

2017 Objectives - July 2017

Financial Metrics Based on June 2017 Financial Statements and Membership Report

Goal	YTD/Status
Financial Metrics – by 12/31/17	
2017 Surplus: \$25,000	\$425,369 vs. budget of (\$259,641), \$685,010 positive variance
Membership: 47,000	45,948 vs. 45,940 (6/27/17); flat from 2016 See report for explanation.
Development (budget): \$2,466,500 – Foundation and ancillary contributions to US Sailing	
US Sailing General - \$690,000	\$813,674.43 - donations YTD
Olympic Medalist - \$1,766,500	\$441,532.92 - donations YTD
Strategic Programs - Status	
Youth	
Design and launch Sailor Development Framework	Youth, Education and Olympic staff working together to outline the core components. See the Education Department report for details.
Develop recreational pathway	Sailor Development Model includes both racing and non-racing development. Its rollout will be a huge opportunity to promote and support recreational youth sailing in a variety of disciplines. In process of hiring a new Youth Recreational Sailing Manager.
Adult	
Promote US Sailing Education brand and implement proactive marketing to grow core programs	Marketing plan for Keelboat programs developed and being implemented through multiple channels. Safety at Sea and First Sail marketing plans under development with SAS print ads being launched in 3rd quarter of year. US Powerboating plan to be developed.
Launch and grow Safety at Sea 2.0	SAS online and Coastal SAS online were launched in April and May respectively. To make current SAS online course compliant as an alternative to the one-day Offshore SAS, two chapters have been filmed and are under edit for full implementation in Fall 2017 (October time-frame). Review & updating of Host Agreements

	for 2018 SAS courses underway TBC by 8/15. Registration process for SAS Courses under review. Plan to bring registration in-house.
Activate First Sail	Expanding outreach to more locations. 57 new since 1/1/17 (70% increase over 2016 EOY). Certificate of completion program rolled out in early July. FS sharing media stories with USS.
Competitive Services & Support	
Complete UCS (Universal Certificate System)	Integration of the ORC rule within the UCS is complete. The final implementation to roll out ORC via the UCS requires the developers at the ORC to finish their development to post generated certificates to the ORC database; this is in progress. Discussions regarding the IRC implementation are underway as the SAP team works to align with the developers from the IRC rating office. All is on target for issuance of all IRC, ORC and ORR certificates for the 2018 season through the UCS.
Develop and launch new RM education offering	Ongoing course development and acquisition of video and audio for development of RC 201; building course modules; anticipate beta testing fall 2017 and full roll out spring 2018.
Olympics	
Implement new 5-ring program strategy	Both the Performance and Business sides of the 5-ring strategy well underway and progressing with positive initial indicators.
Marketing and Communications	
Improve member satisfaction – 20% increase in value, satisfaction and understanding	2017 Organizational Benchmark Survey Complete
Implement Effective Communication Capability – broaden distribution, increase awareness	New Blog and Video Series “This is What We Do” launched
Administration	
Complete move to RWU	Mover selected. Moving calendar created with milestone dates identified to ensure we meet the move date of September 15th
Improve processes and efficiencies	Whiteboard meeting has been scheduled to streamline our fulfillment work

Association Report – July 2017

CEO Summary – Jack Gierhart

The first six months of 2017 have gone by quickly and it is hard to believe August is right around the corner. As you will read in the following pages, we have made a lot of progress, as well as encountered some challenges as we implemented our new staff structure. Overall, however, the Customer Connect strategy is having a very positive impact on the office, our responsiveness to members and the quality of the products and services we are providing. Internally, our team is working really well together and the interaction with volunteers is also positive and productive. While we continue to make refinements, there are a couple of areas which we have yet to accomplish what we need to; we will be focusing on changes in the coming months.

Overall, we are on target and plan. From a budget perspective we are ahead of plan – revenue above target and expenses below, although some of this are timing issues. Our cash position has eased as support for the Olympic program is starting to come in. Membership is underperforming as I discuss below and we will be working on that. Donna provides a detailed financial discussion below.

Our fulfillment process design and operations is one area where we encountered challenges this past winter and spring. As part of the structural changes, we consolidated four fulfillment processes from across the organization into one functional department. We made some tweaks around the edges, but did not have the opportunity to fully standardize the function. We are now working with a cross departmental team to start with a clean piece of paper and redesign the process with the customer, efficiency and economy in mind. We expect to change not only how we are delivering, but what we are delivering. We expect there are significant improvements we can make in this area.

The other area that needs work is membership. Within the new structure, we no longer have the traditional Membership Department. We split membership responsibilities across all departments: youth, adult, competitive services, engagement, operations/fulfillment and marketing and communications. The engagement side is going very well and fulfillment is being addressed as mentioned above. Communications are improving and our events in the field are being well received. However, we have not established the right fit or approach with regards to acquisition and growth. The key channel departments have a membership responsibility and they understand this, but we need to pull all the pieces together; I assumed this would come organically. The good news is that with our new CTO, Mike Waters, onboard the main technology responsibilities shifted off of Lauren's plate. She will be taking on a more proactive role in membership management and acquisition and working with me and the different departments to develop and execute a comprehensive membership strategy. Overall, our membership numbers are flat with growth in some core areas and declines in others – organizations and keelboat. Keelboat may be timing and process-related which we are looking to address in the fulfillment review. As for our budget

shortfall, we budgeted aggressively and we have not hit those sales targets to date. We will be looking to make adjustments to this and clarify the issue in the coming month.

Another significant project on our plate is the Strategic Planning Project, which began back at the end of April with an off-site in person board and senior staff meeting. A considerable amount of progress has been made on preparing US Sailing for its next level of growth and service to the sailing community, as represented by the changes in our organizational structure and staff. Changes also continue to take place in the world of sailing, including: increasing fragmentation of the sport; flat participation; aging demographics; time challenges; and technology and innovation.

As US Sailing moves to the future, it is important to have a clear and shared understanding about the roadmap the organization will use to capitalize on the newly established structure and go-to-market approach, build on previous capacity-building activities, and pursue creating more value to US Sailing's customers. This roadmap needs to help US Sailing channel its energy to engage opportunities that move toward the vision, in support of the mission, and reflecting its values along the way. The roadmap should also be accompanied by practical tools that help different people make consistent decisions on a daily basis about how they spend their time, energy and resources as they travel down the road.

In the pursuit of our mission, the goal of the Strategic Planning Project is to establish organizational strategy and plans to help US Sailing reach its vision. The purpose is to establish a deliberate, explicit and shared understanding of how it will channel its talent, focus its energy and utilize its resources as an organization that enables US Sailing to reach its next level of growth and impact on the sport of sailing.

Toward that end, we will come away from this project with:

- a set of organizational strategies for reaching its vision in pursuit of its mission.
- specific tactical projects, activities and timelines to translate the strategic framework into focused action.
- an agreed-upon set of success measures to assess performance and make course corrections when needed.
- tools for guiding decision-making on commitment of time, energy and resources used in pursuit of opportunities for growth and impact.
- a deliberate and disciplined strategic planning process US Sailing will use to lead the implementation of the strategic plan.

Over the past month we formalized a working group that will take the foundation and fundamentals refined by the Board in April and defined a clear process and timeline for the project. The strategic planning process will involve three main phases of activity.

- 1) Data Gathering and Analysis (July 2017)
 - Examine US Sailing's Values, Mission and Vision
 - Examine US Sailing's future operating context

2) Strategies Development (July – September 2017)

- Scope priority opportunities to pursue
- Design organizational strategies
- Develop strategy implementation tools

3) Implementation Planning (October - December 2017)

- Identify projects and activities to translate strategy into action
- Design coordinated implementation plan
- Initiate strategic planning management process

The goal is to have the organizational strategic plan in place in time for US Sailing budgeting activities taking place in late fall 2017.

We assembled a core working group comprised of several board members, the senior staff and group of external stakeholders that represent, and are experienced across, the broad spectrum of the sport – youth, community, clubs, racing and cruising. This working group will drive this process and interface with all of the key US Sailing stakeholders – committees and volunteers, members, industry, etc. – to ensure this is an inclusive and comprehensive process. Stay tuned for regular updates on this project and opportunities to contribute to the process and provide feedback.

The move to Roger Williams is just around the corner. We contracted a mover and will relocate on Friday, September 15th. The office will be closed that day and reopen on Monday, September 18th. We consulted with other NGB's as well as Roger Williams on moving strategies and have developed a plan that will follow a tight timeline and minimize disruption. The building renovation is close to completion; flooring and millwork installation is currently underway. I walked through earlier this week and it is looking fantastic. The office furniture and workstations will be installed during the second half of August and we will have approximately two weeks to address final details. Work goes on here internally at a fast pace to digitize our decades of documents and we continue to identify pieces for sale, donation and disposal. We have a great team of Lee, Lauren, Martha, Robin, Donna, Tim and Brad who are managing the move and preparing the staff. Georgia is finalizing a campaign that will launch in the next week to raise donations for the furniture and investments we have made in the property. There will be some great naming opportunities and other ways to support the new home of US Sailing. We are looking forward to an official ribbon cutting / office opening on Thursday, October 19th during the in-person board meeting. We will send out invitations and hope that those of you who are in the area will please join us.

With new directors coming onto the board, the new US Sailing Foundation continues to develop and grow. The Foundation is the fundraising entity supporting US Sailing Association programs, initiatives and services through donor investment. Its mission is focused sharply on supporting the future of sailing. To thrive, the sport must inspire new sailors and grow participation in all types and at all levels of sailing, while upholding the highest standards of excellence and fairness. To do so, USSF will invest in three core areas:

- 1) Access – expand participation;
- 2) Highest standards in training – develop and promote; and
- 3) Competitive excellence – opportunities to excel

This requires change – change in how and where sailors engage. The US Sailing Foundation invests in programs and services that align the sailing community and drive innovation.

Georgia and Lorie are implementing new fundraising tools and finalizing the development, mechanisms and structure of key marketing materials – website, brochures, slide decks, etc. A good deal of focus is currently on securing Olympic resources, but as we develop that program, we are building parallel elements for the broader organization. We are working on bringing new trustees into the Foundation and developing creative fundraising strategies and programs. We are drafting a mid -year board report that will be completed within the next several weeks, along with a report to donors.

Thank you to our Board and all our dedicated volunteers for all you do for the sport. I hope you are finding time to get out on the water and enjoy the fruits of your labor and commitment. The team here continues to rise to the occasion and strive to continually improve our organization and how we support our volunteers and members. I am impressed with their determination and it is a pleasure every day to come and be part of this great group. Please enjoy the updates the directors present in the following pages and know that we welcome your feedback. We hope you enjoy the rest of the summer and please stop by and say hi if you are in the area.

Cheers,

Jack and the US Sailing Staff

Department Updates - July 2017

Finance – Donna Kane

- **Audit and 990 Update**

The audit was completed for the Association and presented to the Audit Committee on July 12th. The draft audit is attached for board approval. The Foundation 990 for 2015 was presented to the Foundation board on July 5th. The 2016 Association and Foundation 990's are attached for board approval.

- **Variance Analysis for Attached Financials**

There is a \$420,366 surplus at the end of June against a budgeted deficit of \$259,641. Of this variance \$172 is in investment earnings. Revenue from investments was budgeted for \$99K for the year and is \$222K year to date. Another \$198K is in grants from The Coast Guard that were not budgeted; \$79K of this is from the prior year deferred revenue.

- **Revenue**

Overall revenue is \$490,850 ahead of budget.

Membership revenue is \$174K below budget and \$37K ahead of the prior year. (See Lauren's Membership Report).

Total public support is \$575K ahead of budget and \$362K behind the prior year. The variance to budget is in a \$125K restricted grant to the REACH program, \$293K contribution to the Olympic program for the purchase of boats and unbudgeted restricted contributions to the Education and Adult programs. We are \$29K behind schedule with unrestricted contributions. The variance with 2016 is the recognition of \$550K in pledges for the Olympic program.

Sponsorship consists of cash in the door and VIK. The VIK is booked as we use it there are timing difference in the revenue and expenses being below budget. This year the SAP VIK is being booked at \$25K a month for a total of \$300K for the year instead of at the end of the fiscal year. The Olympic program VIK for coaching is included and is offset by the Coaching VIK expense. We are ahead by \$28K in the timing of sponsorship cash.

Program revenue is \$140K ahead of budget with the major variance of \$127K in registration fees, revalidation is \$10K above budget, and new certificates is \$9K above total budget. Sail numbers are below budget by \$11K which is offset by a donation of \$10K.

The variance in USOC performance funding is timing; the next payment is confirmed for July.

Publication sales are ahead of budget by \$50K which is timing of new publications.

Miscellaneous income is below budget by \$42K. Revenue from the Foundation of \$87K has not been recognized yet and unbudgeted items are the sale of boats.

- **Expenses**

Overall expenses are \$189,157 below budget.

Salaries and benefits are \$17K below budget. There are variances in each department with the moving of staff to different departments. The major variances are in wages (positive \$54K) and temporary services (negative \$33K); we have used temporary employees to fill some open positions until permanent staff could be hired.

Operating expenses are \$177K below budget.

VIK expenses for coaching in the Olympic program were unbudgeted as was the VIK income which offsets the expense. Industry VIK is \$62K below budget to correlate with the below budgeted VIK income.

Major variances under budget due to timing are in Printing \$71K, Coaching Fees \$26K, Logistics \$25K, Advertising \$25K and Events \$30K. We are still getting in reimbursement requests for the Memorial weekend courses which created a timing issue for Non-Staff Travel \$52K and Instructor Fees \$17K both under budget year to date. Royalties are below budget by \$14K which is timing.

The major variance in expenses over budget is registration fees \$89K which is offset by the \$127K variance in registration fee revenue. Other major variances over budget are in Shipping & Postage combined of \$28K which should decrease going forward and Publications of \$23K which is timing. Organizational grants are \$35K above budget due to the unbudgeted REACH grant mentioned above.

Technology – Mike Waters

I would like to thank the entire US Sailing family for this opportunity to shape the trends and directions in information technology moving forward. I am in a bit of a whirlwind of properly closing out my previous responsibilities with IBM and, in parallel, gaining an understanding of each of the functional areas that make up our organization.

In the past 10 days that I have been on board my focus had been on meeting with all of the stakeholders in education, development, marketing, competitive service, OC, race administration, operations and all levels of member engagement. I look forward to deeper discussion and action with the IT team to be a better partner and deliver measurable quality.

My short-term direction is tactical: protect our information and brand, drive through the move to the new location at Roger Williams University and assure that transition is smooth, rework of the store for compliance and work to understand the matrix of the organization. The document scanning project is working at full speed and about 40% complete.

Strategic initiatives have yet to be formed but my philosophy will include the move to cloud services that will free up valuable resources in both people and technology to focus on higher value work. I will develop a project to adopt a consistent set of tools that our talented people will use to better collaborate and maintain security. I will continue a focus on 'how does this benefit the membership?

Membership – Lauren Cotta

We hovered around 45,500 active members for the first half of this year. The negative membership revenue variance is due to aggressive budget numbers. Compared to 2016, we are only 189 members behind. Although below budget, we are collecting more revenue than last year due to the dues increase. June was a good halfway point at which point we finally bounced back in the active member category after seeing negative growth in the prior three months. The lack of a dedicated Membership Department is a challenge. But we are dividing membership responsibilities amongst departments and will continue to work on achieving better numbers in the second half of this year.

Youth – John Pearce

The first half of 2017 has been a building period in many ways. Staff turnover in Championships and Youth Recreational Sailing Manager positions has meant that many tasks have been handled by interim teams. Many thanks to Nancy Mazzulli who has been interim Championships staff, our intern Ava Grafius and all of the staff that have pitched in to help with Youth Department tasks this spring and summer.

Going forward, we have Meredith Carroll (Youth Development Manager) splitting her time between Youth and Olympic Departments, working on racing and high-performance youth programs such as Championships and ODP. We are searching for a new Youth Recreational Sailing Manager to replace Windy Key and take the lead on all things outside of the racing "pyramid." Among her many roles within the organization, Lee Parks continues to spearhead the Junior Olympic Sailing Festivals as well as provide crucial insight and institutional knowledge to our department.

Thanks to our great team of Schedulers within the Education Department, we have already exceeded some of our goals for Smallboat Certification Courses. There still remains immense potential to grow our footprint in some of these areas; this will be a key responsibility for the incoming Youth Recreational Sailing Manager. The Sailor Development Model project, which is outlined in the Education Department report, will also fuel interest in these courses.

Junior Olympic Sailing Festivals are in peak season and continue to represent a strong network of local and regional youth racing events. Championships have gone well to date, with the Chubb Junior Champs coming up in early August being the last regatta in the series. A comprehensive Youth/Junior Championships debrief will be conducted after the season to identify process improvements to be implemented in the 2018 season, particularly with how responsibilities are shared between the Host Club and US Sailing, as well as communication and registration processes.

Reach had a great spring and summer of activation at regattas, boats shows, Tall Ship festivals and the America's Cup education zone. Details of these events can be found on the [Reach blog](#), which serves as a great platform for engagement with kids and families at these public-facing events. When our new Youth Recreational Sailing Manager comes on board, they will continue to champion Reach to the public.

Course	YTD	2017 Goal	# to meet goal	% complete	2016 total
SMALLBOAT					
<i>Sailing Counselor</i>					
Courses held	16	25	9	64%	23
Course attendees	129	250	121	52%	197
<i>Level 1 Instructor</i>					
Courses held	127	136	9	93%	144
Course attendees	1442	1496	54	96%	1580
<i>Level 2 Instructor</i>					
Courses held	20	18	-2	111%	13
Course attendees	202	198	-4	102%	154
<i>Level 3 Coach</i>					
Courses held	5	8	3	63%	5
Course attendees	40	80	40	50%	34
REACH					
<i>Reach Educator Courses</i>					
Courses held	7	23	16	30%	21
Course attendees	62	248	186	25%	175

Adult - Betsy Alison

2017 saw the creation of a new Adult Department responsible for 6 major programs: Keelboat; Adaptive; Safety at Sea; Adult Championships; US Powerboating; and First Sail. In May, both Karen Davidson and Nancy Mazzulli moved over from Education and Member Engagement, respectively, to take on major areas of responsibility within the Adult Department. Below is some data from mid-year reporting.

Nancy, working with intern Ava Grafius, took lead on managing and coordinating aspects of all Championships (Adult and Youth) with the primary focus on the Youth events being held in June and

July. Nancy and Ava worked with John Pearce on those events and are now focusing attention on the Adult events which run from July through November. With Multihull Champs successfully completed in April and US Singlehanded Championship underway, seven more Adult Championships are still to come. Once things settle down in the fall/winter and the Youth Department takes over the Youth Championship events, Nancy will come on board with Adaptive programming moving into the 2018 season.

Karen has been fully engaged in the operations side of things with Keelboat programs, First Sail, Safety at Sea and US Powerboating. Karen is working point with new Keelboat and Powerboat schools that have applied to come on board with US Sailing, and with the various network of schools to schedule instructor courses throughout the year. Our Accredited Schools Certificates have been adjusted to be in conformity with each other so that the look and feel for programs across the board are consistent. She has done a great job on the technical side of all of our programs. Typically, four to six schools sign on annually; thus far in 2017, seven new schools are confirmed with several more in the wings. One new Cruising Powerboat school also joined as an accredited center.

To date, there are 33 Keelboat instructor courses on the calendar that have either been completed or are still to be held. In the first half of 2017, we matched the number of scheduled courses on the calendar and are on track to meet and/or exceed the number of instructor certifications issued. US Powerboat Instructor courses, though behind to date in the number of courses held, have almost met projected output for Instructor certifications. Again, only being halfway through the year, I expect we will meet or exceed the number of certifications issued. Keelboat online sales are very slow, but interest by sailing schools is growing and with some targeted marketing over the fall and winter promoting the value of the product and ease of use along with making the online course final test comparable as an alternative to the in-person written test should improve 2018 sales numbers.

The 2017 Safety at Sea season has finally ended, and we are in a review period prepping for 2018. The number of in-person courses were the same as 2016 but with more certifications issued. With the Newport-Bermuda race on the schedule, we anticipate a busy 2018 season. We are about to embark on a marketing plan for the fall/winter season to promote Safety at Sea courses both in-person and online. The online products were launched too late in 2017 to actively promote the programs but, with some active marketing and promotion, 2018 numbers should be substantially higher. As of June 30th, 216 individuals completed SAS online, and 19 completed the Coastal SS online. Some proposed changes for 2018 would include: in-house registration with the ability to link a SAS certificate to a member ID; standardization of slide deck format; approval of a "refresher course" for sailors who have taken International SAS within the past 10 years; using updated SAS online as an alternative for the one day in - person Offshore SAS; and creating a calendar to post Offshore and Coastal events that identify what level of SAS training is required for that specific event.

First Sail is growing. We are up 70% in numbers from December 31, 2016 (81 in December compared to 138 to date in 2017). New locations come onboard every week. Our goal is to reach 200 by year's end. Targeted marketing with funds raised at the Sail America conference in May will help us in this endeavor.

Opportunities to grow the cadre of US Powerboating trained instructors are there. A marketing program is still to be developed, but the plan is to engage LSOs and attempt to have at least one trained powerboat instructor on staff at every LSO in our system. As we have seen in the past week with the Centerport tragedy, the best prevention for accidents is education and hands-on training.

Course	YTD	2017 Goal	# to meet goal	% complete	2016 total
KEELBOAT					
<i>Instructor Courses (all levels)</i>					
Courses held	17	35	18	49%	31
Course attendees	85	166	81	51%	154
<i>Basic Keelboat courses</i>					
Certifications issued	1075	3500	2425	31%	3163
<i>Basic Cruising courses</i>					
Certifications Issued	555	1200	645	46%	1146
<i>Bareboat Cruising courses</i>					
Certifications Issued	416	875	457	48%	858
IPCs Issued	103	130	27	79%	170
POWERBOAT					
<i>Instructor Courses</i>					
Courses held	9	15	6	60%	9
Course attendees	59	70	11	84%	74
SAFETY AT SEA					
Seminars held	23				23
Certificates Issued	2012				1977
ADAPTIVE					
Workshops held	2	3	1	67%	4
Certifications Issued	7	36	29	19%	36

Olympics (Performance) - Malcolm Page

Active Olympic Leadership Team (OLT) Initiatives

- **Cultural**
 - Create Winning Spirit
 - US Sailing has a long and distinguished Olympic history that has been forgotten by the current generation of athletes campaigning within recent times. Aim is to build and create this belief into these athletes, or “Winning Spirit” that USA can be the leading Olympic nation again.
 - A team approach is being established to help build this strong culture. A strong component of the team culture will be strong leadership with inordinate team values. These values will continually be adapted within a system to meet the generational athletes of the time.

- A new USST logo was launched. Created as a sign of the new professional way forward, this new logo represents national pride, best of the best, excellence, technology, alignment to US Sailing and a positive culture.
 - **Performance**
 - Strategy
 - To create the flip, from the historical athlete driven campaign, to system-driven program.
 - This system is focused on the athlete to bring resources and expertise to allow them to unleash their talent.
 - Method
 - To secure the world's best coaching leadership for each Olympic discipline. This role needs to have the technical experience, athlete sporting mindset and management skills to lead each sub team.
 - To create technology focus from the sailing team level, based on a science approach. Projects will focus from individual disciplines to team wide research that will lift the knowledge base for current and future generations. The Olympic Department has a new person to lead this area who comes with experience and success from another recently successful sailing country.
 - Education/Library: The Olympic Department is working with the Education Department to capture the best practices and knowledge to help prepare the existing team members and also the greater US Sailing committee.
 - USST has had a success in recent times on the international circuit, with two medals at prominent events.
- **Sustainable**
 - A system with strong leadership is being setup, to ensure we maximize the short-term potential of the athletes, but also create a structure that will learn and develop over time to bring US Olympic Sailing back to being the dominate country.
 - Domestic Fleets: A key partnership with Oakcliff has seen the birth of the Triple Crown series. This is utilizing a qualifying series of regattas into a three final event where athletes can win Olympic campaigning money. The aim of this annual series is to build larger fleets within the USA and assist the current campaigner leaders towards the next Olympic Games.
- **ODP**
 - Youth Development Manager: A greater alignment with the Youth Department has been formed in creating the YDM position. This will support both the Youth and ODP with a full-time role. This alignment makes sense with the common stakeholders

(young athletes, parents, organizations, yacht clubs, distributors and class associations).

- 2017 Youth Worlds Team: After a successful Youth Championships, the 2017 Youth Worlds Team has been announced to represent the USA in this year's event being held in Sanya, China in December.
- ODP Travel Teams: The 2017 ODP travel teams have all been announced and will be attending various World Championships over the summer months.
- One notable non-announcement was on the 29er Worlds representation; this is due to a local World Championship to the USA, being held in Long Beach, CA. The ODP is bringing wider support as there is greater local USA participation.

Olympics (Business) - Jim Campbell

Active Olympic Resource Bank (ORB) Initiatives

- **Fundraising**

- Strategy 1 (Short-Term) Major Gifts Campaign
 - Focus on creating a 2020 Match to launch our Medalist Program which will create urgency and generate needed cash flow.
 - Key players: Jim, Georgia, Brian Keane, Jack and Bruce.
 - Execution mode in Wave 2 of 4 mailing tailored letters with our new Olympic brochure enclosed. Campaign completion at year end.
 - In final process of locking down \$1M Match Pool. Have secured pledges for \$1.65M to date.
 - We expect to see continued positive results by the end of summer and build momentum as we move into the fall to fund the System that Malcolm and team are building out on the performance side of the Olympic Program.
- Strategy 2 (Long-Term) Create Olympic Sailing Endowment
 - Initial framing discussions underway with key people. Working closely with Georgia in the initial framing process.
 - This idea represents an exciting new aspect not previously attempted by US Sailing as a sustainable way to fund our Olympic Program for the long term.
 - Continue working through the process in order to gain conceptual agreement which will lead to building and selling mode.
 - There are other aspects of this strategy that will be developed and validated in August.

- **Facilities**

- Centers of Excellence

- West Coast: Conversations with StFSF continue. Additional aspects of the facility being considered. Exciting projects that could represent a positive momentum shift and launch of this new organizational concept for the USST and an important piece of our new system.
 - East Coast: Working with USSC in Coconut Grove. Details forthcoming related to facility renovation and property enhancement. Funding confirmation will follow. Then build out for the fall seasonal shift to southern Florida.

- **People**

- Talent Retention Strategy

- College Alignment: Key USS leaders partnering with College Sailing leaders to create a solution that was sparked by a generous donor who has offered to buy boats to enable the idea. The idea is aimed at helping slow the drain of top sailing talent for the ages 18 to 24.
 - Career Paths for Olympic hopefuls: Working with select key leaders that will help shape a solution to this material challenge. Identifying core team members.

- Olympian Research Project: Sparked by Malin Burnham, is now in Phase 4. Carol Cronin is leading the project for USS and now focused on interviewing top international Olympic Medalists from the past 2 Quads. The project is progressing as planned and already yielding insights that is confirms underpinning the build-out of our new System.

- Technology: Connecting current knowledge set with future leaders and funders of this future aspect of our system. Peter Logan (new IR&D director) with Mike Waters (new CTO) with Bill Kreysler (Chair StFSF) with Malcolm to explore new tech frontiers.

Offshore – Nathan Titcomb

The first half of 2017 was very productive for the Offshore Department. We have focused primarily on three main areas: training of measurers; developing the Universal Certificate System; and our core business of processing rating rule certificates.

On the measurement front, we set the goal of having any sail certificate submitted for a measurement rule rating certificate be submitted by a certified sail measurer. Utilizing some of the best practices in the World Sailing In House Certificate (IHC) training program, we conducted seminars at lofts in the North East, Southern California, Northern California, Pacific Northwest, Eastern Great Lakes and the Chesapeake

Bay. In total, we trained and certified 80 official sail measurers. As we approach the fall we will expand this program to the Southeast, Chicago and Galveston Bay.

Much of our time leading into the rating rule season focused on the development of the Universal Certificate System (UCS) with SAP. While the UCS was originally intended to launch for the ORC rule starting in April, we took a step back to align the specific measurement attributes between ORR, ORC and IRC. This took considerable time, but was a necessary step to speed the integration of the IRC rule this fall. The ORC rule is now fully integrated and operational from the US Sailing side within the UCS. The last remaining step requires the ORC database developers to “flip the switch” for when certificates are processed through the UCS they are updated to the ORC database concurrently.

In June, a team from SAP was onsite at the US Sailing offices with three goals:

- 1) Conduct interviews to witness how the staff utilized the UCS and identify areas of improvement for future development.
- 2) Conduct interviews with boat owners who use the UCS currently to identify wants, needs and areas of improvement.
- 3) Identify opportunities to expand the reach of the UCS and the SAP/US Sailing partnership to reach a broader audience.

The SAP team completed all three goals in their week at the office. Of particular note was the session with a focus group of key members of the sailing industry where we delved into ideas that would be relevant to sailors across the United States. We continue to investigate these concepts further as we focus on the partnership between SAP and US Sailing.

Lastly, we have been focusing on the core business in the Offshore Department: helping owners obtain rating rule certificates. To date, we have processed 220 IRC certificate transactions, 102 ORC certificates and 734 ORR certificate transactions. The greatest change to the processing workflow for the 2017 ORR rating season has been the complete adoption of the UCS for processing certificates. The development time spent in the offseason of 2016 and the early stages of 2017 have drastically improved the workflow and response time for the Offshore Department staff. One telling statistic regarding the general adoption of the UCS by the boat owners is the number of users (boat owners) with active accounts in the UCS. At the end of 2016, there were approximately 450 registered accounts; today there are 735. This adoption is very encouraging for the 2018 season with the IRC rule and ORC rating certificates to be issued via the UCS.

Race Administration - Matthew Hill

During the first half of the year we worked on ensuring that all members who wanted them received their copies of the RRS for 2017-2020. While there were some kinks in the notification and distribution process, we have taken a variety of steps to ensure complete distribution - varied forms of notification, including additional complimentary copies with course materials for race official seminars, and several automated

web processes. The demand for rulebooks was substantial and in early July we printed an additional 10,000 copies that incorporated changes and corrections from World Sailing, including their new logo, which they adopted last September - just as most MNAs were printing their rulebooks.

The rulebook is available in digital format for both iOS and Android operating systems through the US Sailing Bookstore app. The decision to make the RRS available in this format, which allows us to offer a variety of other publications in digital form as well, has required some adjusting on the part of our customers who were accustomed to a stand-alone app. However, we have addressed most customer concerns, the publication works well and both versions include extensive content from *Dave Perry's Understanding the Racing Rules* - all at no charge to members.

We have begun developing the very popular and newly updated *Join the Race Committee Team!*, the standard text for race committee training, in a digital format. This will also be available for purchase through the Bookstore app, and will include digital content such as video and audio of race committees at work as well as animations illustrating key concepts. This will be a tremendous addition to our training library, and we expect it to be very popular.

Also in production are the *US Sailing Judges Manual for 2017-2020* as well as *The Appeals Book for 2017-2020: Including the World Sailing Case Book for 2017-2020*. Both publications remain in a holding pattern pending final revisions from their respective committees. Once completed, we expect to print and publish.

When Race Administration joined the National Faculty last year, we set a goal of creating an effective and accessible mark-set training program for support boat operators. That initiative is moving forward as we plan for this year's Nat Fac meeting. We have added several members to our corps, are collaborating with the Powerboating faculty and plan to offer a mark-set instructor course in conjunction with this October's Nat Fac meeting.

Just as other NGBs have adopted SafeSport training and background screening for volunteers, we are moving forward to put these protections in place for our officials and instructors. Our work with US Sailing Ombudsman Robert Lane and others with expertise in this type of work will focus on developing a system that effectively screens volunteers and paid instructors, respects the privacy and rights of officials, and responds effectively and nimbly to complaints about officials and instructors so they can be resolved as quickly as possible. The goal is to create a system that will cover all volunteers and contractors across the organization who have contact with athletes.

Foundation – Georgia McDonald

Cash In - YTD

US Sailing \$813,674.43	Olympic Program \$441,532.92	Pledge Payments - Prior Year's \$303,466.00	Total Cash-In \$1,558,673.35
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Overall, fundraising efforts for the first half of the year are strong. In particular, YTD donations to the Association have exceeded the amount budgeted for 2017: Budget: \$690,000 vs. Actual \$813,674. While general fundraising efforts have produced results consistent with prior years, there were two significant gifts that pushed the results beyond the 2017 forecast. We do not view these gifts as anomalies, but rather as indicators that our message and the Foundation's mission to focus on the future of our sport is resonating with our market. We are confident that sizable gifts will continue to grow as we progress.

Fundraising for the Olympic effort is moving forward, but got off to a slow start due to the addition of new staff and the integration of a newly restructured Olympic Sailing Committee and volunteer force. The new team took some time to acclimate and formulate plans, but their plans are taking shape and they are now soliciting prior Medalist supporters for renewed gifts in support of the Tokyo 2020 Team. Adding incentive to that effort, they are pooling donor funds to use as a match for gifts received in 2017 (up to \$1 million). The Foundation staff is supporting their efforts administratively, and on an advisory basis when requested in addition to stewarding and securing gifts from a few existing Medalists from the last quad. For more information about the short and long term Olympic fundraising strategy, see the Olympic Department section of this report.

The Olympic Program 2017 fundraising forecast was estimating using the funding received in the 1st year of the 2016 quad as a model, plus an estimate developed prior to the new administration. Against that budget of \$1,766,500, \$441,532.92 has been secured and another \$495,000 in verbal commitments are awaiting signed pledge forms. The USOC secured a significant gift of \$580,000 for the US Olympic Sailing Technology Project from one of their Board members, and we will receive \$250,000 from that gift in 2017.

The CRM software solution purchased by the Foundation in 2016 is being discontinued, and we are in the process of implementing a new (better) solution. Raiser's Edge by Blackbaud is considered the gold standard in fundraising software and offers impressive capabilities for managing donor information, acknowledgements, tracking relationships and communications in addition to accounting, wealth screening and more. We will go live with the new system in early September.

The Foundation continues to recruit members to the Board of Directors and Board of Trustees. Recently, David Loring, Director of Software Solutions at Blackbaud joined our board. Tom Siebel, founder of Siebel Systems and the new start-up C3 IOT, has joined our Board of Trustees. Both gentlemen bring incredible expertise in their respective fields as well as long experience with philanthropy – in addition to being avid sailors. Our goal is to bring five new Trustees to the Board in 2017 and recruit new members to the Board of Directors as well.

In July, we will launch a campaign to offer naming rights for elements within the new US Sailing Headquarters. There will be an opportunity to name the building, entry foyer, board room, trophy case, library and the collaborative space. In addition, we are seeking funding for a Technology Fund to upgrade our technology infrastructure as well as funding to offset the cost of "essentials" such as desks, chairs, work areas, computers and more.

Education – Stu Gilfillen

The Education Department has seen four staff changes since the beginning of the year. Karen Davidson moved to the Adult Department, but has temporarily retained oversight of the Keelboat and Safety at Sea course registrations until the fall. James Shannon joined us as the Scheduling Coordinator for Areas D and E and has already been communicating with key stakeholders in those areas about how to get more courses on the calendar as early as this fall. Peri Burns was promoted to Educational Operations Manager, a role that has her managing the scheduling for New England and also overseeing the inventory required for courses. Lastly, Pat Crawford moved from the Race Administration Department to the Product Development side of the Education Department. Currently, she continues to work with Race Administration courses, but we expect this to change by the fall. As the Resource Development Specialist, she will ensure consistency in the “voice” of our publications and also work to catalog much of the content within US Sailing in a way that is accessible to the membership. As a former librarian, she’s uniquely suited to this role.

One of the most important projects we are currently working on is the new Youth (i.e., smallboat) Curriculum. This endeavor, which is being undertaken by Grant Spanake, John Peace, Dave Dellenbaugh and myself, is designed to help provide a structured curriculum for sailors from beginner to ODP. We will present a formalized draft of the project to the National Faculty in late October for review, but if you are interesting in seeing the initial version [please take a look here](#). Please be aware that much of the structure is subject to change, but one thing we were certain to do was use our “Little Red Book” as the basis for this matrix.

After the student level is developed, we expect to upload it into the Checklick system which will provide the opportunity for resources, such as videos and lesson plans, to be made available for instructors and coaches. We also will review our materials and instructional/coaching programs to ensure consistency. This is a multi-year process but we expect to have stage one complete by the end of 2017.

From a scheduling standpoint, we experienced great success with our Level 1 and 2 programs. Level 2, in particular, has seen great growth and we expect the trend to continue. Level 3 Coach has seen some growth but not as much as we would like. While we expect to finish with a lower enrollment than anticipated for 2017, we do see a great opportunity for growth in the future. Once the new Youth model is developed, we expect there to be an uptick in the corresponding courses, including the Level 3 Coach course.

Our Product Development team has established a plan for developing products and is in the process of developing a structure for determining organizational priorities. That process is a more organization-wide endeavor and will need to be put in place before we can be truly streamlined.

Below is an update regarding our current Educational Department goals (and their status):

Goal #1	Develop and implement a Performance Quality Assessment (PQA) program for Instructors and Accredited Schools
Status	Ongoing. Primary barrier is cost as third-party assessment (which is the ideal method for PQA) is costly. We are looking at modifying some of the volunteer-driven evaluations that the American Camping Association utilized. We expect to have a formal proposal in place by Fall 2017 in time to discussion during the budgeting process.
Goal #2	Increase operational efficiencies by establishing consistent processes for scheduling and registration
Status	<ul style="list-style-type: none"> ▪ Pre-course fulfillment (i.e., shipping of course materials) has been moved to Allied, our fulfillment center, for smallboat, powerboat and Reach courses. Keelboat, Race Admin, Adaptive and potentially Safety at Sea will all be moved by year's end. ▪ We are working on revamping the Regional Training Coordinator program so as to better define their role. Our expectation is that they will assist the scheduling coordinators in better integration into the calendars of the regional sailing associations. In areas (like Long Island Sound) where this is already occurring, we have experienced great success.
Goal #3	Define a process for selecting the delivery medium (web, instructor-led, paper) based on course content, certification requirements, instructor availability and other considerations. This strategy will guide course development and delivery decisions, cost estimates and implementation decisions, in addition to defining requirements for US Sailing future web development strategy
Status	<ul style="list-style-type: none"> ▪ Continuing to utilize Asana project management plan to track product development. ▪ Projects are currently being prioritized for completion based on the following criteria: <ul style="list-style-type: none"> ○ Scope of Impact (i.e., number of people it will benefit) ○ Cost for development and implementation ○ Needs/requirements of Channels ▪ In the coming months we are looking forward to working with the other departments to develop a "filter" to more formally determine product/program development choices. In the interim, we're working to keep up with demand.
Goal #4	Number of products and programs launched/redesigned, on-time within budget
Status	<ul style="list-style-type: none"> ▪ Safety at Sea Guide was printed in mid-February ▪ Safety at Sea Online and Safety at Sea Coastal are both live ▪ Adaptive Sailing Resource Manual is 90% complete, undergoing final review ▪ Teach Sailing the Fun Way is currently at the printer ▪ Updated version of Bareboat Cruising scheduled for completion in October 2017 ▪ Yudu platform features digital versions of Basic Keelboat and Basic Cruising

Marketing and Communications - Dan Cooney

At the six month mark of 2017, the number one thing to report is the incredible efforts of the marketing/communications team as they say grace over a broad array of initiatives and programs. Hats off and sincere gratitude to Robin Dale, Jake Fish, Martha Fortin, Jon Graham and Josh Toso. The following is the direct result of their work product in collaboration with the rest of the staff and volunteers at US Sailing.

2017 Organizational Survey: The goal of the survey was to establish a benchmark of awareness for key US Sailing programs and a benchmark on the quality of customer service we are delivering. The survey was aimed at local sailing organization leadership. We received over 900 responses and are positioned well for a continued longitudinal study of both awareness and customer service satisfaction.

Website Redesign: Last month we outlined our current state of the project and briefly outlined our strategy going forward including adding external resources. We have selected a partner to manage the website project, one with extensive WordPress and SEO expertise. Our anticipated timeline is to work throughout the late summer and fall with an anticipated year-end completion date. It's a major project and there will be challenges and we are ready to address them head on! The result will have strong positive leverage across the organization. In the meantime, some solid increases for YTD Pageviews (19%) and unique visitors (8%) to the current sites. Also great increase in Instagram followers (17%). More communications metrics below.

Sponsorship: Executed renewals with Chubb/Gowrie and Sperry. Signed new USA Junior Olympic Sailing Festivals sponsors Zim Sailing and KO Sailing and also the new Ginger Beer of US Sailing – Regatta Ginger Beer.

The US Sailing Team signed on Helley Hansen as the Official Technical Apparel Provider and Marlow Ropes as a Supplying Sponsor.

Sponsorship of NSPS hit record highs with 21 sponsors, 18 exhibitors, 5 on-water demo sponsors and over \$35,000 of sponsorship and exceeding budget by 100%.

In collaboration with the Olympic leadership, and a sponsorship working party thereof, we have initiated **an RFP process** to research potential partner agencies to help us package and sell our team and association property assets. We received responses and are narrowing down the field for a recommendation to the OSC.

Membership Campaigns: This year we introduced vertically integrated membership incentive campaigns which include targeted email, Facebook advertising, Sailing World/Cruising World digital banner ads, custom landing page on US Sailing website, Scuttlebutt ads, Sailing World Newsletter and video elements. The campaigns have been very successful. Campaigns include:

- Dave Perry Rules Package

- US Sailing-branded neck gaiter
- Cool College T-Shirt Offer (around College Sailing Nationals)
- Sailor Bags

Keelboat and Safety at Sea Marketing: We have partnered with the Adult Department to help them achieve their goals and objectives by creating integrating marketing plans for their programs. For the keelboat program, we developed and executed two campaigns which included print, digital and social media advertising and have two campaigns planned for second half of the year. Next on tap is Safety at Sea which will launch in the Sailing World's Volvo Ocean Race issue in September.

US Sailing Blog: The goal for the blog is to empower those that power the sport, to become a trusted source of relevant and original sailing content that is valued and shared throughout the community. Thus far, we are pleased that every post has been picked up by Scuttlebutt, immediately establishing the blog's relevance in today's national sailing conversation. Bloggers to date include President Bruce Burton, Tom Duggan, Dave Perry, Dave Dellenbaugh, John Pierce and Deb Marlor from Offshore Sailing School. Be on the lookout for a great post on sailing fitness by Olympic Gold Medalist and Crossfit Games athlete Anna Tunnicliffe.

This is What We Do is an ongoing video series designed to increase awareness of US Sailing programs and services. We endeavor to add something of practical value in each piece and strategically release of the videos to promote US Sailing programs and events in a timely fashion. Thus far, we have featured Dave Perry on the Racing Rules, Chuck Hawley on Safety at Sea, Dave Perry on Match Racing and Hank Stuart on Race Officials. We will continue to release new videos throughout 2017.

American Sailor is a printed newsletter for members. The last edition featured the naming of the US Sailing Team, First Sail, JO's and a great article on getting millennials hooked on sailing.

Quarterdeck: We have produced two Quarterdeck e-Newsletters in 2017, featuring dedicated resources, news and information to support sailing organizations. In the latest May edition, and with strong collaboration with Membership Engagement, we updated the e-newsletter production platform. The whole new look got great reviews for design and reader experience.

College Nationals: US Sailing was excited to power the college nationals livestream. Our activation included on-camera branding, commentators wearing US Sailing apparel, US Sailing video commercials and "reads" to promote US Sailing events and promotion of a special edition college nationals t-shirt membership campaign. John Pierce, Annie Haeger and Board Secretary Martine Zurinkas were interviewed during the livestream production. Our social media was significant that week with a total reach of over 100,000.

First Sail Donation: In conjunction with the Adult Department, the marketing team developed a donation ask one-pager complete with levels for Founding Contributors to help fund the First Sail program through 2017. The donation ask was presented at the 2017 Sail America Industry Conference and we currently have 7 companies signed on as founding contributors with over \$20,000 pledged to program.

Championships: We are four-fifths of the way through our Junior Champs schedule and just beginning the adult championships schedule. Ongoing marketing support to these events is activated through social media, website, live streaming through Facebook, photo and video. We also provide sponsor activation support.

Membership Lifecycle Communications: Each member of US Sailing receives four print messages and five email messages during their 12-month membership cycle outside of any subscribed communications including e-USSailing, The Blog, Partnership Promotions, Quarterdeck, Medalist, Social Media, etc. We have completely re-vamped these nine touches.

Buzz Bars: Getting out beyond Portsmouth, RI to meet our members and future members has been a part of our strategy of building awareness and customer satisfaction. The “Buzz Bar” has been a proven winner with sailors at events. We have had a great presence at Charleston Race Week, Long Beach Race Week, and Chicago Mac. Next stop is the ILYA Annual Regatta in August. In addition to these engagements, US Sailing rocked the Orange Bowl by distributing 700 encouraging “Notes in a boat” and US Sailing T-shirts. This is the lighter, more fun tone we want to bring to most of our engagements points with sailors.



Website, Email List and Social Media Statistics:

Web Stats (Jan 1 - June 30)	2016	2017	Variance	
USSailing.org				
Visits	328,509	339,158	10,649	
Unique Visitors	212,785	218,588	5,803	
Pageviews	1,339,331	1,574,149	234,818	
SailingLeadership.org				
Visits	2,617	1,385	-1,232	
Unique Visitors	1,893	1,146	-747	
Pageviews	6,120	3,152	-2,968	
NSPS.USSailing.org				
Visits	1,382	3,427	2,045	
Unique Visitors	1,190	2,207	1,017	
Pageviews	2,191	6,035	3,844	
Reach.USSailing.org				
Visits	4,763	4,181	-582	
Unique Visitors	2,545	3,055	510	
Pageviews	8,582	9,024	442	
FirstSail.org				
Visits	5,512	9,158	3,646	
Unique Visitors	4,428	7,501	3,073	
Pageviews	12,971	18,288	5,317	
SailingCertification.org(.net.com)				
Visits	20,618	19,469	-1,149	
Unique Visitors	16,921	15,407	-1,514	
Pageviews	45,589	50,866	5,277	
USPowerboating.org(.com)				
Visits	24,417	31,939	7,522	
Unique Visitors	19,546	25,553	6,007	
Pageviews	52,744	70,951	18,207	
USSailing.blog				
Visits		10,729	10,729	
Unique Visitors		8,471	8,471	
Pageviews		15,243	15,243	
Totals				% Increase
Visits	387,818	419,446	31,628	8.16%
Unique Visitors	259,308	281,928	22,620	8.72%
Pageviews	1,467,528	1,747,708	280,180	19.09%

Email Lists & Social Media

e-USSailing (monthly)

- Current Distribution List: 32,465
- Average open rate for 2017: 20-25%

The QuarterDeck (quarterly)

- Current Distribution List: 12,042
- Average open rate for 2017: 22-27%

Partner Promotions

- Current Distribution List: 15,086
- Average open rate for 2017: 20-25%

US Sailing Blog

- Current Distribution List: 31,990
- Average open rate for 2017: 24-30%

Facebook

- Total Page Followers: 59,190 (+1,790 new Followers in 2017)
- Total Page Likes: 61,026 (+1,826 Page Likes in 2017)

Twitter

- Total Followers: 27,974 (+1,374 new followers in 2017)
- Tweet Impressions: 576.9k in 2017

Instagram

- Total Followers: 22,482 (up 17% since December)
- Average weekly impressions: 74,000+
- Average weekly likes: 12,000+
- Average posting likes: 1,200+
- Instagram stories: 2,000+ individual views per story frame per day

Snapchat:

- Approximate followers: 2000
- Utilized in a variety of settings: High school and college nationals, college sailing spring break week

Snapchat filters (example attached):

- 15 filters created
- 1,100 swipes
- 425 uses
- 20,100 views

Member Engagement - Katie Ouellette

With an entirely new team put together in 2017, the first-half of the year has been about growing and learning for the Member Engagement Department. The department strategy which directs our initiatives is to develop strong connections with Local Sailing Organizations (LSOs) by providing access to and knowledge of US Sailing Programs via proactive communications utilizing the US Sailing web presence, events, personal contacts, in-house staff and field representatives. Manage the membership lifecycle for Organizational Members and MVP.

The objective of the Member Engagement Department is to connect individual and organizational members, and Local Sailing Organizations (LSOs) to US Sailing's resources.

Below are the metrics we've identified to achieve this department mission as well an update on the status and challenges:

Growth in Number of Organizational and MVP Members

- **Status:** 1622 Orgs have renewed to date. Unfortunately this is down from 1807 Orgs in 2016. We have spent quite a bit of time and effort on getting orgs renewed including emails, mailings, special promotional offers and personal outreach.
- **Challenges:** Having a fulltime staff member dedicated to building relationships with LSOs made us hopeful that Organizational Membership would grow however it has not. 2017 is down from 2016 which was also down from 2015 (1912). This could be a matter of needing more time to better understand the needs of Organizations or a revamping of the Org Membership. We are currently working on an agenda for a 2018 planning meeting to look at the decline in Org Members, a new value proposition and possibly new benefits that Orgs would find valuable.

- **Challenges:** MVP needs to be reevaluated: what is working, what isn't, how can we improve the product. MPV Memberships are also down TYD from 2016.

Communications to Organizations

- **Status Quarterdeck:** To date, two Quarterdeck newsletters have gone out including our latest which was a new exciting fresh look to the newsletter. If you have not seen it please take a look. Marcy and Jake did a phenomenal job and we are incredibly proud of them: [The Quarterdeck](#).
- **Status LSO Outreach:** Many organizations have replied to outreach from Marcy and have directly contacted her seeking additional resources and donations and have even utilized the opportunity to simply say hello! She has enhanced relationship building through these communication touches. Marcy also conducted her first regional outreach trip to Northern California this spring and plans to conduct two to three more this fall and early winter.
- **Status Rolodex:** The Organizational Rolodex Project is well underway. This project aims to collect contact information from our member organizations for 5 specific roles within an organization. The Organizational Rolodex will enhance targeted communication efforts. With specific individuals designated as lead contacts for these different roles, we can be confident that content specific communications will be delivered to the appropriate recipients. We hope the Organizational Rolodex Project will yield an efficient and reliable process to update organizational staffing contact information to augment company-wide outreach.
- **Challenges:** Reaching Organizations continues to be a challenge and will be our biggest challenge in the Organizational Rolodex project. We will need to engage with the staff, Board, RSA Committee and volunteer community to assist us in getting the request into the proper hands in our initial effort to collect this data. We have an uphill climb in capturing these contacts but with the infrastructure in place to capture and maintain current contacts we hope the battle will only be in the initial data collection period.
- **Challenges:** Create and implement a new Field Ambassador program.

Successful NSPS

- **Status:** NSPS was very successful meeting every goal we set. We had 302 attendees and over \$25,000 in cash sponsorship. Presentations were high quality, attendees were engaged and Austin proved a perfect venue for afterhours networking.
- **Challenges:** Combining the National Conference with NSPS was not very successful. SLF proved to be a better lead-in with a more diverse group of attendees representing many committees however the time away from home for volunteers and added workload on the staff has made us rethink the pairing of National Conference with SLF or NSPS moving forward.

- **Challenges:** Keeping the conversation going with event attendees after the event.

Venue Selected and Contract Signed for NSPS 2019

Status: A contract has been signed for NSPS 2019 at the Hyatt Regency Jacksonville – Riverfront. I am confident Jacksonville will be a welcoming host for this event. The entire city came together to host US Sailing for our site visits and the Visitors Bureau put forth funds toward our 2019 event. We look forward to supporting the many sailing programs in that region by bringing NSPS to Jacksonville.

Boats Shows, Regional Symposiums and US Sailing Night at LSOs

- **Status Boat Shows:** US Sailing had a strong presence at the Pacific Boat Show and visitors to our booth were very positive about US Sailing and all we are doing. These shows continue to be a positive outreach with our members and local sailing communities. We have confirmed our booth space at the Newport International Boat Show, Annapolis Sailboat Show and Annapolis Powerboat Show.
- **Challenges Boat Shows:** Keeping the conversation going with booth visitors after the show.
- **Status Regional Symposiums:** Five Regional Symposiums were held in the first-half of the year with over 170 attendees.
- **Challenges Regional Symposiums and US Sailing Nights:** Promoting and soliciting hosts continues to take effort but with Marcy's constant communication with Orgs this is something on the "menu" of offerings she can present. We had budgeted for 16 Regional Events so our work is cut out for us this fall.

Achieve 80% Customer Satisfaction Based on Survey Results

- **Status:** In an effort to best serve our members, we have fully implemented Zendesk, our live chat feature on the website. We now have three means of contact with members; email, phone and chat. Since it launched in late May have served 161 chats with the average response time being 2m15s. 30 active chats is our weekly high and that seems to be growing as we have now added the chat feature on every page throughout the website. The average chat time is 6m45s. Our satisfaction rating upon completion of a chat is 95.2%. This platform has proved to be very successful for us thus far. Emily is doing a great job serving the members via chat and Deb is doing a phenomenal job responding to emails in a timely manner. Both Emily Dobb and Deb Rainey are serving our members on the phone with nearly all of our callers receiving a live voice greeting.
- **Challenges:** Frustrations with the website and fulfillment time of member kits starts some conversations off in a negative tone. We look forward to continuing to work with the other departments to enhance the ease, speed and access to information.

A metrics not highlighted but worth mentioning is the ongoing planning for Sailing Leadership Forum 2018. We hope to see you all Feb 1-3 in St. Pete Beach, FL.

With the department fully staffed and working incredibly well together as a team, we look forward to tackling the second half of the year!

Education and Outreach Manager – Jessica Servis

US Sailing's Reach Initiative just completed an educational partnership with the America's Cup Endeavour Program where we were involved in engaging youth and the sailing public in STEM and Sailing at the 34th America's Cup through a number of Reach activities.

Currently we're finalizing three resource videos that were done in conjunction with [Waterlust](#). Here is a quick view of [video #1](#) that correlates to Reach Module7: Upwind Sailing.

The partnership with [Endeavor](#) provided value to our membership in the following ways:

- ✓ US Sailing branding was view to every person coming out of the AC VIP area
- ✓ US Sailing was seen at the forefront of STEM & Sailing education
- ✓ US Sailing had a presence at the biggest sailing event in North America this year.
- ✓ US Sailing members were able to follow the event over three days through the eyes of our Reach Students. They took over US Sailing's Snap Chat and Instagram Social media platforms for three days.
- ✓ Through the potential partnerships and relationships build with US Sailing staff on the ground for the duration of the event, we were able to make new connections with potential donors, current & potential members, sponsors, and leaders in the industry while protecting our brand and programming.
- ✓ Watch & learn more about our partnership [here](#).



While worthwhile, the AC partnership had unanticipated staffing costs and pulled resources for an event that was not a US Sailing-run event. Additionally, staff was focused on operations of activities and worked with kids instead of donors and partnerships.

Going forward Endeavour is doing a terrific job branding boats and providing seed funding for program in key areas. However, when it comes to an ongoing financial plan for open access sailing, they are lacking. US Sailing needs to be aware of Endeavour and ensure they are correctly representing our work together to date and that they are using several Reach modules in their programing and they were trained by US Sailing through the Reach Educator Course in 2015 & 2016.

For AC, the measurement is the number of donors, sponsorships, and partnerships that emerge from having US Sailing present at the 35th America's Cup. For the Waterlust videos the metric of ROI will be video views and shares. A priority of the videos is to engage all sailors in STEM.



Thanks to the support of US Sailing donors and our Partnership with the America's Cup Endeavour Program we were able to support 2 Reach students to travel to Bermuda for an experience of a lifetime filled with six days of STEM and sailing experiences. Reach more about McKenna and Abigail's experience [here](#) in the Reach Blog. As a thank you the girls put together a [video](#) highlighting their experience.

**All videos are in the editing process. I will send links to the final versions when ready.*

Administration - Lauren Cotta

Below is our progress on the operational tactics defined for 2017:

Consolidate the fulfillment processes from Training, Race Administration, Membership and Offshore to one fulfillment department. Create a procedure manual to document existing processes to ease transition and train new staff.

The processing of certifications, sail numbers and membership and post course materials such as evaluations and instructor payments were consolidated from Offshore, Training and Membership with a transition from Race Administration to fulfillment still remaining. Notes were taken on the tasks from the respective areas and formatted into a Standard Operating Procedure template. Anila joined us in March of this year and was essential with Tina to make this aspect of Customer Connect a reality. Unfortunately, Anila will be leaving us at the beginning of August. We are thankful for her work and that we are able to confidently train the next person with a set of documented procedures.

Consolidate the number of vendors used for printing, postage and mailing and streamline the fulfillment processes.

Looking to the next six months, we will make significant efforts to streamline the fulfillment processes. Our work will begin with a blank whiteboard. The previous departments created fulfillment processes on their own and now that these responsibilities are one department we recognized the need to create one workflow to ease the workload on fulfillment staff and improve customer satisfaction.

Donna, Julia and I are working together to gain a better understanding of store operations. We developed a new monthly report to track sales, cost and net profit. The data behind this report will also help identify high and low performing products allowing us to make more informed decisions for the future store products. Mike's expertise has been essential to move along new store conversations.