



# GATEWAY REGION YMCA ENDOWMENT

## 2021 REPORT





# A MESSAGE FROM THE CEO



I am excited to share with you the Gateway Region YMCA's inaugural Endowment Report. Gifts to the endowment fund provide lasting support for the Y to remain accessible to everyone - regardless of their ability to pay.

We take great pride in operating a fund that is well-managed through strategic investments, which allows us to plan for long-term stability, fiscal responsibility, and financial viability. Most importantly, it enables us to carry out our mission serving those in need in our community.

Endowment support is critical to the Y, and this was never more apparent than during the pandemic. Many organizations and businesses have suffered greatly the past couple of years. Thankfully, we were able to withstand the volatility of the economy in part due to the health of our endowment. It is imperative to plan for a rainy day, and our endowment served as a large umbrella.

This year, we celebrate 50 years of the Lamplighter Society and recognize all those who support the endowment. Your investment has created a legacy; one that lives on forever to benefit generations to come in the gateway region. Thank you!

**Tim Helm**  
President and CEO

# ENDOWMENT HISTORY



IN 1853, 23 YOUNG MEN GATHERED AT THE 2ND BAPTIST CHURCH IN DOWNTOWN ST. LOUIS TO FORM THE AREA'S FIRST YMCA. YEARS OF GROWTH ON BOTH SIDES OF THE RIVER EVENTUALLY LED TO THE YMCA OF SOUTHWEST ILLINOIS AND THE YMCA OF GREATER ST. LOUIS' MERGER TO FORM THE GATEWAY REGION YMCA IN 2016. TODAY, THE Y IS ONE OF THE LEADING HEALTH AND HUMAN SERVICE ORGANIZATIONS IN THE BI-STATE REGION, SERVING MORE THAN 220,000 INDIVIDUALS ANNUALLY.

Supporters of the YMCA have ensured the legacy of our organization for many years. One of the earliest gifts recorded came in 1883 from the Collier Family in honor of their son. The \$5,000 gift was truly significant considering it would equate to a value over \$152,000 in today's world. In their will, the family documented their hope the gift would allow the Y to, "actively carry on its benevolent work in the City of St. Louis."

Trees were planted years ago from families like the Colliers and many others. Today, we benefit from healthy branches extending widely to provide shade and security for our children and families to prosper for years to come.

**"THE TRUE MEANING OF LIFE IS TO PLANT TREES,  
UNDER WHOSE SHADE YOU DO NOT EXPECT TO SIT."**





# ENDOWMENT OVERVIEW

THE PURPOSE OF THE ENDOWMENT IS TO PROVIDE MAXIMUM SUSTAINABLE FINANCIAL SUPPORT TO THE GATEWAY REGION YMCA TO SERVE ITS MISSION IN PERPETUITY. CORE TO THE ENDOWMENT'S PURPOSE IS BALANCING THE INTERESTS OF CURRENT AND FUTURE GENERATIONS OF YMCA MEMBERS AND THE COMMUNITY THE Y SERVES.

When you give to the endowment fund, the Y invests your gift as part of its overall endowment portfolio. The primary investment objective of the endowment is to generate, on average and over time, inflation-adjusted gains from investment returns that at least match distributions to the institution. The investment strategy is structured to serve this objective.

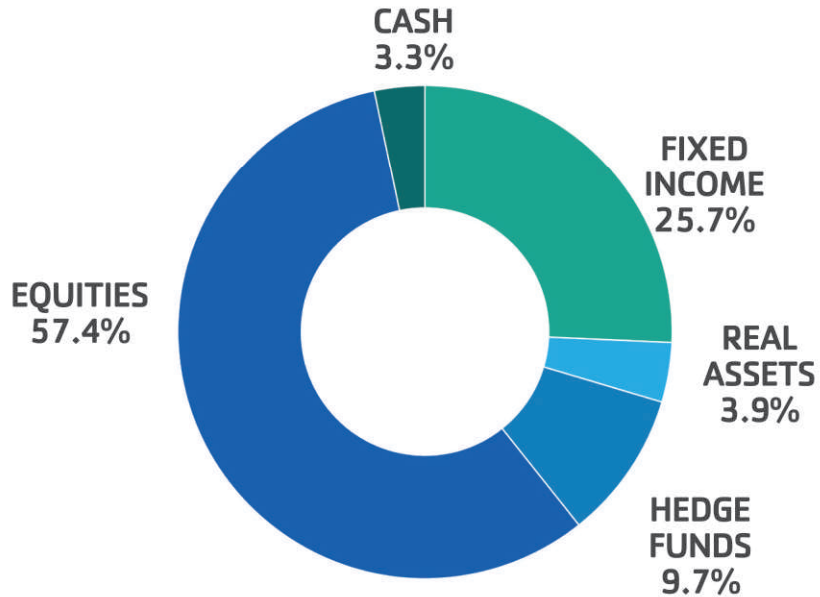
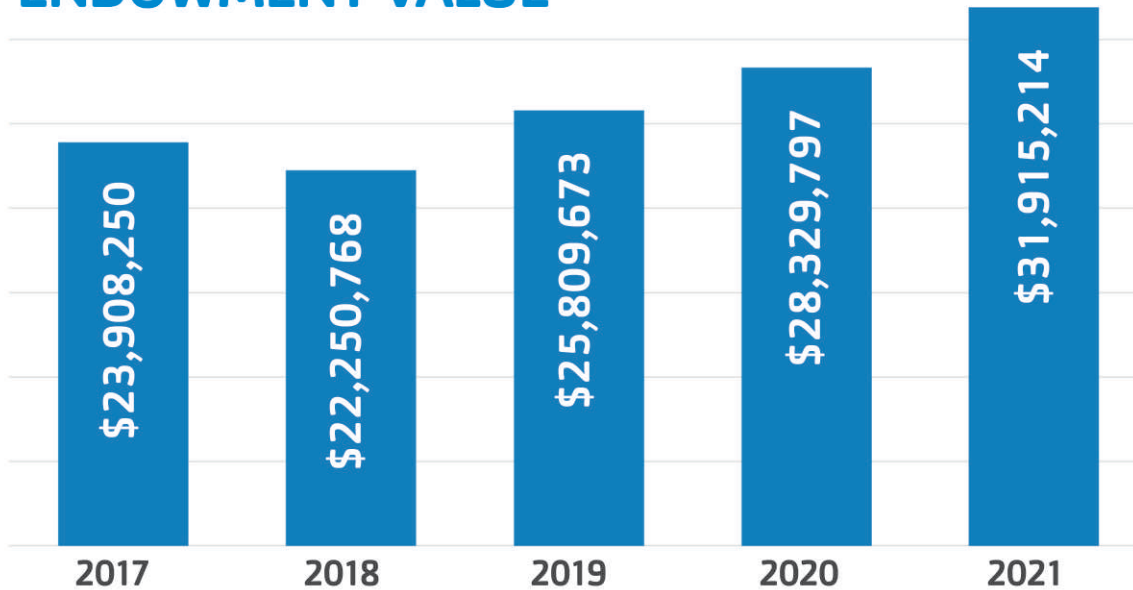
The spending distribution policy provides a mechanism for delivering financial support to the operating budget while also ensuring protection from the volatility of the capital markets.

Each year, a portion of the value of the endowed fund is distributed to the YMCAs in our Association. Gifts designated to a branch or program are distributed as a percentage of the overall value of the fund. Remaining earnings are used to build the endowment's value. In this way, the endowment fund can grow and provide support for its designated purpose in perpetuity.

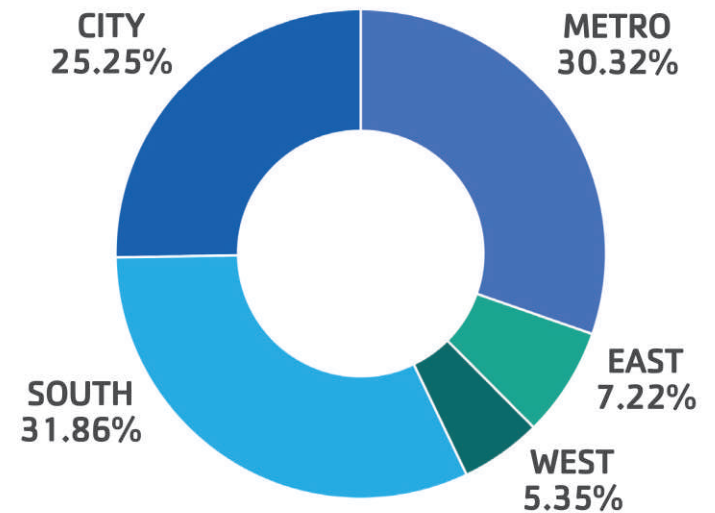


**THE GATEWAY REGION YMCA'S ENDOWMENT  
VALUE AS OF DECEMBER 31, 2021: \$31.9MM**

## ENDOWMENT VALUE



**ENDOWMENT ASSET  
ALLOCATION**



**ENDOWMENT SHARES  
BY DISTRICT**



# YOUR GIFT AT WORK

Your support of the endowment directly impacts our community by supporting branch programs that serve a wide range of needs and opportunities. These are only a few of the many programs offered across the Association.

- **YOUTH DEVELOPMENT:** nearly 900 children receive **free Safety Around Water** instruction, learning critical drowning prevention skills and reducing their risk of drowning.
- **HEALTHY LIVING:** 146 individuals participated in a 12-month, group-based **Diabetes Prevention Program** to encourage behavioral change to reduce the risk for diabetes.
- **SOCIAL RESPONSIBILITY:** 72,456 meals were served last year in our community and child care programs, providing **food access to at-risk families**.



## BY THE NUMBERS

The annual endowment distribution is determined based on a rolling 5-year average of the endowment balance as of June 30 the previous year. Historically, the distribution has ranged between 4.0% to 4.75% depending on the needs of the Association.

In 2021, the endowment served a critical role supporting the operations and infrastructure of our Association with a distribution totaling **\$933,267**.

### SAMPLE DISTRIBUTION OF 4%

| Gift Amount | Estimated Annual Distribution |
|-------------|-------------------------------|
| \$25,000    | \$1,000                       |
| \$50,000    | \$2,000                       |
| \$100,000   | \$4,000                       |
| \$500,000   | \$20,000                      |

# 50 YEARS OF THE LAMPLIGHTER SOCIETY

Although donors contributed to the endowment as far back as 1883, a recognition society came many years later. In 1972, the legendary YMCA Vice President of Financial Development, Dick Stoll, distributed a publication encouraging donors to make provisions in their estate plans. To his surprise, more than 30 people responded saying they had already done so. Thus, the Lamplighter Society was born.

The Lamplighter Society recognizes those who designate the Y as a beneficiary in their estate plans, make an outright gift to the endowment fund or establish various kinds of planned gifts. Dick noted that there's a "satisfaction of being a light for someone in the future." He was proud that the YMCA is all-inclusive, remarking "those who can't afford it can still come in."

The Lamplighter Society helps make that possible. The Gateway Region YMCA thanks all those who have made the endowment fund the robust revenue and security reserve it is today, and invites others to consider joining the society.

**"OUR FAMILY IS GRATEFUL FOR THE BLESSINGS WE RECEIVE EVERY TIME WE GO TO OUR LOCAL Y. WE WANT TO HELP ENSURE THAT GENERATIONS TO COME WILL BE STRENGTHENED BY THE VALUES THE Y BRINGS TO EVERY COMMUNITY IT TOUCHES. WE HOPE YOU WILL JOIN US IN SUPPORTING THE Y THROUGH ITS ENDOWMENT FUND."**  
- KATE AND BILL GAVIN



## STORY OF THE LAMPLIGHTER

Sir Harry Lauder, the Scottish humorist and singer, often related a story of those who were responsible for lighting the street lights of his city just at dusk. Sir Lauder would watch each lighter progress from lamp to lamp, causing each new light to soften the approaching darkness. "Finally," said Sir Lauder, "even though the lamplighter had disappeared around some far corner, you knew he had been there by the lights he left behind."





**GATEWAY REGION YMCA**  
2815 Scott Ave Ste D  
St. Louis, MO 63103  
[gwrymca.org](http://gwrymca.org)

**Contact us to learn how you can support  
the Gateway Region YMCA's mission with  
a gift to the Endowment Fund.**

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**OUR MISSION:** To put Christian principles into  
practice through programs that build healthy  
spirit, mind and body for all.