

# FOUNDATIONS FOR A LASTING LEGACY

## 2023 Annual Report YMCA of Greater Waukesha County



Dear Friends,

The YMCA of Greater Waukesha County wrapped up 2023 with another successful year. This could not have been possible without the collective efforts of committed staff, dedicated board members, and generous donors. Together, our impressive work has made a positive impact across our large and diverse service area.

The foundation of the YMCA is the people: those we serve through programs and membership, those who work for the Y to better the community, those special volunteers who lead and give back, and those who are donors that create opportunities for others. The thousands of people that are involved in the YMCA are connected by the strongest building block of the organization, the Y mission.

The promise to serve others, the responsibility to strengthen the community, the commitment to be welcoming to all, and the steadfastness to continue to be successful are all pillars on which the YMCA of Greater Waukesha County is rooted.

Our collective work is driven by our strategic plan, which not only guides our work but establishes branch-driven initiatives. The positive impact is a collective of board vision and staff implementation working together to determine goals that produce focused results.

At the Association level, we are committed to future growth opportunities to expand the YMCA throughout the region. In 2023, planning became further defined for potential priorities which will continue to be developed and analyzed.

While the foundation of any structure is the base of support, we build upon that to grow, to serve more, and to do more. Being successful is not final, it is the courage and ability to strive for the greater good.

Thank you for all you do to make the YMCA of Greater Waukesha County a success, but more importantly for setting the strong foundation for continued success.

**John Petrie**  
Chief Volunteer Officer

**Chris Becker**  
Chief Executive Officer

# COMMITMENT TO SERVE

## Spirit of Service Award

### Lisa Brown, Generac, VP–Corporate Development

**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.**

The YMCA of Greater Waukesha County proudly recognizes Lisa Brown as the recipient of the Spirit of Service Award. This accolade celebrates individuals whose exemplary character, leadership, and unwavering commitment propel our association forward, embodying our core mission and values.

Lisa’s character radiates as a beacon of inspiration within our organization. Her integrity, empathy, and dedication to service shine through every interaction and decision she undertakes. Lisa leads with humility and inclusivity, fostering an environment where all feel valued and supported.

In addition to her outstanding character, Lisa possesses a remarkable passion to drive our association’s progress. Her visionary leadership and strategic acumen have been pivotal in shaping our trajectory and ensuring continued growth and success. Lisa excels at identifying opportunities, defining goals, implementing planning processes, and motivating others to strive for success.

Lisa’s strategic planning prowess has been particularly impactful, guiding our organization through the development and execution of our inaugural strategic plan. Through countless hours of dedication, Lisa led executive leadership, boards, and staff in insightful discussions and planning sessions, ensuring alignment with our mission and objectives.

Lisa’s commitment to service shines through her extensive volunteerism with the YMCA of Greater Waukesha County. Serving on multiple boards, including the Waukesha YMCA Board of Management, Mukwonago YMCA Board of Management, and Greater Waukesha County YMCA Association Board of Directors, Lisa has played a vital role in shaping our organization’s direction and impact.

Among her volunteer responsibilities, Lisa co-chairs the strategic development planning task force, ensuring alignment with organizational objectives and fostering effective communication across the association. Her dedication to our mission is not merely spoken; it is a tangible testament to her steadfast commitment to serving others.

In honoring Lisa Brown with the Spirit of Service Award, we celebrate not only her outstanding achievements but also the depth of her character and the profound impact she has had on our association. Lisa’s leadership, passion, and tireless dedication inspire us all to aim higher, dream bigger, and make a lasting impact on those we serve.

Congratulations, Lisa, on this well-deserved recognition. Your exemplary character, strategic leadership, and commitment to advancing our association are an inspiration to us all.



## PREVIOUS AWARD RECIPIENTS

2023 **Scott Naze**  
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**

# LEAVING A LASTING IMPACT

## The Bob Lombardi Memorial Youth Scholarship Fund

At the core of our organization lies a steadfast commitment to the youth of our community—a commitment that has been strengthened through the Bob Lombardi Memorial Youth Scholarship Fund.

Bob Lombardi, a beloved citizen of Waukesha, embodied the very spirit of commitment and community. Raised amidst the challenges of financial hardship, Bob's life was forever changed when he received a youth membership to the YMCA at the age of seven. This pivotal moment ignited a flame of gratitude and purpose within him, as he found solace, support, and opportunity within the walls of the Y.

Throughout his remarkable 81 years of membership, Bob remained steadfast in his dedication to giving back. From volunteering his time to actively engaging with the community, his presence was felt in every corner of the YMCA. Whether coaching sports teams or participating in youth programs, Bob's impact reverberated far and wide.

For Bob, investing in YMCA memberships for his loved ones and fellow community members was not merely an act of generosity—it was a calling. He understood the transformative power of the YMCA and sought to extend its reach to those who needed it most. His commitment to the Annual Support Campaign and the Youth Membership Fund was a testament to his unwavering belief in the potential of every young individual.

In Bob's own words, "I always felt that somebody sponsored me, and if I had extra money, I felt I should give it to a kid who needs it now. That's just the way I feel." His legacy of compassion, generosity, and service continues to inspire us all.

As we reflect on the past year and look ahead to the future, let us carry forward Bob's legacy with pride and purpose. Together, let us honor his memory by continuing to support and empower the youth of Waukesha, ensuring that they have access to the same opportunities that once transformed Bob's life.



# LIVING OUR CAUSE

## 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.



**Kim Cyra**  
MUKWONAGO



**Scott Schoen**  
TRI COUNTY



**Rajula Mody**  
NEW BERLIN



**Judy Shepard**  
WAUKESHA



**Tom Piontek**  
SOUTHWEST



**Diane Geithman**  
WEST SUBURBAN

# INVESTING IN VALUES

## Financial Statements

### CONDENSED STATEMENT OF FINANCIAL POSITION

As of December 31, 2023

#### ASSETS

Cash and equivalents	\$	1,420,187
Certificates of deposit		1,227,524
Other assets		119,076
Accounts receivable, net		304,631
Pledges receivable, net		24,346
Property and equipment		40,524,414
<b>Total assets</b>	<b>\$</b>	<b>43,620,178</b>

#### LIABILITIES AND NET ASSETS

Payables and accrued expenses	\$	1,002,229
Deferred revenue		797,008
Refundable Advance *		-
Capital lease obligations		-
Notes payable		3,679,352
<b>Total liabilities</b>	<b>\$</b>	<b>5,478,589</b>
Total net assets		38,141,589
<b>Total liabilities and net assets</b>	<b>\$</b>	<b>43,620,178</b>

### CONDENSED STATEMENT OF ACTIVITY

As of December 31, 2023

#### REVENUE

Public support			
Contributions and special events	\$	608,180	2.89%
United Way		72,387	0.34%
Membership revenue		9,937,829	47.15%
Program revenue		9,406,993	44.64%
Government Grants		696,717	3.31%
Other		353,145	1.68%
<b>Total revenue</b>	<b>\$</b>	<b>21,075,251</b>	<b>100%</b>

#### EXPENSE

Youth development	\$	11,720,670	54.50%
Healthy living		6,125,646	28.48%
Social responsibility		239,323	1.11%
Management and general		2,975,043	13.83%
Fundraising		444,216	2.07%
<b>Total expenses</b>	<b>\$</b>	<b>21,504,898</b>	<b>100%</b>
Gain (Loss) on Sale of Fixed Asset		500	
<b>Change in net assets</b>	<b>\$</b>	<b>(429,147)</b>	

## CONDENSED STATEMENT OF ACTIVITY - OPERATING FUND

As of December 31, 2023

### REVENUE

Public support			
Contributions and special events	\$	564,622	2.86%
United Way		72,387	0.37%
Membership revenue		9,524,069	48.26%
Program revenue		9,406,993	47.67%
Other		167,472	0.85%
<b>Total revenue</b>	<b>\$</b>	<b>19,735,543</b>	<b>100%</b>

### EXPENSE

Youth development	\$	10,724,923	54.50%
Healthy living		5,608,446	28.50%
Social responsibility		216,466	1.10%
Management and general		2,715,668	13.80%
Fundraising		413,254	2.10%
<b>Total expenses</b>	<b>\$</b>	<b>19,678,757</b>	<b>100%</b>

<b>Change in net assets</b>	<b>\$</b>	<b>56,786</b>
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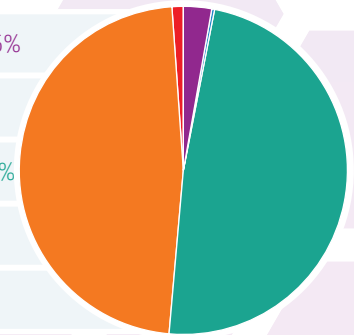
CONTRIBUTIONS/EVENTS 2.86%

UNITED WAY 0.37%

MEMBERSHIP REVENUE 48.26%

PROGRAM REVENUE 47.67%

OTHER 0.85%



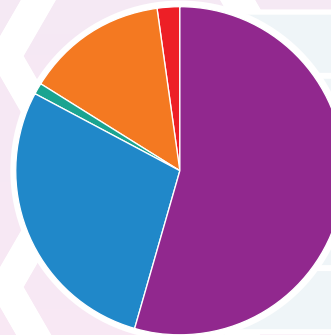
YOUTH DEVELOPMENT 54.50%

HEALTHY LIVING 28.50%

SOCIAL RESPONSIBILITY 1.10%

MANAGEMENT/GENERAL 13.80%

FUNDRAISING 2.10%



# CREATING OPPORTUNITY

## 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.



**58,380 INDIVIDUALS**

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



**1,645 YOUTH**

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



**1,909 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.



**420 VOLUNTEERS**

devoted time, energy, and heart to serving others.



**949 STAFF**

worked with purpose to positively impact people in our community.



**4,040 HOURS**

spent strengthening our community through the dedication of volunteers.



# TRANSFORMING LIVES

## 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.



**11,969 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.



**23 SCHOOLS**

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

## Community Benefit

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.



**\$393,426**

**1,203 donors** ensured Y programs and services were available for all.



**\$563,248**

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



**331 INDIVIDUALS**

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

# MAKING A DIFFERENCE

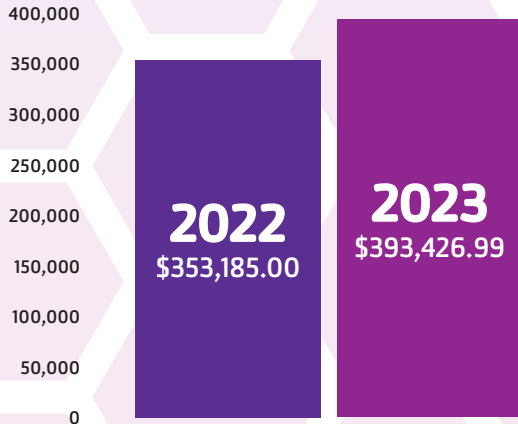
## Circle of Impact Giving Society

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.

### TOTAL DONATIONS

AS OF DECEMBER 31, 2023

Donations \$999 or less	\$	120,110.27
Circle of Impact Donations \$1,000 or more		273,316.72
<b>Total Donations*</b>	<b>\$</b>	<b>393,426.99</b>

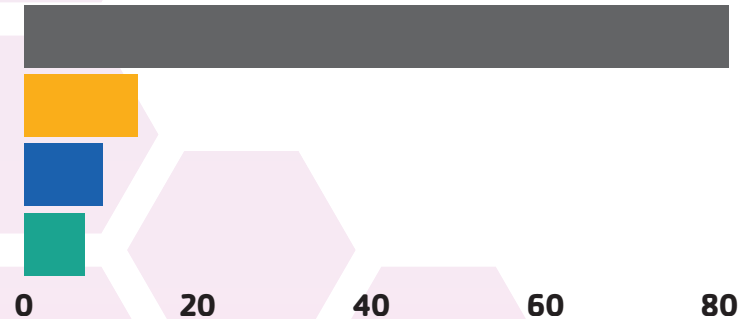


\*Excludes Contributions from United Way & Y of the USA

### TOTAL DONATIONS

AS OF DECEMBER 31, 2023

	DONOR COUNT	AMOUNT DONATED	PERCENT OF DONOR	PERCENT OF \$ DONATED
Silver \$1,000+	81	\$102,837.38	74%	38%
Gold \$2,500+	13	\$39,550.00	12%	14%
Platinum \$5,000+	9	\$47,500.00	8%	17%
Diamond \$10,000+	7	\$83,429.34	6%	31%
<b>2023 Total</b>	<b>110</b>	<b>\$273,316.72</b>	<b>100%</b>	<b>100%</b>



# SUPPORTING OUR CAUSE

## Our Donors

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

### DIAMOND (10,000+)

Anonymous  
David Griffin  
L&A Crystal Services, LLC  
L.L. Bean Summer Camp Scholarship  
Pepsico Bottling Group LLC  
Angela Porter, In Memory of Barbara  
Thompson  
William N & Janice V Godfrey Family  
Foundation Trust

### PLATINUM (5,000+)

Educators Credit Union  
Froedtert Health Menomonee Falls  
Terrance McAdams,  
IN MEMORY OF John & Lorraine McAdams  
Scott & Richelle Naze  
Francis Wagner  
WaterStone Bank  
West Bend Community Foundation's  
West Bend Mutual Insurance Company's  
Charitable Fund  
Kevin & Katie Wilke  
Wisconsin Vision

### GOLD (2,500+)

Anonymous  
Steve & Kathy Baptist  
Ron & Susan Clayton  
Jerome & Claudine Doornek  
Paul & Joan A. Ewig  
Suzanne Frank  
Karin Hiller  
Tom & Amy McAdams  
Sherri Mitchell  
Kelly & Rob Olejniczak  
Beth & Robert Southwick  
Muriel Van Beek  
Mark Westen  
Woodman's Food Market, Inc

### SILVER (1,000+)

Anonymous (5)  
Francisco Aguilar  
Keith Alexander  
The Ansell Family  
Appraisal Management Specialists  
Chris & Nancy Becker  
James Bellin  
Benjamin & Cristi Bergles  
Rob & Cathy Brendel  
Scott & Jennifer Campbell  
Timothy Colombe  
Verne Cowles  
Crivello, Nichols & Hall, S.C.  
Ellen & Seth Dizard  
Dale Dobroth & Theresa Dobroth  
Richard Dow  
Alec Durand  
Brett Engelking  
Suzanne & Patrick Falvey  
Bob & Joan Farrell  
George Furey  
Scott Gierhahn  
IN MEMORY OF Willie Grace Gordon  
GS Global Resources, Inc.  
Jeff Guencher  
Rob & Jean Henke  
Darren Horndasch  
Patrick Horne  
Ryan & Sarah Hynek  
IN MEMORY OF James D. Jensen (2)  
JM Swan Construction LLC  
Daniel & Merry Johnson  
Kahler Slater  
Rick & Colleen Kalscheuer  
Don & Mary Lou Kasner  
Robert Kettler  
Matthew Krawczyk & Gretchen Leehr  
Penny Kroog  
Jay & Betty Lauck

Bob & Carol Lombardi  
IN MEMORY OF Emma Mertens  
Mark Mirsberger  
Mary Mokwa  
Heather Nelson  
Carol Neumann  
Laurie Ocepek  
Laurie O'Loughlin  
Tim O'Malley  
Ben Peterson  
John & Ann Petrie  
Jeffrey Piette  
Pool & Hot Tub Alliance  
Prohealth Care, Inc.  
Brian & Lesa Radloff  
Rev Laura McLeod  
Jeffrey & Kristy Richards  
Stan Riffle Family  
Matt Rios  
Jeremey & Laurie Schlitt  
Gene Schneider  
Jason & Amanda Schneider  
Shepard, Robert  
Gary Sievwright  
Shirley & Gerald Stanke  
Richard & Martha Swan  
Steve & Jane Thompson  
James Tidey  
Stephanie Turks  
Jim & Marjorie Wagner  
We Energies Foundation  
Kathleen Westpfahl  
Mark Wildeman  
Marie Zangerle LeRoy

### YMCA STAFF HOURLY CLUB DONORS

Anonymous (7)  
Emily Gerlach  
Samantha Grutza  
Rick Herbst  
Karin Hiller  
Sarah Hynek  
Paul Karnes  
Eric Lachance  
Sheryl Leonard-Schneck  
Eileen McBrair  
Rajula Mody  
Lisa Ohland  
Reebee Ratkowski  
Talia Schaefer  
Melissa Sonnemann  
Carol Spaeth-Bauer  
Jaimie Sponder  
Katrina Weinberg  
Kathy Westpfahl

# SHOWING SUPPORT

## Annual Campaign Fundraisers

Through 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.

Altogether, the members, friends, and donors who attended our 2023 Annual Campaign events helped raise \$164,866. 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 2023 lead event sponsors.



**DILLETT**



**FREEMOTION.**



## 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.

## SOUTHWEST YMCA & WEST SUBURBAN YMCA PARTNERS 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.

## MUKWONAGO YMCA 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.

## TRI COUNTY YMCA 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 YMCA 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.



# LEADING WITH PURPOSE

## 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

### Brittany Callies

MUKWONAGO EXECUTIVE DIRECTOR

### Ryan Buck

SOUTHWEST EXECUTIVE DIRECTOR

### Aaron Miller

TRI COUNTY EXECUTIVE DIRECTOR

### Sam Seidel

WAUKESHA EXECUTIVE DIRECTOR

### Katy Groh

WEST SUBURBAN EXECUTIVE DIRECTOR

### Kathy Westpfahl

WAUKESHA EXECUTIVE DIRECTOR – RETIRED

### Katrina Weinberg

ASSOCIATION DIRECTOR OF FINANCIAL DEVELOPMENT

### Jennifer Ruis

ASSOCIATION SENIOR DIRECTOR OF MEMBERSHIP

### Chelsea Kujawa

ASSOCIATION DIRECTOR OF HEALTHY LIVING

### Kristen Deal

NEW BERLIN OPERATIONS DIRECTOR

## Association Board of Directors

### John Petrie

CHIEF VOLUNTEER  
OFFICER

### Jack Riesch

VICE CHIEF VOLUNTEER  
OFFICER

### Scott Naze

PAST CHIEF VOLUNTEER  
OFFICER

### H. Stanley Riffle

CHIEF LEGAL OFFICER

### Mark Mirsberger

TREASURER

### Jeff Piette

SECRETARY

### Darius Anderson

Rick Andritsch

Lisa Brown

Ron Clayton

### Verne Cowles

Ellen Dizard

Brett Engelking

Tracey Esser

### Scott Heine

Darren Horndasch

Rick Kalscheuer

Ryan McCumber

### Sherri Mitchell

Griffin Prochnow

Brian Radloff

Jeff Richards

### Jason Schneider

Gary Sievwright

Rick Swan

# ON BOARD WITH OUR CAUSE

## Board of Managers

### Mukwonago

**Rick Swan**  
BOARD CHAIR

**Ben Bergles**  
**Lisa Brown**  
**Jennifer Burns**  
**Brett Engelking**  
**James Green**  
**Jolynn Greene**  
**Byron Hawks**  
**Joe Koch**  
**Tom McAdams**  
**Dawn Minikel**  
**Martin Pepe**  
**Ben Peterson**  
**Robert Pilant**  
**Vito Schwartz**  
**Jane Thompson**  
**Fran Wagner**  
**Mark Wildeman**

### Southwest

**Tracy Esser**  
BOARD CHAIR

**Verne Cowles**  
**Trent Cummings**  
**Gregory Glisch**  
**Matt Krawczyk**  
**Wesley McKenzie**  
**Matt Rios**  
**Robert Shepard**  
**Gary Sievewright**  
**Joanna Thompson**  
**Jim Wagner**

### Tri County

**Scott Heine**  
BOARD CHAIR

**Suzanne Falvey**  
**Lisa Kiefer**  
**Melissa Mass**  
**Jeff Richards**  
**Jason Schneider**  
**Scott Schoen**  
**Keith Shepard**  
**Kara Waggoner**  
**Katie Wilke**

### Waukesha

**Brian Radloff**  
BOARD CHAIR

**Jack Riesch**  
**Tim Black**  
**Mark Blegen**  
**Darren Clark**  
**Matt Deiningner**  
**Tom Dieckelman**  
**Alec Durand**  
**Chadd Frank**  
**Dan Gallegos**  
**Alexis Garus**  
**Ron Jahnke**  
**Sherri Mitchell**  
**Heather Nelson**  
**Matt Nitka**  
**Jeremy Schmidt**  
**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**  
**Carley Hoelzel**  
**Pat Horne**  
**Eric Koepp**  
**Jacklyn Rynish-Knapp**



FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

## **YMCA OF GREATER WAUKESHA COUNTY**

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gwcymca.org | 262-330-5199