AGENDA

1. ABOUT THE YMCA AND YMCA OF THE USA
2. MANAGING CHANGE
3. STAKEHOLDERS
4. A SIGNIFICANT ORGANIZATIONAL SHIFT
5. PILOTS & PRE-LAUNCH ACTIVITIES
6. AWARENESS & ADOPTION
7. Q&A
ABOUT THE YMCA AND YMCA OF THE USA

Scope of the Y in the U.S.
• 2,600 locations
• 20 million members
• 600,000 volunteers
• 250,000 part-time staff
• 20,000 full-time staff

YMCA of the USA (Y-USA)
• National resource office
• Not a headquarters
The new knowledge-sharing and social-networking platform for the Y Movement.

It’s designed to...

• help the Y’s tens of thousands of staff and volunteers share knowledge and connect with one another in real time

• Be accessible anytime, anywhere

• Offer personalized experience through communities of Y peers and resources

Link is...
"A change management initiative not a technology project."
Y’S 7-STEP CHANGE MODEL

1. Identify issue(s)
2. Confirm direction
3. Create & share vision
4. Mobilize commitment
5. Make the plan
6. Activate the change
7. Institutionalize the change
Y’S 7-STEP CHANGE MODEL

Before you begin
a. Determine the need
b. Obtain initial support
c. Create a change coalition

1 Identify the issue
a. Describe the gap between current & desired state
b. Take stock of what matters most (mission, strategic plan)
c. Define the hypothesis

2 Confirm the direction
a. Gather data
b. Analyze data and test hypothesis
c. Confirm (or redefine) the issue

3 Create & share the vision
a. Develop a compelling image of the future
b. Declare desired outcomes
c. Communicate the vision & invite participation

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Y’S 7-STEP CHANGE MODEL

4 Mobilize commitment
   a. Secure stakeholder support
   b. Organize for effectiveness
   c. Create the incentives
   d. Prepare to build skills
   e. Secure resources
   f. Remove barriers to success

5 Make the plan
   a. Select the preferred path
   b. Identify & prepare tactics
   c. Define early wins
   d. Script the key moves

6 Activate the change
   a. Deliver short-term wins
   b. Sustain action and motivation
   c. Institute habits to ensure success
   d. Report on progress

7 Institutionalize the change
   a. Reward performance
   b. Create processes and protocols
   c. Create new cultural norms

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EARLY EXECUTION OF THE CHANGE MODEL

- Developed hypothesis
- Identified stakeholders
- In-person and virtual focus groups
- Card sorting activity to inform information architecture
- Platform naming contest
- Consultant to assist with insight collection, strategy, and launch roadmap
**RIZ, LOCAL YMCA STAFF**
A STAFF MEMBER AT ONE OF THE 829 LOCAL YMCAS WHO DELIVER ON OUR CAUSE TO STRENGTHEN COMMUNITY PROGRAMS AND SERVICES Y DELIVERING

**HIGHLIGHTS**
+ EXCITEMENT AND FILLED WITH QUESTIONS
+ SEEKS CONNECTION WITH IDEAS AND SOLUTIONS
+ OVERWHELMED AND JUGGLING MULTIPLE PRIORITIES

**HOW I FEEL**

<table>
<thead>
<tr>
<th><strong>Onboarding &amp; Orientation</strong></th>
<th><strong>Performance &amp; Growth</strong></th>
<th><strong>Experience &amp; Purpose</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Excited</td>
<td>Curious</td>
<td>Resourceful</td>
</tr>
<tr>
<td>Overwhelmed</td>
<td></td>
<td>Stressed</td>
</tr>
<tr>
<td>Stressed</td>
<td></td>
<td>Cynical</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hopeful</td>
</tr>
</tbody>
</table>

**NEEDS & OPPORTUNITIES**

- An intuitive, Google-like search across platforms that brings back what I am looking for
- Connect with YMCA staff to learn best practices, how-tos, innovative ideas and solutions
- Update my profile with skills, tags so others can find me
- Collaborate with my peers across the YMCA network
- Personal news feed and alerts for new content
- Single source of truth - trust that the content or answer is “correct”
INTERNAL WORKGROUPS

- CHANGE AGENTS
- SITE DESIGN AND INFORMATION ARCHITECTURE
- USER-GENERATED CONTENT
- VENDOR EVALUATION
CHANGE AGENTS

Objectives:
• Conduct research
• Communication strategy and messages
• Process refinement and reinforcement
• Championing new approaches and shifts in staff responsibilities

Expectations:
• Share ideas and give input
• Participate in research
• Recruit other participants
• Contribute to communications efforts
• Advocate and influence
STAKEHOLDERS
KEY STAKEHOLDERS

Y-USA Leadership
Local Key Local Y Leader (CEOs & HR)
Stakeholders
Y-USA Staff
Moderators
SERIES OF DEPARTMENT LEADERSHIP MEETINGS

Objectives:

• How does this apply to you?
• Help them envision the future
• Uncover challenges, concerns, leverage points
SAMPLE DAILY TASKS

- Scan community to assess activity.
- Monitor open questions, comments, and posts.
- Implement engagement activities.
- Recognize community members with awards.
- Guide members on how to use the community.

BACKGROUND

I started at my Y at the membership desk. Our Y uses Daxko. I became the go-to person for questions about that software. Before I knew it, I was helping out with lots of software we use at our various branches. I love answering questions and helping people figure out how to use what’s available to make their jobs easier!

LOCAL Y SME MODERATOR

A local Y staff member responsible for working in partnership with Y-USA SME(s) to moderate and manage a community (strategize, curate content, facilitate conversations) within KM 3.0.

CHARACTERISTICS AND SKILLS

- Expertise in their subject area
- Intrinsically motivated to share and build relationships
- Seeking opportunities to grow their career
- Understands the role of Y-USA and its support of the Movement
- Skill and comfort with technology

TIME SPENT PER DAY

- KM 3.0 Moderation
- Other Job Responsibilities

ORGANIZATIONAL SUPPORT REQUIRED

- Advocate with local Y supervisors to promote willingness to allow staff to devote time to moderation and partnership with Y-USA
- Provide access to ongoing training on role and technology
- Create community for moderators that allows them to connect with one another and understand Movement-wide initiatives

BACKGROUND

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A SIGNIFICANT ORGANIZATIONAL SHIFT
Shifting from Y-USA as the center for expertise to leveraging expertise throughout the Y's network

**YMCA Services**
- State & Regional Alliances
- Service-Delivery Partner Ys
- Training Partner Ys
- Third-Party Partners

**Innovation**
- Thought Leader Cohorts
- Innovation Teams & Labs
- Advisory Council

**Y-USA Support**
- **Existing Networks** such as YPN, DIG, ERGs
- **Direct Services** such as CEO Search, leadership development
Evolving Community Model

- Y-USA Staff
- Y-USA SME Moderators
- Local Y SME Moderators
- Local Y Staff & Volunteers
- Moderators
- Network Partners
- KM Community Strategist

Change Management
- Process
- Training
- Governance
TIMELINE

Y-USA's current service-delivery model will remain in place through January 31, 2019. To ensure continuity, we will implement our transition plan concurrently between now and then.

By February 1, 2019, Service Partner Ys, Third-Party Providers, the new knowledge management/social connectivity platform and the new State Alliance service system for Region 1 (Northeast) will be operational.

By July 1, 2019, the new State Alliance service system for Regions 2, 3 and 4 (South, Midwest and West) will be operational.
PILOTS & PRE-LAUNCH ACTIVITIES
EMAIL COMMUNICATIONS

YMCA of the USA (Y-USA) is excited to introduce **Link -- a new knowledge-sharing and social-networking platform for the Y Movement** launching Feb. 1, 2019.

**Easy, social, and mobile,** Link will change the way the Y’s tens of thousands of staff and volunteers share knowledge and connect with one another across the Movement.

Built around curated topical communities, Link allows users to **ask questions, seek advice, share resources and collaborate in real time with Movement colleagues** of all levels and specialties.

GET TO KNOW LINK

**LINK IS EASY.**

Find what you need when you need it using:

- an optimized search function,
TEASER VIDEOS
AWARENESS & ADOPTION
# COMMUNICATION

<table>
<thead>
<tr>
<th>Date</th>
<th>Tactic</th>
<th>Objective/Message</th>
<th>Audience</th>
<th>Responsible</th>
</tr>
</thead>
</table>

## PHASE: Q4 (Oct, Nov, Dec)

<table>
<thead>
<tr>
<th>Date</th>
<th>Tactic</th>
<th>Objective/Message</th>
<th>Audience</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct. 1</td>
<td>Begin Link influencer strategy development</td>
<td>Here’s why I love Link... It’s MOBILE! (testimonials, top 3/5 benefits, etc:)</td>
<td>Influencer social networks</td>
<td>MarComm to draft posts/new guide/creative assets for influencers to push on their social channels. KM help select/recruit influencers (engage Y-USA leadership)</td>
</tr>
<tr>
<td>Oct. 2</td>
<td>Executive News</td>
<td>Link feature tailored to CEOs—Push notification tools/guides</td>
<td>CEOs/C-Suite/EDs</td>
<td>Link team to provide content to Vanessa/Ashley</td>
</tr>
<tr>
<td>Oct. 8</td>
<td>Email</td>
<td>You are missing out! Here are the top 3 reasons to log into Link...</td>
<td>Non-link users</td>
<td>MarComm to draft, build send. TKM to provide Link user email list to be cross referenced with all Y staff list</td>
</tr>
<tr>
<td>Oct. 11</td>
<td>Email</td>
<td>You may have missed this... copy of email noted above</td>
<td>Send to list non-link users who did not open email noted above</td>
<td>MarComm to draft, build send</td>
</tr>
<tr>
<td>Oct. 16</td>
<td>Executive News</td>
<td>Link feature tailored to CEOs — Link Is Mobile!</td>
<td>CEOs/C-Suite/EDs</td>
<td>Link team to provide content to Vanessa/Ashley</td>
</tr>
<tr>
<td>Nov. 1 – Dec. 15</td>
<td>Kick Off Influencer Campaign</td>
<td>#DYK: Link is Mobile! Here’s how to download</td>
<td>Influencer social networks</td>
<td>MarComm to organize, influencers to</td>
</tr>
</tbody>
</table>

*NOTE: Reconnected with Lisa in Q3 (Sept. 11) to discuss Q4 plans*
"I want to learn a dozen languages and give tours at the United Nations" is what I used to tell grown-ups who pestered me about my future.
MONTH-LONG INTRO WEBINARS

Missed an orientation session? No worries. Watch a recording!

**Make It Personal** - Learn how to set up your personalized dashboard, news feed, notifications and profile.

Download Video

**Join the Conversation** - Learn about Link communities and how to join the conversation through updates, questions and polls.

Download Video

**Find It** - Learn how to find information using the navigation, file folders and hashtags.

Download Video
#LinkValentine

You're unBEATable!
Gamification Points: 14

Add a Reaction 16

Maurecn Henrikson
02/14/2019 4:25 PM CST

Very thankful for this community!!!

#LinkValentine

You Are SHRIIMPPLY the Best!
Gamification Points: 14

Add a Reaction

#LinkValentine

I Appreciate You a Little S'MORE Each Day
Gamification Points: 14

Add a Reaction 17

Tymikia Glenn
02/14/2019 4:33 PM CST

This community ROCKS!!! Excited for 2019!

Tymikia Glenn
02/14/2019 4:25 PM CST

Love being apart of this amazing team!!!
A BIG WIN: Y-USA’S NATIONAL BOARD

Our National Board And Their...

Lisa Tallman in Board Governance
02/27/2019 7:55 PM CST
202

Add a Reaction • 9
RECOGNITION!
Link Training with a Personal Touch

Looking for a personal touch when it comes to getting the most out of Link for you, your staff and volunteers? The Knowledge Management team at Y-USA is offering to do a Link Orientation with Tips & Tricks virtually or in-person.

What’s required of you?

- **Work with us to schedule it.** For gatherings with a smaller number of staff (say, under 25), we’ll be happy to do a virtual session. For larger staff gatherings, events, conferences, etc. and in situations where Internet connection is unreliable, we will do our best to do an in-person session. Where possible we may ask you to be flexible if we have multiple requests within close proximity of each other.

- **Set hands-on expectation.** The best way to learn is to do it! We ask that participants have laptops (preferably) or smartphones/tablets and be prepared to use them during the training.

- **Get the word out!** Be sure to get the invites out to staff and volunteers.

I’m in! What’s next?

You can tell us you’re interested via the comments section below or email us at link@ymca.net.
MODERATOR APPRECIATION

Randy, You’re a Standout!

Tallman, Lisa <lisa.tallman@ymca.net>
To: Craig, Randy
Cc: Hess, Erica; Waller, Valerie; Green, Jerry

Re: Promotion Policy - YUSA - Inbox (2 Years) (2 years)
Expires: 11/1/2021

We could not verify the identity of the sender. Click here to learn more.

Randy
When it comes to Link, you’ve been identified as a STANDOUT among Y-USA moderators! Your commitment and dedication to the Marketing community on Link is greatly appreciated and has not gone unnoticed. We have an extra bonus thank you gift for your hard work as we celebrate our first Y-USA Moderation Appreciation Day. Please join us today at 2pm in conference rooms A&B.
Y-USA AND LOCAL Y INTRANETS ON THE MOVE
KM TEAM

COO

SVP, Talent & Knowledge Management

Lisa Tallman
Senior Director

Elizabeth Hererra
Coordinator

Kara Archer
Community Strategist

Jerry Green
Community Strategist

Kaleena Escallier
Community Strategist

Emily Hatteberg
Editorial Manager

Tracy Barr
Senior Editor
FACTORS IN MANAGING COMPLEX CHANGE

MORE POWERFUL MOVEMENT

A culture of knowledge sharing.
OUR VISION

Our vision is that all Y staff and volunteers:

• share knowledge and experience
• learn from each other in ways make us all smarter and
• have a welcoming space to build meaningful connections
**BASELINE METRICS**

**Culture & Leadership**
- Segmented annual Link user survey:
  - Network Partners (SDPYs, Alliances, and TPYs)
  - Executives (VP and above)
  - Moderators
  - General users
- Monthly engagement levels:
  - Moderators
  - Y-USA leadership
  - General Link users

**Roles & Responsibilities**
- Moderators
  - Attendance at monthly meetings
  - Completion of required trainings
  - Monthly engagement level

**Platform Level**
- Net Promoter Scores for key audiences
- Overall user engagement level
- # users who have logged in at least once
- ROI score (adjusted to be Y-specific)

**Community Level**
- Community rank and score*
- # new social items
- Comments/replies, reactions, and views on social items
- Total file views
- Most/least viewed/downloaded files
- Page views

* Develop formula for score to take into account #members and other significant engagement criteria.

**Phase 2**
*Identify metrics for these components in 2020:*
- Communication
- Curation
- Knowledge Harvesting, Packaging, Dissemination
- Strategic Plan Objectives Related to Knowledge Sharing
LOOKING AHEAD: KM ROADMAP

A cross-functional team at Y-USA has defined a strategic knowledge management roadmap that will serve as a guide toward long-term results and keeps us focused. We’ll use the roadmap to:

• Guide resource allocation
• Guide decision-making
• Tie strategic objectives together
• Identify additional uses for the Link platform
• Serve as a communication tool
ROADMAP INSIGHTS COLLECTION PROCESS

- Identify Purpose, Components & Characteristics
- Identify Insights to Be Collected
- Collect Insights
- Synthesize Insights