

USPS DEO Meeting

31 January 2014 - USPS Annual Meeting

Jacksonville, FL

Minutes

Don Fiander – Introductions

Description of the Upcoming changes within the Educational Department for the coming year due to the upcoming elections.

Bob Brandenstein – Observations for the Education Department and within USPS.

Thank you for the quick responses on the survey of the SEOs and DEOs .Of the 420 requests, we got 220 back. We will want to repeat the process in about 6 months. We didn't ask for identifying information on the first survey. We will make that optional on the next survey. We can let you identify your region of the country.

We have changing demographics. We have to have a long view.

Issues that I see.

Declining participation in our educational programs. We are not attracting as many ABC students. We have trouble filling out Squadron bridges. We need to address the participation issue, then this will help address the membership issue.

Revenue Sharing looks at the educational activity in the squadron over the previous eight quarters. We have roughly 400 squadrons, but approximately one-third of the squadrons have not purchased any educational materials over the past two years! This is a symptom of a problem that we need to address.

Public Boating Classes which have historically been our way of attracting new members are slowly declining. The on-line course is also down. We believe that our courses are superior. Would our national courses be stronger if we had optional ways of presenting our courses? Should we consider taking our ABC class and teach the class as a series of 8 seminars? This sounds a bit like Vision 2000 from a few years ago.

A lot of states offer boating classes for free or almost free. Free is hard to compete with.

The number of Spanish speakers in the country is increasing. It has been reported that by 2040 the Spanish speaking population in the U.S. will be in the majority. The number of Spanish boaters is growing according to the National Marine Manufacturers Association. Over one-half of the decision makers in the purchase of a boat are women. We need to look at that changing situation.

Cyber Squadron members don't go to meetings. They don't hold bridge offices. There are 800 Cyber squadron members, and this number is growing. So far we have not addressed the needs of this group.

The identity of our organization may be changing due to our new Marketing Committee.

Carolyn Reid – Canadian Power and Sail Squadrons, National Training Officer

We are keeping our status quo as far as membership.

Some of our squadrons in CPS are merging. We are now down to 160 squadrons. Our squadrons are larger than those in USPS, but there are fewer. Our memberships is about the same as that of USPS.

CPS offers 22 courses. The number is large because we offer courses in French and in Chinese. Our biggest interest is in teaching in Chinese. We have to offer two types of Chinese. Those from Hong Kong and those from mainland China are different. There are also two different types of written Chinese. Our second course, Boating Essentials, is being written into Chinese as well. Our basic course is set by Transport Canada. We can't change it. The class is online. We are breaking up Boating Essentials into modules.

How many people use paper charts? Should we teach charting and plotting? Perhaps this should not be in Boating Essentials.

We use go-to-webinar and go-to-training. Go-to-training will let you work with 1000 people and has a lot of advance features. We use this because in some areas there aren't enough instructors. We are focusing on individual instruction and giving instructors the tools that they need.

We are working with local community colleges to do Instructor Led Self Study Courses. This uses electronic navigation book. There are lessons and assignments that go with that book. There are interactive discussions using webinars or conference calls.

We don't have On-the-water training. We like the idea of the simulator and hope to partner with USPS on that.

There are new governance policies in Canada for non-profits. We have simplified our organization. We have fewer directors (reduced by about half). There will be one type of membership. Everyone will have a vote. We are working on electronic voting. That will make it possible for every member to vote. We do not have ranks anymore. We just designate commanders but not all the other rank. We think that these are good changes for our organization.

We are facing all the same issues that you are.

The members will elect 25 directors. The directors will elect the officers of the organization.

Bob Brandenstein - Results of the SEO / DEO survey.

We wanted to get hard data. We think that we need to get the opinions of the SEOs and DEOs.

We came up with 5 categories that we wanted to address in this survey.

We narrow that down to: Scope and Content; Putting students in the seats; Following up on Leads.

Response rate was over 50 %. That means that nearly 50% did not respond.

Question 1 - Future Courses and Seminars- Top Requests new seminars ranked 1 - 6

Chart Plotters, Outboard Engine Maintenance, Boat Maintenance

Suggestions of other topics largely referred to seminars that we already have in place.

Conclusion is that we need to do a much better job letting SEOs know what seminars we offer. We must do a better job of informing the Squadrons about what we are offering. DEO need to be sure that SEOs know. This was important for us to know.

We need to improve our marketing to our squadrons and our members.

Question 2 – Distance Learning – most squadrons (over 42 %) welcome training and information for using Go-to-meeting to teach. Comment was made that it is better if there are face-to-face meetings.

Question 3 – Downloadable course material – well over 67 % in favor. Perhaps the squadrons think that the material was free or at least lower costs. CPS does this as an E-publication and charges the same so that the squadrons are not undercut.

Question 4 – Customization of class offerings - Many squadrons are doing this. This was viewed favorable.

Would your squadron use Mariner's Learning System (software offered for discounted price for Getting Captain's License) – This is online only but it is far less expensive than an in-class course. We could become testing centers for MLS products. – 25 % positive response. Many squadrons said that they were unsure.

Question regarding how ABC competes with the State Courses. Free response question. Free State courses are hard to compete with even though we know that our course is better. There were 200 responses to this question. These responses have been forwarded to the BPE Committee. Comment – We need to come up with a more sellable name and better marketing.

We asked about On-the-water training – many boaters don't want to take the time – responses also forwarded to BPE.

How successful have efforts been to promote courses and seminars? About 5% say effective. About 45 % said so-so. About 50% said not very effective. Squadrons said that they need help with marketing.

How many courses and students did your squadron have in ABC this last year? Average number of classes was 3.5. The average number of student in the class was 10 per class. The completion rate is high.

How effective were efforts at attracting course students at boat shows? 6 % said that boat shows were effective. 60 % said not effective. (Note that attendance at boat shows is down) Have the demographics of the boat shows changed? Should we look at other opportunities?

HQ800 – What can be done to improve it? – Variety of responses – Need better user instructions. Need ability to change data after it has been entered. There have been problems in the system because of the change in the server. We need YouTube™ videos to help. We need to redouble our efforts to get SEOs to use it. The DEOs need to help the SEOs learn to use HQ800. There is a HQ800 Swat team (John Esposito, Bob DeNoto, and Carl Filios) in place that can help. Bob Palmer will get their contact information to all the DEOs and ADEOs.

Rate items in term of helpfulness of promoting seminars – Number one answer was “lower price seminar kits”. Number two was “Easier access to the internet”. Number three response was professionally prepared promotional materials”.

Question about our relationship with Brunswick Dealers and what can we do to improve the program? Wide variety of responses. Dealers should make education part of the sales pitch. Remember that dealers are independent and don't have to participate.

Have your squadron members taking courses and advanced grades increased, decreased or remained about the same? 44 % responded about the same. 20% have taken more.

Did your squadron participate in the Boat Operator Certification classes? 46 % yes and 54 % No. How should we modify the Certification program to make them more attractive? Variety of responses. Some squadrons don't see the value. The districts have not been directly involved in this program. It is hard to find a means of becoming certified. The cost of the passport is high. It would be good to have a District person involved. There is a proposal from D23 that would have the District involved and would have a Squadron BOC Coordinator.

Have supplemental On-the-water programs been viewed favorably by your squadron? 24% yes, 15% no, 60 % unsure. Some squadrons don't know that we have supplemental programs.

How should we alter the supplemental programs? Responses about time and scheduling were common.

What can we do to improve your success in following up with on-line course takers? Variety of suggestions. Perhaps the correct squadron person is not being notified at to course completions. About 50% do not follow up on the contact.

Would an "elevator speech" improve your response with students that have taken the class on-line? 41% yes.

Conclusions: Overall we had a high response rate. People don't know what is in our product line. Better HQ 800 instruction would improve usage. Current Boat Show efforts are not effective. More marketing assistance is needed by the SEOs.

There will be another survey in about 6 months. DEOs are welcome to the results. Contact Bob Palmer.

DEOs and ADEOs will be sent the letter from Law Officer Dave Allen regarding our insurance by Bob Palmer.

Bob Palmer – How can we start to understand and implement the courses that we have?

Successful organizations have a story. How do we tell our story? What is our message? USPS has a new mission statement: "To promote recreational boating skills and boating safety through education, hands-on training and civic activities."

Three key factors for success of non-profits organizations.

We need real time data. We need to measure what we do. There needs to be a way to report what occurs and to do something with that data.

Successful organizations use local entrepreneurial talent. Who in our organization knows the territory? Squadrons and SEOs are the key. How do we train them to gain skills?

Successful organizations do intense marketing – target marketing. We should be focused on our marketing being more “aspirational” and less focused on “avoidance” – i.e. promote the positive benefits of education and membership.

Take ten minutes and discuss these three questions:

1. What are the things that we need to measure to make a positive change for USPS?
2. Who are our local entrepreneurial talent and how can we train them better?
3. How can we present our products and programs in an aspirational way?

Response to the three questions:

1. Would you like to be a better more confident boater? We need to understand why people take our courses. We need to understand why they join our squadrons. Which squadrons have the highest conversion rates from ABC to membership and how do they do that? We need to ask different questions of members versus non-members. We need to know the local demographics. We need to know what kind of boating is done: offshore, coastal, inland. Need to know how did people learn about our class? Do surveys at marinas to see what interests people have. Survey the dealers to see what kind of boats are selling. Get the percentage of boaters that have taken ABC and what percentage of boaters who are USPS members.
2. The instructor may not be the best person to promote courses. You need to know your area. Make sure that you make the job easier. Remove the barriers to doing whatever that person does best. There is a need for leadership training. Is there a book that the squadron can use to do leadership training? Make sure that the expectation for leaders is well represented. “Don’t overload the people”.
3. “Boating is more fun when you know how.”

Don Fiander – The New USPS Web Site

Was to be announced at this meeting is not ready due to moving the server and some development issues.

We need to have the new site in place before we can implement it and will do training on how to use it. We have some issues. We can’t plan until we see it. We have very little time at the national meetings for training.

Assuming that the Web site comes on line soon, we may be able to do training using Webinars etc. We don’t have all the answers. Stay tuned.

Bob Palmer - Revenue Sharing

Many squadrons have no educational sales.

Using eight quarters of data from the purchasing of educational materials from HQ. The mechanism is set up, but currently there is very little money to distribute. What concerns us are all those squadrons with no sales. What are your squadrons doing and how can we help them to have classes. Remember that 25% of the price of educational materials and on-line classes

taken by a non-member minus the cost goes into the pool of money that is divided among the squadrons that are educationally active. If the on-line class is taken by a USPS member then their squadron gets 100 % of the difference.

In some states squadrons are supposed to get \$5 for every proctored ABC exam that is given by the squadron. This payment has not been made, and it needs to be fixed by HQ.

Gene Molteni – Marketing Committee

Gene is the proposed R/C of the New Marketing Committee. Greg Scotten will chair the PR Committee.

Glenn Sherman will be the Stf/C. Tammy Brown is the HQ Marketing Director. Paul Mermelstein is a member of the Committee and will do the presentation today.

Paul Mermelstein Marketing and how it affects our role in dealing with public

Key Points:

Differences between PR and Marketing

The world of communications and recreation are changing – fast. Education is changing. We need to change as well.

We have had a number of Marketing and PR initiatives. Everyone has been doing their own program. We need a concentrated, professional-level effort.

We don't know who our customer is, and we don't know what they want.

There is no strategic plan or marketing plan. We don't know where we will be in ten years.

We often send the wrong message. It isn't just what you say, it is how you say it.

Our competition is tough, and they know their market and how to reach them with a clear, concise message.

How do we promote the idea that our courses are better?

We need to promote our organization and what we do. Material distributed at boat shows is often from others (USCG, National Safe Boating Council – etc.) and don't have our logo on it, nor do they promote our programs, seminars, or courses. Most of our message and material promotes boating safety. That isn't what people want.

Uniforms put people off.

People want to feel connected to us. Marketing has to make them feel comfortable and connected. It has to meet their needs.

Marketing will vary on the local level to meet local needs.

We have many marketing efforts going on, but they all need to be coordinated.

We need a simple concise message focused on the audience.

Differences between Marketing and Public Relations. Most Public Relations uses media to promote your image. Much of it today used Social Media. Marketing is much more targeted. It performs a strategic function that looks at who the customer is and what do they need. It determines what to sell and at what price. Should there be loss leaders?

What are our demographics? Who do we want to attract? Some people want the membership. Some want education. Some want both.

Branding is important to separate our organization from the competition.

Tammy Brown – How the committees will function.



Committee Structure

Marketing Committee	Headquarters Marketing	Public Relations Committee
Marketing Chairman	Headquarters Director	Chairman
Assistant Chairman		Assistant Chairman
Education		Headquarters Director
Membership		General Members
Member Benefits		
Public Relations		
Communications		
Headquarters Marketing		
8 At-large Members		



Committee Responsibilities

Mkt Committee	Co-shared	HQ Mkt	Co-shared	PR Committee
Volunteer Led Marketing	Branding	Online Sales – Educational, Ship's Store	Posters	Squadron & District PR
District Marketing Plans	Marketing Plan	Website, Social Media	Awards	Filling boating class
Squadron Marketing Plans	Literature	Business to Business	National Press Releases	Press Releases
	Budget Management	Corporate Memberships	Budget Management	PRO log
		Trade Shows		



We need to have collaboration between all committees at all levels. We need your help. If you have something that works at your squadron or district, please share it.

Glenn Sherman –

Is it PR or Marketing?

Why does marketing get involved in education? The educational materials need to look like they are from the same organization.

Gene, Tammy, Glenn & Paul

We want to give the squadrons the tools that they need.

We need to do some surveying outside of our organization to see what the public wants.

We need data.

Do we know our product? Do we know the difference between marketing and sales? What is the organization that is behind that instructor? We need to be ambassadors for our organization.

Eileen Rickard – Boat US On-Line Education Project (Interactive Online Learning)

Let me clarify that this is our product, our content material that exists on the Boat US platform.

Boating on Rivers, Locks, and Lakes went live at the end of October.

For this seminar we wanted to include a handout. This was delivered electronically in a downloadable format. It includes key points to remember and some marketing information, but it doesn't give away the course.

The team has been expanded so that we can work on more than one thing at a time.

VHF, Weather, and RADAR seminars are in progress. Cruising and- Cruise Planning is the first course. We will have to figure out how to test. There will be a book that may be delivered by Amazon. We are concerned about giving away part of the course by delivering the book electronically, so we are considering using Amazon.

Because the course is longer, we have to think about how to make that work. We are considering breaking the course up into two pieces. We have had to shoot some video. Luckily we have found a video coordinator who can help with that work.

We have sold over 100 seminars. 80% of the students have been non-members. About 5 % of others are cyber members. Our target has always been the boater that we have not seen. We give the squadron leads about every non-member student in the squadron's area.

We will be doing some advertising in two cruising guides. We will also be advertising in some magazines. We have been getting help from Boat US in preparing advertising. We want to put ads on their web page as well.

Andy Sumberg –

Eileen has been responsible as a project manager for the overall project, while I am just responsible for content. I developed the story boards for the first projects.

We are working on 4 courses right now. VHF and Weather should be out soon. We don't have a release date yet for RADAR. On these 4 someone else is doing the story boards, and I am assisting.

Hurricanes

The next after these will be Hurricanes and Boats. We are working hard to get that delivered before the next hurricane season. Then Using GPS – we have to make sure that we are up-to-date on the technology. We need to get up-to-date graphics. That will be followed by Knots, Bends, and Hitches. We need things that move on the screen. We will need video as well as animation. We don't want to have to shoot our own video. It is expensive and takes time. We want to use other sources.

The process begins with content and that comes from the committees. If there is a good existing Power Point presentation that tells the right story then this makes a very good starting point for the development of on-line courses. Good Up-to-date graphics and speaker notes help. We have to add animation, graphics, and video. There has to be something interesting in every scene and slide.

We want to find video that we can use. We don't want to have to shoot our own unless there is none available. We can use some YouTube™ video if we can get permission to use the video.

We build a story board. We describe everything that will be in each scene. Boat US uses that to turn that into the course.

We need team members who can lead or can assist. It would be good if they are content experts.

These courses are different from what is offered in the Squadron courses and so are priced differently.

Bert Rogers – Tall Ships America Executive Director.

We are very excited about the Memorandum of Understanding that we are executing with United States Power Squadrons for boating safety and education across the country. The more

that I learn about your organization the more convinced that I am that we have a great opportunity to work together. We will work really hard to introduce local power squadrons to local tall ships around the country and do what we can to facilitate a dialogue at the operational level, the level where the rubber meets the road, or the rudder meets the water and get things started where your wonderful programs of education can be made even better if you can cooperate with a tall ship organization and put them on board a tall ships program. The work that our tall ships education programs are doing can provide value to you. There are squadrons all over the country. There are Tall Ships America vessels doing education under sail projects all over the country. If we work together, we can put this all together in a way that extends our reach into new communities and demographics and our relevance on into the future. We are looking forward to it. My hope is that I will get to know you personally as we work together on some projects. Thank you very much for allowing me to be a part of your conference.

Don Fiander – “What You Need to Know to Connect with Students – Generation What?”

Times are changing. You have heard that several times today. We need to recognize the changes and move forward.

Four groups: Baby boomers, Generation X, Generation Y (the Millennials), and Generation Z

The Four generations have different values. They do things differently. They think differently. They have different ideas. They interact differently.

Baby Boomers: Born between 1946 and 1965. 77 million. This group has witnessed and ushered social change. One third of them have graduated college. Two – thirds are married. They own their own homes. 60 % of this group spends money to help out their adult children. Only 11 % plan to fully retire. Optimistic. “Live to Work.”

Generation X: born 1966- 1976. They are just about the age when they have enough disposable income to get into boating. This is our target audience. 41 million. They are the latch key kids, the children of divorce. Skeptics. Lowest voting group. Well educated. Pragmatic. Eclectic. Resourceful, Self-Reliant, “Work to live.” More involved with family activities.

Generation Y 1977-1994. 71 million. Very sophisticated. Grew up with technology. Immune to the marketing ploys and methods. Influenced by technology. Diverse. “It is all about me.” One in nine have a credit card that is cosigned by a parent. Short attention spans. They have been coddled by their parents. They are realists. Very self-centered. They think that they are entitled to many things. They are impatient.

Generation Z – 23 million. Born after the Internet developed. A lot of unanswered questions with this group.

“The End of Membership as we know it.” A highly recommended book by Sarah Sladek that talks about nonprofits and how societal changes affect us. There is a rise in the number of Hispanics. At least 50 % of the people making decisions about buying a boat are women. We in USPS still don’t have very many women involved in leadership positions.

This book presents four steps (described here as it relates to USPS) –

We must focus on real benefits. Courses must provide benefits. Must provide a return on their “investment”.

We need to identify needs to develop better models. Need to identify the changes in the needs of students. Need to provide courses that provide value and in the form that they want to have and packaged so it fits their lifestyle.

Marketing is crucial. We have to target their needs. We have to make our products widely known and differentiated from others. Need the right course presented the right way for the right group.

Innovation is a must. We have to be creative. We have to move beyond where we have been.

Generation X is who we have to target our educational products to.

Exercise – Form groups of three or four. Each table picks one course. How would you modify that course to reach Gen X, Gen Y, Women, or Latinos? What would be the motivation for taking the class and what would be the evaluation? We will take five minutes to discuss this.

Reporting out from exercise.

ABC3 – Gen Y and Women might like the course in modules on-line. As far as the duration: For the Gen Y’s as quickly. For the Women as they had time available. The evaluation would be the certificates for Gen Y and for Women the result would be safety.

For N and JN – for Gen X and Gen Y may not be able to do the math without a calculator. What do we have to do to get more women? We didn’t really look at Latinos.

ABC – Women tend to focus on more practical training. We need to make courses more modular.

Engine Maintenance Course – The change in the course to focus on women perhaps needs more hands-on and audio visual.

Weather – Gen Y – Shorter modules and separate pieces and flexible schedules. Perhaps part of the course would be on-line. Duration would be shorter. For Generation X – We would make everything relevant to today. We should have more women involved in developing the course so that it meets their needs. For Hispanic we have the obvious changes in language.

Seamanship – Generation Y is impatient. For them the grade would not be as important. They would feel that they would be equal to someone who has been a member for 25 years. So we would encourage the use of seminars that would be the equivalent of the course. (I.e. break the course into small modules). Graphics should be more women friendly.

Weather – Generation X have busy schedules. We would make the course more suitable to their schedule. For women there is a time constraint.

Don Fiander - We know that each of us have different learning styles. Different strokes for different folks. We need to consider who our courses are targeting and be prepared to modify the approach.

Ken Griffing – Issues that we have been asked to address to alleviate problems at HQ.

DEOs and ADEOs can help out by working with squadrons.

Sight folders are getting sent in without the ED33 form. Someone should check to make sure that the packages are complete before they are submitted.

JN Course Exams are turned in without the sight certification form.

Exams are ordered but not taken. This is happening more and more often.

Sometimes a non-member takes a class without registering as a USPS University student. We recently had a former member that wanted to take JN. The SEO registered them into USPS University creating two separate files which makes an impossible administrative situation for HQ. If a past member wants to take a class, they cannot be enrolled in USPS University. If not enrolled and not a member then cannot get an exam. They have to rejoin USPS.

The squadron needs to give the USPS University students the results of their test for the course. There are downloadable certificates that can be filled in for University students.

There may be a lead time problem with ordering exams. The rule says 30 days, but this may be causing a large number of exams that were not taken. Comment: maybe we should transmit the exams electronically instead of by mail. They would be printed locally. That would eliminate the lead time problem.

Question: Could we be taking exams on line? That would eliminate problems.

Bob Brandenstein – We are dealing with an antiquated paper based system. We are looking at alternatives.

Don Fiander - Meeting Conflicts.

We want to explore options for the Governing Board in Virginia. We could leave the meeting schedule as it has been. Or we could move the DEO ADEO meeting to Thursday. That would eliminate the conflict with the Friday activities and training sessions but not without other issues. You would have to arrive one day early and because of the budget constraints they would not be reimbursed for the extra day. We don't have the funds to permit the Educational Department to meet on a date outside of the regular governing board or annual meeting time.

There is a lot of redundancy between the Leadership and DEO/ADEO meeting. Perhaps we should combine the two meetings. In CPS they do a combined meeting and one day.

Carolyn Reid – in CPS There are separate meetings and then a joint meeting.

There was a suggestion that we use Go To Meeting to meet on a monthly basis.

Don Fiander polled the DEO and ADEOs as to keeping the meeting on Friday, or Thursday, or a combined meeting.

We could do a lot by electronic meetings. Some committee meetings are quite small. However sometimes having a face-to-face meeting is how we pick up new members of a committee. We are concerned about the size of the meeting if it is combined.

Don Fiander - Next Steps and Homework Action.

We will work to combine the two meetings.

If there are any pressing issues, please get them to us.

Bob Brandenstein – Thank you all. Enjoy your evening.