

## 2022 Association Report – September

Topics	Comments	Status																				
<b>Financial Metrics – Financials are based on August numbers.</b>																						
<b>Revenue</b>	<p>YTD Revenue \$13.4MM vs budget of \$13.7MM</p> <ul style="list-style-type: none"> <li>• Net Revenue is \$315K below budget or 2.3%</li> <li>• Public Support \$87K ahead of budget, this includes \$5.0MM Schoonmaker Endowment</li> <li>• Membership \$1,453K vs budget of \$1,402K : 50K ahead of plan</li> <li>• Investment Income YTD \$443K below budget (\$417K Loss YTD)</li> <li>• Program Revenue \$1.4MM vs budget of \$1.7MM (\$267K): <ul style="list-style-type: none"> <li>○ NSPS \$94K below budget due to cancellation (expense savings outweigh revenue loss)</li> <li>○ Offshore \$169K below budget on certificates issued, this is partially timing related . Year end gap will be much smaller as we move into Q4</li> </ul> </li> </ul>	<b>Red</b>																				
<b>Expense</b>	<p>YTD Expense of \$8,757 vs budget of \$10,461 is \$1,704K or 16% below budget:</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;"><u>\$V to Budget</u></th> <th style="text-align: left; border-bottom: 1px solid black;"><u>Comment</u></th> </tr> </thead> <tbody> <tr><td>400,213</td><td>Salaries &amp; Benefits - Open Roles</td></tr> <tr><td>327,704</td><td>Travel (NSPS &amp; Olympics)</td></tr> <tr><td>311,518</td><td>Coaching (timing, not savings)</td></tr> <tr><td>168,080</td><td>Sponsorship fulfillment</td></tr> <tr><td>155,994</td><td>Consulting in Oly, timing not savings</td></tr> <tr><td>114,161</td><td>Meetings (NSPS)</td></tr> <tr><td>136,595</td><td>Supplies (timing Oly &amp; Siebel)</td></tr> <tr><td>31,713</td><td>Athlete grants, (timing)</td></tr> <tr><td>32,849</td><td>SW, in Fundraising &amp; offshore (savings)</td></tr> </tbody> </table>	<u>\$V to Budget</u>	<u>Comment</u>	400,213	Salaries & Benefits - Open Roles	327,704	Travel (NSPS & Olympics)	311,518	Coaching (timing, not savings)	168,080	Sponsorship fulfillment	155,994	Consulting in Oly, timing not savings	114,161	Meetings (NSPS)	136,595	Supplies (timing Oly & Siebel)	31,713	Athlete grants, (timing)	32,849	SW, in Fundraising & offshore (savings)	<b>Green</b>
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<b>Net</b>	<p>August Cashflow \$634K vs estimated loss of (\$58K)</p> <p>Net Cashflow YTD \$248K vs estimated loss of (\$2.4MM)</p>	<b>Green</b>																				
<b>Key Priorities Update</b>																						
<b>Membership &amp; Retention</b>	<ul style="list-style-type: none"> <li>• Membership Cards and Welcome Packages are set to launch in November. New cards with up to four certifications on the back will be available for add-on purchase of \$15. The mailed envelope will include a letter from the CEO, membership card, membership key fob, bag tag, and a suite of the new stickers.</li> <li>• Membership relaunch with value proposition and member benefit messaging to launch in November as a “Lock in 2022 Pricing” campaign.</li> <li>• Membership pricing will increase in early January 2023.</li> <li>• Membership website pages are undergoing a refresh with dedicated pages for member benefits, a new landing page for the Weekly Lift, and updated graphics.</li> <li>• As of 8/31/2022 we have <b>35,490</b> active memberships which is behind previous year by – 3.73%</li> <li>• As of 8/31/2022 we have <b>43,729</b> active members which is behind previous year by –2.89%</li> </ul>																					

<b>Adult:</b>	<ul style="list-style-type: none"> <li>• 9 new schools have joined our keelboat network since the start of the year.</li> <li>• 125 new keelboat instructors have been certified surpassing dept. Goal of 100 for 2022.</li> <li>• 7 Safety at Sea courses scheduled for the fall with more being scheduled for 2023 season.</li> <li>• Working with Membership to capture sailors in categories such as sailors with disabilities and veterans.</li> <li>• Final four Championships are fully subscribed and will be completed by early November: US Match Racing; US Adult Championships; Championship of Champions; US Team Racing.</li> </ul>
<b>Education:</b>	<ul style="list-style-type: none"> <li>• Smallboat National Faculty met in August and worked on the following projects: <ul style="list-style-type: none"> <li>○ Level 2 Instructor publication updates</li> <li>○ Adjustments to the Level 1 course including moving the online section from Canvas to the <a href="#">First Tack LMS</a> platform and modification of in-person Level 1 section from two days to three days, starting in 2023.</li> </ul> </li> <li>• Staff worked with Keelboat National Faculty Members to address concerns from customers in the <i>Basic Keelboat</i> textbook. Currently we are working to create a new look and feel for <i>Basic Keelboat</i> that aligns with <i>Bareboat Cruising</i> (copyright 2019) and <i>Passage Making</i> (copyright 2020) books.</li> <li>• A Keelboat photoshoot is planned for late September with an in-person meeting in November for launch in the fall of 2023.</li> <li>• NASBLA re-approvals are in process for our Safe Powerboat Handling and Basic Powerboat Cruising courses at both the National level and with various states.</li> <li>• An updated version of the Advanced Race Management Seminar power point was provided to the RA National Faculty for review and further edits.</li> <li>• Peri Burns and Andi Barton, with assistance from Judie McCann, have done an outstanding job covering the gap created by the departure of Laurieanne Sarro. Additionally, Education is working in conjunction with other departments to help cover the responsibilities of Scarlletth DaCosta who left US Sailing last month.</li> </ul>
<b>Offshore:</b>	<ul style="list-style-type: none"> <li>• While the bulk of ORC and ORR certificate production is now behind us, we are actively producing certificates for a number of events this Fall. Notable among them is the Rolex Big Boat Series hosted by St. Francis Yacht Club. While the fleet is small, perhaps 20 boats, it is a high-profile event with a very competitive fleet.</li> <li>• PHRF discussions are ongoing. Some of the fleets have handicappers that are “aging out” with no replacements at hand. This opens the door to considering alternatives to PHRF. US Sailing has set as a priority the support of PHRF and strengthening the services we can provide.</li> <li>• Our focus is shifting towards developing a more thorough and robust system for collecting, tracking and vetting measurement data and the ratings produced by the rules we implement.</li> </ul>
<b>Race Administration:</b>	<ul style="list-style-type: none"> <li>• Race Admin education offerings continue to be popular – to date we have completed or scheduled 61 seminars and CE events with at least 712 participants, and a half dozen more are ready to go on the calendar.</li> <li>• We are tracking (and reminding) officials who are due to recertify in 2022 and hope to get everyone back in the fold by the end of the year.</li> <li>• Interest in the St. Petersburg YC Trophy is strong again this year – we have received 4 complete applications and at least 7 other clubs have expressed interest.</li> <li>• A Club Judge Seminar Instructor training session at the end of August went very well, and should result in more seminars on the calendar.</li> <li>• The new Advanced Race Management Seminar is close to completion, with second round beta testing underway and anticipated rollout late this year. In the meantime, we will offer two interim “new” ARMS courses this fall for RROs and NROs who need a course to recertify.</li> </ul>

- Siebel:**
- Closing out first 3 Regions this month as they are at the end of their 3-year grant period: Mid-Atlantic, Midwest and NorCal.
  - Florida and the Pacific Northwest are starting up Fall Programming in September.
  - Blair conducted a site visit to the PNW visiting our current Seattle Centers and 3 prospective Siebel Centers.
  - Center Application Interviews (second stage of center vetting) will conclude the week of 9/19 and Regional Rankings will be available internally.
  - RFP vetting was completed by the grassroots team and will be passing up to a Leadership vetting team.

**Youth:**

**Small Boat**

	<b>Student Goal</b>	<b>Students YTD (8/31/22)</b>	<b>Registrations 1/1- 12/31/2022 (includes 6/30/22 YTD)</b>
Sailing Counselor	126	106	<b>111</b>
Reach Educator	64	38	<b>56</b>
Level 1- Online Section	1440	1530	<b>1568</b>
Level 1- In-Person Section	1500	1318	<b>1552</b>
Level 2 Instructor	160	132	<b>150</b>
Level 3 Head Instructor	48	27	<b>30</b>
Level 3 Coach	32	23	<b>24</b>

\*Online Reach and L3 Head Instructor Courses are on the calendar for the fall.

**Reach**

- Site visit to Fishers Island Junior Sailing (Fishers Island, NY) - youth students are completing Reach modules and using the Logbooks including having Charlie Enright sign his career connection page when he is on island.
- Jessica Yorke and Jen Guimaraes taught two Reach Educator Courses in Bermuda with long-time program partner, Endeavour. Additionally, an in-person meeting with Bermuda Tourism Authority took place to build off Marketing's virtual meetings.

**Community Sailing**

- Site visit to Community Sailing Center and host of many Level 1s, Longshore Sailing School (Westport, CT).
- CS Award nominations for 2022 are open please spread the word.

**Youth Competition**

- This summer's Championships (U.S. Youth Match Racing Championship, U.S. Youth Championship, U.S. Junior Women's Championship, and Chubb U.S. Junior Championship) were successfully completed.
- The 2023 Championships schedule has been finalized except for the Chubb US Junior Championship. The Junior Champs format is being discussed by the Junior Champs Committee and the Youth Racing Task Force and will be finalized this fall.
- US Sailing staff have attended each of the USA Junior Olympic Sailing Festivals to support the host club and assist with windsurf and windfoil demos provided by partners iQFOiL and Cabrinha. There is a great deal of general interest in windsurfing, winging, and foiling.

	<ul style="list-style-type: none"> <li>The final two JO's of the season will be held at Edison Sailing Center in Fort Myers, FL and US Sailing Center Martin County in Jensen Beach, FL. Planning for the 2023 USA Junior Olympic Sailing Festivals is underway.</li> <li>Fall and winter communications will focus on the Youth Performance Pathway, including updated resources for kids, parents, and coaches and communications about 2023 events.</li> </ul>
<b>Events:</b>	<ul style="list-style-type: none"> <li>Sailing Leadership Forum planning continues with a focus on agenda development and sourcing keynote speakers. Registration is at 77 which is ahead of 2020 but behind 2018.</li> <li>Many of US Sailing's perpetual awards will be presented during two award ceremonies at SLF. Communications promoting nominations are ongoing with hopes of a strong applicant pool. Rolex Yachtsman &amp; Yachtswoman of the Year awards will be presented in conjunction with the US Sailing Association Awards the evening of February 2<sup>nd</sup> The Community Sailing Awards will be presented during a luncheon on Saturday February 4<sup>th</sup></li> <li>Stakeholders Summit is less than a month away. The agenda is still being fleshed out and we currently have 25 registrants.</li> </ul>
<b>HR:</b>	<ul style="list-style-type: none"> <li>Onboarded Director of Marketing Communications Merrill Allen 8/31/22</li> <li>Preparing for open enrollment with Benefit Broker and collecting renewal proposals and setting up for enrollment meetings and sign ups</li> <li>Initiated mandatory Sexual Harassment training and Preventing Discrimination and Harassment training due 9/20/2022</li> <li>Transitioning 1099s to Paycor payroll system for direct deposit and electronic document signing</li> </ul>
<b>IT:</b>	<ul style="list-style-type: none"> <li>We are toward the end of the evaluation process for choosing a new Association Management System, which will replace Sailor Base and a number of other IT functions, with a timeline to select the best choice for US Sailing in October.</li> <li>We replaced our entire phone system due to poor performance with Verizon One Talk over the last year and a half. We've signed on with Harbor Networks moving to Elevate, a cloud-based unified communication system. This brings greater performance, features, and ease of use. Feedback has been overwhelmingly positive.</li> <li>The IT team now supports double the users we did a year ago, many of whom are remote. We continue to look for ways to streamline our standards to handle this additional load.</li> <li>Implemented automated emails seeking feedback from Course and Seminar attendees as part of the effort to gather information useful for monitoring and improving our offerings.</li> <li>Expanded our use of JetMail to fulfill course materials to registrants, reducing staff workload.</li> </ul>
<b>Marketing &amp; Communications:</b>	<ul style="list-style-type: none"> <li>Merrill Allen, Director of Marketing Communications started 8.31</li> <li>Merrill having dept by dept intros to determine marketing needs &amp; priorities</li> <li>US Sailing 125<sup>th</sup> –The 4<sup>th</sup> (of 6) US Sailing videos produced and released</li> <li>Website updates across various departments being scheduled/addressed as well as broader discussions around site architecture</li> <li>US Sailing credentials deck for business development finalized</li> </ul>
<b>Partnership Marketing:</b>	<p><u>Partners</u></p> <p>West Marine US Open Sailing Series – San Francisco</p> <ul style="list-style-type: none"> <li>Activation for multiple partners: West Marine, Gill, YETI, New England Ropes, Gowrie Group w/ on-site branding, in-person panel events, social and multimedia content</li> <li>Developed 2022 (Season 2) West Marine recap &amp; developing renewal concepts for 9.12.22 mtg.</li> </ul> <p>Rolex</p> <ul style="list-style-type: none"> <li>Developed content ideas which were positively received by Rolex: <ul style="list-style-type: none"> <li>Social video series</li> <li>Sailing Media Roundtable</li> </ul> </li> </ul>

	<p>Kilroy</p> <ul style="list-style-type: none"> <li>- Created collaboration video series against Kilroy pillars</li> </ul> <p>Gill</p> <ul style="list-style-type: none"> <li>- Working on 2023 team and organizational needs</li> </ul> <p>Gowrie-Chubb</p> <ul style="list-style-type: none"> <li>- Presented 3yr renewal proposal</li> </ul> <p><u>Partnership agreements signed</u></p> <ul style="list-style-type: none"> <li>- Siemens (through August 2023). Discussion in Q4 for additional commitment for more prominent branding and support of US Open Sailing Series 2023</li> <li>- Nimbix (through December 2022). Discussion in Q4 to grow commitment with new parent company ATOS</li> <li>- Harken Derm (through December 2022)</li> </ul> <p><u>Championships</u></p> <ul style="list-style-type: none"> <li>- Activated for multiple partners at CHUBB Junior, Women’s Match Racing, and Multihull Championships <ul style="list-style-type: none"> <li>o CHUBB, Gowrie, Gill, Regatta Craft Mixers w/ on-site branding, participant gifts, social events, hospitality, and social and multimedia content</li> </ul> </li> <li>- Planning for remaining Championships in October and early November</li> </ul> <p><u>Boat Shows</u></p> <ul style="list-style-type: none"> <li>- Planning for activation at Newport and Annapolis Boat Shows including: <ul style="list-style-type: none"> <li>o Gill, West Marine, New England Ropes, Harken, Gowrie Group</li> <li>o Support partner events (e.g., Gill VIP event at Newport store) and athlete appearances at partner booths</li> </ul> </li> </ul> <p><u>Strategic Partnerships</u></p> <ul style="list-style-type: none"> <li>- Finalizing organization-wide comprehensive strategic media partnership with Bonnier (Sailing World/Cruising World)</li> <li>- Finalizing strategic partnership with The Sailing Museum</li> <li>- Building relationship with Sailing La Vagabonde (YouTube influencers) to promote US Sailing programs and leverage partnership opportunities</li> </ul> <p><u>Miscellaneous</u></p> <ul style="list-style-type: none"> <li>- Building partner activation tracking processes</li> <li>- Discussions with OLY team re processes to support US Sailing and Team programs</li> <li>- Reviewing 2022 EOY fulfillment budget and starting 2023 budget planning</li> </ul>
<p><b>Business Development:</b></p>	<ul style="list-style-type: none"> <li>• US Sailing overview deck and initial asset evaluation complete</li> <li>• SLF sales pacing ahead of previous event</li> <li>• Partnership revenue (cash/vik) at \$3,112K against budget of \$3,597K</li> <li>• Gowrie 3yr proposal (2023-25) submitted</li> <li>• Additional conversations with other insurance agencies ongoing</li> <li>• West Marine renewal meeting 9.12</li> <li>• New business development prospect discussions of note include Bermuda Tourism, Suntex, Makita, Vineyard Vines &amp; Garmin</li> <li>• Developed initial Olympic Sailing Trials asset list to share with USOPC</li> <li>• Initial conversations re broader USSA Licensing Program</li> <li>• Ongoing discussions with RWU &amp; Bonnier re joint business development ideas</li> </ul>

<p><b>Foundation:</b></p>	<ul style="list-style-type: none"> <li>• 2022 Total Raised in Pledges, Conditional Pledges, and Verbal Commitments toward Year-end goal of \$15,773,000: \$10,209,000 raised so far.</li> <li>• 2022 Total Cash Received, including pledge payments and new gifts: \$4,155,000</li> <li>• Raised funds for Project Pinnacle. Year-end goal: \$4,000,000. Raised \$2,855,000,000 so far.</li> <li>• Raised funds to match the James M. “Ding” Schoonmaker II Project Pinnacle Endowment Fund Challenge of \$500,000. Raised \$56,000 so far.</li> <li>• 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. Raised \$787,000 so far.</li> <li>• Activities and forecast for Siebel Sailors through 12/31/22: <ul style="list-style-type: none"> <li>○ 14 potential commitments of \$100,000 or more with a likely total raised of \$575,000 to \$4,600,000</li> <li>○ Siebel impact email #1 (with link to give) September 6 forecast: \$2,500</li> <li>○ Siebel reporting letter – Print/snail mail (with donation form) September 25 forecast: \$2,500</li> <li>○ Siebel impact email #2 (with link to give) October 18 forecast: \$2,500</li> <li>○ Annual Report October forecast: \$500</li> <li>○ Siebel Gift Catalog/Gift List October forecast \$20,000 <ul style="list-style-type: none"> <li>▪ Email #1 – October 10</li> <li>▪ Gift List in mailboxes – October 10 - 14</li> <li>▪ Email #2 – October 22</li> <li>▪ Email #3 – October 28</li> </ul> </li> <li>○ Year-end appeal letter: November forecast: \$70,000 <ul style="list-style-type: none"> <li>▪ Watch your mailbox email – November 10</li> <li>▪ Letter in mailboxes – November 14-19</li> <li>▪ Email #2 – December 7</li> <li>▪ Email #3 December 15</li> <li>▪ Last chance to give emails – Dec 19, 30, and 31</li> </ul> </li> <li>○ Giving Tuesday November 29 forecast: \$500</li> <li>○ Planned Giving e-mail push December 3</li> </ul> </li> </ul>
<p><b>USST/ODP:</b></p>	<ul style="list-style-type: none"> <li>• Halifax was a success from a support point of view, less so from an athletic results point of view. PT, meals, meteorology, coaching, boatwright, and technology were all well executed by our staff. Debrief has been held.</li> <li>• Radial and Formula Kite Worlds coming up</li> <li>• Long Beach progressing slowly</li> <li>• End of the second year of the WM US Open. Participation numbers grew from 695 participants this year, compared to 604 last year. Prize \$ was added from USST budget.</li> <li>• Planning “All Team Camp” December 1-15 in Miami. Training, racing, outside experts, coaches’ seminar 2 days prior, fitness camp and testing.</li> </ul>