Awards and Accolades

USNA Ranked #9

2015 Educational Fundraising Award Recipient

2015 Distinguished Graduates

Demographics of 2016 Nominations

Decade	Noms	Rcpts	2016
30's	13	8	0
40's	30	13	3
50's	90	27	1
60's	61	21	12
70's	22	3	7
80's	3	1	1
	219	73	24

Historical Distribution
(by community)

SUB	19
N Aviator	23
SWO	14
USMC	9
Other (EDO/CEC/Supply)	6
USAF	2
	73

A Look Ahead

- **19-20 November: SACC, San Antonio**
- **21 November: Navy Football @ Tulsa**
- **27 November: Navy Football @ Houston**
- **1 December: Ogle Hall Tree Lighting**
- **5 December: AAC Championship**
- **10 December: Board of Trustees Meeting**
- **12 December: Navy Football vs Army**
- **18 December: Blue Chip Dinner, Dallas**
- **28 December: Military Bowl in Annapolis**

Go Navy!

- 8-1 (6-0 in conference)

- Ranked 16th
in College Football
Rankings

- Reynolds
sets NCAA career rushing
TD record

Bill Dawson '82
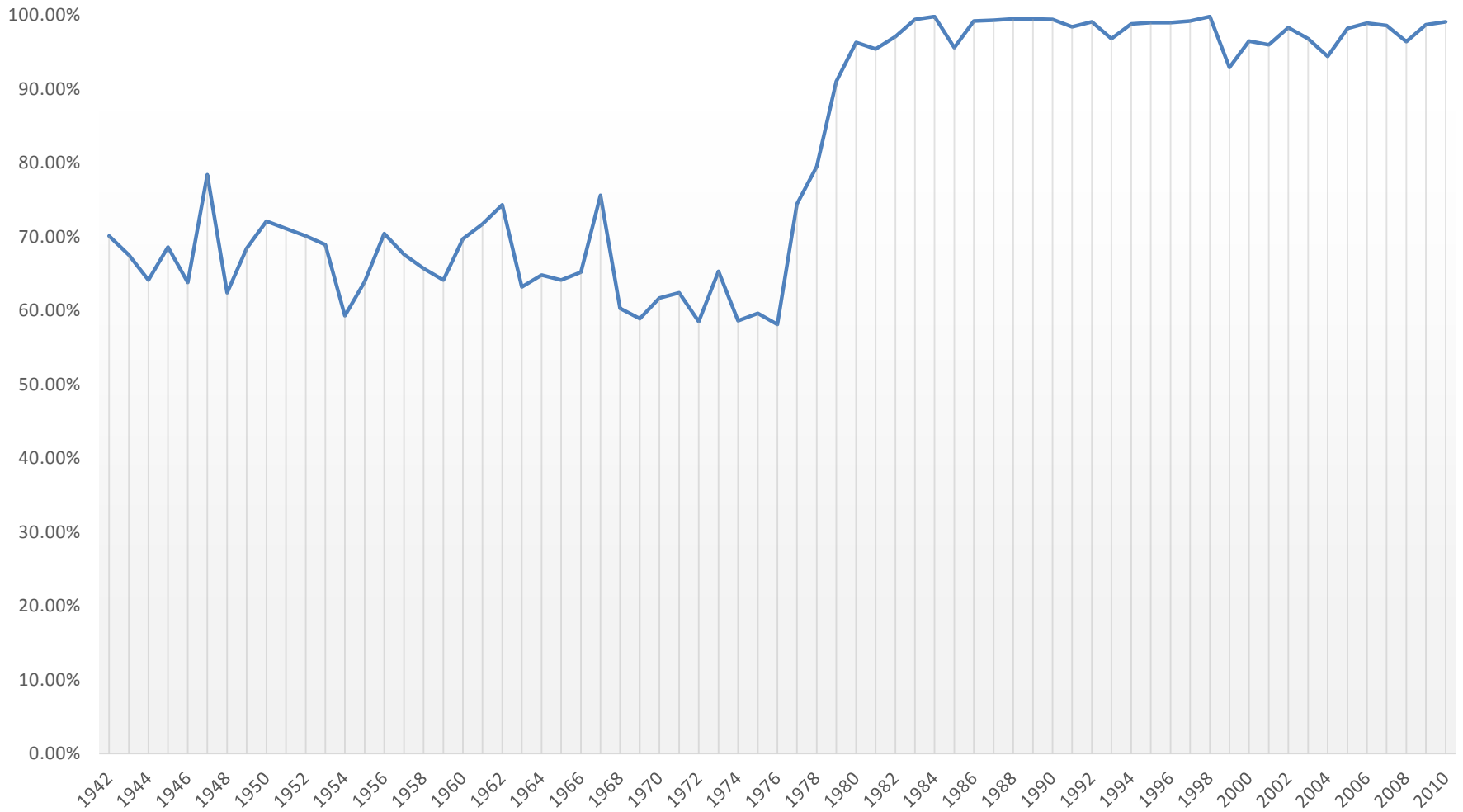# Executive Vice President Engagement

10 months on the job...

- **On the road**
- **There's energy to be tapped**
- **Finding/encouraging volunteers**
- **Recognizing superior efforts**
- **Spreading the message**
- **Supporting the USNA mission**
- **What do you need from the AA?**

What is Engagement?

- ☑ Membership
- ☑ Participation
- ☑ Reachable
- ☑ Communication
- ☑ Volunteers time & talent
- ☑ Giving

Membership %

Membership Metrics

	11/30/12	11/30/13	11/30/14	11/2/15
Living Grads	**55,258**	**55,780**	**56,310**	**56,784**
Alumni Life	47,318	48,232	49,031	49,648
Alumni Annual	724	635	595	535
Total Alumni Mbr	48,042	48,867	49,626	50,138
	(86.9%)	(87.6%)	(88.1%)	(88.3%)
Parent life	1,107	1,184	1,316	1,451
Parent Annual	1,319	1,457	1,517	1,542
Total Parents	2,426	2,641	2,833	2,993
Total Members	58,268	59,520	60,505	61,371

> **New Parent Membership (2019 vs 2016) up 66%**
> **Focus Area... Parents, Grandparents and Friends**

Parent Membership Growth

Data points: 346 (2015), 402 (2016), 452 (2017), 534 (2018), 667 (2019)

Legend: # Parents Members
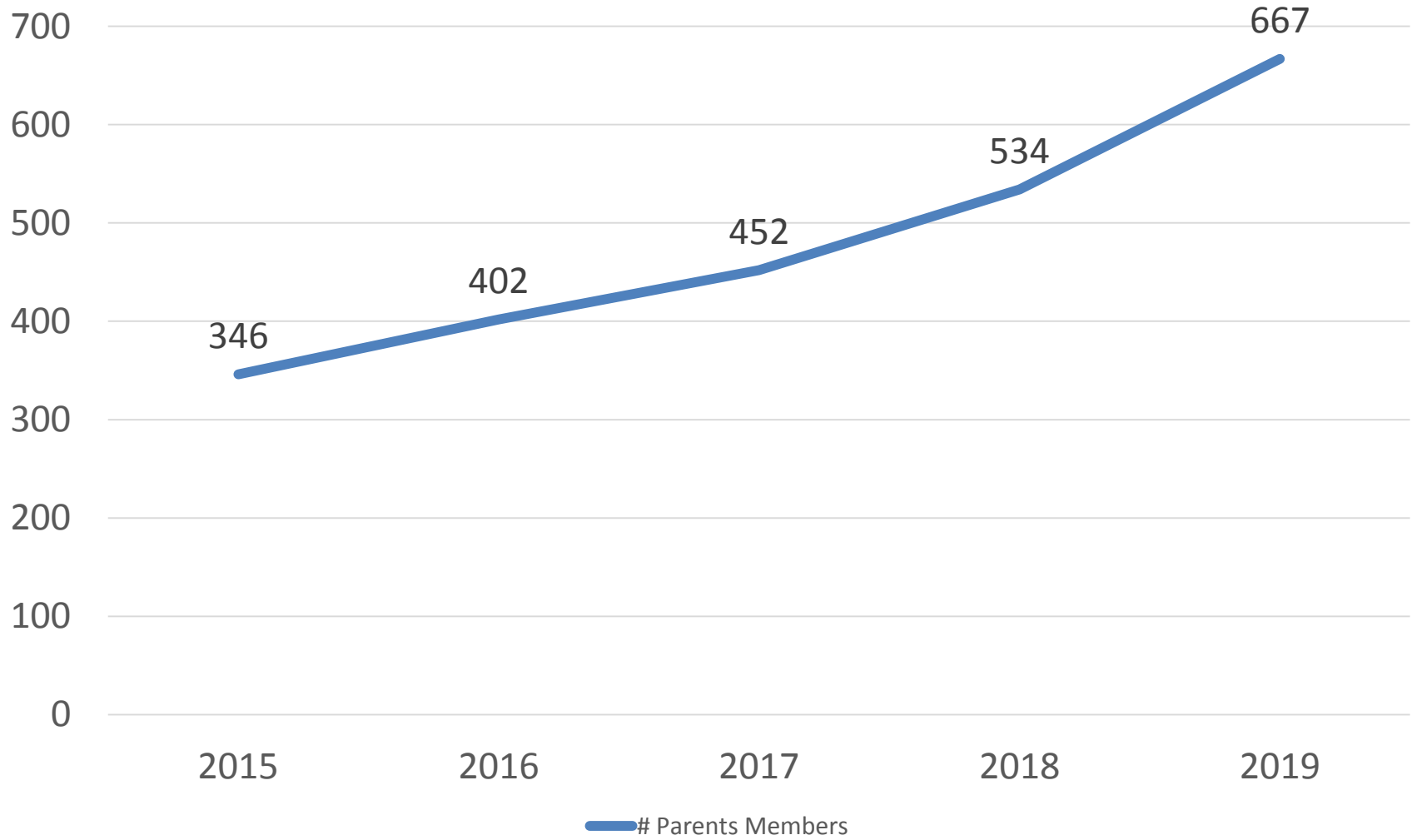
Reunion Participation (2010 – 2015)

Reunion Year	2010 Class	Total	2011 Class	Total	2012 Class	Total	2013 Class	Total	2014 Class	Total	2015 Class	Total	Reunion Year	Ave
75	0	0	1947	48	1937	40	0	0	1939	88	1935	1	75	35
70	1940	51	1942	102	1943	42	0	0	1945	95	1940	17	70	61
65	1945	160	1947	200	1947	247	1948	120	1949	101	1950	153	65	172
60	1950	314	1951	0	1952	240	1953	280	1954	175	1955	143	60	174
55	1955	361	1956	320	1957	450	1958	477	1959	412	1960	380	55	385
50	1960	750	1961	737	1962	811	1963	885	1964	886	1965	672	50	771
45	1965	520	1966	680	1967	695	1968	613	1969	583	1970	708	45	637
40	1970	776	1971	421	1972	757	1973	817	1974	725	1975	842	40	704
35	1975	580	1976	550	1977	550	1978	644	1979	540	1980	625	35	569
30	1980	829	1981	736	1982	730	1983	872	1984	765	1985	964	30	805
25	1985	928	1986	963	1987	833	1988	444	1989	790	1990	772	25	857
20	1990	614	1991	1069	1992	557	1993	1200	1994	831	1995	863	20	787
15	1995	350	1996	240	1997	443	1998	415	1999	496	2000	418	15	389
10	2000	517	2001	227	2002	277	2003	411	2004	282	2005	471	10	355
5	2005	125	2006	174	2007	237	2008	427	2009	315	2010	312	5	233
		6875		6467		6909		7605		7084		7340		6935

Another Link In The Chain

'65 at 2015's graduation
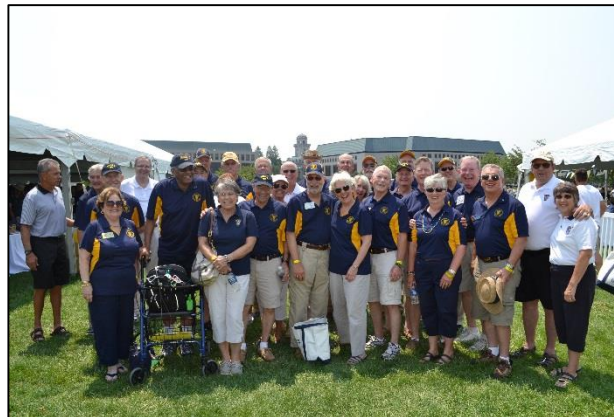

Ring Dance 16/66
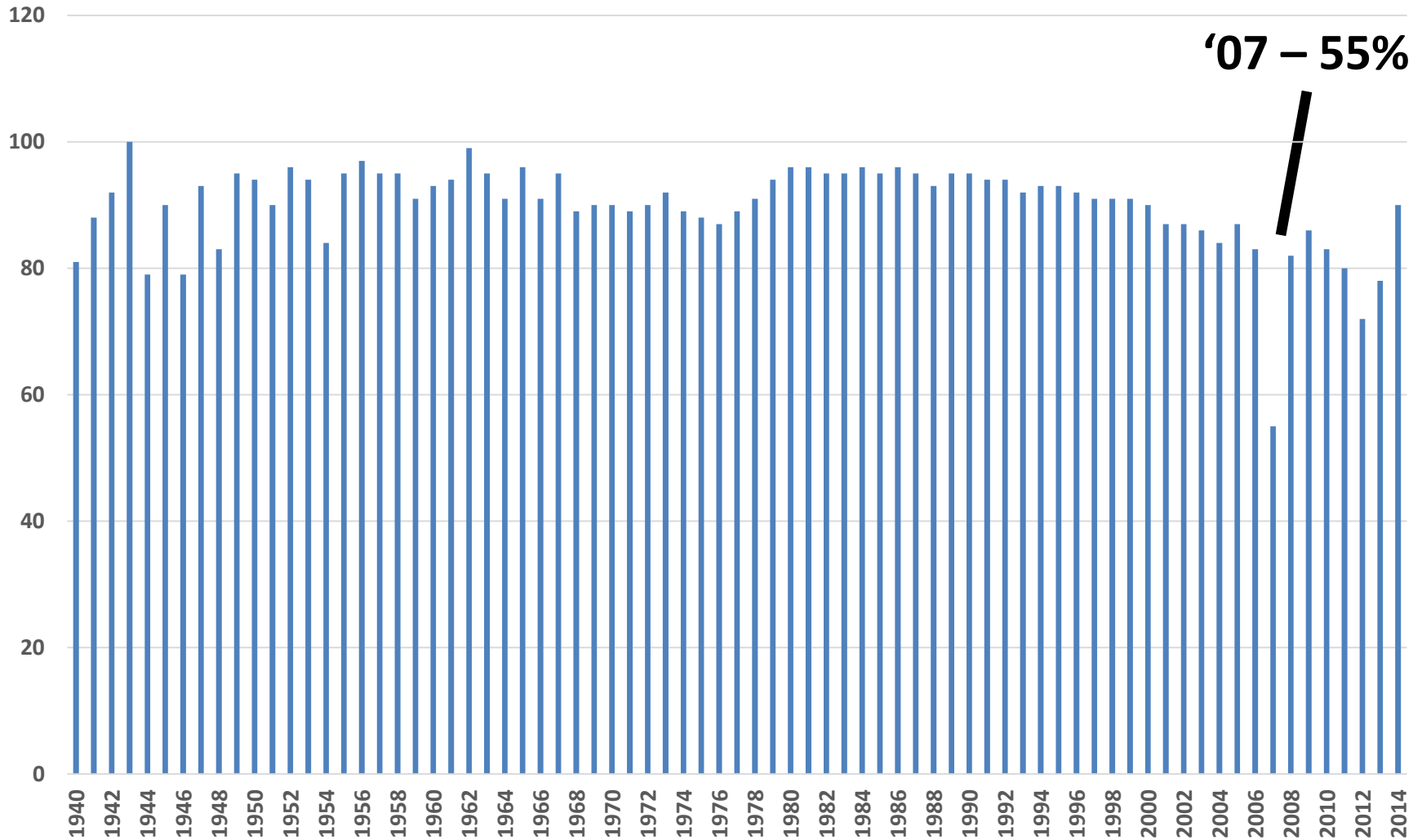

Commitment Dinner 17/67
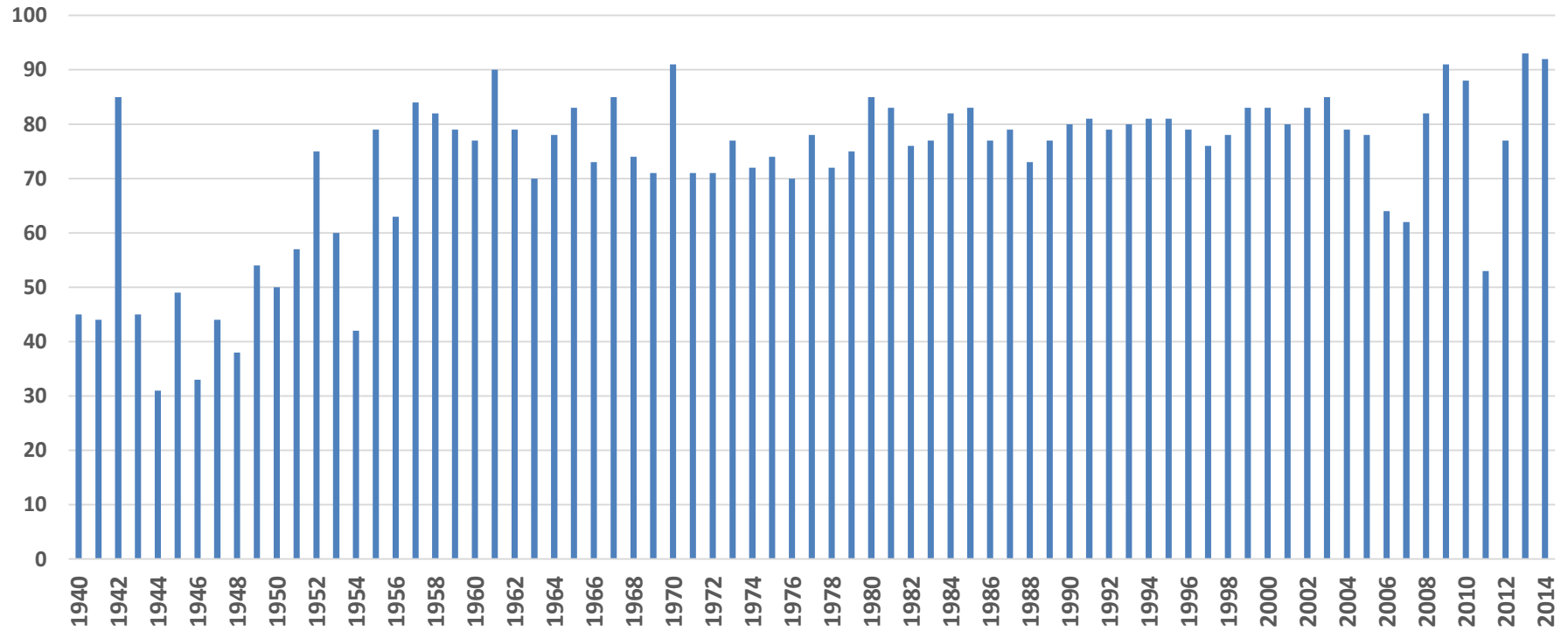

Herndon Climb 18/68

I-Day 19/69

On Deck '70

Reachable Alumni (Mail/Email)

'07 – 55%

Top 20 Reachable Classes

Class	%	Class	%
1943	100	1955	95
1962	99	1957	95
1956	97	1958	95
1952	96	1963	95
1965	96	1967	95
1980	96	1982	95
1981	96	1983	95
1984	96	1985	95
1986	96	1987	95
1949	95	1989	95

Good Email (By Class)

Top 20 reachable classes (email)

2013	93		1957	84
2014	92		2000	83
1970	91		1965	83
2009	91		1985	83
1961	90		2002	83
2010	88		1981	83
2003	85		1999	83
1942	85		1958	82
1967	85		2008	82
1980	85		1984	82

Unreachable %

# What does an "Engaged" Class look like?

- **Involved Leadership Team**

- **Consistent, inclusive event planning and coordination**

- **Good governance (documented)**

- **Succession planning**

- **Partnership with local AA Chapter, Parents Clubs & BGO network**

- **USNA Admissions Outreach Support**

- **Support USNA Sports / ECAs**

- **Financially stable and involved with support for USNA**

- **Good Comms (FB, Web, other social media...)**

Kristen Pironis
Executive Director
Enterprise Communications

Enterprise Communications

Shipmate
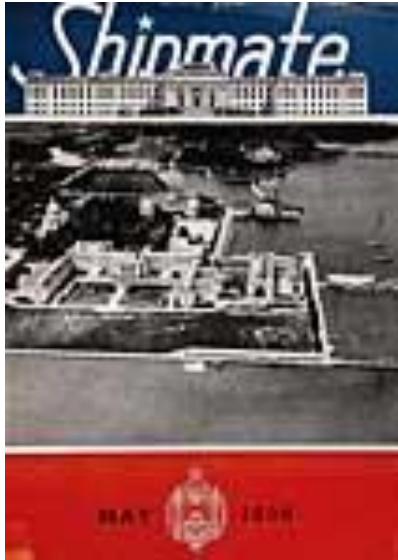
Then...   and Now...

Boeing Partnership

2015
CAPT Sunita Williams '87
LCDR Mark Tedrow '04
David Robinson '87
ENS Joe Cardona '15
LT Mitch Harris '08, USNR
Montel Williams '80

2014
President Jimmy Carter '47
Roger Staubach '65
CAPT Wendy Lawrence '81, USN (Ret.)
CAPT Tom Frosch '92
CAPT Chris Cassidy '93
Billy Hurley '04
LT Brad Snyder '06, USN (Ret.)

In Case You Missed It

WE SHARE THE MISSION.

Social Media Tools

What's Next?

- *Shipmate* **survey** – participation is key
- **Share your stories**
  - Send in Class and Chapter columns
  - Tell us what you are up to for Bravo Zulu and other publications
  - Submit a story or story idea
- **www.usna.com**

James Wolff '03
Director, Information Services

Information Technology Tools

- CRM is replacing an end-of-life system for alumni engagement management and fundraising operations.
  - Will allow for Volunteer Leaders to interact with shared alumni records
  - Anticipated Spring 2016 roll-out

- Volunteer Tools Improvements since Spring COCP
  - Added e-mail attachments
  - Improved Alumni Lookup
  - Rolling out WordPress website capability (http://usnaaasiteadmin.net/)
    - Thanks to Steve Clark Hall '75, Western Region Trustee and Karen Hurst, Tampa Bay Parent's Club
  - Conducted 1st IT Tools Webinar

- Planned Improvements
  - Create a discrete "Toolkit"
  - CRM interface for alumni records
  - Social Media Login
  - Event Management Reports
  - Reachability Reports

- Need Help with Website Archiving

Treasurer's Report

Hank Sanford
Chief Financial Officer

Year End Summary ●

- ➢ Strong Year!
    - Carried by contributions
    - Despite lackluster unrealized investment Income

- ➢ Budget
    - Best ever Annual Fund
    - Other revenue exceeded budget estimates
    - Expenses driven by campaign investments – CRM, consultants, fully staffed
- ➢ Result
    - 2 consecutive years of substantial budget surpluses
    - Strong financials – met or exceeded Board standards
    - Fully mission capable

FY 15 Fiscal Targets...

| Metric	Target	6/30/2015	
Composite Financial Index	5-10	6.63	✅
Unrestricted Net Assets	> 18 Months of Operating Expense	16.4 Months	
Operating Reserves	= 25% of Operating Expense	29.3%	✅

FY 15 vs. FY 14

($ Million)	FY 15	FY 14	Over/(Under)
Net Assets	$227.5	$218.1	$9.4
Contributions	$36.6	$36.4	$.2
Annual Fund	$10.9	$9.7	$1.2
Investment Income	$1.9	$23.1	($21.2)
Support to USNA	$18.7	$23.2	($4.5)
Budget Surplus	$2.8	$3.0	($.2)

10 Year Investment Performance
6/30/2006 – 6/30/2015

	Average Annual Return	Number of Years with Best Return
Navy	6.66%	5
Army	6.37%	3
Air Force	5.51%	2

FY 16 Looking Ahead…

- Good Start

- Overall Contribution Revenue

- Challenges
  - ➤ Annual Fund
  - ➤ Investment Income
  - ➤ Contribution Momentum

Perry Center Property Lease & Alumni Center Project

Proposed Location

USNA Bishop Stadium
Terwilliger Bros. Field

King George Street

College Creek

St. John's College
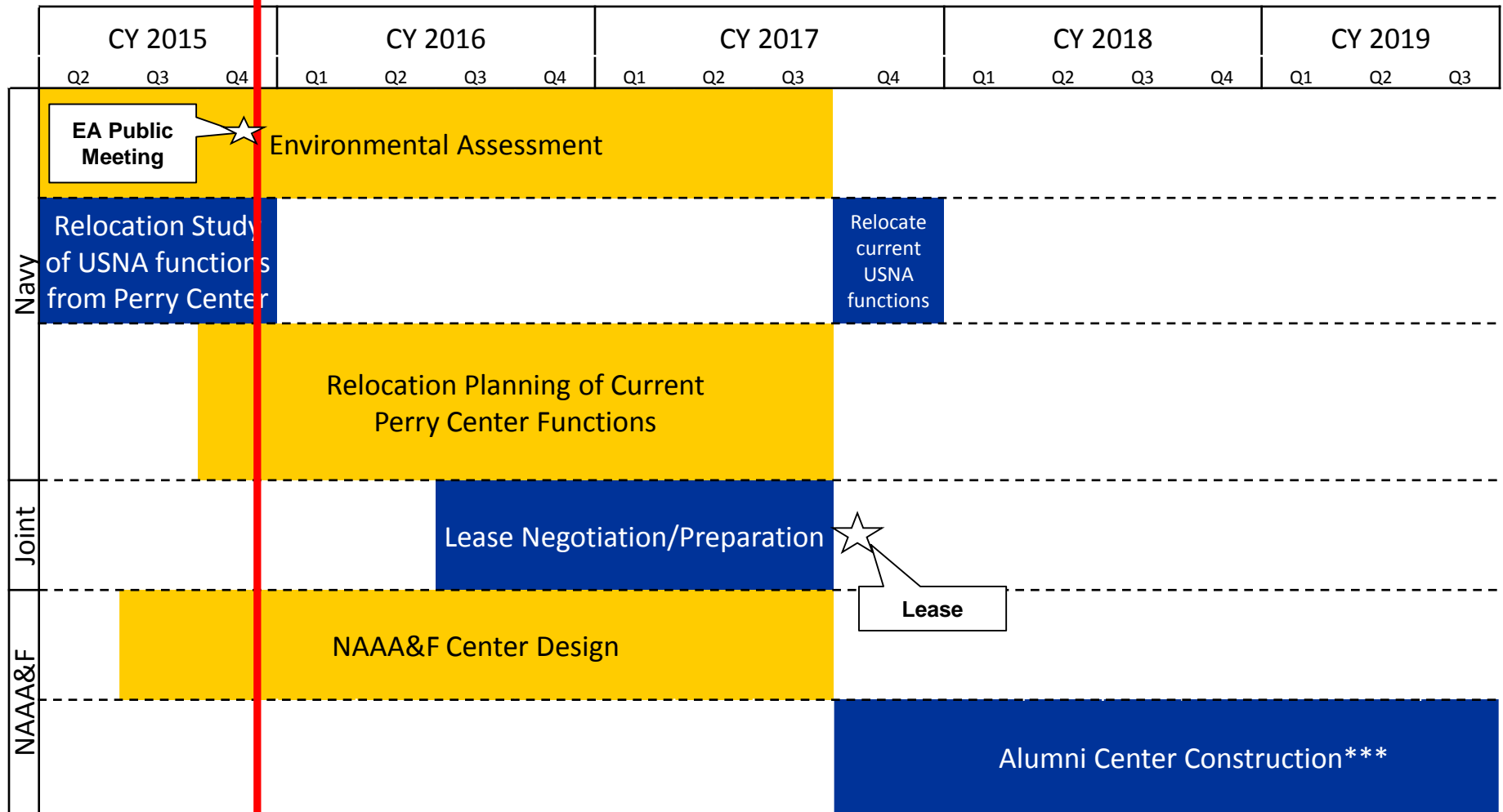
Aerial from South

Long Range Timeline

Bill O'Connor
Executive Vice President
Development

Development Update

- **Class Giving**
- **All Academy Challenge**

ALL ACADEMY CHALLENGE

4 Teams. 10 Days. 1 Mission.

Classes Starting Projects During Campaign

Class	Components	Raised (Thousands)	Goal
1958	Larson Leadership Award, AF	$ 129	
1959	Donovan Leadership Fund, Cyber, AF	$ 154	
1966*	Cyber, Athletics Programs, AF	$ 2,518	
1967	Cyber, Leadership, Athletic Excellence, AF	$ 1,778	
1968	Leadership Instructors, Athletic Excellence, Chapel Doors, AF	$ 663	
1969*	Alumni Mentoring Program, AF	$ 1,634	
1975	Stockdale Center, CAE, AF	$ 721	
1976	Cyber, Athletic Excellence, AF	$ 782	
1977	Leadership, Athletic Excellence, AF	$ 1,207	
1978	Stockdale Center, STEM, Athletic Excellence, AF	$ 855	
1979	Trident Scholar Program, Athletic Excellence, AF	$ 353	
1986*	Stockdale Center, Mexican Monument, AF	$ 637	

* Fundraising began March 2012   Started this year

Classes Starting Projects During Campaign

Class	Components	Raised (Thousands)	Goal
1987	Leadership/Ethics, STEM, AF	$ 365	
1988	Cyber, Experiential Leadership Development, Athletic Excellence, AF	$ 214	
1989	Cyber, Athletic Excellence, AF	$ 89	
1995	International Programs, Athletic Excellence, AF	$ 212	🟩
1998	Cyber, International Programs, Athletic Excellence, AF	$ 198	
2004	Cyber, AF	$ 105	🟩
2006	Leadership/Ethics, AF	$ 123	🟩
2007	International Programs, AF	$ 89	
2012	First Gift, AF	$ 169	
2013	First Gift, AF	$ 111	
2014	First Gift, AF	$ 91	
2015	First Gift, AF	$ 54	
	Grand Total	$ 13,251	

Started this year

Up 15% since April

50ᵗʰ Reunion Classes Leading the Way

Class	Components	Raised (Thousands)
1961	Leadership Education Chair, USNA Support, AF	$ 1,242
1962	Resident Ethics Fellow, Ripley Portrait, AF	$ 1,243
1963	'63 Center for Academic Excellence, AF	$ 3,612
1964	Ethics Integritas Project, A&SP Scholarships, AF	$ 3,167
1965	Distinguished Chair Ethics, Athletic Excellence, Stadium Goat, AF	$ 2,963
1966	Cyber, Athletics Programs, AF	$ 2,518
1967	Cyber, Leadership, Athletic Excellence, AF	$ 1,778
1968	Leadership Instructors, Athletic Excellence, Chapel Doors, AF	$ 663
1969	Alumni Mentoring Program, AF	$ 1,634
	Grand Total	$ 18,820

Average of $2.1M per class

Classes Up Next

- **The 0's – '60, '70, '80, '90, '00 plus '08 during CY 16**
  - **'60 has volunteered to do a 60th Reunion Gift Project**
  - **'08, the inaugural First Gift Class, will start their final push toward their 10th Reunion Gift**
- **The 1's – '71, '81, '91, '01, plus '09 during CY 17 – Training next spring after COCP**

2nd Annual All Academy Challenge

- **Tentative - June 1-7, 2015 alumni participation fundraising competition between Navy, Army, Air Force, Coast Guard and Merchant Marine (new participant in 2016)**
  - **All gifts greater than $5 to any fund counted; received by any means (online, mail, phone)**
  - **Institution with the greatest alumni participation wins (CG in 2015)**
- **2015 Results – A Multi-channel, Enterprise-wide fundraising effort that:**
  - **Raised about $2 million including $1.5 million in major gifts**
  - **Increase of $200 thousand in non-major gifts over 2014**
  - **Increase from 1,540 to 2,464 donors, <u>nearly 1,000 more than 2014</u>**
  - **Acquired about 200 new donors, similar to 2014**
  - **Good News Story: <u>reacquired 770 lapsed donors, about 250 more than 2014</u>**