the YMCA

LAMPLIGHTER SOCIETY
EST. 1972

GATEWAY REGION YMCA ENDOWMENT

2024 REPORT

A MESSAGE FROM THE CEO

I am constantly reminded that the heart of our work is made possible not only through the dedication of our staff and volunteers, but also through the foresight and generosity of donors like you—those who have invested in the long-term sustainability of our mission through our endowment.

Your support ensures that the Gateway Region YMCA can plan for the future with confidence. An endowment is more than a financial asset; it is a promise—a promise that the work we do today will continue for generations to come. The earnings from this fund allow us to respond to emerging needs, sustain our core programs, and invest in innovative solutions that strengthen our impact in the community.

In the pages that follow, you will find a summary of our endowment's performance and the tangible difference it has made. We share this information not only as a measure of accountability, but as a celebration of what we have achieved together.

On behalf of our entire team and those whose lives are touched by our work, thank you for your trust, your partnership, and your belief in the future we are building. Your generosity today ensures hope, opportunity, and transformation for years to come.

Tim Helm
President and CEO

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

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. 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.

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.

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

THE GATEWAY REGION YMCA'S ENDOWMENT DISTRIBUTION FOR 2024: $1,189,000

ENDOWMENT MANAGEMENT & SUPPORT

Supporters of the Gateway Region YMCA have ensured the legacy of our organization for many years. One of the earliest gifts recorded was 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 $151,000 in today's world. In their will, the family documented that their hope for the gift would be that the Y would, "actively carry on its benevolent work in the City of St. Louis."

Today, we utilize multiple layers of checks and balances to ensure the health of the endowment fund through internal and external management and support.

INVESTMENT SUBCOMMITTEE

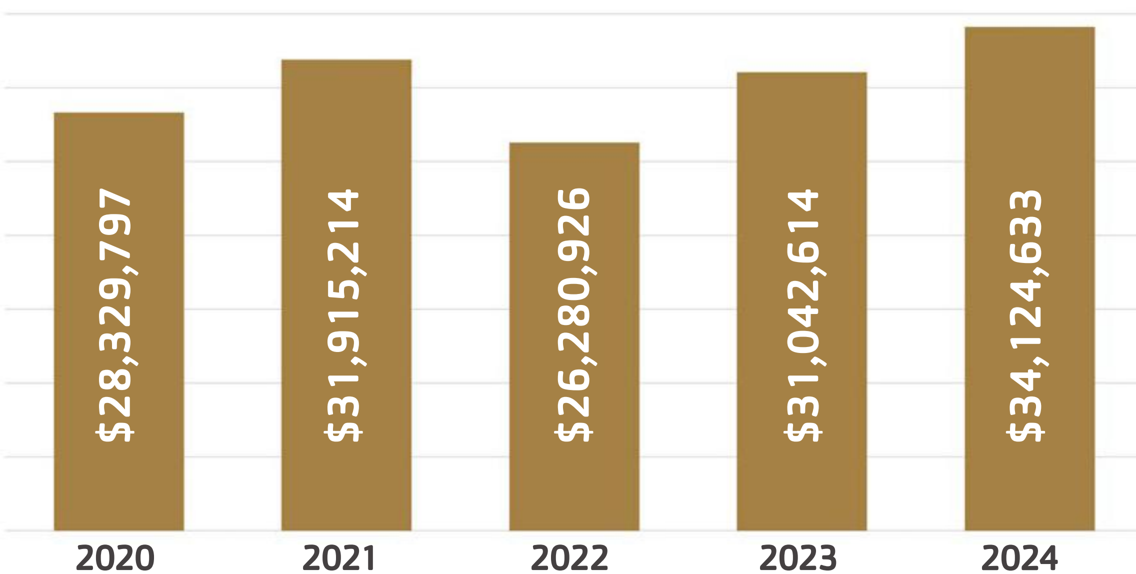
Guided by the Y's Endowment Investment Policy, the Investment Subcommittee reports to the Board of Directors' Finance Committee and is charged with management of the endowment fund. Its responsibilities include to review the performance of the endowment quarterly; review, authorize and monitor the asset allocation targets and acceptable allocation ranges; appraise the performance of the investment managers; annually recommend the Spending Rate Formula to be used as the basis for distributions; and report the endowment's performance to the Finance Committee and the Board of Directors.

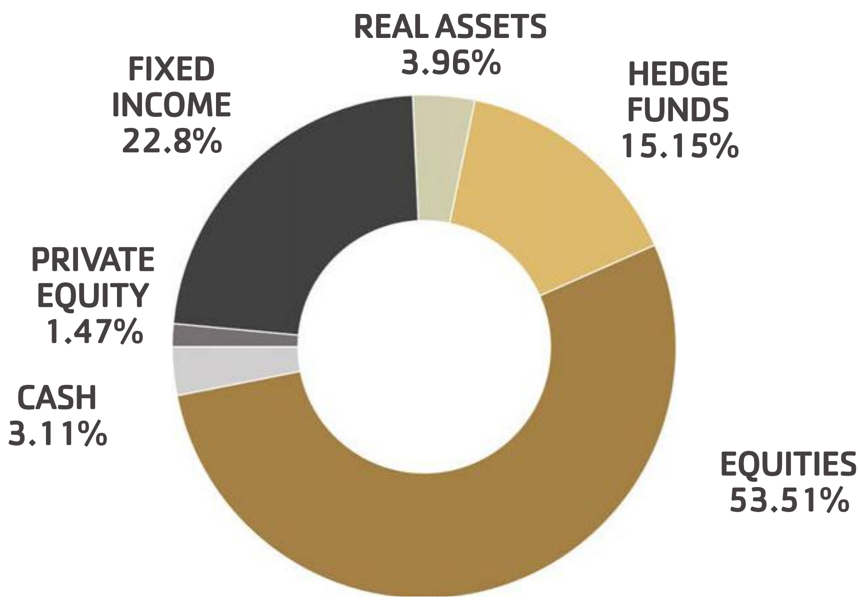
RESOURCE DEVELOPMENT COMMITTEE

Reporting to the Board of Directors, the purpose of the Resource Development Committee is to ensure financial resources are procured to support the mission and sustainability of the organization. In addition to providing oversight to fundraising appeals such as the Annual Campaign and the Comprehensive Campaign, it is charged with ensuring endowment support is raised annually to contribute to the Endowment Fund.

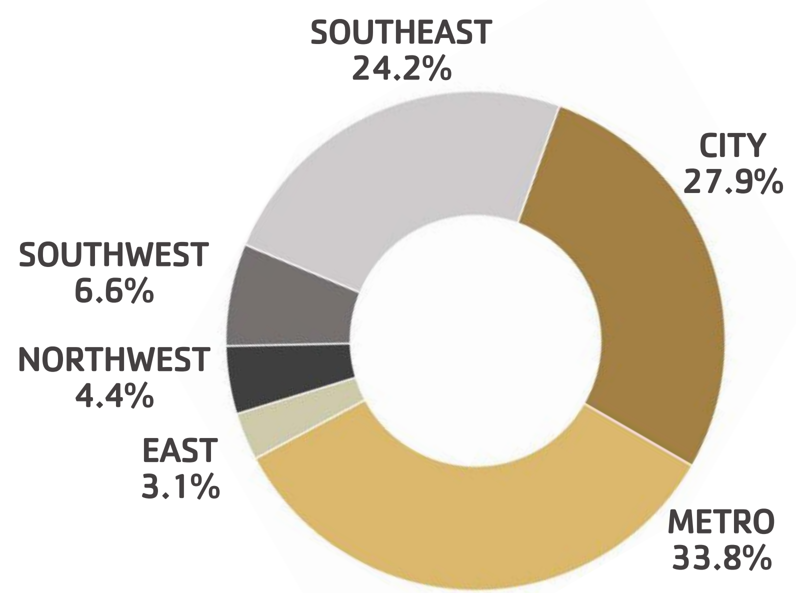
"The true meaning of life is to plant trees under whose shade you do not expect to sit."
Nelson Henderson

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:** 6,440 youth had fun and stayed active at **summer day camp** and 1,609 campers discovered new wonders and made lasting friendships at **YMCA CAMP LAKEWOOD**.
- **HEALTHY LIVING:** 167 survivors participated in **LIVESTRONG® AT THE YMCA**, a free wellness program for adult cancer survivors, and 202 individuals with Parkinson's disease participated in regular exercise to help extend mobility and quality of life in our **EXERCISE FOR PARKINSON'S** program.
- **SOCIAL RESPONSIBILITY:** 358 teens participated in one of our **YOUTH AND GOVERNMENT** programs, which serves teens in grades 8-12, providing opportunities to develop leadership skills and actively engage in their schools, YMCAs, and communities.

INVESTING IN MISSION

Thanks to your generous support and long-term commitment to our YMCA, we are able to make meaningful investments that meet evolving community needs and expand our impact. Our healthy endowment enables us to reinvest in both programmatic and capital initiatives that help us serve more people, more effectively.

A recent example is the YMCA Adaptive Sports Complex, which opened in June 2024 in partnership with the St. Louis Cardinals and Cardinals Care, along with the Boniface Foundation. This innovative complex features:

MIRACLE LEAGUE BASEBALL FIELD (PAUL GOLDSCHMIDT FIELD; AN INCLUSIVE PLAYGROUND; AND A MULTI-PURPOSE FIELD.

These facilities ensure that children and adults with disabilities can enjoy sports and recreation, and that kids of all abilities can play and grow together.

To ensure the long-term sustainability of the Complex, we've established a dedicated endowment fund with a goal of raising $400,000, and we are currently seeking commitments toward this important initiative.

Your continued partnership makes opportunities like this possible. Thank you for investing in our mission.

THE LAMPLIGHTER SOCIETY

Although donors contributed to the endowment as far back as 1883, a recognition society came many years later in 1972 under the leadership of the legendary YMCA Vice President of Financial Development, Dick Stoll. 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.

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.

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 Harry would watch each lighter progress from lamp to lamp, causing each new light to soften the approaching darkness. “Finally,” said Sir Harry, “even though the lamplighter had disappeared around some far corner, you knew he had been there by the lights he left behind.”

RESOURCES

Estate planning is an opportunity to echo your voice, values, and vision in a plan that uplifts both your family and the greater community. When you include the Gateway Region YMCA in your estate plan, your generosity moves us toward healthier, more connected communities.

The Y partners with a service named FreeWill to support our community in completing the essential task of creating a will. FreeWill provides easy-to-use tools to create your own will and other estate-planning documents—at no cost.

Visit gatewayregionymca.planningyourlegacy.org for more planned giving resources.

Explore FreeWill.com

“It’s worthwhile for us to leave something behind that will continue benefiting communities in the future. We really appreciate that the Y never turns anyone away due to financial reasons. It’s truly a place for everyone.”
–Mark and Kelly Henderlong

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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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