



**FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY**

YMCA of the Greater Tri-Valley 2016 Donor & Volunteer Information

**Oneida Family YMCA
701 Seneca Street
Oneida, NY 13421**

**Rome Family YMCA
301 W. Bloomfield Street
Rome, NY 13440**

**New Hartford SACC
25 Oxford Road
New Hartford, NY 13413**

www.ymcatrivalley.org



Table of Contents

- ✓ **Letter from the Director of Development**
- ✓ **Investing in the Present & Future of the Y**
 - **Y Endowment Fund & Red Triangle Club**
 - **Changing Lives Campaign Direct Appeal**
 - **Association Wide Special Events**
 - **Volunteerism**
- ✓ **The Y's Impact in the Communities it Serves**
 - **Overview of Programs & Services**
 - **Recent Developments**
- ✓ **Y Key Statistics**
- ✓ **Y Governance & Leadership Teams**
 - **Board of Trustees**
 - **Board of Directors**
 - **Management Team**



January 1, 2016

On behalf of our entire Y family, please allow me to begin by thanking you for your interest in supporting our Organization and those that we serve within the local communities. Either as a member, donor or volunteer your contribution will enable us to provide programs and services designed to address the needs of the communities and build healthy spirit, body and mind for all.

The information contained in this presentation is designed to inform, educate and motivate past and present Y supporters in the best interests of preserving the Y and its programs and services well into the future. It's been created to provide you with as much information as possible so that you can become fully engaged in what we do, how we do it and why we do it.

As you will see, there are multiple opportunities to invest in the Y's future – becoming a member of the endowment fund's "Red Triangle Club", serving as a sponsor of our special events, contributing to the Changing Lives Campaign or donating your time and talents to one of our worthwhile initiatives.

Here at the Y we understand and are deeply focused on our place in the communities we serve. With this revised approach to development, we are confident we can expand our community relationships, increase member engagement and ultimately enhance the impact the Y has on the community.

Please take some time to digest the information that follows to determine your level of interest in either establishing or continuing your support of the Y. I will follow up with you in an effort to further explain our plan and answer any questions you may have.

Again, thank you very much for your past and present support as well as your consideration to continue that support going forward. We appreciate your loyalty and assistance is changing the lives of children and families in need.

Very truly yours,

Jennifer M. Cossette

Jennifer M. Cossette
Director of Development
jcossette@ymcatrivalley.org
(315) 336-3500 x 229



Investing in the Present & Future of the Y

A CASE FOR GIVING TO THE Y'S ENDOWMENT FUND, THE RED TRIANGLE CLUB

When you give to the Y, your gift will have a meaningful, enduring impact right in your own neighborhood. In a world that changes so rapidly, the Y has been at the heart of communities for generations. The Y is a reliable, professionally managed organization guided by four core values: caring, honesty, respect, and responsibility. Led by local volunteers, the Y is in touch with our community's changing needs. A healthy Y capable of making a significant impact in the community is a gift we received from prior generations. It is a gift we should pass along, in a stronger position, to future generations.



Many friends of the Y choose to help extend their values and the Y's influence beyond their own lifetimes by gifting some of the assets they have accumulated to the Y's permanent endowment fund. Donors can direct that their gifts support the overall work of the Y or designate them to support an area of major focus that will remain integral to the Y and the community it serves for future generations.

A donor does not need to have ready cash to make a gift to the Y's Red Triangle Club: gifts made in the future are also an important option. The most typical gift methods include making a meaningful donation to the Y through cash and cash equivalents, bequests, and publically traded securities.

Individuals who have made a meaningful gift to the Y's endowment are recognized for their generosity and become members of the Red Triangle Club.

In recognition of the singular role that charitable organizations play in meeting important needs in our society, the nation's tax laws provide incentives that encourage philanthropic donations. Depending on the type of gift and specific arrangements, donors to the Y's Red Triangle Club can expect some or all of these benefits:

- ✓ Income tax savings through a tax deduction for the value of the charitable gift
- ✓ Avoidance of capital gains tax by contributing certain kinds of property that have increased in value over time
- ✓ Elimination of federal estate tax on the value of a gift passed to the Y upon the donor's death
- ✓ Reduced estate settlement costs

When friends of the Y make us aware of their philanthropic objectives, we work with them and their professional experts to formulate plans that will fulfill their desire to benefit future generations of children and families in our community through the Y.

At the Y we know there are various gift plans that friends of the Y employ to meet personal, family, tax, estate, and charitable planning objectives. The Y welcomes the opportunity to confidentially discuss one or more of these options with you.

FREQUENTLY ASKED QUESTIONS RELATED TO THE RED TRIANGLE CLUB

How can I or our family become a member of the Red Triangle Club? Any donor who gives a meaningful gift to the Y endowment fund is considered a member.

If I cannot give a large gift, will a small gift really make a difference? We know that everyone has different personal circumstances. Even small gifts will make a huge difference as the Y endowment fund is a segregated fund where the principal of donor-designated gifts is held into perpetuity. The endowment fund is invested and the Y uses only the return on investment for annual support.

Can I designate my gift for a specific purpose? Many donors choose to leave their gift unrestricted to allow the Y governing board to direct the earnings where the need is the greatest. However, the YMCA of the Greater Tri Valley has specific options to which you can designate your funds: 1) undesignated for highest needs at the time, 2) for use at a specific branch, 3) for facility improvements, and 4) for high priority programs identified by the board of directors.

What types of gifts could I give? We know that members of the Red Triangle Club choose to give to perpetuate their values and that their gifts say something about who they are and how they want to be remembered. Therefore, options are available to meet individual circumstances. The majority of gifts are received in these forms:

- ✓ **Current gifts of cash or cash equivalents**
- ✓ **Planned gifts including:**
 - **Bequests through wills**
 - **Naming the Y as a beneficiary of retirement plans**
 - **Naming the Y as a beneficiary of insurance policies**
 - **Living trusts**
 - **Charitable trusts**

What is the proper wording I should use to assure my gift is designated as I wish? Here is an example of wording you could use: "I give the YMCA of the Greater Tri Valley", 501(c)(3) corporation, incorporated in New York, the sum of \$_____ (or % of the remainder of my estate) to be deposited in the Y's endowment fund. The income shall be used to benefit said Y in such manner as the board of directors thereof may direct"



CHANGING LIVES CAMPAIGN DIRECT APPEAL

When you look into the eyes of a child having recently completed their first swimming lesson, or day at summer camp, you realize the joy, appreciation and thankfulness.

We know that children enrolled in programs, especially YMCA programs, tend to stay out of trouble, become engaged in positive behavior, and go on to be productive members of the communities we serve.

We've seen it first hand, time and time again. A desperate parent comes to our front desk. They are at their wit's end. They are working multiple jobs, trying to make ends meet and cannot be home when their child gets out of school.

- ✓ The Y provides financial assistance to hundreds of families in Oneida, Rome, New Hartford and the surrounding areas at the rate of nearly \$200,000 annually.
- ✓ The Y is considered a necessity to the families who utilize our services on a regular basis programs.
- ✓ The Y never turns anyone away based on their inability to pay.

If you, a friend or a family member were to lose your job, or experience financial difficulty, we would assist you as well, and never turn you away.

THAT IS WHY WE NEED YOUR HELP! Your gift today will provide a child or a family with programs, and open up a world of opportunities. Just \$15 per month provides a child with an entire year of membership services. Generous friends like you enable us to give children a full opportunity to engage in positive before and after school programming, such as swimming lessons, basketball, arts, music lessons and more. But if you cannot afford \$15 per month, any gift amount will help give children and families relief and a chance to succeed.

ASSOCIATION WIDE SPECIAL EVENTS

As part of the Changing Lives Campaign, the Y hosts a series of special events designed to raise awareness for the Y's programs and services and raise monies to support the scholarships awarded to children and families in need. These events create exposure for the supportive individuals and businesses to thousands of people in the local communities.

The slate of 2016 association wide special events is as follows:

Changing Lives Determination Celebration ~ In Memory of Don Connelly

April 9, 2016

Vernon Downs

Presenting Sponsor	\$2,500
Corporate Sponsor	\$1,500
Major Sponsor	\$1,000
Patron	\$500

Changing Lives Healthy Kids Day Walk ~ In Memory of Frank DiChristina

April 30, 2016

Oneida Family Y

Determination Sponsor	\$2,500	RESERVED	Harden Foundation
Dignity Sponsor	\$1,500		
Friendship Sponsor	\$500		
Trust Sponsor	\$250		
Compassion Sponsor	Up to \$250		

Red Triangle Raffle ~ In Memory of Dudley "Gig" Rowland

September 14, 2016 (Winners announced at the Changing Lives Golf Tournament)

Youth Development Sponsor	\$2,500
Healthy Living Sponsor	\$1,500
Social Responsibility Sponsor	\$1,000

Changing Lives Golf Tournament ~ In Memory of Frank Martinelli

September 14, 2016

Tournament Sponsor	\$5,000	RESERVED	Community Bank
Dinner Sponsor	\$2,500		
Awards Sponsor	\$1,000		
Lunch Sponsor	\$1,000		
Raffle Sponsor	\$1,000		
Putting Contest Sponsor	\$500		
Driving Range Sponsor	\$500		

Celebrate the 'C' Concert

December 2016

Unity Sponsor	\$10,000
Peace Sponsor	\$5,000
Hope Sponsor	\$2,500
Faith Sponsor	\$1,000
Joy Sponsor	\$500

VOLUNTEERISM

The Y provides a variety of volunteer opportunities for community members interested in supporting the Y and the children and families it serves. A volunteer's gift of his/her time and talent provides invaluable support to the Y as it delivers its mission.

The following represent the opportunities currently available at the Y:

- ✓ **General Volunteer**
- ✓ **Program Volunteer**
- ✓ **Special Events Volunteer**
- ✓ **Board Level Committee**
- ✓ **Board of Directors**
- ✓ **Board of Trustees (Advisory Group)**



The Y's Impact on the Communities it Serves

OVERVIEW OF PROGRAMS & SERVICES

- ✓ **Swimming Lessons**
- ✓ **Kickboxing**
- ✓ **Youth Sports**
- ✓ **Silver Sneakers**
- ✓ **Group Exercise**
- ✓ **Fitness Assessments**
- ✓ **Gym & Swim**
- ✓ **Adult Volleyball**
- ✓ **Adult Basketball**
- ✓ **Racquetball**
- ✓ **School Age Child Care**
- ✓ **Summer Camp**
- ✓ **Pool Parties**
- ✓ **Water Aerobics**
- ✓ **Deep Water Jogging**
- ✓ **Pre/Post Surgery Rehabilitation**
- ✓ **Spinning**
- ✓ **Yoga**
- ✓ **Pilates**
- ✓ **Zumba**
- ✓ **Country Line Dancing**
- ✓ **Personal Training**
- ✓ **Music Lessons**
- ✓ **STEP Program (Rome Only)**
- ✓ **Youth Boxing (Rome Only)**
- ✓ **SCUBA (Rome Only)**
- ✓ **Hydrospin (Oneida Only)**

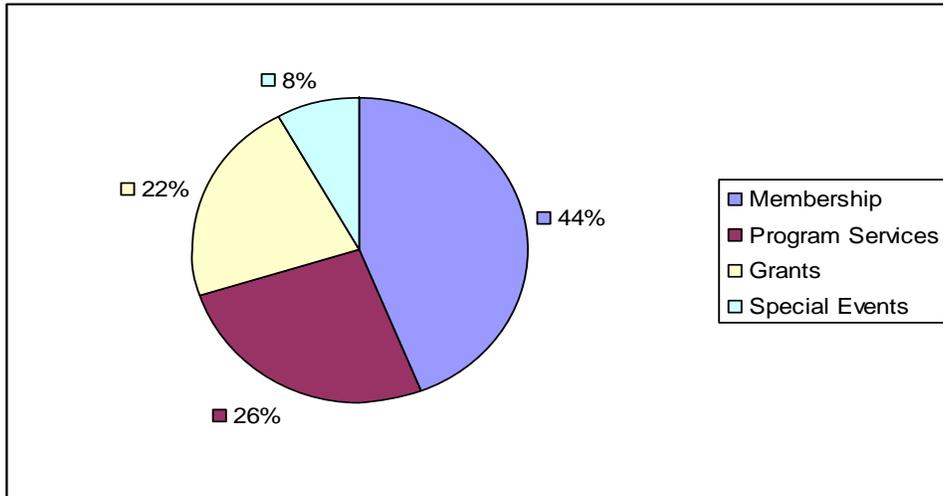
IMPORTANT INITIATIVES & RECENT ACCOMPLISHMENTS

- ✓ **Began the YMCA Center for the Creative Arts in 2003 modeled after the New Orleans Center for the Creative Arts. This program continues in Rome and Oneida and has recently expanded to the New Hartford community. The program provides children with an opportunity to learn and apply creative arts skills in positive environment.**
- ✓ **On an annual basis, the Y awards approximately \$200,000 in financial assistance to individuals and families in need who cannot afford programs & services. This effort is put forth with the Y's long standing philosophy to not turn anyone away who based on their ability to pay.**
- ✓ **In 2006 received the "Employer of the Year" award from the ARC of New York State for employing people with developmental disabilities.**
- ✓ **Created several new programs for including the STEP Program, which teaches students the value of understanding and accepting differences in others. In addition, the Y created center-based curriculum to educate our school age children.**
- ✓ **Considered a leader of Y's in childhood obesity prevention designed to engage communities in pursuing healthy lifestyles.**
- ✓ **Recently completed a Capital Campaign in Rome and Oneida that resulted in major facility and equipment upgrades all designed to enhance our members' experience.**
- ✓ **An expansion project at the Oneida facility is expected to be complete in Spring 2016. This project will add an additional 2,700 square feet. The majority of the space will be used for program space for youth, teens and adults. The remaining portion will provide a much need meeting and training space for the facility.**

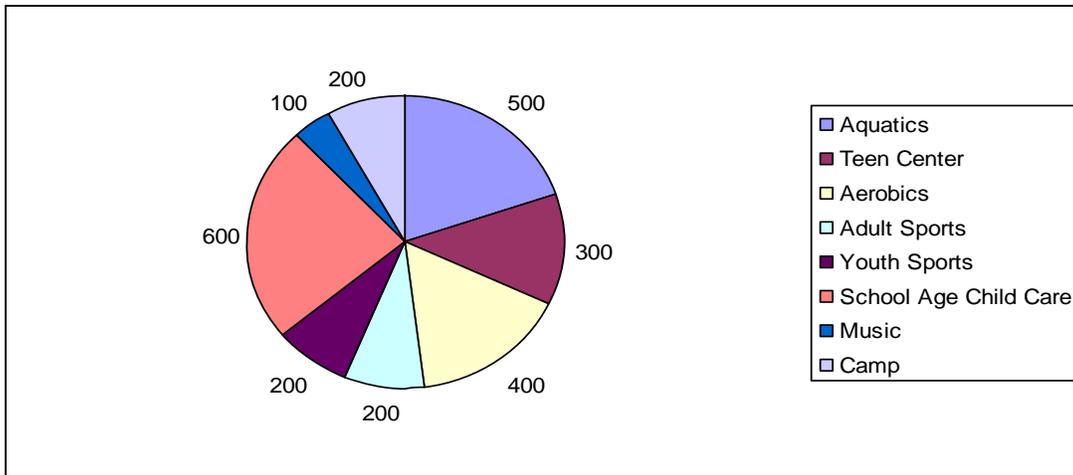


Y Key Statistics

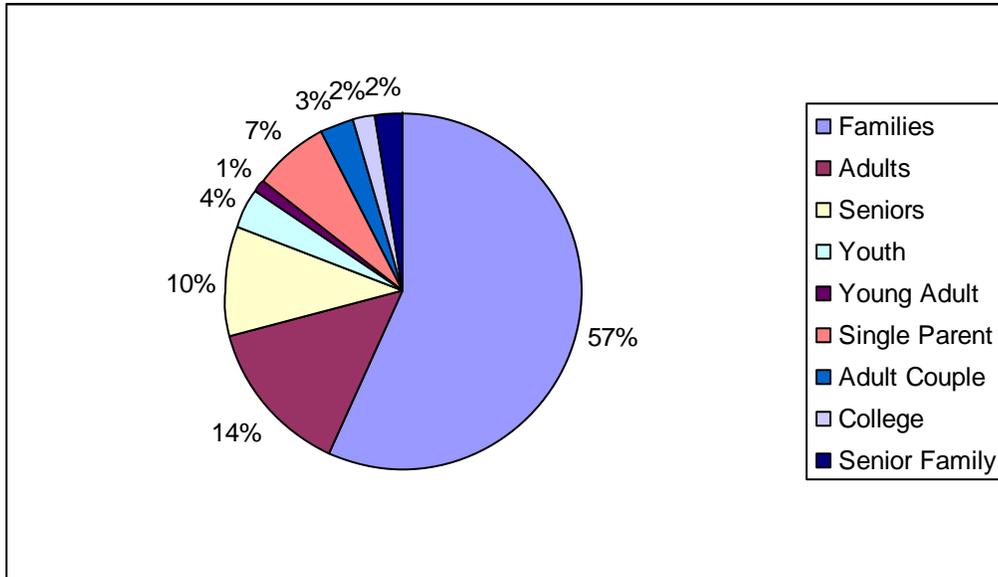
Where does the Y receive its funding?



Y Programs & # of Participants



Y Membership Breakdown



- ✓ **Currently serve nearly 9,000 members with operations in Rome, Oneida, and New Hartford.**
- ✓ **The monthly usage of our Y facilities is approximately 20,000 people**
- ✓ **The Y's School Age Child Care program currently serves over 350 children in 25 elementary buildings covering 9 school districts.**
- ✓ **Currently provide swimming lessons to nearly 400 children.**

Y Governance & Leadership

BOARD OF TRUSTEES

✓ Gregory Harden	Chairperson
✓ John Campanie	
✓ John Haskell	
✓ Mike Kallet	
✓ Jeff Rowlands	
✓ David Nolan	
✓ Charles Schoff	
✓ William Stevens	
✓ Matt Brown	Ex-Officio
✓ Craig Bailey	Ex-Officio
✓ Jack Butts	Ex-Officio
✓ Hank Leo	Ex-Officio

BOARD OF DIRECTORS

✓ Craig Bailey	President & Chief Volunteer Officer
✓ John Elbersen	1 st Vice President
✓ Abby Buchanan	2 nd Vice President
✓ Jack Butts	Treasurer
✓ Leslie Taylor	Secretary
✓ Russ Brewer	
✓ Mary Condes	
✓ Sharon Hoff	
✓ Randy Phillips	
✓ Jeff Simons	
✓ Mark Strong	

MANAGEMENT TEAM

✓ Hank Leo	Chief Executive Officer
✓ Diana Wozniak	Chief Financial Officer
✓ Bruce Hairston	Rome Multi-Team Leader
✓ Stephanie Neff	Oneida Multi-Team Leader
✓ Randy Hirschey	VP – Facilities & Maintenance