

2018 QUARTERLY ASSOCIATION REPORT (JANUARY - MARCH)



CEO Summary - Jack Gierhart

Spring has finally arrived, although you would not know it based on the weather - it was snowing in Boston yesterday, April 19!

This month we are providing a quarterly report that includes updates from all the departments on their activities so far this year, so my section will be brief. Financially we are on track with an overall positive variance. Our cash position has eased somewhat with strong progress in fundraising. Membership numbers improved in March from February, and we are almost level with our numbers from last March; revenue is up from last year and slightly above budget.

On the HR side, our CMO search continues, and we have five strong candidates that are moving to the second round. Our goal is to have this position filled and up and running by July 1. We are also posting an opening for a Major Gift Officer in the Foundation. This person will be responsible for development activities in support of all the Foundation goals. If you have ideas on candidates, please let us know.

We are also looking to fill two positions that will be vacated shortly. Will Ricketson has accepted a position with American Magic as its Communications Director. Will has been an integral part of the Sailing Team for over five years and set a high bar with the content and work he produced. We look forward to continuing to work with Will as the US Sailing – American Magic partnership evolves. In filling this position, we are looking to align the priorities of our Olympic program with the evolving communication needs of the organization and expect to revise this role. Marcy Eichner is also moving on to a new challenge on the West Coast. Marcy has been an integral part of the Member Engagement team, focusing on establishing a relationship platform with our organizational members. We have made great progress in this area and the new person will have a solid foundation to build on. We wish both Will and Marcy good luck in their new ventures and thank them for their contributions to US Sailing and the sport.

A working group has spent the last six weeks analyzing the World Cup Series Miami event and developing a plan for financial sustainability. We have identified elements relating to participation, revenue/sponsorship and expenses/operations where we can make changes to improve the bottom line while maintaining a world class regatta. We are in discussions with World Sailing to make amendments to our agreement. So far World Sailing is understanding of our situation and receptive to our thinking, and we will learn in the next several weeks if we can come to an agreement that works for both of us.

The recent attention in the Olympic community around sexual misconduct and the work we have done to supply Congress with information have driven us to revisit all our processes and procedures around safety for our athletes and youth in the sport. One area we are revamping is our background screening. We analyzed the process of our current vendor and determined it is not as thorough as we would like. We have been working with another vendor and developed a process that is more comprehensive, thus eliminating the shortfalls we found in the service provided by NCIS, which is endorsed by the USOC. Our legal committee has reviewed our new approach, and we will be rolling it out over the next two months. It will also be available for member organizations.

Tarasa Davis and Lauren Cotta have been finalizing elements of the strategic planning project, focusing on the implementation and ongoing plan maintenance and updating. We will provide an update to the board on our April 23 call, and will have public documents available in May. We are also working on implementing/updating tools, procedures and practices needed to execute and monitor progress against the plan. We will establish a level of discipline in our operations that has not been in place previously, nor we believe is common in many NGB's. Expect to see these changes materialize over the next 9 to 12 months.

Earlier this month I traveled to Charleston Race week and spent a couple of great days engaging with volunteers, sailors and sponsors. US Sailing hosted the popular Buzz Bar. Bruce and Cory, along with Robin, Kate and Georgia, welcomed sailors each morning with a delicious selection of coffee. Bruce and I were offered the opportunity to welcome the sailors and thank the volunteers at the skippers' meeting, and I had the chance to sit in on the judges round table, led by Sarah Ashton, and field some great questions and feedback from this very active and committed group of volunteers. After racing, Malcolm was interviewed on the main stage by Alan Block and gave an update on the Team and Olympic program. Many OSC members were in attendance as well. US Sailing has a great partner in Randy Draftz and CRW, and it provides us a great opportunity to engage with our members and see what is happening on the water.

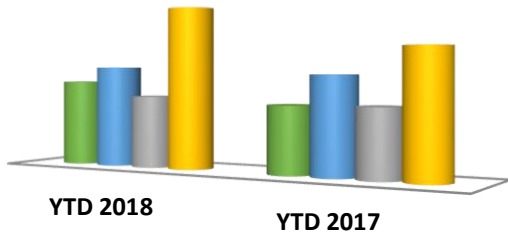
Please enjoy the full staff report that follows. The team is working hard and making great progress on our initiatives. Thank you to our Board and all the dedicated volunteers for your commitment and generous contributions of time and innovative thinking as we work to evolve the sport, attract new long-term participants and provide leadership across the country.

Cheers,
Jack and the US Sailing Staff

March 2018 Dashboard – Donna Kane

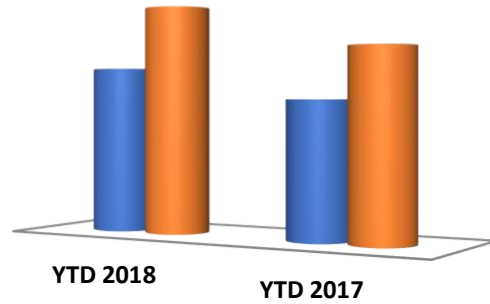
As of 3-31-18	USSA/USSF			Olympic			Total		
	2018	Budget	2017	2018	Budget	2017	2018	Budget	2017
Revenue	1,987,910	1,697,012	1,441,904	581,230	785,294	675,013	2,569,140	2,482,306	2,116,917
Expense	1,718,870	1,843,996	1,364,440	1,288,436	1,705,052	1,080,544	3,007,306	3,549,048	2,444,984
Surplus/Deficit	269,040	(146,984)	77,464	(707,206)	(919,758)	(405,531)	(438,166)	(1,066,742)	(328,067)

YTD Revenue



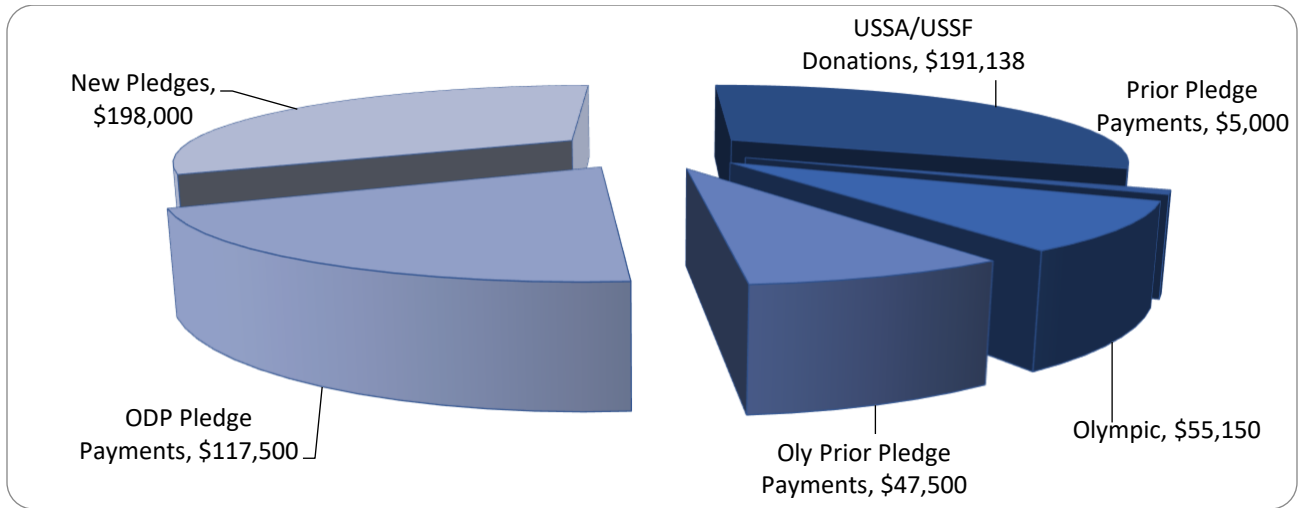
	YTD 2018	YTD 2017
■ Public Support	445,506	338,990
■ Membership	523,300	488,191
■ Sponsorship	370,575	340,331
■ Program Revenue	827,212	620,982

YTD Expense



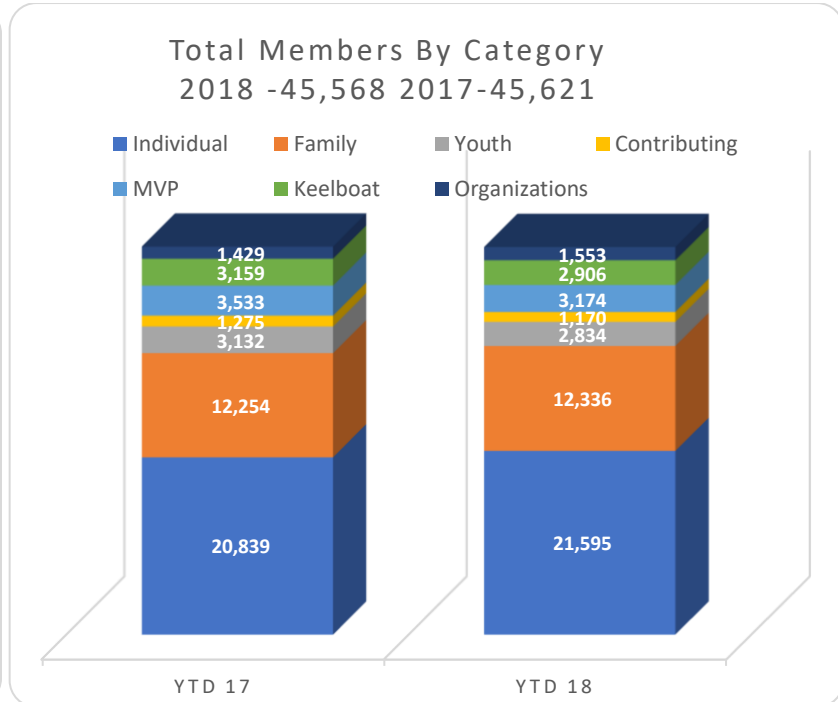
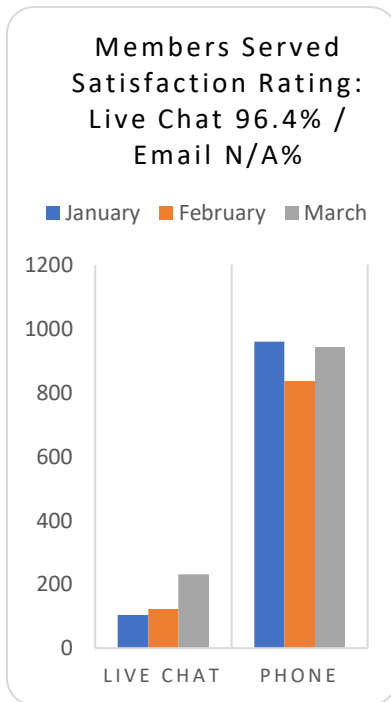
	YTD 2018	YTD 2017
■ Salaries & Benefits	1,241,688	1,007,799
■ Operating Expenses	1,700,704	1,383,681

Donations

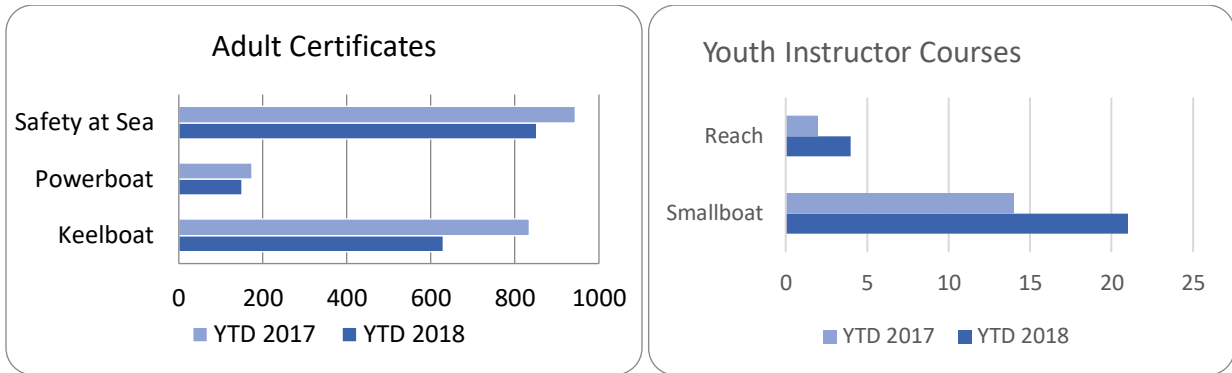


As of 3-31-18	Cash	Pledge Payments *	New Pledges	Total Cash & Pledges
YTD 2018	\$246,288	\$170,000	\$198,000	\$614,288
* Original pledge received prior to 2018				

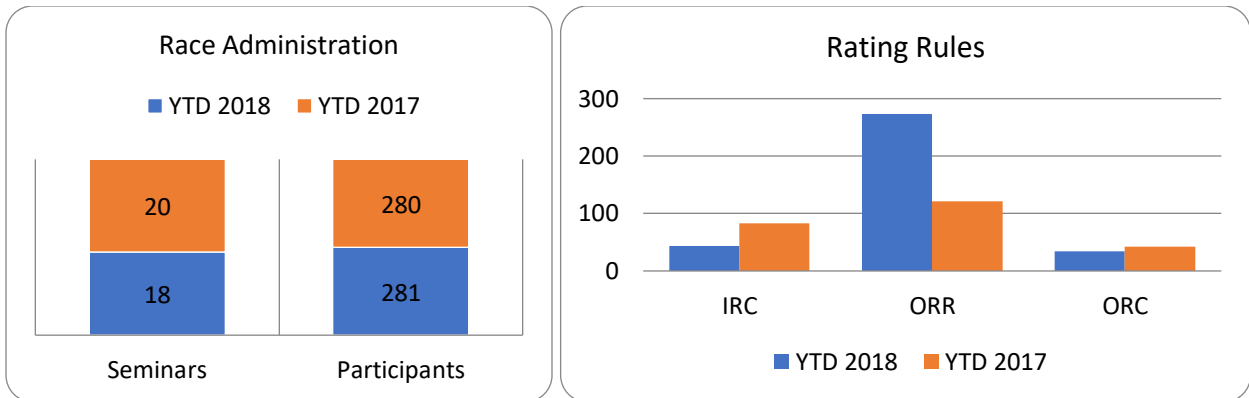
Membership & Member Engagement



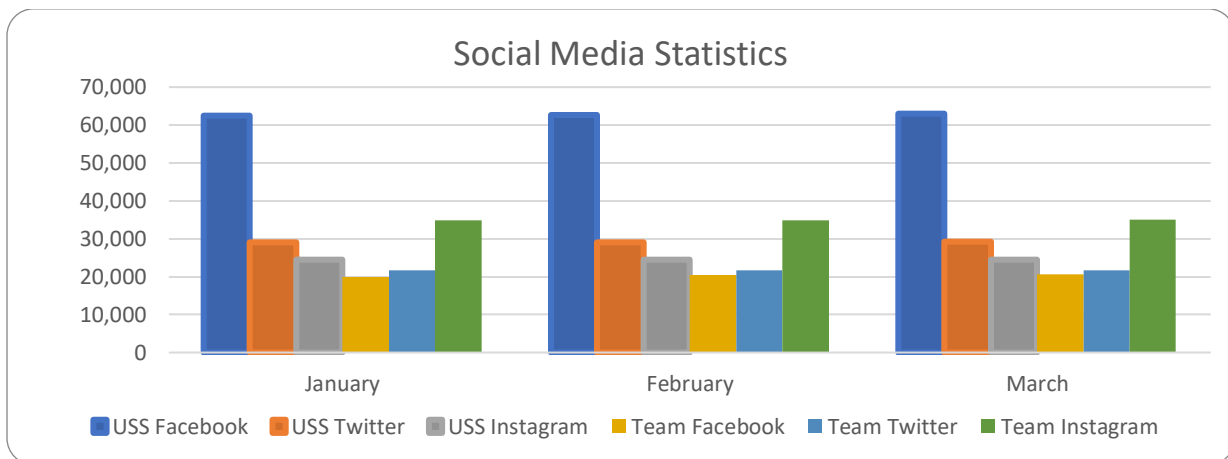
Adult & Youth



Race Administration & Rating Rules



Marketing



Targeted Communications and E-Newsletters - March 2018

Reach Student STEMcation Opportunities

<https://mailchi.mp/ussailing/2018-reach-student-stemcation-510-515-apply-now-1192641>

Important Information about SafeSport Training and Your Certification

<https://mailchi.mp/ussailing.org/important-information-about-safesport-training-and-your-certification>

2018 US Sailing Youth Championship Regattas

<https://mailchi.mp/2cbe0f1d0f76/youthchamps18-application-1192625>

2018 Reach Student STEMcation - Apply Now

<https://mailchi.mp/ussailing/2018-reach-student-stemcation-510-515-apply-now-1192617>

Special Offer for Sailing Leadership Forum 2018 Participants

<https://mailchi.mp/06439853c5d5/slf2018-thank-you-specialoffer>



The Quarterdeck Newsletter

<https://mailchi.mp/ussailing/the-quarterdeck-resources-for-sailing-orgs-030718>

Improve Your Sailing & Teaching Skills - Take a US Sailing Course

<https://mailchi.mp/8c95ced1d376/youthchamps18-application-1192585>

Improve Sailing & Teaching Skills - Courses for You and Your Staff!

<https://mailchi.mp/8610b428925b/youthchamps18-application-1192581>

Training Opportunities for Level 1 Certified Instructors

<https://mailchi.mp/ussailing.org/youthchamps18-application-1192561>

Training Opportunities for Level 2 Certified Instructors

<https://mailchi.mp/ussailing.org/youthchamps18-application-1192565>

US Sailing 2018 Reach Grant Applications Due Today

<https://mailchi.mp/ussailing/us-sailing-2018-reach-grant-applications-due-today-322018>

Video Highlights from Rolex Yachtsman, Yachtswoman of the Year Awards Ceremony
<https://mailchi.mp/ussailing/yofy-2017-18-video>

News Announcements and Editorial - March 2018

Roster Announced: 2018 US Sailing Team

<http://www.ussailing.org/roster-announced-2018-us-sailing-team/>

New National Standard and Resource Guide Available for Recreational Boating Skills Instructors

<http://www.ussailing.org/news-newnationalstandard/>

Thoughts on Choosing a Sailing School

<http://ussailing.blog/choosing-a-sailing-school/>

DEPARTMENT SUMMARY UPDATES

Director of Development - Georgia McDonald



Our Focus is in the Horizon A more comprehensive look at our fundraising progress and evolution over time can be tracked by following several key metrics. In addition to the monthly dashboard fundraising reporting, we will report on the following metrics quarterly. The value of this information will become more evident over time as we make year-over-year comparisons and use the ebbs and flows of donor support to schedule fundraising campaigns. Increasing new donor support, retaining existing donors and increasing the average gift through solid donor stewardship is the goal.

Quarter 1 - 2018

Total Number of Gifts	661
Number of First-Time Donors	336
% Retained Donors	10% *
Average Gift Amount	\$630.00

*Retained donors made a gift in 2017 and 2018. As we progress through the year, this percentage will increase to 80-90%.

During the first quarter, 2018 Foundation staff time was dedicated to several Olympic fundraising initiatives:

- A concerted effort to develop a focused Tokyo 2020/Olympic Program fundraising message, and the creation of presentations, digital and print brochures and email content that presents a consistent, compelling message to the donor community.
- Planning and Implementing a One-Design Challenge to raise Team funds prior to the combined World Championship in Aarhus, Denmark.
- Creating the content and fundraising plan for a revitalized Olympic Medalist campaign using Blackbaud Analytics to target a specific audience of affluent, competitive sailors. The campaign will launch in late April.

A Foundation Awareness campaign was launched to introduce the Foundation to our most philanthropic members. The mail campaign contains the new Foundation folder and cover letter and rolls out weekly, followed up with a phone call to each recipient.

We are ready to launch an initiative to raise funds for the new Youth Sailing Model, and it will utilize email, print and social media as well as person-to-person engagement over from May - July. Again, using the Blackbaud Target Analytics, we will be targeting individuals with a proven history of supporting Youth organizations, as well as USSA family memberships.

Olympics - Performance Malcolm Page - Business Jim Campbell



Olympic Resource Bank’s Fundraising Focus - Aarhus Now Campaign

In Q1, we launched a critical fundraising campaign for our 2018 Olympic Program. All fundraising efforts are being channeled through the Aarhus Now Campaign that began its planning phase in mid-February. The reason that this is so important is that the combined World Championships held in Aarhus, Denmark this August is “the” mid-Quad country-qualifier for the US Sailing Team (USST).

- Objective of Campaign
 - Short-term cash infusion: 100 Day Campaign, April 1 – July 9
 - Internal Goal: Raise \$2.5M by December 31, seeking most of funding by August 1
 - Disciplined execution of coordinated, short-term fundraising campaign
 - Bring New Major Donors to the Olympic Program
 - Broaden the base of support
 - Build positive momentum toward our 2020 Fundraising efforts
 - External Goal – Smaller, publicly announced appeal goals (e.g., One-Design Class Challenge)

- Case for Giving
 - Part of the planning effort was to create and agree on our core messaging for the Tokyo 2020 Fundraising; and
 - serve as effective guides (guard rails) all our efforts to improve consistency of our message.

Making an Impact in Tokyo 2020 and Beyond

It's Time - The Olympic Games changed in the 90's when the IOC changed the rules to allow professional athletes to compete in the Games. Prior to that, the United States was the dominant nation in sailing. In the 90's, other countries began to build professional systems for Olympic sailing, fueled by government funding. Since '92, this has propelled international sailors past those competing for Team USA. It's now time to turn that tide.

Pivot - A transformation in U.S. Olympic sailing is now underway, with the US Sailing Team building a tailored, unified team approach led by two-time Olympic Champion Malcolm Page. This culture shift will provide the leadership, professional coaching, technical innovation and comprehensive development that our top talent requires from the youth level through to the Olympic level. Ultimately, the system will establish a team culture to reignite a winning spirit that had previously propelled us to the podium.

New Coalition - The objective: provide our athletes with a professional sports system that will give them a path to success against other well-funded professional sports programs. America does not send athletes to the Olympics; Americans do. US Sailing does not send the US Sailing Team to the Olympics, a community of American sailors does. Fortunately, it comes full circle: advancements in Olympic sailing such as improved coaching theory, practice and technical innovation permeate every level of racing in the U.S. An investment in the US Sailing Team is an investment in the long-term health, relevance and success of racing in this country.

Crucial Moment - We stand at a defining place for the US Sailing Team. LA 2028 is only 10 years away. The urgency to support the 2020 medal potential teams is to provide the role models for our 2024 and 2028 pipeline. The 20-30-years old of 2028 are 10-20 years old right now, and they (and their parents) are looking at this Olympic generation for inspiration. With your help, our Tokyo 2020 success will demonstrate the power of the new process in place and sailing will be poised for greater success on home soil at LA 2028.

Pursuit of Excellence - Our nation's Olympic athletes aim for achieving the highest standards of excellence for all competitive sailors of every age, in every discipline. Chasing the rings changes people for the better. It's the journey that creates future leaders in sport and in life, and that leadership creates a positive cycle for our sport as we create exemplary role models for our sailors of all ages. Your investment will help fuel podium results for our athletes and nation for years to come.

Why 2018 Matters

August 2018 is the first and greatest chance for Americans to qualify our country for Tokyo 2020 at the Hempel 2018 Sailing World Championships in Aarhus, Denmark.

- Your generosity will be directly invested in critical building steps of our performance system, such as the implementation of the latest technology for training and equipment, for success at this August 2018 milestone event.
- The better the team's performance in Aarhus, the more funding the US Sailing Team receives from the U.S. Olympic Committee for 2019 and 2020.
- With your support now, the leadership of the US Sailing Team can continue to architect and implement a hybrid system tailored to help the U.S. restore its champion position on the Olympic stage.
- For deeper review, here is the LINK to our digital brochure: [Making a Difference: US Olympic Sailing In Tokyo 2020 and Beyond](#)

Director of Technology - Mike Waters

The first quarter uncovered several challenges regarding uptime and system availability based on the weather. Our new home in Bristol experienced several power outages and the inability to access the campus due to snow and a rough patch of storms.



Good news is that the current server farm is stable, our web presence is hosted externally, and everyone can access their email and many files from anywhere with our adoption of cloud-based Office 365. Productivity impacted, no one was “down.” We will evaluate and move what we can to places of lower impact. Redundancies will be created as are, what / if plans.

Progress on workflows, website and association management system continue while we do our best to keep the hackers at bay. We maintain a tight communication with our partners and are participating with state and federal authorities who have the resources. Organizations like ours are under siege and, frankly, we cannot spend our way out of harm's way. We will educate and take the necessary measured steps to minimize impact.

We are proud to have successfully contracted and trained on an athlete management system that enables the Olympic team to efficiently manage and communicate with the coaches and athletes from a single dashboard. This mobile solution is comprehensive and has been used

successfully by other NGO's and will provide visibility and accountability in places we may have been thin on to date. Rollout scheduled for the next camp. This solution is consistent with everything we are doing: 'Does this make sense for all of US Sailing? Where else can this be used?' In a future report you will see this being pushed to our development levels and beyond.

As we work to get costs in line and provide better service, we changed our cell phone carrier and our conference calling provider and ensuring that the proper tools in use and accounted for.

The team's rollout of Safe Sport integration and the yearly rework of the ratings rules into the SAP are complete and now move to the daily workflow.

In support of our hosting of the World Cup Sailing in Miami, a partnership was created with the city-owned Dinner Key Marina to assist them in getting internet back up and running for the residents of the marina in exchange for the ability to use the bandwidth to support the ever-increasing need and wants of the racing community. The project was a huge savings for the event, provided excellent service and proved our forward non-traditional progress. We must connect in every way we can. To build on this success, we are working with several events to consult or provide services including event applications, IT services, multimedia support and infrastructure. It is my opinion that these efforts will support our member clubs in a way that they may not have thought of, increase visibility into events beyond the shore and provide our sponsors, at any level, with value in connecting with participants and spectators for a greater experience.

Director of Operations - Lauren Cotta

In Q1 of 2018, our Operations team worked to help build the new website, deliver member materials and drive sales in our online store. Brady's onsite presence with the store at the Sailing Leadership Forum was a success. Aligning the booth with the same look and feel as Gill created a coordinated presence and drove soft good sales. We continue to improve our store experience by documenting procedures and refining our use of the systems in place. At the beginning of the year our inventory database was no longer PCI-compliant. We took the opportunity to consolidate all credit card processing to Authorize. Next on our list is to investigate postage expenses and other opportunities within our WooCommerce online store to track inventory.



Rachel's support of our new projects has been crucial to keep moving the organization forward. She's assisted Bryan, Josh and Design Principles to build the new WordPress website. Support of both the Race Administration and Education Departments to digitally deliver course materials created a positive experience for our Race Administration customers. The feedback and piloting

of digital materials with an online testing experience is exciting and a model we can look to replicate with other disciplines. As we continue to rethink how we deliver value to members, the cost savings realized from moving away from paper and fulfillment expenses can be reinvested to strengthen other areas of our organization.



An example of savings is with our member cards. At the end of last year, we rolled out a new card design. In lieu of a .40¢ thick plastic card, we are now using a .26¢ standard sheet of paper that includes a pop out card to realize a yearly savings of about \$3,000. The card template is purchased in bulk and printed on demand. The updated process reduced delivery from 4-6 weeks down to 2 weeks. We're also able to quickly turn around modifications to the card artwork or letter content as needed. Here is a screenshot of an Instagram post of a happy member with their new card!

Our membership statistics have improved so far in Q1 compared to EOY 2017. The number of active members is almost flat year over year with March at -.01%. Contributing to the stronger numbers are the successful member incentive campaigns run by Robin and elaborated on in the Marketing section of the report. We're taking a closer look at how to communicate with our expiring contributing members. This year we are also researching how to restructure our membership options for rollout in 2019.

Director of Marketing - Josh Toso

Website - The website, a long and cumbersome project that started back in the Spring of 2017, is nearing completion. Anticipated launch of the new website is May 1, 2018. The three main goals of the website renovation project are below, with quick explanations and updates for each:

- 1. Ease and Speed of Navigation** - Creating a new site map, creating new main navigation and secondary navigation options and reorganizing the website to enable the end user to know where to go and empower them to get there with minimal clicks.

The new organization and navigation options streamline the website's options to allow for easy and speedy navigation. We have decreased the number of main navigation options from 11 to 4 and reorganized the website to talk to who the CONSUMER is and what they are looking for.

- 2. Purging and Consolidation of Pages** - Bring external websites underneath USSailing.org, consolidating the vast amount of information to easy to view/easy to consume format, and cleaning up old and outdated information.

Many external sites have been consolidated and brought underneath USSailing.org including SailingCertification, Reach, CleverPig and FirstSail. NSPS and Sailing Leadership

Forum sites are next to be migrated over and there is a plan to give USPowerboating.com a face lift so that it follows along with the new website design. Consolidation of information throughout the site has allowed us to decrease our total number of pages from over 1,300 to just over 500.

- 3. Updated Look and Feel** - US Sailing has a new organizational structure, new and state of the art building and headquarters, and it should have a new up to date website to match.

The new look and feel of the website utilizes the newest and best practices of SEO and website design while using new tools to allow for seamless navigation and sharing of relevant resources throughout the site. The design of the site includes a heavy use of pictures which allows us to capitalize on the great imagery that our sport has to offer.

The website project has truly been a team effort throughout the organization. All the departments and staff have dedicated countless hours of work ensuring that the information is migrated correctly from the old site and that we are creating a new site that will serve our constituents correctly and proudly. Bryan Donovan and Rachel Reagan have been absolutely amazing and crucial to this project. We look forward to launching the site in the next couple of weeks and reporting on its success in the next quarterly report.

Sponsorship - We have continued our work with Dan Egan in acquiring new sponsors, consolidating efforts for both US Sailing and the US Sailing Team, as well as huge efforts around the World Cup Series Miami. We have established official relationships with both Sailing World and The Weather Channel as media partners, and both have begun to get off the ground in co-selling relationships, establishing brand connections, and implementing content creation. Strong prospects include Yeti, Hinckley, Goslings, Garmin, Yanmar and a few prospective auto brands.

Our current partnerships are very strong, with recent contract renewals with Harken/McLube and Hobie. We have several contracts up for renewal at the end of the year and are looking ahead to assess how we might be able to evolve and expand those relationships.

Sailing Leadership Forum had a total of 24 sponsors bringing in \$67,000 of cash and \$69,000 of VIK for a total sponsorship contribution of \$136,000 topping 2016's total of \$125,000. All sponsors seemed to be happy with the venue, setup and format of the conference. They were pleased with new and improved activation concepts including video coverage, event app, and having the Keynotes and General Sessions in the Exhibitor Pavilion. There continues to be a noticeable displeasure with rising sponsorship prices...something to keep in mind for 2020.

World Cup Series – Miami - During the medal races of Sailing World Cup Miami, US Sailing hosted the 2nd Annual World Cup Festival where the public was invited to Coconut Grove's Regatta Park to watch the racing live on a Jumbotron, medal award ceremonies, purchase event merchandise, as well as enjoy merchandise that local vendors had on hand. The Miami Grilled Cheese Truck was on hand to keep fans fed, and local Wynwood Brewery provided beverages. The local community came out in droves to support the sailors and enjoy the festival. Through social media, there were over 200,000 impressions viewed over the two days of the festival. The US Sailing Education Zone was also part of the festival and a big hit - over 200 local youth sailors

each day enjoyed learning about the importance of keeping our waterways clean and healthy through STEM education.



Debut of the Starboard Tap at World Cup – Miami

With the debut of The Starboard Tap, a customized, portable tap water filtration system, we can help keep our events green and prevent the use of single-use plastic bottles. During the World Cup alone over 5000 bottles were saved and competitors from across the globe were able to get “water the right way!” Next up for the Starboard Tap – Charleston Race Week. It will continue to make the rounds to major regattas throughout the year.

Lapsed Member Campaign

Month	Item / Incentive	Lapsed Member Renewals
January	World Cup T-shirt	160
February	Custom Etched Glass	270
March	Gill Hat	270
Totals		700

Association Communications – Highlights and Top Items



The **Sailing Leadership Forum** commanded an expansive communications plan that included multiple announcements and updates regarding features and attractions, registration information and reminders, and news coming out of the event. We focused heavily on social media content throughout the event, including fully produced Facebook Live streaming video on location. A total of 24 videos were produced (3 hours 45 mins and 8 seconds of coverage) and delivered through Facebook, capturing over 54,000 views from over 45,000 unique viewers with a total of 42,519 minutes viewed (that’s 708 hours and 38 minutes...OR 29 days, 12 hours and 38 minutes)!

We were also very active on our other social media outlets, photo and video channels, such as Twitter, Instagram, YouTube and Flickr. The communications plan also included post event targeted and personalized letter from US Sailing leadership to attendees, as well as special offers and requests for feedback.

- YouTube Playlist
<https://youtu.be/Iye8bnRnc0I>
- Flickr Photo Albums
<https://www.flickr.com/photos/ussailing/albums/72157690014519592>
<https://www.flickr.com/photos/ussailing/albums/72157690045737992>

US Sailing's 2017 Rolex Yachtsman and Yachtswoman of the Year Award winners were announced in January with expansive communications outreach and public relations both nationally and locally for award winners and finalists. We also supported the Awards Luncheon administrative, marketing and communications efforts. US Sailing fully covered the Awards Luncheon with news editorial, videos, photos, and social media with limited contributions from Rolex in these efforts.

- YouTube Playlist: <https://youtu.be/kot1SWuCCtA>
- Flickr Photo Album: <https://www.flickr.com/photos/ussailing/albums/72157693930297045>

US Sailing worked closely with World Sailing and the race organizers of **World Cup Series Miami** on communications efforts by assigning a press officer to handle daily reports, manage the media center, respond to media requests, schedule the media boats and drivers, conduct social media outreach and support Regatta Park promotions. We utilized our channels for distribution to enhance our coverage of the event and American athletes. In the months leading up to the event we coordinated efforts and planning with World Sailing and their communications team.

- Event Website - <http://miami.ussailing.org/>

Communications has made great strides in our approach to more focused and **targeted communications** to members and constituents. Many departments at US Sailing have been working closely with Communications on drafting and distributing this important and timely information, which has supported our many educational offerings (trainer courses, Safety at Sea, Race Official Seminars, Reach courses, etc.) being hosted by sailing organizations around the country. We believe this continues to enhance participation and general awareness of these opportunities and US Sailing programming.

Olympic Communications - Here is a link <https://spark.adobe.com/page/xKmJzFbcIMO6N/> to the *Status Report: Q1 2018 – US Sailing Team* created by Will Ricketson for a separate report. Some of you may have seen this already, but we thought it important to include in this report.

Youth Director - John Pearce

US Sailing's Youth programs are off to a solid start in 2018. Our staff of Jen Guimaraes (Youth Recreation), Meredith Carroll (Youth Development), and Lee Parks (Junior Olympics) are doing a tremendous job of not only implementing our programs successfully, but also improving our processes and strengthening our relationships with stakeholders. It's great to have such a talented and hardworking Youth team.

The *Youth Sailor Development Model* is taking shape and 2018 promises to be an exciting year as we communicate the goals and principles of the program and generate buy-in for the future. The goal is to grow the sport of sailing through retention and skill development. At the Sailing Leadership Forum, I presented a session called "Squaring the Pyramid" that was the first

opportunity to share the concept of the *Model*. A webinar recapping the session is [available here](#). In March, I presented at the Bayview Yacht Club in Detroit and the Foundry in Cleveland, with great discussion and helpful feedback. In May, the *Model* will have a webpage prominently located on USSailing.org and we will open the discussion with a post on the US Sailing Blog to promote the new book *Teach Sailing the Fun Way* and accompanying *Instructor Cue Cards*. The US Sailing Foundation will also begin a fundraising campaign to support the *Model*.

Of critical importance is the ongoing development of the system that will support implementation and adoption by youth sailing programs, called the *Sailor Skill System*. Stu Gilfillen and I are working with contractors Grant Spanhake and Blair Overman to create a set of teaching tools and resources that includes lesson plans that teach the broad skill set we are seeking to promote, as well as digital skill tracking through the Checklick and the Retrieve websites. We have six “Beta” programs from around the country that are testing these tools this summer, and the information collected will inform the structure and business model for broader adoption in 2019. The *Sailor Skill System* will generate revenue so that it is a self-sustaining program and scalable in the future.

Smallboat Instructor/Coach and Reach Educator courses are off to a good start. 25 Smallboat and Reach courses were held in the first quarter of 2018, compared with 16 courses in the first quarter of 2017. We’ve seen a positive variance in registration fee revenue as a result. Looking ahead to the 2nd Quarter, 80% of the total Smallboat/Reach courses for the year take place over the next three months. Jen Guimaraes is working hard to promote the courses and drive registration numbers, and the awesome scheduling staff in Education are doing a great job of planning and executing the heavy volume of courses.



Jen has only been onboard since January but is already making a huge impact. She’s been working on Reach program promotions and outreach, traveling to Bermuda (on their dime) to teach a Reach Educator Course for the AC Endeavour Program, and has been running Reach mentor sessions for regional organizations in the Southern California and MidAtlantic Reach Hubs. Next month there will

be an exchange of sailors from Bermuda and Hawaii coming to Rhode Island to participate in the Volvo Ocean Race stopover. Last year we sent two sailors to Bermuda for the America’s Cup Reach Exchange, so we are excited to reciprocate this year. Jen is also working closely with the Community Sailing Committee to promote and grow community sailing.

Lee Parks has scheduled a full season of Junior Olympic Sailing Festivals around the country in 2018. The first JO of the season was at Sarasota earlier this month, and had 180 competitors, up from 143 in 2017. The Open Bic fleet showed significant growth, going from 10 to 29 boats. Our 2018 goal is to position the JO's to be the "go-to" regatta for entry level racers, such as Green Fleet, by providing a fun, inviting regatta environment and racing experience.



Meredith Carroll is working hard on the 2018 US Sailing Championships, which are just around the corner. We're working hard to simplify our processes and requirements, while still providing a world class sailing experience for the racers and the host clubs. A few items of note:

- The Junior Women's Doublehanded Champs (Ida Lewis Trophy) has sold out for the first time since 2014, with 40 teams already registered.
- Interest in the Youth Match Racing Champs is also up this year. 28 skippers requested an invitation, up from 21 in 2017.
- Junior Women's Singlehanded Champs (Leiter Trophy) has 18 registrants thus far, and we are promoting the opportunity through our communication channels.
- Applications for Youth Champs are lower than in past several years, possibly due to this year not being a Youth World's qualifier. The competitive level is still very high across all six fleets, but fleet sizes will be slightly smaller.
- Chubb US Junior Champs will be held at North Cape Yacht Club in Michigan. The Area qualifiers are scheduled and NoRs are being written by the Area reps to the Junior Champs Committee.

Adult Director - Betsy Alison



The Adult Department has signed on two new Keelboat schools in the first quarter, one following a Basic Keelboat Instructor Course in Shanghai in August 2017. Kane Gong (pictured left) is a principal in “Xin Hang Sports” which will be using US Sailing keelboat materials to teach their adult students. They currently operate from one location on Taihu Lake but will expand to 3 locations over the next 2 years. Kane recently visited the new US Sailing offices and will be hosting Katie Tinder who is traveling to Taihu Lake to teach a REACH educators course and a Level 1 soon. We also signed the Newport Navy MWR (Morale, Welfare and Recreation) program in RI to teach both Keelboat and US Powerboat programs. This

bolsters our efforts to get more MWR facilities nationwide as the US military is beginning to require certifications for those using MWR services.

Safety at Sea programs are in full season and we are meeting or exceeding our 2018 goals. To date, we have 32 courses posted on the SAS calendar with a goal of 35 in 2018, a 23% increase over 2017. As of April 12, 281 people have completed the Offshore Safety at Sea Online course compared to a EOY total of 226 for 2017. The success of this online offering is clear, and we are well on our way towards our 2018 goal of 500 online course completions.



Safety at Sea certificates issued for all courses (Coastal, Offshore, International Offshore) are currently at 1,234 in comparison to 1,135 same time 2017, so we are slightly ahead of where we were last year but expect to well exceed the end of year numbers. Last year, a total of 2,105 certificates were issued, and we hope to reach 2,500 by EOY. One area that Karen is tracking is the number of replacement certificates that we are asked to generate by folks who took courses in former years. She created an online form for people to fill out rather than have them call us. Karen has generated 91 certificates since January 1st for requests that have come in. This is a service that should become a member benefit in 2019, since many of those individuals who take SAS courses are not members of US Sailing. Ideally, we would like to attach a certificate completion to someone’s member ID along with the expiration and the ability to print on demand as we move to a new membership management system.

Keelboat Instructor courses and student certifications are lagging a little bit this first quarter. Some of this is due to the impact of the hurricanes in the islands from last fall, some to a fairly wet and cold winter season down south, and some due the timing of our receipt of student level certifications from the schools. We have 14 courses scheduled for Keelboat Instructors at all levels on the calendar for May, June and July with more coming on each week and expect that

keelboat programs will have busy 2nd and 3rd quarter numbers as is indicated by the number of packages that have been sold to schools to date. On a related note, we have quite a few potential new schools on our radar that Karen has been in active communication with, and we hope to bring some on board through the year. The new *Bareboat Cruising* and *Coastal Passage Making* books will be available to schools and students by June. (Note: we have several “destination locations” as Keelboat locations including the BVIs, China, Bermuda, and Mexico). The Education Department has completed a process for Online Integration into Basic Keelboat courses which we will be making available to schools by early May.

Powerboat programs are on track for this year even as we have delayed posting of instructor courses while Education beta-tested the new format for Powerboat Instructors. The USPB program is splitting the instructor level course into two certifications: Safe Powerboat Handling Instructor Certification and Powerboat Safety, Rescue and Support Instructor. The feeling was that many trained instructors were not actively teaching because the standard course required teaching capsized recovery, and they were not teaching students in an environment that required the rescue of capsized boats, and plus a lack of comfort with teaching that portion of the student level course.



The intent of the two certification tracks is to allow Instructors to focus on the delivery of safe powerboat handling skills to everyone, and then offer a second course for those students who need or want to be better trained to assist and rescue dinghies and small boats on the water. The beta testing period is over, and we will be encouraging clubs and Powerboat Instructors to schedule and teach powerboat courses. 2018 will be telling in how many more safe powerboat certificates may be issued with the new scheme.

The number of First Sail locations now stands at 194 with a target of 250 for the year. Though this is not a profit generating program, we are working on some additional materials (sample curriculum for several 4-hour sessions as “nest steps”).



Adult Championship season begins with US Multihull Championship, April 20-22 in Ft Walton Beach, FL. Nancy will be going down to support the event which has 37 entrants. We have a full

complement of 9 Adult Championships. Nancy and Meredith Carroll have been coordinating assets and trying to control costs to minimize excess. US Sailing Championships are an important part of “What We Do” and it is essential to get as much bang for the buck as we can with limited budgets. Nancy has done a fantastic job of coordinating with Championship committees and is well ahead of last year in preparation.

Offshore Director - Nathan Titcomb

Spring preceding the Newport Bermuda race is always a busy time for the Offshore Department; this year is no different but has recently become more challenging. Andrew Williams, who had been measuring on behalf of US Sailing for over 25 years resigned on April 8th and is no longer an Official US Sailing Measurer. This has left approximately 30 boats requiring full measurement that intend to compete in the Newport Bermuda race. Eric Baittinger, the Offshore Chief Measurer, and Nathan can cover some of these boats, however the other US Sailing Measurers will be coming to the East coast as their schedules allow to make sure all the work gets done. The Offshore Department is keeping a weekly update to the Bermuda Race organizers and have been generously offered housing assistance for out of town measurers by members of the CCA.

There is opportunity with the loss of Mr. Williams, as we now look to fill what was previously a regional monopoly for one measurer with four or five newly trained measurers starting in late 2018 and beyond. During many of the measurements we are introducing new measurer to the duties of yacht measurement and treating each boat as a training exercise.

The SAP software continues to improve the actual rating certificate processing workload. During the 24 hours of the ORR rule being open for the 2018 season, we processed 120 certificates including capturing payment and certificate delivery. The ORC rule is now being processed with the certificates for Charleston Race Week being issued via the SAP Universal Certificate System. As the workload allows, we are also conducting tests of the processing the IRC rule via the database, making sure we are on track to start issuing IRC, ORC and ORR certificates via the UCS by the end of 2018.

Race Administration Director - Matthew Hill

Race official seminars continue to be popular and busy as we reach out to train new officials and refresh those who are due for renewal. A new continuing education offering, Judges Protest Day, allows judges the opportunity to polish their hearing and arbitration skills in small groups under the close supervision of highly experienced National Judges. Special thanks to Bruce Cook and Bill Simon for the heavy lifting on Protest Day.

Another new product, Race Committee 201, will be beta tested at the end of April in Pewaukee, WI. This RC training course, which will be offered to organizations and delivered by certified race management instructors, will teach members how to perform the essential functions of the race committee. It is not a race official certification course but is aimed at supporting one of our most underserved groups - the faithful volunteers at local sailing organizations who keep sailboat racing rolling along.

Getting the word out about the new SafeSport training requirement for race officials has taken considerable time and communication. The program has been well received, with many member reporting that it was informative and easy to complete. Volunteer area officials are taking on much of the follow-up work by tracking and reaching out to the officials in their areas. The recent completion by the IT team of automated test reporting and certification, as well as an automated renewal reminder system (in process now), has made our tracking and follow-up tasks far easier, and I am optimistic that we will have almost all, if not all, of our officials SafeSport trained by the end of the year.



Director of Education - Stu Gilfillen

Spring represents the busiest time of the year for the Education Department. The scheduling team is gearing up for Memorial Day weekend (our busiest time of year) and our Product development group is hard at work on several projects.

Peri Burns, Andi Barton and James Shannon are doing an outstanding job of handling course scheduling request from all areas, and the feedback on the new Customer Connect model has been incredibly positive. Clubs appreciate having one person to connect with for their course scheduling needs and the team has also done a great job of helping to tighten up policies that might have been inconsistent in the past, and we're working with other departments on a regular basis to ensure we're on the same page with regards to course promotion and customer needs. We still occasionally hit bumps in the road, but we're getting more effective every day.

On the product development side, within the next few months US Sailing will roll out new versions of *Teach Sailing the Fun Way* (and accompanying *Cue Cards*), *Bareboat Cruising*, *Passage Making*, *Race Administration Handbook*, *Judges Manual*, *Adaptive Sailing Resource Manual*, *Adaptive Sailing Manual* and *Sailing Drills Made Easy* (and accompanying *Cue Cards*). The timing of these will be staggered so as not to interrupt current courses and programs, and to allow for education on use by our instructor, Instructor Trainers and Seminars.

As we develop new publications, there is a recognition that print is not always the best medium. Starting this year, we've begun delivering materials electronically for all Race Administration courses, and our hope is to expand that process to other courses in the future. We have been working with Mike Waters to also explore print-on-demand options which would allow us to provide materials more rapidly to students, reduce the headaches related to inventory and re-ordering, and allow us to be nimbler with content changes within publication. We've also discovered that there may be an added bonus of providing materials in multiple languages, which will set us up well to engage new markets.

In the long-term, we will also seek to switch from delivering digital versions of publications to a true “digital publications” that include interactive content. This route will create a more dynamic product and provide the user the ability to verify their comprehension of the material.

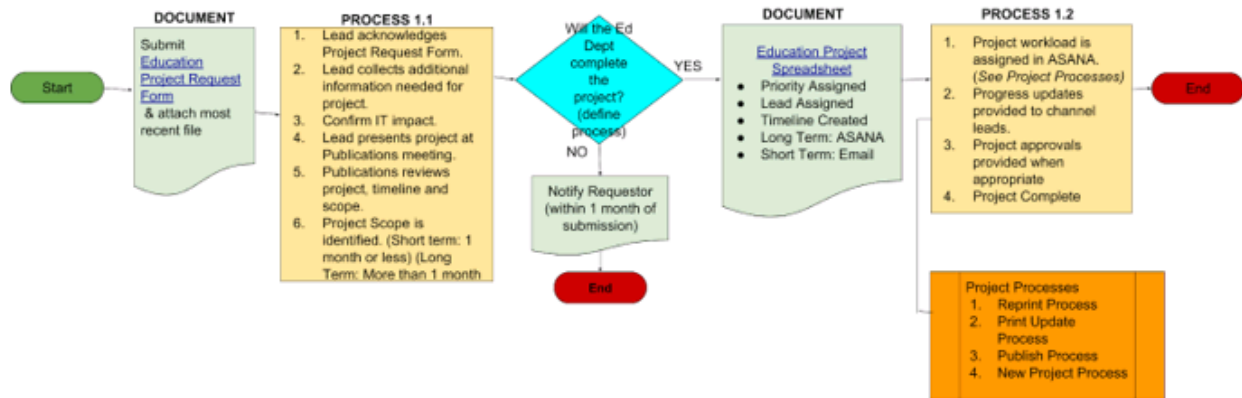
In addition to exploring better ways to deliver our materials, we’re also looking at better ways to potentially deliver course content. For several years, the National Faculty has been working on the framework for the development of an “Online Teaching Fundamentals” course which would potentially serve as a required course for anyone teaching a US Sailing course or Seminar. Thanks to an introduction from Jack Gierhart, we discovered that the US Olympic Committee was looking to create a foundation of coaching course this year, and they offered us the unique opportunity to work together. The USOC’s goal is to develop a course that can be modified by other NGBs to teach the fundamentals of coaching and teaching.

While the term "coaching" is one that we are very sensitive to (especially in a non-competitive program like Level 1) we have been very pleased by how responsive the USOC has been to our concerns, and open they are to utilizing content that has been created by our National Faculty team. Bradley Schoch, Jessica Servis and I will be meeting with the USOC on April 25th to dive into the content and scripting, and our hope is to develop a course that meets the needs of all involved, with regards to content, terminology and focus. One major benefit of this collaboration is that the USOC will cover all the development and productions costs for the course as well as provide US Sailing a grant for \$20K for US sailing-specific section of the course. Also, based on our role in its development, US Sailing will likely be the first NGB to adopt this product, which will sit on the same platform as SafeSport. We feel that this is a great opportunity to showcase not only who we are, but also position as one of the leading NGB’s in the educational space. The deadline that the USOC has set for completion of this course is December 31, 2018.

Looking a little farther out, we are set to return to St. Petersburg, FL for our National Faculty meeting on October 25-29 and to Miami for the National Coaching Symposium, which will occur on November 27-28. We have several great speakers already lined up including Amanda Callahan, Mike Ingham, Jame Lyme, Rosie Chapman, Dave Perry, Chris Bedford and our own Malcolm Page. The agenda is attached with this report for your review, and the hope is to open registration in early May. We’d welcome Board members at either event, and appreciate Dave committing to be a part of the NCS.

We also continue to work on streamlining our processes and put mechanisms in place to make us more efficient. We’ve introduced an “Educational Project Request Form” for other departments to submit project requests. This serves a similar role to the Spiceworks platform used by IT. Jessica Servis has developed a “Project Management Flowchart” which provides guidelines for how we logistically handle product requests and, having Brad Schoch and Pat Crawford, both of who have large skill sets and can juggle multiple projects, have been invaluable. Going forward, we are really beginning to explore all resources available in Asana, our project management system. If you’re not familiar with Asana, [please check out this article about who they are and what they do](#). Very cool stuff.

Education Projects Process Flow



Lastly, we’re working providing more communication to our ITs. So far, we’ve sent out [a larger webinar to give an update](#) and we’ve also kicked off a “Thursday Update” which gives them a quick piece of info or news. April 12th was the first one and we [completed an \(very\) informal walkthrough of our new office](#). We also have a webinar coming up about the National On Water Standards on May 7th from 2:00pm - 3:30pm if you’d like to [register](#) and join. We’ll also be recording it if you can’t attend but are interested.

Director of Member Engagement - Katie Ouellette

At t end of 2017 we launched the campaign to renew our member organizations for 2018. With a new simplified membership tiering, enhanced benefits and a strategic invoicing calendar, organizations have renewed at a steady pace. We are very pleased with the response to our Patron (\$1000) Level Membership. In 2017 there was one Patron Level Organizational Member, thus far in 2018 we have 14 which is added revenue of over \$12,000 (see list below of Patron Organizations).

The renewed member organizations will be receiving their certificates of membership at the end of the month coupled with a letter introducing the new initiative to collect key leadership contacts (“Org Rolodex”) and the form to provide such and mail back.

An issue of *The Quarterdeck* was published in March promoting SLF archived presentations, safety resources, a thank you to our 2018 Patron and Benefactor organizational members, and additional program offerings.

Our Member Experience Representatives, Deb and Emily, continue to respond to the info@ and membership@ emails daily and handle the influx of calls and live chats from our members efficiently, effectively and with poise and respect. They continue to provide an excellent experience for our members often going above and beyond which is met with great appreciation from our members.

We have a steady flow of unexpected but welcomed visitors from the community, university, potential students and our constituents. Deb is often seen giving tours of the building and making our scheduled visitors feel welcomed by having a spot tagged for them in the parking lot and their names and company name on the TV monitors throughout the building.

The Adult Department represented US Sailing at the Chicago Boat, RV and Sail Show promoting our keelboat and powerboat providers and introducing newcomers to the sport through a First Sail Experience using a special sailing simulator. Betsy, Karen and Nancy helped to connect sailors to the right educational opportunities for them: First Sail, Keelboat Courses, Instructor Courses, Safety at Sea Courses and US Powerboating education. Moving forward, Emily is working on a new approach to Boat Shows considering the objective of each show, gate numbers, additional opportunities, ways to partner, etc.

Once again, the South Atlantic Yacht Racing Association hosting a Regional Symposium in conjunction with their Annual Meeting this past January. The event hosted 50 attendees and featured topics focused around safety and expanding youth participation. In March, The Foundry hosted the Midwest Sailing Symposium which gathered over 70 attendees including representatives from both Zim and The Gowrie Group.

*Please see previous report for a recap on the 2018 Sailing Leadership Forum.

2018 Patron Level Organization Members

Bayview Yacht Club	Lauderdale Yacht Club
Bella Mente Quantum Racing Association	Nantucket Yacht Club
Cedar Point Yacht Club	New York Yacht Club
Chicago Yacht Club	New York Yacht Club Regatta Association, Inc.
Coral Reef Yacht Club	San Diego Yacht Club
Guest Services DBA Boating in Boston	Southern Yacht Club
Indian Harbor Yacht Club	St. Francis Yacht Club