly Olejniczak Robert Southwick

Supporting Families Together Association Carl Trapp Muriel Van Beek Waukesha County Community Foundation West Bend Community Foundation Mark Westen

**SILVER** (\$1,000+) American Advantage Insurance Anonymous (3) Anderson Commercial Group, LLC Nathan & Heather Ansell Mario & Tanya Balistreri Chris & Nancy Becker Penelope Becker Benjamin Bergles Lvnn Blackburn Rob & Cathy Brendel **Campbell Construction** John & Bia Carrigg Century 21 Affiliated Community League of Menomonee Falls

Verne Cowles John & Linda Daley Thomas Deisinger Fllen Dizard Dale & Theresa Dobroth Patrick & Suzanne Falvey Family Robert Farrell

George Furev IN MEMORY OF Willie Grace Gordon Mary Hallman

Jav & Karin Hiller IN MEMORY OF James D Jensen Merry Johnson Robert Jovanovich Rick & Colleen Kalscheuer Don & Mary Lou Kasner Robert Kettler Matthew Krawczyk & Gretchen Leehr Frank Lauck William & Marilyn Leehr Robert & Carol Lombardi Katherine Luck Amy McAdams IN MFMORY OF Emma Mertens Mark & Martha Mirsberger Heather Nelson & Ihsan Atta Laurie Ocepek Laurie O'Loughlin John & Ann Petrie PM - McBurt Charitable Fund Brian & Lesa Radloff Stan Riffle Family Matt Rios Jeremy & Laurie Schlitt Jason & Amanda Schneider Robert & Halee Shepard The Sonnemann Family Carol Spaeth-Bauer

Richard & Martha Swan

1M Swan Construction

Robert Southwick

Jane Thompson

Scott Tanis

James Tidey

Robert & Jean Henke

Stephanie & Tom Turks Family Jim & Marjorie Wagner Tom & Kathy Westpfahl We Energies Foundation Mark & Lori Wildeman Kevin & Katie Wilke Marie Zangerle LeRoy

### YMCA STAFF HOURLY **CLUB DONORS**

Sandra Hauser Jay Shields Julie Fullerton Fileen McBrian



### **ASSOCIATION EXECUTIVE TEAM**

Chris Becker CHIEF EXECUTIVE OFFICER

**Geoff Mertens** 

CHIEF OPERATING OFFICER

Laurie Schlitt

VICE PRESIDENT OF STRATEGIC DEVELOPMENT

Chris Janssen

ASSOCIATION DIRECTOR OF FINANCE

Laura Jazwiecki

ASSOCIATION DIRECTOR OF HUMAN RESOURCES

Sarah Hynek

ASSOCIATION DIRECTOR OF BUSINESS OPERATIONS

Katrina Weinberg

ASSOCIATION DIRECTOR OF FINANCIAL DEVELOPMENT

Jennifer Ruis

ASSOCIATION DIRECTOR OF MEMBERSHIP

Chelsea Kujawa

ASSOCIATION DIRECTOR OF HEALTHY LIVING

Kathy Westpfahl

WAUKESHA EXECUTIVE DIRECTOR

Ryan Buck

SOUTHWEST EXECUTIVE DIRECTOR

Aaron Miller

TRI COUNTY EXECUTIVE DIRECTOR

Katy Groh

WEST SUBURBAN EXECUTIVE DIRECTOR

**Brittany Callies** 

MUKWONÁGO ASSOCIATE EXECUTIVE DIRECTOR

Sam Seidel

WAUKESHA ASSOCIATE EXECUTIVE DIRECTOR

Kristen Deal

NEW BERLIN OPERATIONS DIRECTOR



### **ASSOCIATION BOARD OF DIRECTORS**

Scott Naze CHIEF VOLUNTEER OFFICER

Rick Andritsch Lisa Brown Ron Clayton Tom Dieckelman Ellen Dizard Brett Engelking Tracey Esser Scott Heine Darren Horndasch Rick Kalscheuer Ryan McCumber Mark Mirsberger John Petrie Jeff Piette Griffin Prochnow Brian Radloff Jeff Richards Jack Riesch Stan Riffle Jason Schneider Gary Sievewright Rick Swan Jim Wagner

### **BOARD OF MANAGERS**

### MUKWONAGO

Rick Swan BOARD CHAIR

Ben Bergles
Lisa Brown
Jennifer Burns
Brett Engelking
James Green
Byron Hawks
Tom McAdams
Robert Pilant
Martin Pepe
Rick Swan
Jane Thompson
Fran Wagner
Mark Wildeman

### **SOUTHWEST**

Tracey Esser BOARD CHAIR

Verne Cowles
Tom Deisinger
Gregory Glisch
Matt Krawczyk
Laurie O'Loughlin
Matt Rios
Robert Shepard
Gary Sievewright
Joanna Thompson
Jim Wagner

### TRI COUNTY

**Jason Schneider** BOARD CHAIR

Suzanne Falvey Scott Heine Jeff Richards Scott Schoen Keith Shepard Kara Waggoner Katie Wilke

### WAUKESHA

**Brian Radloff** BOARD CHAIR

Tim Black Darren Clark Linda Daley Matt Deininger Tom Dieckleman Chadd Frank Ron Jahnke Jim Keal Sherri Mitchell Heather Nelson Matt Nitka Jack Riesch Jerry Schmidt Mike Schulist Chad Schultz Gina Spang Stephanie Turks

### **WEST SUBURBAN**

**Ryan McCumber** BOARD CHAIR

Darius Anderson
Steve Baptie
Jerome Beamon
Fay Berry
Brandon Campbell
Ellen Dizard
Thomas Engel
Scott Gierhahn
Pat Horne
Eric Koepp
John Petrie



### YMCA OF GREATER WAUKESHA COUNTY

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