

2022 Association Report - May

Topics	Comments	Status																				
Financial Metrics – Financials are based on March numbers.																						
Revenue	<p>YTD Revenue \$7.3MM vs budget of \$2.8MM</p> <ul style="list-style-type: none"> \$4.5MM positive variance associated with \$4.7MM associated with Public Support (\$5MM Schoonmaker Endowment) Investment income YTD \$140K below budget (\$109K Loss YTD) Program Revenue \$82K below budget: <ul style="list-style-type: none"> NSPS 93K below budget due to cancellation Offshore 81K below budget on certificates issued Adult 26K above budget various courses Youth 67K above budget due to Level 1 	Yellow																				
Expense	<p>YTD Expense of \$2,932 was \$908K or 24% below budget of \$3,841K. Large variances listed below</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>\$V to Budget</u></th> <th style="text-align: left;"><u>Comment</u></th> </tr> </thead> <tbody> <tr> <td>202,255</td> <td>Salaries & Benefits (\$60K Open Roles, \$85K Merit Increase)</td> </tr> <tr> <td>169,319</td> <td>Travel (50K savings due to NSPS)</td> </tr> <tr> <td>114,524</td> <td>Meetings (\$100K savings due to NSPS)</td> </tr> <tr> <td>106,554</td> <td>Coaching (timing Olympic Dept, not savings)</td> </tr> <tr> <td>70,379</td> <td>Supplies (timing Olympic Dept & Siebel)</td> </tr> <tr> <td>66,150</td> <td>Sponsorship fulfillment – timing</td> </tr> <tr> <td>63,775</td> <td>Consulting in Olympic dept, timing not savings</td> </tr> <tr> <td>48,623</td> <td>Software in Fundraising & offshore (timing)</td> </tr> <tr> <td>39,550</td> <td>Athlete grants, timing</td> </tr> </tbody> </table>	<u>\$V to Budget</u>	<u>Comment</u>	202,255	Salaries & Benefits (\$60K Open Roles, \$85K Merit Increase)	169,319	Travel (50K savings due to NSPS)	114,524	Meetings (\$100K savings due to NSPS)	106,554	Coaching (timing Olympic Dept, not savings)	70,379	Supplies (timing Olympic Dept & Siebel)	66,150	Sponsorship fulfillment – timing	63,775	Consulting in Olympic dept, timing not savings	48,623	Software in Fundraising & offshore (timing)	39,550	Athlete grants, timing	Green
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Net	<p>March Cashflow -\$608K vs estimated loss of \$120K</p> <p>Net Cashflow YTD +\$331K vs estimated loss of \$967K</p> <p>Net Cashflow YTD -\$668K vs estimated loss of \$967K (Ex Schoonmaker \$1mm)</p>	Green																				
Membership & Retention	<p>Revenue:</p> <ul style="list-style-type: none"> Month: March '22 - \$181,171 vs Budget \$174,295 YTD: '22 \$538,180 vs '21 \$519,823 (3.5% variance) <p>Members #'s Include Organizations & Corporations:</p> <ul style="list-style-type: none"> Awaiting retention metrics from Prism and will have a comprehensive report in the next two weeks. <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th style="text-align: center;">Members</th> <th style="text-align: center;">Memberships</th> </tr> </thead> <tbody> <tr> <td style="text-align: left;">Dec-21</td> <td style="text-align: right;">45,019</td> <td style="text-align: right;">36,880</td> </tr> <tr> <td style="text-align: left;">Mar-22</td> <td style="text-align: right;">44,173</td> <td style="text-align: right;">36,179</td> </tr> <tr> <td style="text-align: left;"># Variance</td> <td style="text-align: right;">(846)</td> <td style="text-align: right;">(701)</td> </tr> </tbody> </table> <p>Membership Renewal Campaign drops in June</p>		Members	Memberships	Dec-21	45,019	36,880	Mar-22	44,173	36,179	# Variance	(846)	(701)									
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Key Priorities Update

Adult:

Safety at Sea

- 1525 SAS certificates have been generated by the office to date – this is 22% ahead of 2021 YE data. About ½ of SAS courses on the calendar have been run so far with May/early June poised to deliver a lot of training prior to key races like Newport/Bermuda.

Keelboat and Powerboat

- March KB figures are above budget with both recertifications and course registrations ahead of budget. Publications were slightly behind due to timing, but overall, KB is 34% ahead of budget
- March PB figures are on budget with peak season yet to hit. Course registrations and recertifications bode well for a strong teaching season which should result in more publication sales throughout the season.

Adaptive

- Lots of interest in hosting courses, but slow registrations. One early course cancelled, and a second will reschedule to later in the summer.
- US Sailing is seeking applications for a 25 and Under Para Sailing World Championship in July in the Netherlands. We have had some interest and will field a team to this inaugural event.
- US Sailing will propose a team of 2 Para Kitters and a Coach to go to an inaugural Paralympic Development clinic for Para Kiteboarding at Lake Garda in June. We are receiving expressions of interest with priorities for selection going towards experienced female and U25 para kitters.

Championships

- NORs (Notice of Race) are posted for 8 US National Championships.
- Multihull Championship has registration open for F-18s in Newport. The minimum number of registrations has been met to make the event “a go” for late August.
- We expect applications to open for Adult Champs, C of C, and Team Racing to open soon.
- US Singlehanded Championship will be held in conjunction with the West Marine US Open Sailing Series in San Diego in June.
- Qualifying Series for US Match Racing well underway with 2 of 8 qualifying events complete.

Membership related to Adult Programs

- Membership retention for Basic Keelboat Members is at 10% for March and 11% for April. Working with Membership Dept to increase that retention rate
- To date, 210 memberships have been generated through Safety at Sea packages and communications to sailors post SAS courses
- Nearly 30 sailors have either joined as new members or renewed membership due to participation in a US Match Racing Qualification event. For the recent San Francisco event, this was 50% of the participants. This proves that our championships events do drive membership.

Education:

Scheduling

- Reached our annual goal for online Level 1 courses scheduled (120) and exceeded our goal for Level 1 in-person courses (152 scheduled vs. goal of 150).
- At 92% of goal for scheduling keelboat instructor courses.
- Level 1 Instructor Trainer (IT) course was held April 29-May 1 at Sail Newport with eight candidates. Two Online Level 1 Instructor Trainers trained.

Product/Program Development

- Small boat Level 1 IT Manual was updated and used in the Level 1 IT course at Sail Newport- feedback and edits will be integrated by 6/1.

	<ul style="list-style-type: none"> • Beginner Lesson plans were added to Skill Up App and work continues to be done on Intermediate level lesson plans. • Currently collecting data from key stakeholders in the keelboat community determine best path forward for programmatic updates to Keelboat program (course structure, mediums for delivery, etc). • Several Race Admin projects are being updated including <i>Join the Race Committee Team</i>, and the materials for the Advanced Race Management Seminar and Basic Umpire Seminar.
Offshore:	<ul style="list-style-type: none"> • New Head Measurer, Chris Tutmark appointed. Chris started in the role on 5/2. This role has a new title (previously Chief Measurer), the role will now include involvement with the measurement of all boat types including one design and small boats. • Eric Baittinger finishes with US Sailing in May after 16 years with the organization • ORR and ORC certificate processing is ongoing at high volumes. Many races are experiencing high entry numbers compared to previous years. Temporary staff have been employed to manage the workload of processing certificates and responding to boat owner and race organizer queries. • Offshore Organizing Authority Summit was held on 5/4. The purpose of this meeting was to gather major clubs that together run the premier offshore races in the US for a conversation about offshore sailing in the US. This is a follow-up to our meeting from October 2020 with the same group of clubs.
Race Administration:	<ul style="list-style-type: none"> • Course statistics (YTD, completed and scheduled): <ul style="list-style-type: none"> ○ Basic Race Management – 22 courses, 310 students ○ Advanced Race Management – 5 courses, 81 students ○ Club Judge – 2 courses. 26 students (including one for women, by women) ○ Advanced Judge Seminar – 2 courses, 20 students ○ Basic Umpire – 2 courses, 16 students ○ Advanced Umpire – 3 courses, 25 students ○ Judge Continuing Education – 10 courses, 117 students • New Club Judge Seminar for women, taught by women – like our popular Basic Race Management Seminar for women, this course gives potential club judges an opportunity to learn the basics in a supportive, single-gender setting. The course has filled quickly since it was listed on the seminar calendar and we will offer others if it is well received. • Advanced Race Management Seminar – this full overhaul of the ARMS course is nearly finished and is being reviewed by a small focus group. The new course includes more self-guided learning and consists of one day of direct instruction and a day of roundtable-style learning that focuses on safety, communications and other best practices and includes conversations about how race officers make decisions and the consequences of those decisions. We anticipate offering the new course in the fall.

Siebel:

Current Programming:

- FL Programs concluded their 4-month Winter/Spring season at the end of April.
- PNW and Mid-Atlantic Spring Programs have launched.
- Midwest and NorCal Spring/Summer Programs launch in June.

Staffing:

- Patrick Burks accepted Midwest Coach position and started April 25, he will train under Meredith and help her implement summer programming.
- Still searching for NorCal Coach to replace Chris Childers, will implement backup plan if none found by May 15.

Promotion:

- Mid-Atlantic Region site visit, photoshoots, & donor meetings scheduled for May 16-18 (Andrew, Jill, Chris, Lexi, Blair).
- Trying to get major news publications to publish an article about the Siebel Program, contacts welcome.
- Siebel Team in the process of building Center Selection Committee & review timeframe; due date for applications is June 1. We had over 60 centers express interest by attending webinars, via email and phone calls.
- RFP Proposal due date for boat manufacturers was May 2 and the review process will launch ASAP.

Youth:

Youth Racing:

- Three US Sailing Championships will be held in California this summer, scheduled between West Marine US Open Sailing Series events - Youth Match Race Champs at Long Beach YC; US Youth Champs at Mission Bay YC; US Junior Women’s Champs at California YC.
- Youth Racing Task Force recommendations are being implemented over the next 18 months (2022 - pathway communications and USA Junior Olympic Sailing Festivals; 2023- US Sailing Championships and pathway transition clinics)

Small Boat

	Student Goal	Students YTD (5/3/22)	Registrations 1/1- 12/31/2022 (includes 5/3/22 YTD)
Sailing Counselor	126	0	16
Reach Educator	64	22	28
Level 1- Online Section	1440	889	1295
Level 1- In-Person Section	1500	263	1307
Level 2 Instructor	160	23	122
Level 3 Head Instructor	48	19	23
Level 3 Coach	32	10	20

- Intermediate student skills lesson plans are in progress to be added to Skill Up.
- Updated Level 1 IT Manual with Education.

Reach

- US Sailing Open Series
 - Registering all CA sites as bronze level Clean Regattas (Sailors for the Sea).
 - Public beach clean-up on the Saturday of each event.
- 2022 Reach Grant RFP closes 5/6/22.
- Initial meeting with The Sailing Museum about Reach integration with exhibits.

	<p>Community Sailing</p> <ul style="list-style-type: none"> 1 new program accredited, 1 pending application.
Events:	<p>NSPS “Live”</p> <ul style="list-style-type: none"> NSPS “Live” concluded April 14th. The event had 57 active attendees. The schedule was accessed 223 times with 417 session views. Engagement fell short of desired however valuable experience in online and hybrid events was gained. <p>Sailing Leadership Forum</p> <ul style="list-style-type: none"> Planning for Sailing Leadership Forum has commenced. Save the Date of February 2 – 4, 2023. The event will return to St. Pete Beach, FL. The Association Awards and Rolex Yachtsman & Yachtswoman of the Year event is slated to be held Thursday February 2nd in conjunction with SLF.
HR:	<ul style="list-style-type: none"> Onboarded this month: <ul style="list-style-type: none"> SVP Partnerships & Memberships – Eric Krasnoo Head Measurer – Chris Tutmark Executive Assistant – Mikayla Pantano Membership Director – Hannah Meyer Offshore coordinator – Sydney Hough Finance Manager – Cesar Luzon Olympic Coordinator – Tina Cardamone Siebel Coach – Chicago – Patrick Burks Implementing LMS system and benefit platform on Paycor system as we build out the new HRIS system and begin to use more and more of it Completed merit increase and bonus process through annual review process in Paycor system Completed DEI snippets training - 10-week 2 minute lessons followed with going deeper links with an incredible completion and participation rate higher than other company participation rates <ul style="list-style-type: none"> May 19th will be a live 1-hour training following up on this utilizing the data from the snippets to determine what areas of focus US Sailing needs Partnered with Inclusion Playbook to do a deep dive DEI assessment and review of policies, procedures, and practices – working with them over the next 10-12 weeks
IT:	<ul style="list-style-type: none"> Vendor demonstrations for products to replace Sailor Base will commence mid-late May. There has been significant work on upgrading IT systems to be complaint with the changeover in Sailor Athlete categorization The IT team continues to work on the US Sailing’s Platform Modernization with Envision, with the initial priorities focused on security, moving to a zero-trust environment and then moving data into a cloud-based storage environment and moving away from the reliance on physical servers.
Marketing & Communications:	<p>Partnerships</p> <ul style="list-style-type: none"> Siebel RFP closed on May 2nd Siebel Giveback program: working with Regatta Craft Mixers on program for cases sold to individuals and organizations. Working in collaboration with Youth and Education on expanding the Sustainability initiatives of US Open by supporting all three California events as Bronze Level Clean Events. Beach clean ups for the local communities and collaborating with Kilroy Realty, Yeti, GDX marketing on a Sustainability Festival at the LA28 sailing venue. Developing Merchandising strategies with Partners Gill and New England Ropes

	<ul style="list-style-type: none"> • Planning for US Open West Coast activities: Activation for West Marine, Gill, Yeti, Kilroy, and others <p>Marketing/Content Development</p> <ul style="list-style-type: none"> • Celebration of Earth Day with All Staff Beach Clean-Up • Celebrated Autism Awareness Month with spotlight story on David Camilo – Special Olympics sailor • Concluded and announced winner of Boat Name Bracket • Press Release announcing Hanson Rescue Medal • Promoted #backthebid in conjunction with World Sailing • Furthered development and production on US Sailing 125th Anniversary multi-part content series to be produced and aired through USSA O&O channels over 2022. • Continued development of comprehensive US Sailing 125th Anniversary communications, content, and promotions plan <p>Advertising</p> <ul style="list-style-type: none"> • Developing Feathr 2.0 strategy to build on the membership revenue generation from 2021 and include more areas of overall organization promotion - Events, Foundation, and Partnerships, etc. • Continue search for Communications Director • Transition partner account management from Justine to Josh (Kilory, Yeti, Gill, New England Ropes, and others) • Starting search for replacement for Justine (Partnership headcount)
<p>SafeSport/Audit Compliance:</p>	<p><u>SafeSport Administrative Audit</u> The US Center for SafeSport (the “Center”) conducts two types of audits: Event Audits and Administrative Audits. The Center alternates the type of audit it conducts on an NGB each year. US Sailing’s 2021 audit was an Event Audit at the 2021 US Youth Championships at Camp Seagull, NC. US Sailing’s 2022 audit was an Administrative Audit that occurred on March 15th. This audit was conducted remotely with an auditor from the Center reviewing various documents and policies to ensure US Sailing is fully compliant with all policies and procedures.</p> <p>The audit covered four distinct standards</p> <ul style="list-style-type: none"> • Education and Training • Communication and Reporting • Quality Control System • Local Affiliated Organizations <p>US Sailing received our draft audit report on April 26th. US Sailing was found to be “Fully Implemented” (highest score) for three standards and “Partially Implemented” for the fourth. The one standard we received a score of “Partially Implemented” for was Communication and Reporting. To amend our score to “Fully Implemented,” US Sailing must make a minor corrective action to our website’s misconduct reporting guidance. Once this corrective action is complete our audit report will be revised to “Fully Implemented” across all audit standards.</p> <p><u>2022 USOPC Compliance Audit</u> The USOPC recently implemented a new audit structure. Starting in 2021, each NGB will be audited once every four years (as opposed to every year). While audits will occur less frequently than under the old structure, they will be much more comprehensive than any USOPC audit that US Sailing has undergone before. This all comes as the USOPC has made the organizational commitment to implement greater oversight over NGB operations; the USOPC’s audit and compliance staff has undergone much growth and restructuring since 2019 to meet its new oversight obligations.</p> <p>US Sailing’s first audit under this new structure will be in Q4 2022, beginning October 1. Prior to October 1, there will be a 60 day “pre-audit” period in which US Sailing will receive and submit</p>

	<p>document requests from the USOPC. Once all documents and materials have been submitted to the USOPC, it will have 60-90 days to perform its review. Once the USOPC has finished its review phase it will issue a final report of its findings that will be posted on the USOPC website. US Sailing will then have 90-120 days to take any necessary corrective actions to address any deficiencies found in the USOPC final report. Once all relevant corrective actions have been implemented the USOPC will update its final report to reflect such corrective actions.</p> <p>Each NGB will be assessed under the following standards:</p> <ul style="list-style-type: none"> • Governance and Compliance • Financial Standards and Reporting Practices • Athlete Protection and Rights • Sport Performance • Operational Performance <p>Justin Sterk is currently working with all necessary staff members.</p>
<p>Foundation:</p>	<ul style="list-style-type: none"> • 2022 Total Raised in Pledges, Conditional Pledges, and Verbal Commitments: \$9,335,000 • 2022 Total Cash Received, including pledge payments and new gifts: \$1,624,000 • Raised funds for Project Pinnacle. Year-end goal is \$4,000,000. Raised \$1,785,000 so far. • Raised funds to match the James M. "Ding" Schoonmaker II Project Pinnacle Endowment Fund Challenge of \$500,000. Raised \$56,000 so far. • Raised funds to meet the dollar-for-dollar match offered by Tom and Stacey Siebel for the Siebel Sailors Program. Year-end goal: \$5,000,000. \$125,000 raised so far. • Raised funds for new and existing temporarily and permanently restricted funds: \$85,000 • Dedicated the Lattimore Library at US Sailing HQ
<p>USST/ODP:</p>	<ul style="list-style-type: none"> • Good spring in Europe: 5 podiums out of 20 (two regattas x 10 events). 11 top 10's out of 20! • Operations Team gelling • Budget Gap 75% filled • High Performance coach and Sports psych onboarded. • First coaches retreat 5/2-4. • Marseille camp: July 15-August 4 • Private TEAM USA Radial camp by Robert Shiedt August