

2022 Association Report - March

Topics	Comments	Status								
Financial Metrics – Financials are based on February numbers.										
Revenue	<p>YTD Revenue \$6.4MM vs budget of \$1.6MM</p> <ul style="list-style-type: none"> • \$4.8MM positive variance associated with \$5MM Schoonmaker Endowment Pledge • Investment income YTD \$146K below budget (\$126K Loss YTD) • Program Revenue \$50K below budget in registration fees (\$85K associated with NSPS) 	Green								
Expense	<p>YTD Expense of \$1,685 was \$711K or 30% below budget of \$2,396K</p> <ul style="list-style-type: none"> • Salaries & Benefits \$106K below budget YTD (open roles) • Travel below budget \$150K & Meetings below \$90K mainly associated with transition to virtual NSPS • Coaching fees \$106K below budget in Olympic department • Consulting fees \$70K below budget, \$50K in the Olympic department 	Green								
Net	<p>Feb Cashflow \$958K vs estimated loss of \$448K</p> <p>Net Cashflow YTD 1MM vs estimated loss of \$821K</p> <p>100% attributed to Feb receipt of \$1MM Schoonmaker Funds, will even out. Also note that the \$1MM is an endowment, and only a small portion can be spent annually on Project Pinnacle</p>	Green								
Membership & Retention	<p>Revenue:</p> <ul style="list-style-type: none"> • Month: Feb '22 - \$179,761 vs Feb '21 \$168,332 • YTD: '22 \$357,009 vs '21 \$333,698 (7.0% variance) <p>Membership #'s Excluding Organizations & Corporations:</p> <ul style="list-style-type: none"> • 61.2% Retention Rate vs December Year End (typical for this time of year) • Budget built on 60% retention rate expectation • May lapsed member campaign in planning phase <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th colspan="2" style="background-color: #003366; color: white;">Members</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Dec-21</td> <td style="text-align: center;">43,786</td> </tr> <tr> <td style="text-align: center;">Feb-22</td> <td style="text-align: center;">42,715</td> </tr> <tr> <td style="text-align: center;"># Variance</td> <td style="text-align: center;">-1,071</td> </tr> </tbody> </table>	Members		Dec-21	43,786	Feb-22	42,715	# Variance	-1,071	
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Key Priorities Update

Adult:

- A Safety at Sea Moderator Training Course was held last week in St Petersburg, FL with 9 Moderator Candidates. This training was held to boost the number of Moderators available to oversee Safety at Sea in-person courses which are seeing more of a demand as backlog of sailors needed new certificates is high due to a delay in courses due to the pandemic. These new Moderator Candidates will work alongside experienced Moderators at several courses before being approved to fly solo. Education Director Stu Gilfillen went to St. Pete to observe and critique.
- As of the end of February, 12 SAS courses with another 4 in March. Biggest months for in-person courses are April (12) and May (14). A total of 56 are on the calendar for 2022.
- As of the end of February 1,272 Safety at Sea certificates in total have been generated, with nearly 700 of those generated by the office for in-person courses. This is 25% of 2019 total year in-person certificates and more than 50% of total year 2021 numbers. We expect about 5,000 certificates to be generated in 2022.
- Student Keelboat certificates issued (729) as of Feb 28 are well ahead of recent years in comparative period: 165% > 2021; 114% > 2020; 126% > 2019.
- On track with Powerboat and Keelboat Instructor courses and # instructors trained.
- 4 Adaptive Instructor Workshops are on the 2022 calendar of courses with a 5th to be scheduled soon.
- One Design Committee surveys for Class Associations and OD Sailors are in final stages of approval and expect to launch end March/early April. One Design has been using a dedicated Facebook page among class leaders to start comms about getting more college sailors to take part in OD Classes post-college.

Education:

- Completed the *Small Boat Instructor Manual* which replaced the existing Instructor Guide used by our Level 1 course. This was a major undertaking but is a massive improvement as it supplies alignment between our Level 1 course, student curriculum and Skill Up App content. We are waiting on the final print proof before putting it into use.
- Held an all-Instructor Trainer update in early March to give an update on all recent changes and forthcoming ones.
- Several discipline specific IT updates will be occurring during March.
- We reviewed our product line (including publications, online courses and supplementary materials to find places where outdated insurance information is/was listed and remove it.
- Course registration volume continues to be robust across all disciplines (specific data is listed in other reports). Our team continues to set a record pace for scheduling courses while also fielding a variety of customer service and technical questions.
- We are working with Colin Rupp, our webmaster, to implement an online Forum system that will allow for Instructors, ITs (Instructor Trainers) and other potential constituent groups to communicate directly and share ideas. We will be rolling this out slowly to ensure that we can properly support it but expect there to be more widespread use in the future.
- As noted in the Adult Department report, I (Stu Gilfillen) attended the SAS Moderator training last week which provided the opportunity to observe potential candidates and also ID ways that we can better support the people teaching our courses. A big thank you to Chuck Hawley, Bruce Brown, Ralf Steitz and Warrior Sailing for putting it together.

Offshore:	<ul style="list-style-type: none"> • New Offshore Coordinator, Sydney Hough appointed. Started in role 3/15. • US Sailing reinstated as US Ratings Office for ORC • ORR and ORC certificate processing well underway • Initial meetings held regarding improving support for PHRF • Race entries for major offshore races are up on previous years, including record breaking entries for some races including Newport Bermuda. 																								
Race Administration:	<ul style="list-style-type: none"> • Continuing strong demand for race administration seminars and con ed events (events completed and scheduled YTD): <ul style="list-style-type: none"> ○ Basic Race Management Seminar: 17 offerings; 211 participants ○ Club Judge Seminar: 1 offering; 15 participants ○ Advanced Race Seminar: 5 offerings; 64 participants ○ Advanced Judge Seminar: 2 offerings; 23 participants ○ Judge Protest Day: 8 offerings; 98 participants ○ Umpire Seminars: 5 offerings; 17 participants • We continue searching for replacement insurance coverage, as well as educating officials on the situation and the questions they need to ask organizing authorities for events they are considering working 																								
Siebel:	<ul style="list-style-type: none"> • 4 Florida programs have been running a strong season since early January that will end mid-April • Remaining Regions launch programs in April • Process of intaking Siebel Center Applications and RFPs for coach boat & sailboat partners is underway 																								
Youth:	<p>Youth Competition</p> <ul style="list-style-type: none"> • US Sailing Youth and Junior Championships are on track for summer 2022, with planning for 2023 well underway. This includes full implementation of the Youth Racing Task Force recommendations in 2023. • 2022 USA Junior Olympic Sailing Festivals are being refreshed with an increased festival atmosphere, including modern boat demos, sponsor activations, and onshore education modules. In order to focus energy on each of the festivals, the total number of JOs is being reduced to 12 events. • The Youth Racing Pathway Guide is being drafted by Marketing staff, with Youth and Olympic staff and volunteer expert input. This guide will be published in May and be the cornerstone of our youth racing communications. <p>Youth Education</p> <p>Small Boat</p> <table border="1" data-bbox="418 1602 1408 1982"> <thead> <tr> <th></th> <th>Student Goal</th> <th>Students YTD (2/28/22)</th> <th>Registrations 1/1- 12/31/2022 (includes 2/28/22 YTD)</th> </tr> </thead> <tbody> <tr> <td>Sailing Counselor</td> <td>126</td> <td>0</td> <td>2</td> </tr> <tr> <td>Reach Educator</td> <td>64</td> <td>10</td> <td>22</td> </tr> <tr> <td>Level 1- Online Section</td> <td>1440</td> <td>258</td> <td>848</td> </tr> <tr> <td>Level 1- In-Person Section</td> <td>1500</td> <td>46</td> <td>917</td> </tr> <tr> <td>Level 2 Instructor</td> <td>160</td> <td>11</td> <td>71</td> </tr> </tbody> </table>		Student Goal	Students YTD (2/28/22)	Registrations 1/1- 12/31/2022 (includes 2/28/22 YTD)	Sailing Counselor	126	0	2	Reach Educator	64	10	22	Level 1- Online Section	1440	258	848	Level 1- In-Person Section	1500	46	917	Level 2 Instructor	160	11	71
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Events:	<ul data-bbox="467 869 1490 1251" style="list-style-type: none"> • NSPS Live, the virtual NSPS experience, launched March 1st. Content will continue to be delivered twice per week through April 14th. View the schedule at: https://nsp.ussailing.org/schedule/ Email events@ussailing.org to receive access to the event and content • The US Sailing Association Awards and Rolex Yachtsman & Yachtswoman of the Year Celebration is coming up March 24th in San Francisco, CA. US Sailing will be awarding four One-Design awards, the Kevin Burnham Memorial Award, St. Petersburg Yacht Club Trophy, Herreshoff and more. The event will culminate with the live announcement of the 2021 Rolex Yachtsman and Yachtswoman of the Year Award. All Board members have been invited and are encouraged to attend. RSVP to events@ussailing.org • The amended contract postponing NSPS 2022 to NSPS 2024 has been signed 								
HR:	<ul data-bbox="467 1289 1484 1482" style="list-style-type: none"> • Recruiting for 9 open positions – just filled 2 others Olympic Coordinator and Offshore Coordinator with an offer out for executive assistant • Rolled out review process through new payroll platform including compensation planning for merit increase and annual incentive review to align with budget • 60% of the way through learning Snippets for DEI training for the whole staff with record numbers for participation 								
IT:	<ul data-bbox="467 1526 1490 1902" style="list-style-type: none"> • The Sailor Base replacement audit is progressing well. The firm conducting the audit, Trilix, has narrowed the vendor list to four providers. Two offer solutions built on .NET and two on Salesforce. • We are currently finalizing US Sailing’s list of “must have’s” and “nice to have’s” to provide the vendors, who will then give a team here a demonstration of their platform. • We have completed the majority of Envision’s backup solution with only the servers in Fall River remaining to be implemented. • We have migrated to Envision for technical support as of March 1. There has been a dip in the number of support requests over the first 10 days as staff gets used to contacting Envision vs. In-house staff. • We have installed increased security measures for Microsoft 365 and will continue to look for ways to protect our data. 								

<p>Marketing & Communications:</p>	<p>Partnerships</p> <ul style="list-style-type: none"> • Finalized and executed Gowrie Marketing Sponsorship contract with increased revenue and contribution to Siebel Sailors Program, while protecting ability to continue searching for insurance solutions for our members and re-assessing insurance category over 2022. • Secured a 2024 quad partnership with New England Ropes across US Sailing and USST for cash, VIK, and engineer development support for USST/ODP. • Renewed West Marine as Title Sponsorship of the US Open Sailing Series for 2022. New ownership and new CEO, Eric Kufel is invigorated and keen to engage with the sailing community and reestablish West Marine's support of sailors in the US. • Delivered 3rd leg of US Open Series FLA in Clearwater with all daily sponsor activation, comms and content recap associated with contractual delivery. • Presented at the Siemens ILS (Innovation Leadership Summit) Conference with Riley Schutt, Head of Olympic Technology, demonstrating the ways US Sailing is utilizing Siemens's software tool set to optimize the 10 Olympic classes to help us win medals in Paris 24 and LA 28. • 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 • Released public RFP for sailboats and powerboats partners for Siebel Sailors Program expansion and continue intake management of proposals and questions from manufacturers and vendors, including informational conference calls through March. <p>Communications</p> <ul style="list-style-type: none"> • Over 30% open rate for last 35 emails with an average open rate of 53.5% and extending as high as 81.8% • Announced Shortlist for US Sailing's 2021 Rolex Yachtsman and Yachtswoman of the Year Awards • Conducted conference calls with Sailing Media and Past Winners of Rolex Yachtsman and Yachtswoman of the Year for 2021 Award, conducted voting, and announced finalists (3 men and 3 women) – winners to be announced LIVE at Awards Ceremony on March 24th at St. Francis Yacht Club in San Francisco, CA • Announced changes to US Sailing's commercial insurance coverage to membership • Developed, crafted, and distributed US Sailing Statement and actions concerning situation in Ukraine in coordination with the IOC, USOPC, and World Sailing. <p>Marketing/Content Development</p> <ul style="list-style-type: none"> • Executed marketing campaign for Black History Month including logo changeover, email signatures, web presence, and 4 spotlight editorial stories (all picked up as lead story on Scuttlebutt) • Launched "Boat Name Bracket" promotion to coincide with March Madness with call for submissions. Promotion to continue with release of full 32 Boat Name Bracket on 3/16 and voting to take place throughout March with winner announced on April 1. • 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. • Development of comprehensive US Sailing 125th Anniversary communications, content, and promotions plan <p>Web</p> <ul style="list-style-type: none"> • Feb 2022 web traffic up .27% over Feb 2021, new users up 6.49% and overall visitors up 6.52% • Optimized Foundation web pages to speed up pages by removing JavaScript imagery and improved legibility of text and donation information. This will improve user experience of page and hopefully lead to more donations and more informed donors.
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	<ul style="list-style-type: none"> In process of improving links built into copy on web pages by bolding them and allowing for users to see there is a clickable hyperlink in copy <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
Membership:	<ul style="list-style-type: none"> Membership numbers historically trend lower in December, January and February. We are currently tracking at 61.2% retention, which is higher than our rates during this time last year (December '20 at 60.9%, January '21 at 59.3% and February '21 at 58.4%). Developing the value proposition for membership Partnering with the Foundation team to better steward our President's Club members with segmented digital and print communications Reviewing the 2021 metrics and creating 2022 campaigns for targeted digital advertising with Feathr MVP Program: Initiated quarterly club outreach to provide credit balances and support their promotion of the program and launched MVP for Keelboat Schools Continuing to search for a Membership Director
SafeSport/Audit Compliance:	<ul style="list-style-type: none"> SafeSport Administrative Audit: 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 will be an Administrative Audit, set for March 15th. This audit will be 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. All document requests were due February 15th. 2022 USOPC Compliance Audit 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. 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 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. Each NGB will be assessed under the following standards: <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 as well as US Sailing's Governance and Compliance Committee to prepare for this audit.</p>

<p>Foundation:</p>	<ul style="list-style-type: none"> • 2022 Total Raised in Pledges, Conditional Pledges, and Verbal Commitments: \$7,536,000 • 2022 Total Cash Received, including pledge payments and new gifts: \$1,459,313 • Established the James M. “Ding” Schoonmaker II Project Pinnacle Endowment Fund to honor the life and legacy of James M. “Ding” Schoonmaker II. The Fund was established in February with a pledge of \$5,000,000 to be paid over five years with the first pledge payment of \$1,000,000 also paid in February. In addition, we have been challenged with raising an additional \$500,000 per year for the next five years to be matched dollar-for-dollar by the Schoonmaker Foundation thus raising the endowment to \$10,000,000. Raised about \$10,000 toward the match so far. • Raised funds to meet the dollar-for-dollar match offered by Tom and Stacey Siebel for the Siebel Sailors Program. We have until 12/31/22 to raise \$5 million and turn it into \$10 million, all restricted to the Siebel Sailors Program. Raised about \$96,000 so far. • Raised funds for Project Pinnacle. Aiming for \$4 million in new revenue, with \$1 million of that to be collected in cash this year. Raised about \$35,000 so far.
<p>USST/ODP:</p>	<ul style="list-style-type: none"> • First Team camp went well • Fundraising will be tough this year • Unfortunate 2021 expense surprise • Operations Team consists of Sally, Kate, Katie plus new Olympic coordinator • A concerned is not enough sailing is going on • Slight improvement in Long Beach Site project