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
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 Y offers.”

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

2022 Darren Horndasch  
2021 Rick Andritsch  
2020 Rick Swan  
2019 Rick Kalscheuer  
2018 Jim Wagner  
2017 Ron Deabler  
2016 Cheryl Berg  
2015 Stan Riffle  
2014 Bob Lombardi  
2013 Lorraine McAdams  
2012 Doug Hastad  
2011 Tim Colombe  
2010 Rick Frowein  
2009 Roger Pascavis  
2008 David Schmidt  
2007 Ken Riesch  
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  
1997 Don Taylor  
1996 Agustin Ramirez  
1995 Carl Taylor  
1994 Mike Hansen  
1993 Geraldson Family  
1992 Warner Kerr  
1991 Anthony Bryant
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
## FINANCIAL STATEMENTS

### CONDENSED STATEMENT OF FINANCIAL POSITION
**AS OF DECEMBER 31, 2022**

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; equivalents</td>
<td>$2,163,154</td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>214,991</td>
</tr>
<tr>
<td>Other assets</td>
<td>121,182</td>
</tr>
<tr>
<td>Accounts receivable, net</td>
<td>1,104,379</td>
</tr>
<tr>
<td>Pledges receivable, net</td>
<td>12,504</td>
</tr>
<tr>
<td>Property &amp; equipment, net</td>
<td>40,749,064</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td>$44,365,274</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES &amp; NET ASSETS</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payables &amp; accrued expenses</td>
<td>$587,929</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>798,588</td>
</tr>
<tr>
<td>Refundable Advance</td>
<td>-</td>
</tr>
<tr>
<td>Capital lease obligations</td>
<td>-</td>
</tr>
<tr>
<td>Notes payable</td>
<td>4,408,021</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td>$5,794,538</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td>38,570,736</td>
</tr>
<tr>
<td><strong>Total liabilities &amp; net assets</strong></td>
<td>$44,365,274</td>
</tr>
</tbody>
</table>

### CONDENSED STATEMENT OF ACTIVITIES
**FOR THE YEAR ENDED DECEMBER 31, 2022**

<table>
<thead>
<tr>
<th>PUBLIC SUPPORT</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions &amp; special events</td>
<td>$528,725</td>
<td>2.69%</td>
</tr>
<tr>
<td>United Way</td>
<td>59,183</td>
<td>.30%</td>
</tr>
<tr>
<td>Membership revenue</td>
<td>8,838,348</td>
<td>44.90%</td>
</tr>
<tr>
<td>Program revenue</td>
<td>8,431,041</td>
<td>42.83%</td>
</tr>
<tr>
<td>Government Grants</td>
<td>1,529,646</td>
<td>7.77%</td>
</tr>
<tr>
<td>Other</td>
<td>298,904</td>
<td>1.51%</td>
</tr>
<tr>
<td><strong>Total operating revenue</strong></td>
<td>$19,685,847</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPERATING EXPENSE</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Youth development</td>
<td>$10,698,396</td>
<td>53.21%</td>
</tr>
<tr>
<td>Healthy living</td>
<td>5,689,041</td>
<td>28.29%</td>
</tr>
<tr>
<td>Social responsibility</td>
<td>225,770</td>
<td>1.12%</td>
</tr>
<tr>
<td>Management &amp; general</td>
<td>3,288,468</td>
<td>16.35%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>206,174</td>
<td>1.03%</td>
</tr>
<tr>
<td><strong>Total operating expenses</strong></td>
<td>$20,107,849</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GAIN ON SALE OF FIXED ASSET</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$7,700</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHANGE IN NET ASSETS</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ (414,302)</td>
<td></td>
</tr>
</tbody>
</table>
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
Dillett Mechanical
Festival Foods
Fremotion Fitness
Hot House Tavern
Merit Asphalt
Nassco
Next Electric
Precor
Spectrum

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.

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.
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.
This page details the Circle of Impact Giving Society, recognizing the generous donors that support the organization's mission.

### TOTAL DONATIONS
AS OF DECEMBER 31, 2022

<table>
<thead>
<tr>
<th>Donations</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$999 or less</td>
<td>$31,690.46</td>
</tr>
<tr>
<td>Circle of Impact</td>
<td>202,882.54</td>
</tr>
<tr>
<td>Total Donations*</td>
<td>$234,573.00</td>
</tr>
</tbody>
</table>

### CIRCLE OF IMPACT DONORS
AS OF DECEMBER 31, 2022

<table>
<thead>
<tr>
<th>Level</th>
<th>Number of Donors</th>
<th>Amount Donated</th>
<th>Percent of Donors</th>
<th>Percent of $ Donated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Silver $1,000+</td>
<td>55</td>
<td>$62,130.00</td>
<td>64%</td>
<td>31%</td>
</tr>
<tr>
<td>Gold $2,500+</td>
<td>19</td>
<td>$55,196.99</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Platinum $5,000+</td>
<td>8</td>
<td>$43,555.55</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>Diamond $10,000+</td>
<td>4</td>
<td>$42,000.00</td>
<td>5%</td>
<td>21%</td>
</tr>
<tr>
<td>2022 Total</td>
<td>86</td>
<td>$202,882.54</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Excludes United Way Contributions
We are deeply grateful for the generosity 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

**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 McdAdams
Scott Naze
Robert & Kelly Olejniczak
Robert Southwick
Supporting Families Together Association

**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
Lynn Blackburn
Rob & Cathy Brendel
Campbell Construction
John & Bia Carrigg
Century 21 Affiliated
Community League of Menomonee Falls
Verne Cowles
John & Linda Daley
Thomas Deisinger
Ellen Dizard
Dale & Theresa Dobroth
Patrick & Suzanne Falvey Family
Robert Farrell
George Furey
IN MEMORY OF Willie Grace Gordon
Mary Hallman
Robert & Jean Henke

**IN MEMORY OF**
Jay & Karin Hiller
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 MEMORY 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
JM Swan Construction
Robert Southwick
Scott Tanis
Jane Thompson
James Tidey
Stephanie & Tom Turks Family

**YMCA STAFF HOURLY CLUB DONORS**
Sandra Hauser
Jay Shields
Julie Fullerton
Eileen McBriar
Tracy Daugherty

**SUPPORTING OUR CAUSE**

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

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
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 Diekleman
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

ON BOARD WITH OUR CAUSE