

Closing the “Growth Gap”



Discussion Draft
USHGA Planning Committee, July 2005
Martin Beresford

Objective: to provide some inputs for development of “Vision Statement”

1. Review issues & opportunities facing our sport
2. Some thoughts on response strategies
3. Implications for content of “Vision Statement”
4. Suggested Action Steps

This material consists of the graphics used in today's discussion, and is incomplete without the accompanying commentary

A few personal caveats...

- Latecomer to Planning Committee and “Vision Statement” process
- Discussion Draft only
 - Key data sometimes incomplete
 - Conclusions and Action Suggestions are tentative, up for discussion...
 - Corrections/disagreements welcome
- Includes local grass roots inputs
 - “Don’t shoot the messenger..”

Issues

1. How serious is the decline in participation in our sport?
2. What's causing it?
3. What can USHGA do to help reverse it?
4. What kind of "Vision Statement" will help strengthen USHGA's effectiveness?

Summary

Part 1: How serious is the decline?

1. Participation in our sport is declining
2. Reversing the decline is a “survival issue” for our sport
3. “Vision Statement” draft contains inspirational ideals and some highly idealistic goals
4. To be useful, “Vision Statement” must contribute to developing practical solutions to the issues facing our sport

Part 2: What's causing the decline?

1. We don't know for sure
2. Ideally, we need more research
3. Meanwhile, key causes seem to include:
 - Demographic and cultural trends
 - Some actual features of our sport
 - Negative image (partly fact-based)
 - Competition from alternative sports

Part 3: What can USHGA do?

1. Causes of decline are partly beyond USHGA's control, or capability
2. However, USHGA could make a difference by strengthening its activities in three key areas
3. USHGA can implement these actions without radically expanding its existing role or "business model"

Part 4: What kind of “Vision Statement” does USHGA need?

1. Realistically, the above actions may not be enough to fully close the “Growth Gap”
2. Resources available to implement even these limited actions have been drastically depleted thru spending on other projects
3. Vision must therefore reflect a “business model” that will remain effective if growth remains slow or even negative
4. Effective implementation will require substantially more focused, accountable management of USHGA’s limited resources₉

Part 1

How serious is the decline in participation in our sport?



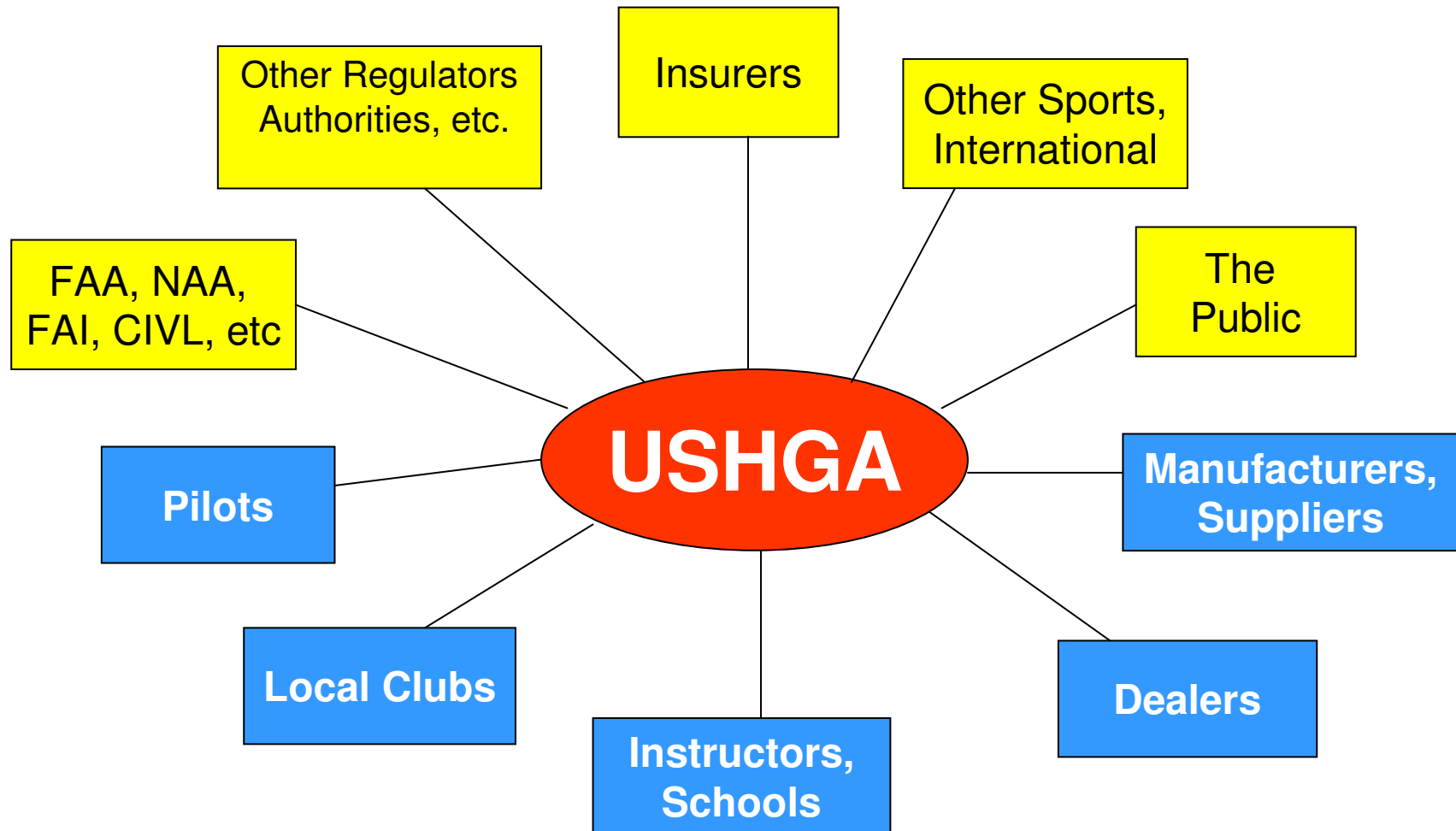
USHGA's Mission:

**“To promote the
growth of sport
flying in foot
launchable
soaring aircraft”**

Growth is important for our sport

- Critical mass and leverage in representing our sport
- Economically viable market for manufacturers, dealers, schools
- Incentive for R&D investment

USHGA plays a vital role in representing and maintaining the viability of our sport



Pilots value USHGA's activities that are clearly best done centrally:

- Representation
 - with FAA, insurers, regulators, public, etc
- Regulation
 - safety & training standards, certification
- Information
 - products, events, sites, schools, etc
- Education
 - flying skills, experience

We owe a big debt to the folks who undertake these vital & often thankless asks

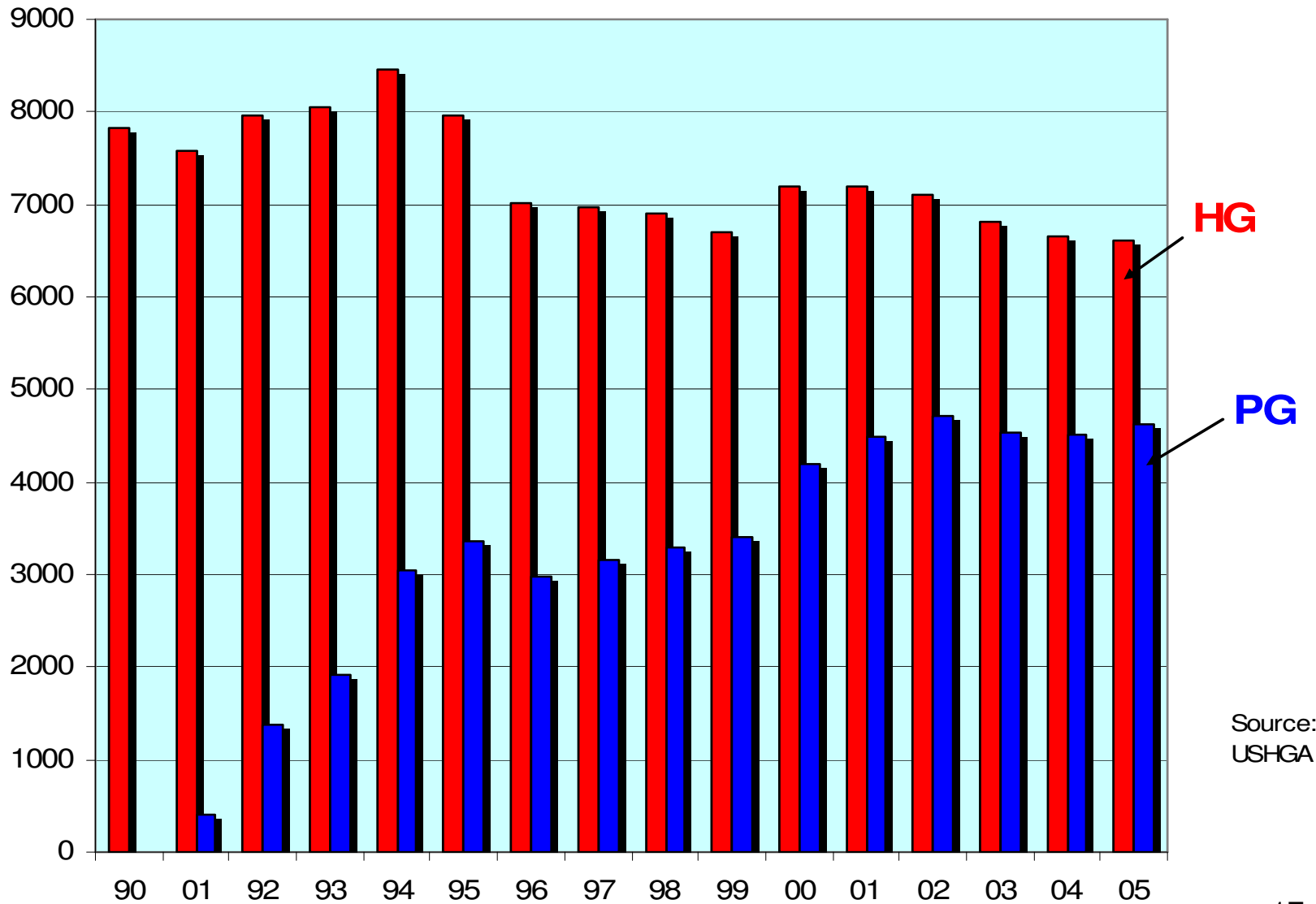
- President
- ED
- BoD
- Regional Directors
- Staff



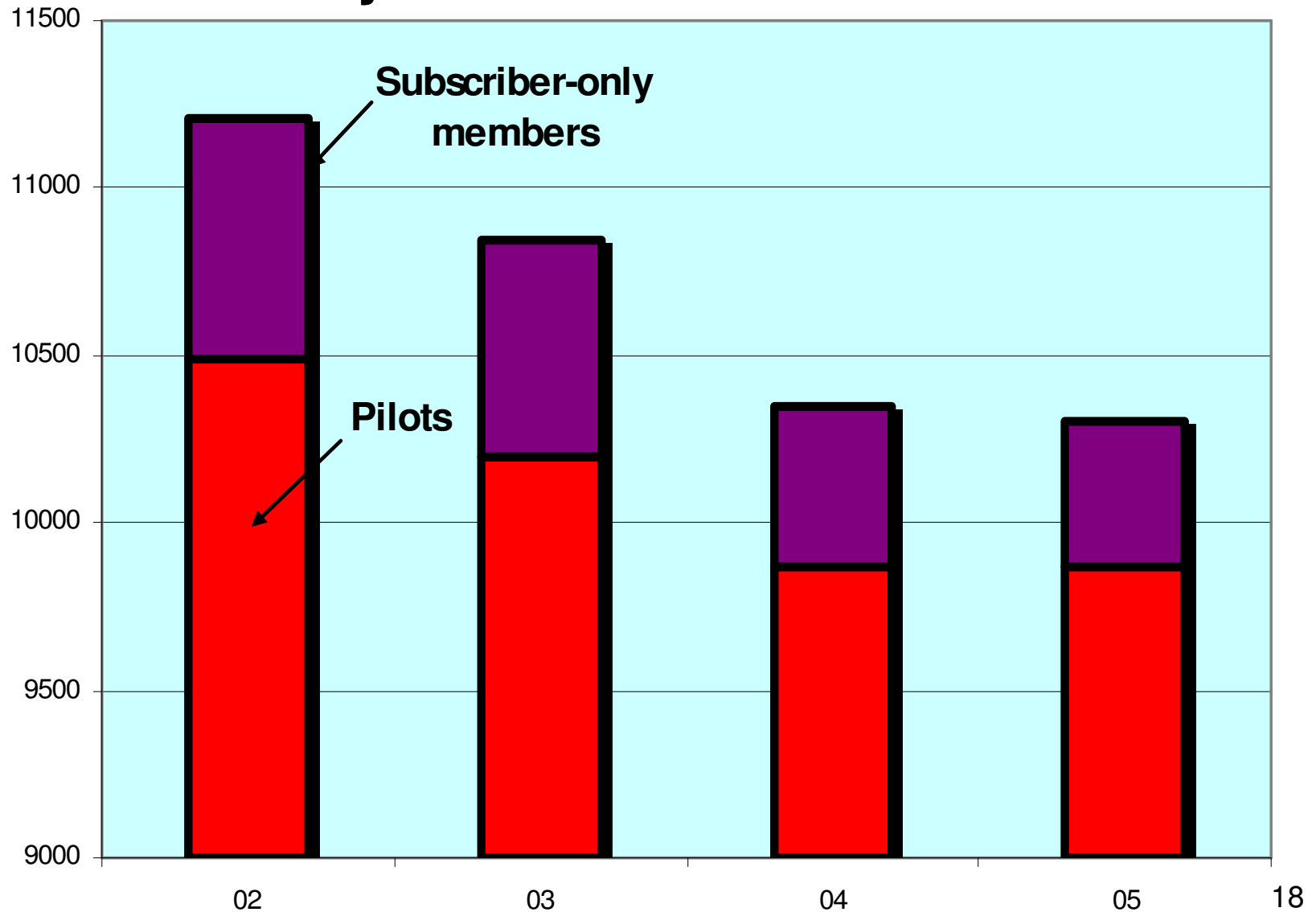
“Without USHGA insurance and FAA relations, none of us would be able to fly at all....”

However, participation in our sport
seems to be declining

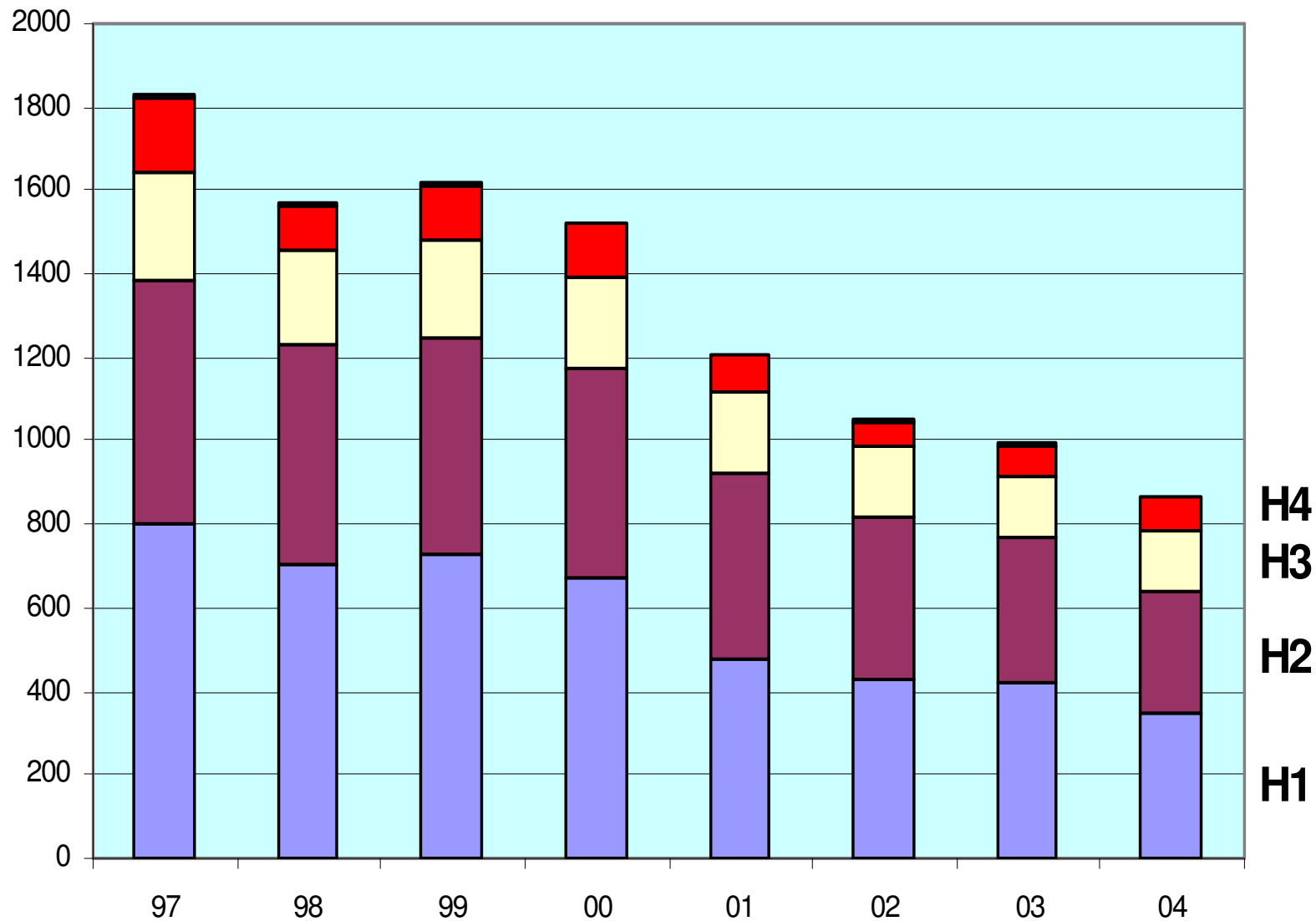
HG membership has declined by 20% since '94, and PG seems to be plateauing



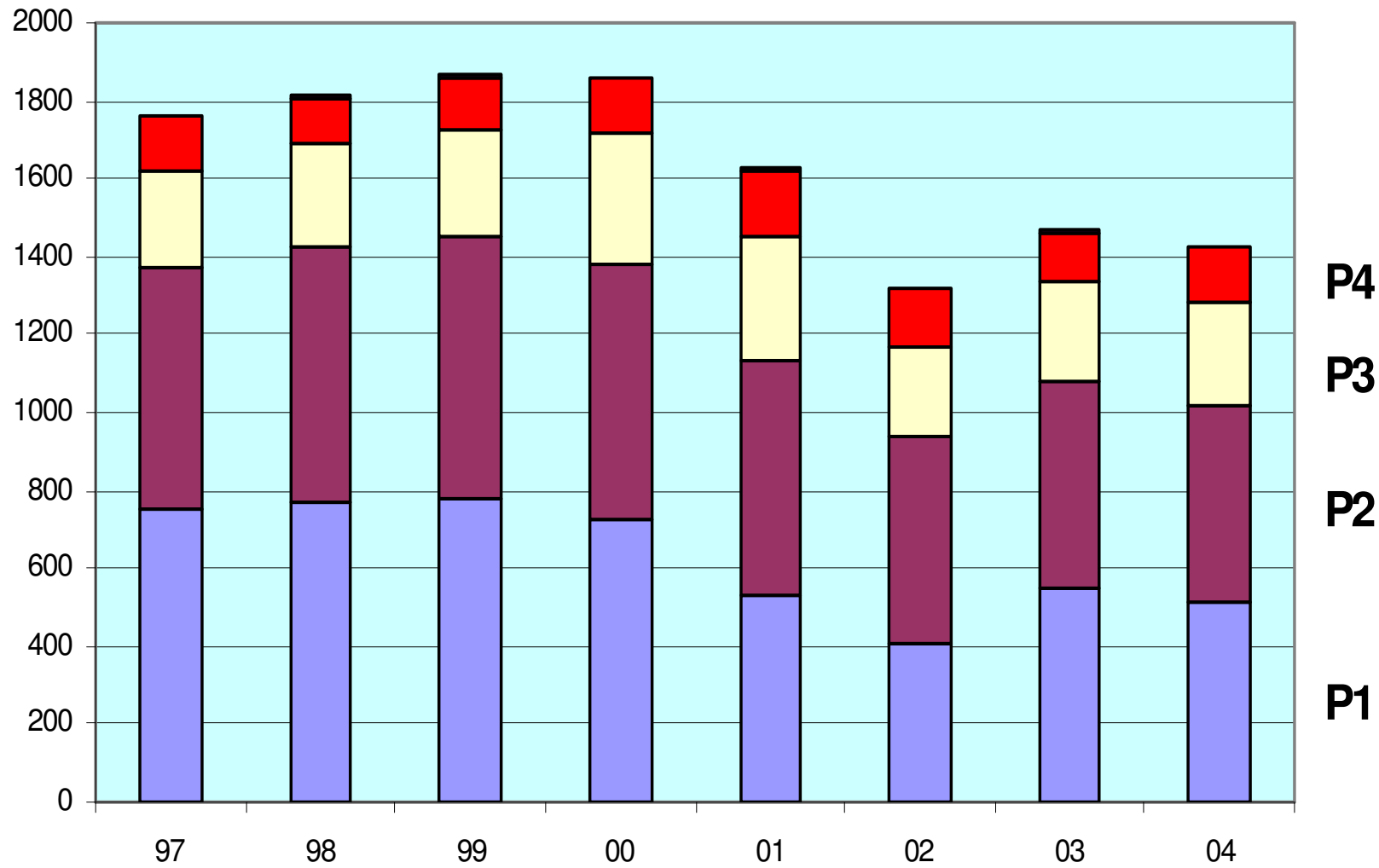
"Subscriber-only" membership has declined by over 40% since 2002



Annual number of new HG ratings has declined sharply, especially H1 & H2

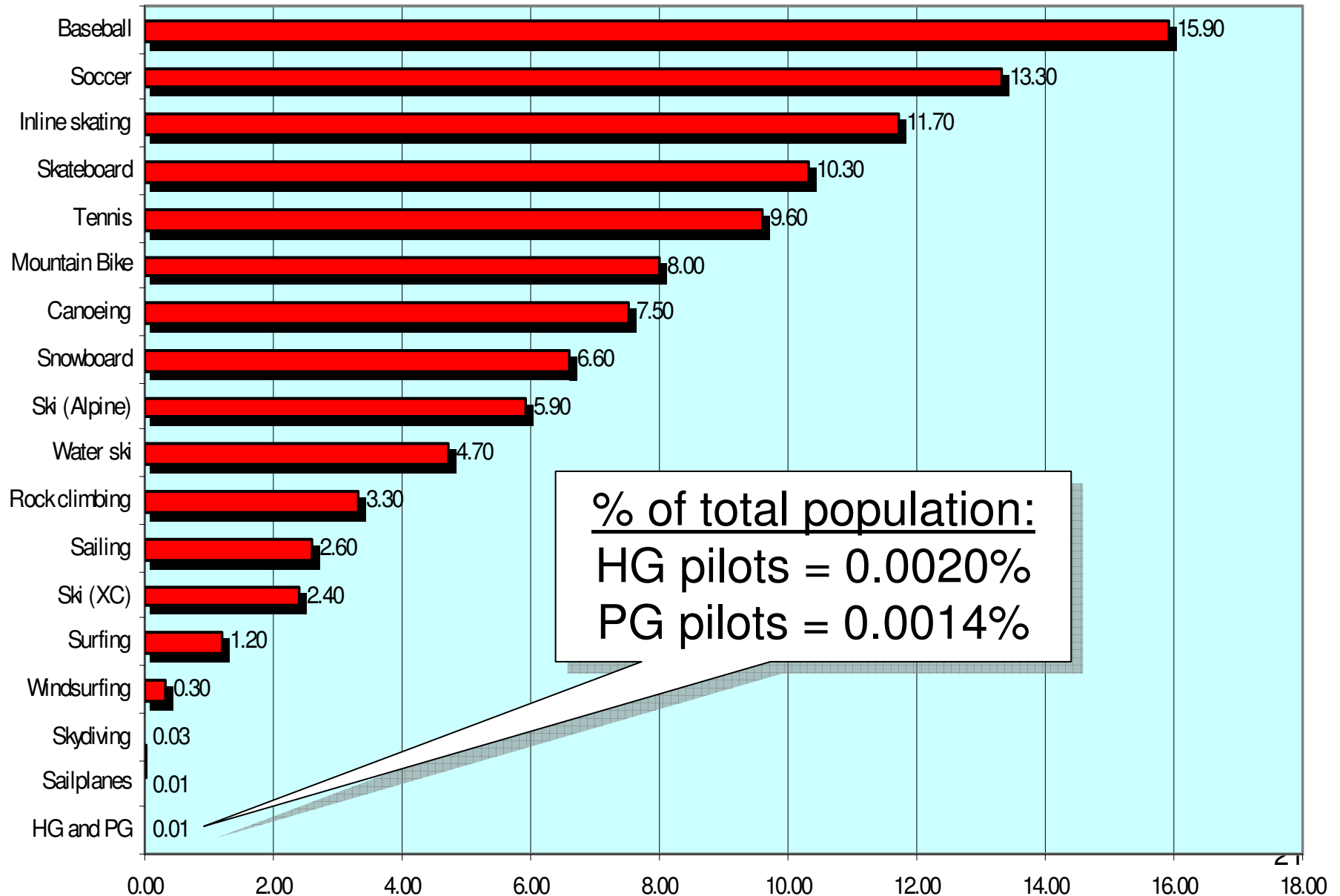


In PG, too, number of new ratings has declined, especially for P1 & P2

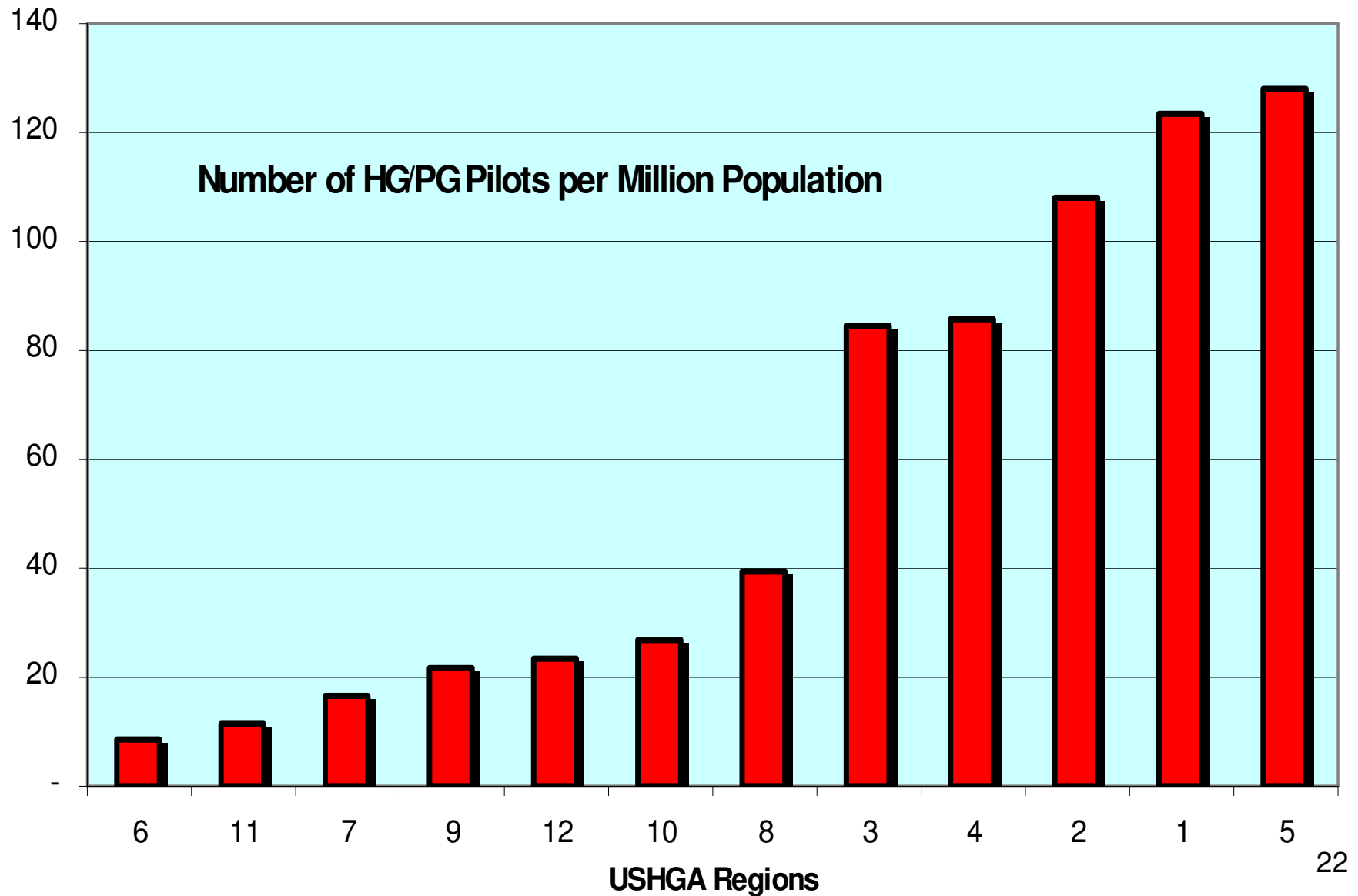


Hang gliding remains a very small "niche" sport

Participants, mn

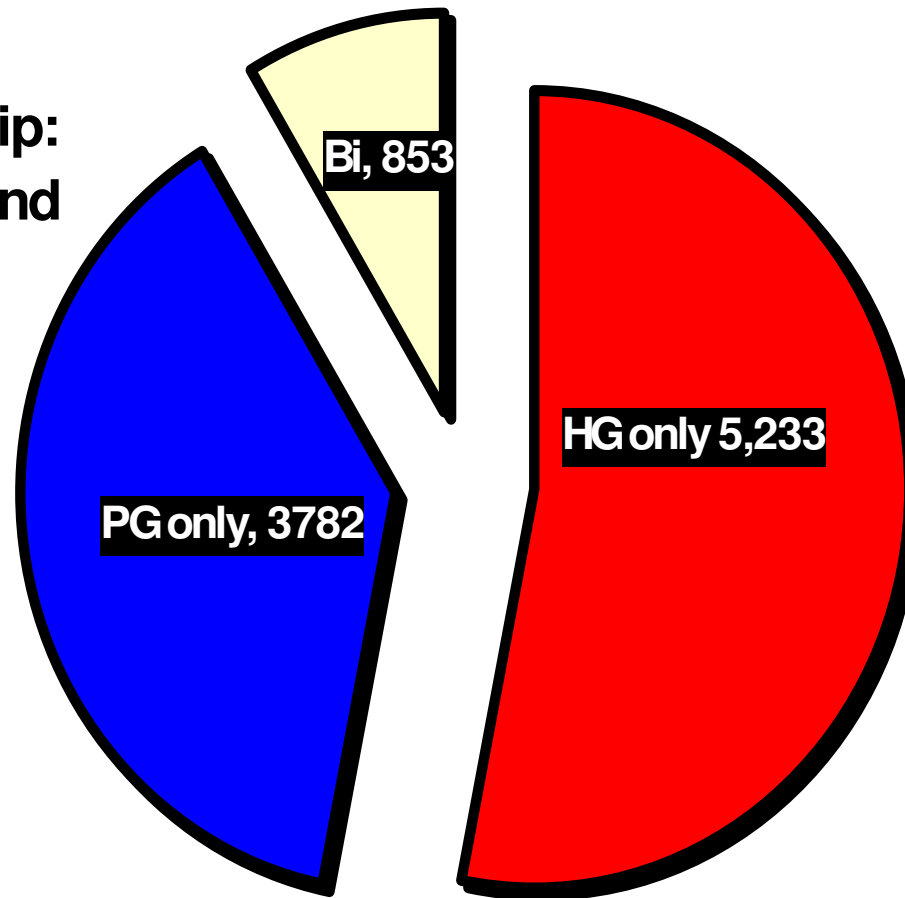


In some regions, penetration of HG/PG remains very low - partly for obvious reasons...

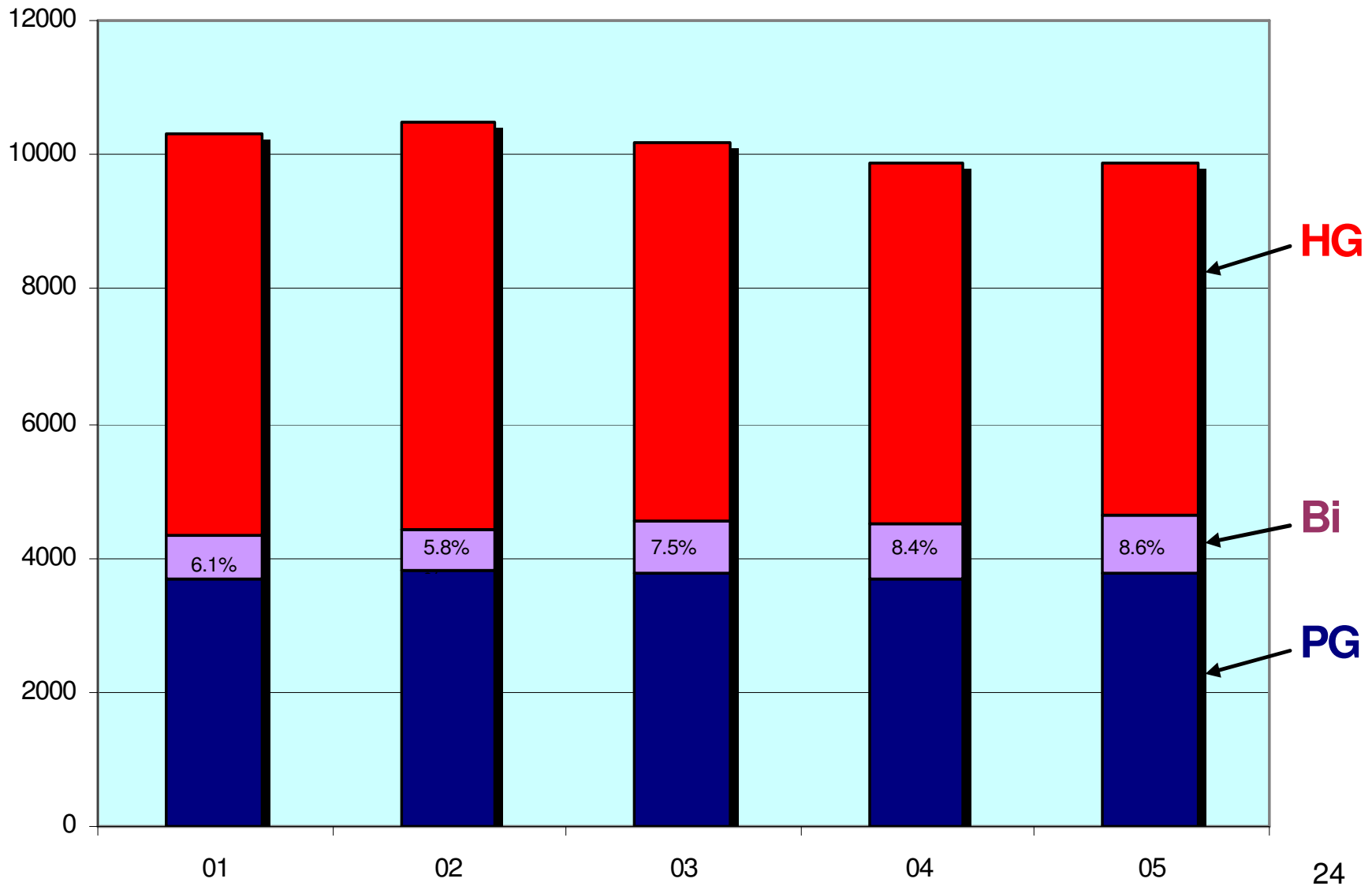


USHGA covers HG/ PG as a single sport, but in fact the two sports remain largely separate:

**USHGA Membership:
HG-only, PG-only and
"Bilingual"**

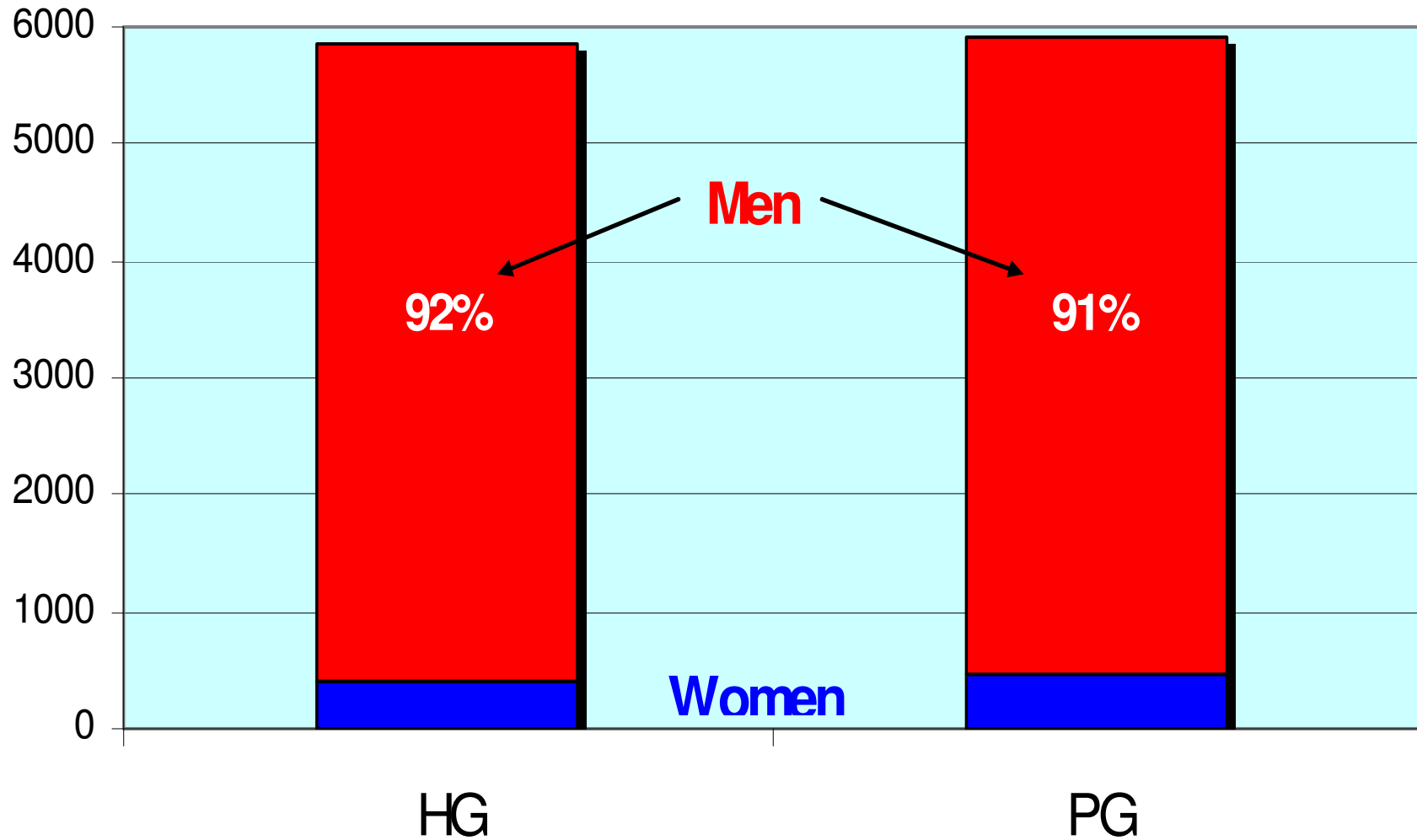


"Bilingual" pilots are increasing slowly, but still account for less than 10% of total

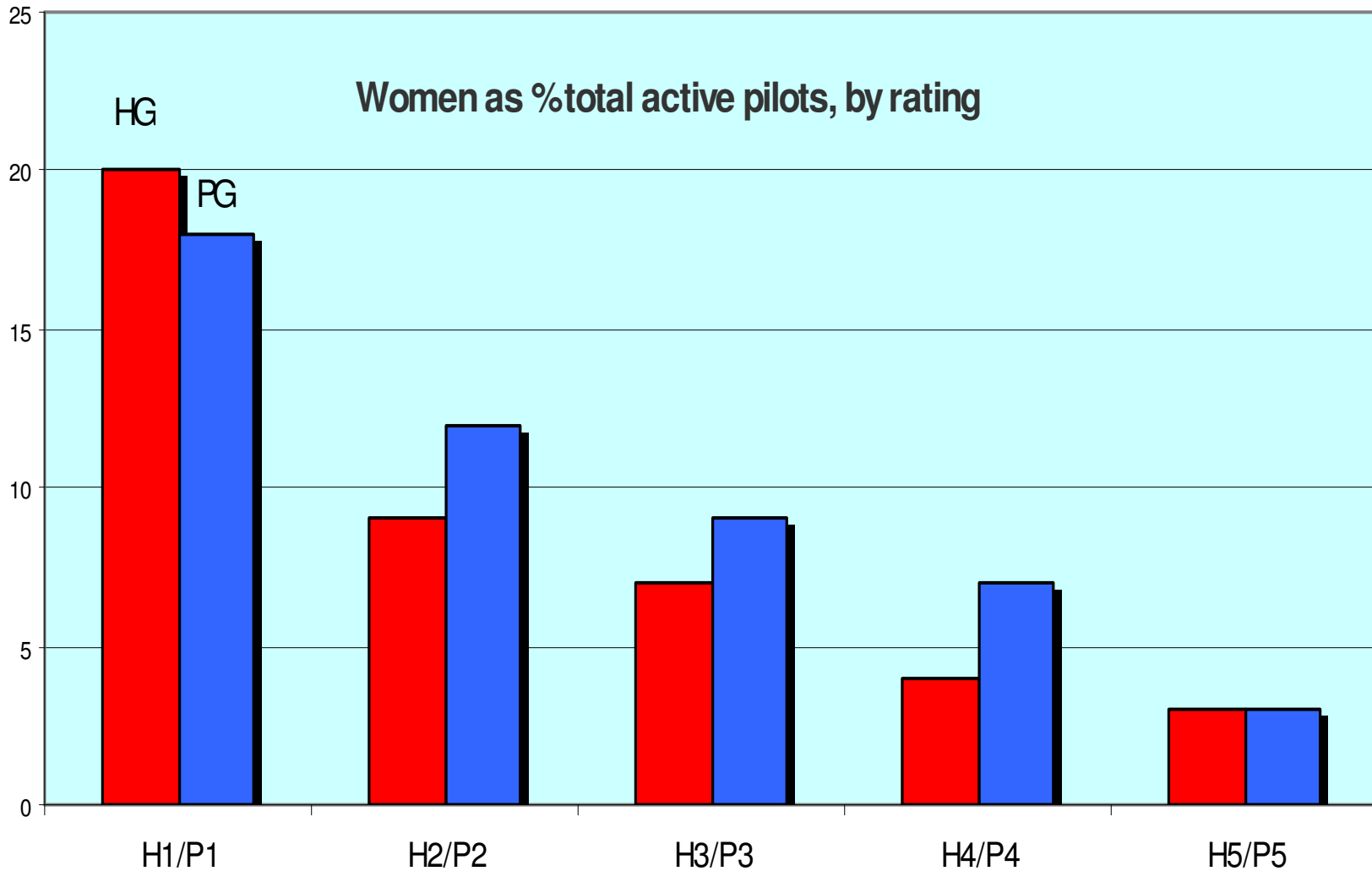


HG/PG remains a largely male-dominated sport...

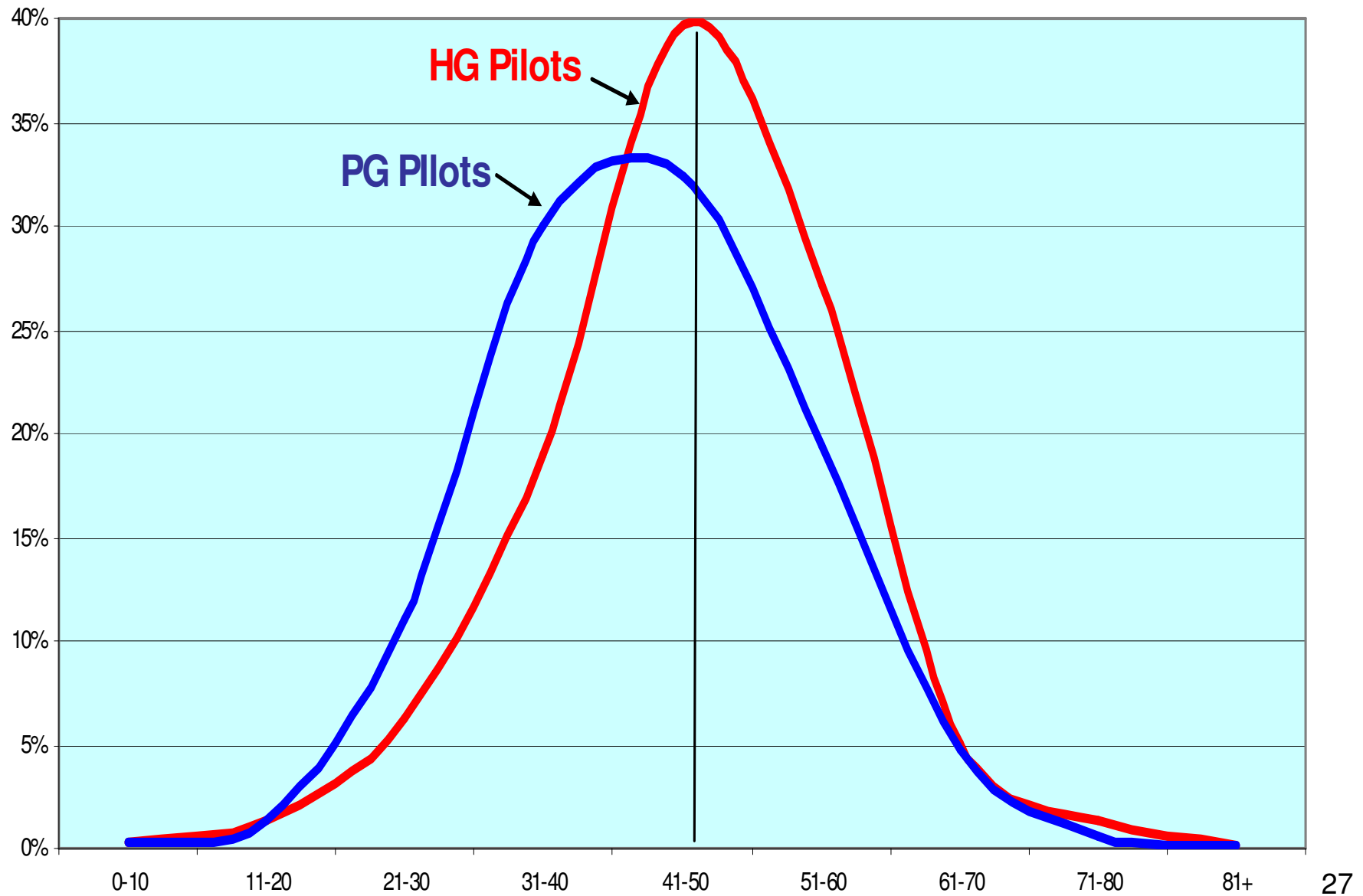
Active Ratings



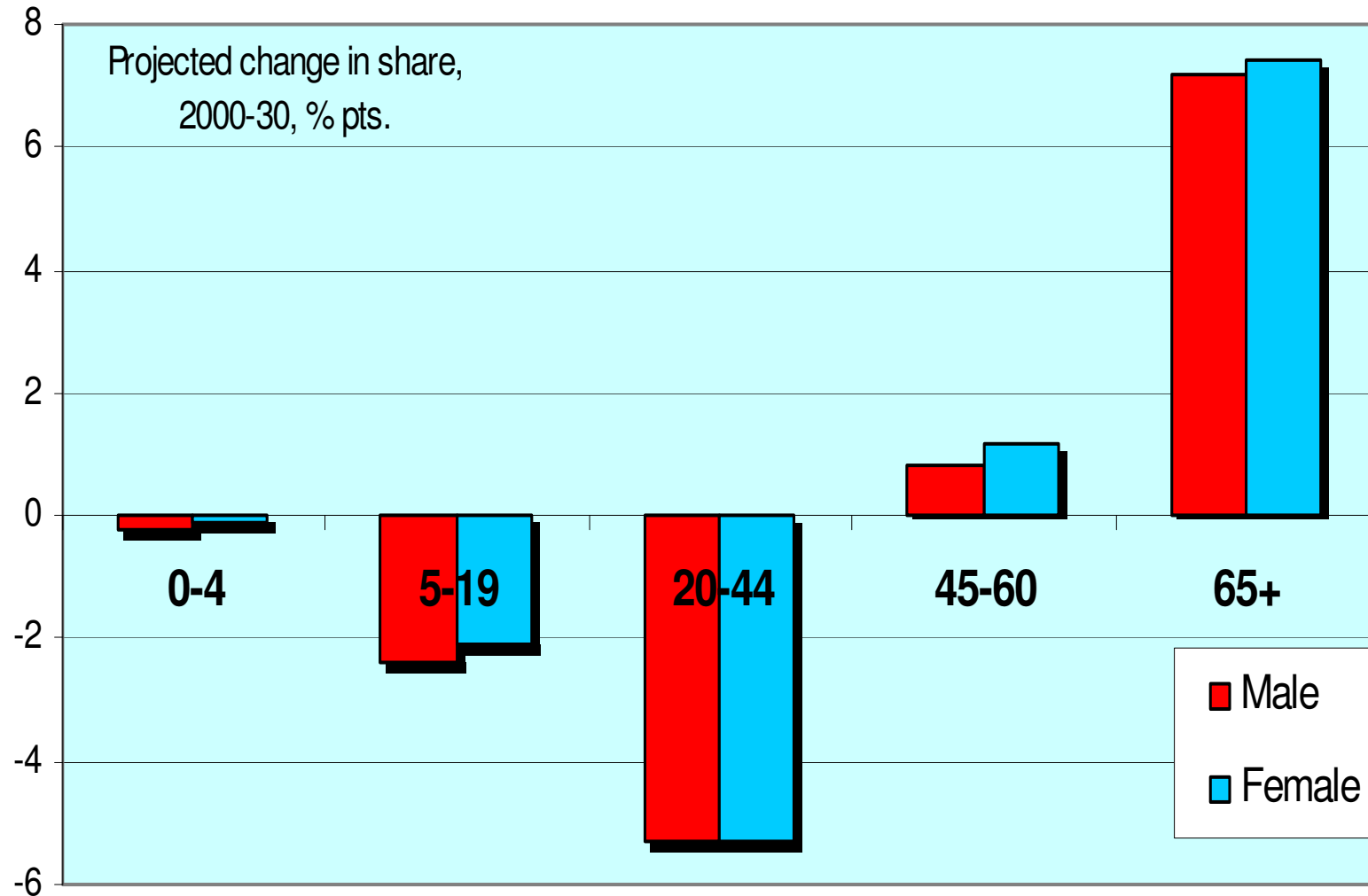
Relatively few women progress beyond beginner and novice ratings...



The bulk of HG pilots are already middle-aged



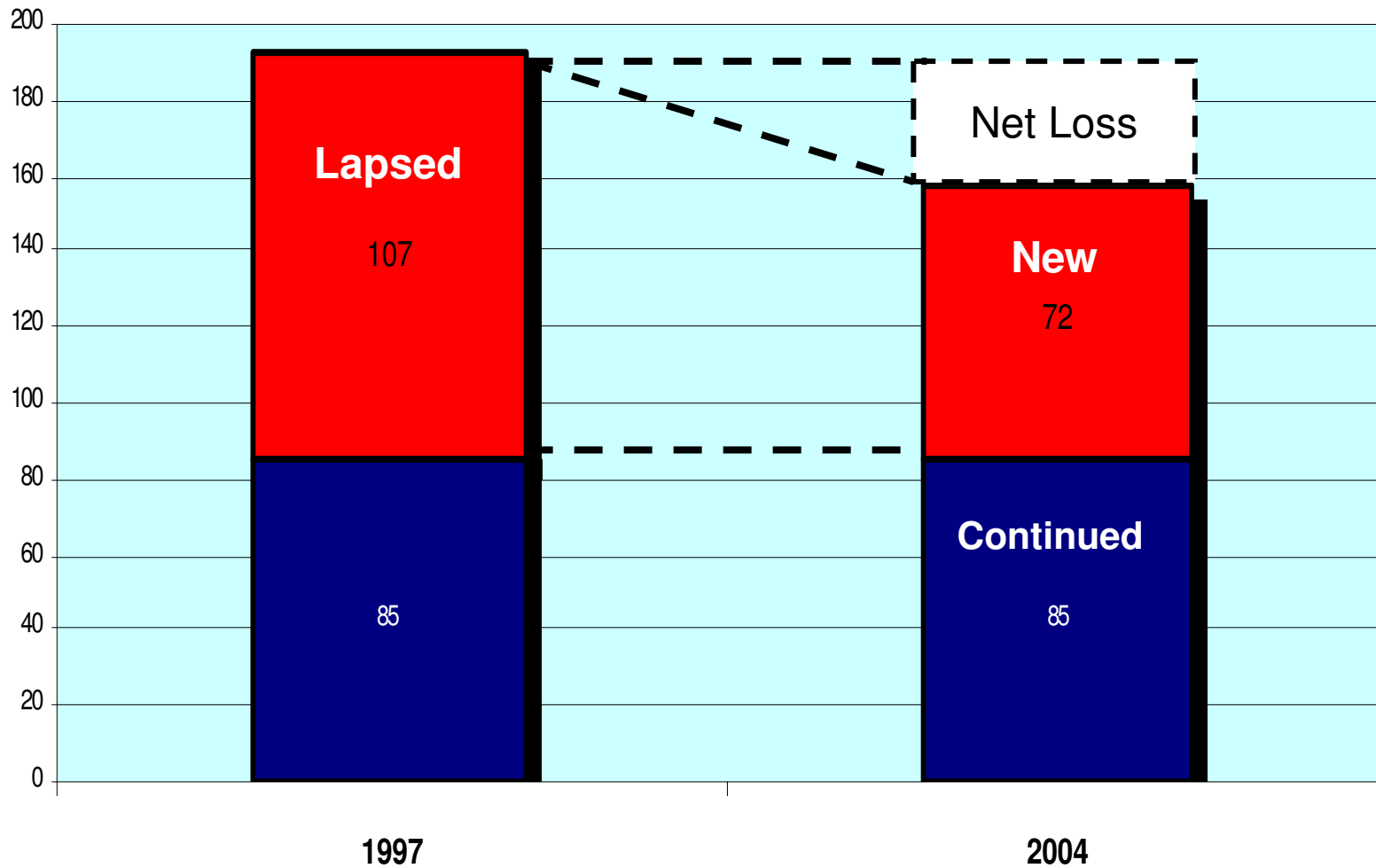
Our prime target age group will lose share of total population



Source: US Census Bureau

In a "typical" club, replacement rate is failing to keep up with lapsed members...

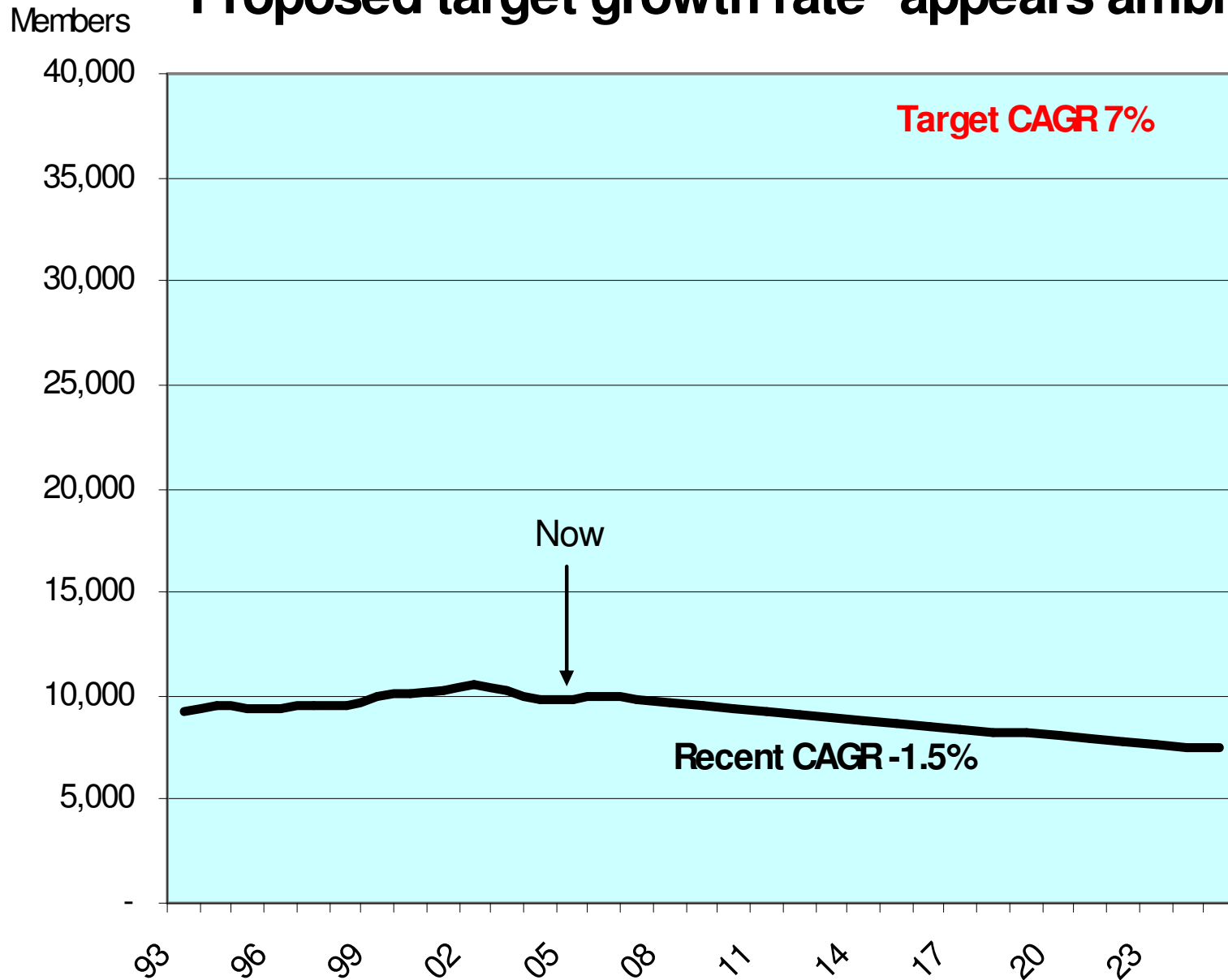
Members



“Vision Statement” draft contains very idealistic growth targets:

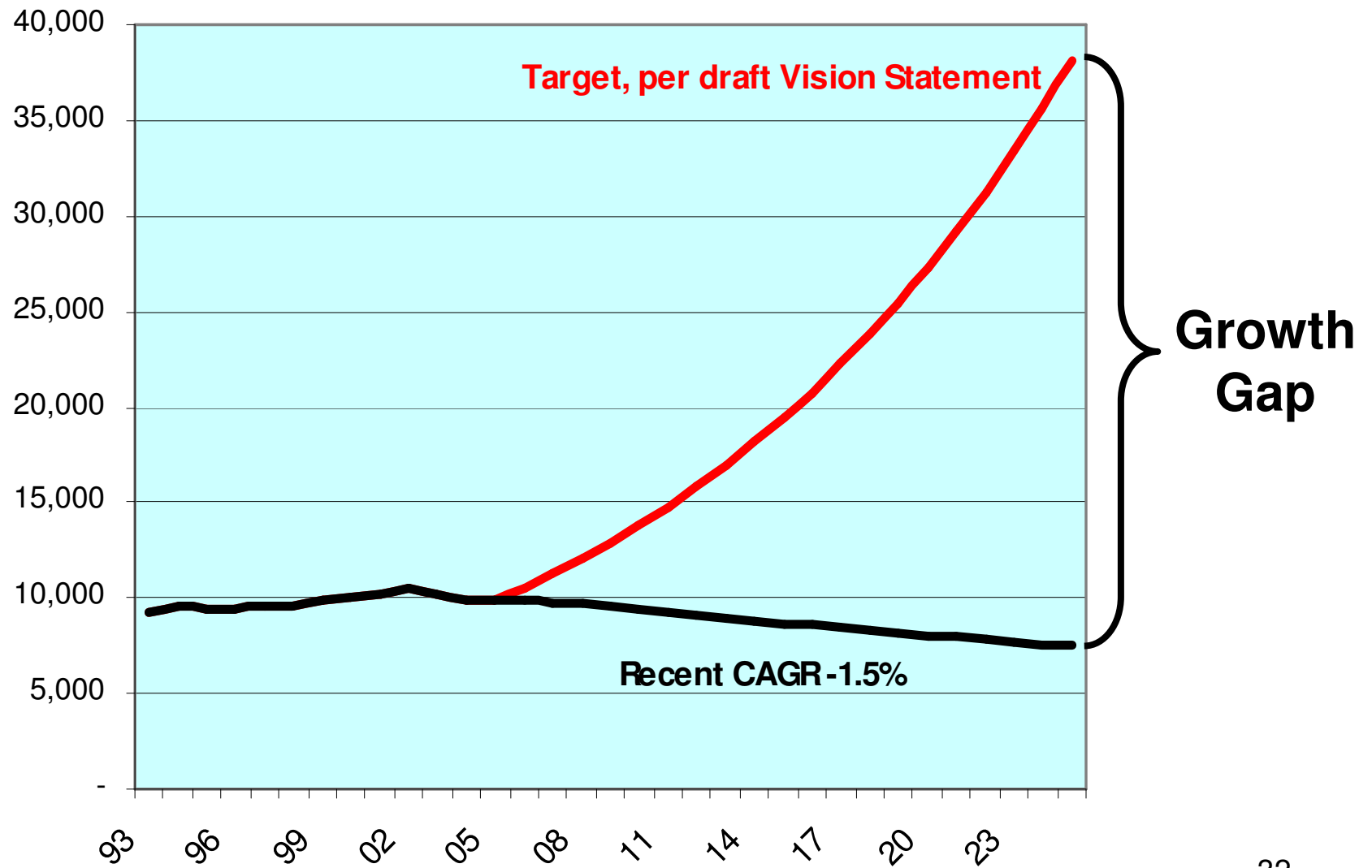
- “Reach 20,000 members by 2020...”
- “Double membership every 10 years”

Proposed target growth rate* appears ambitious



* Vision Statement: "Double membership every 10 years"

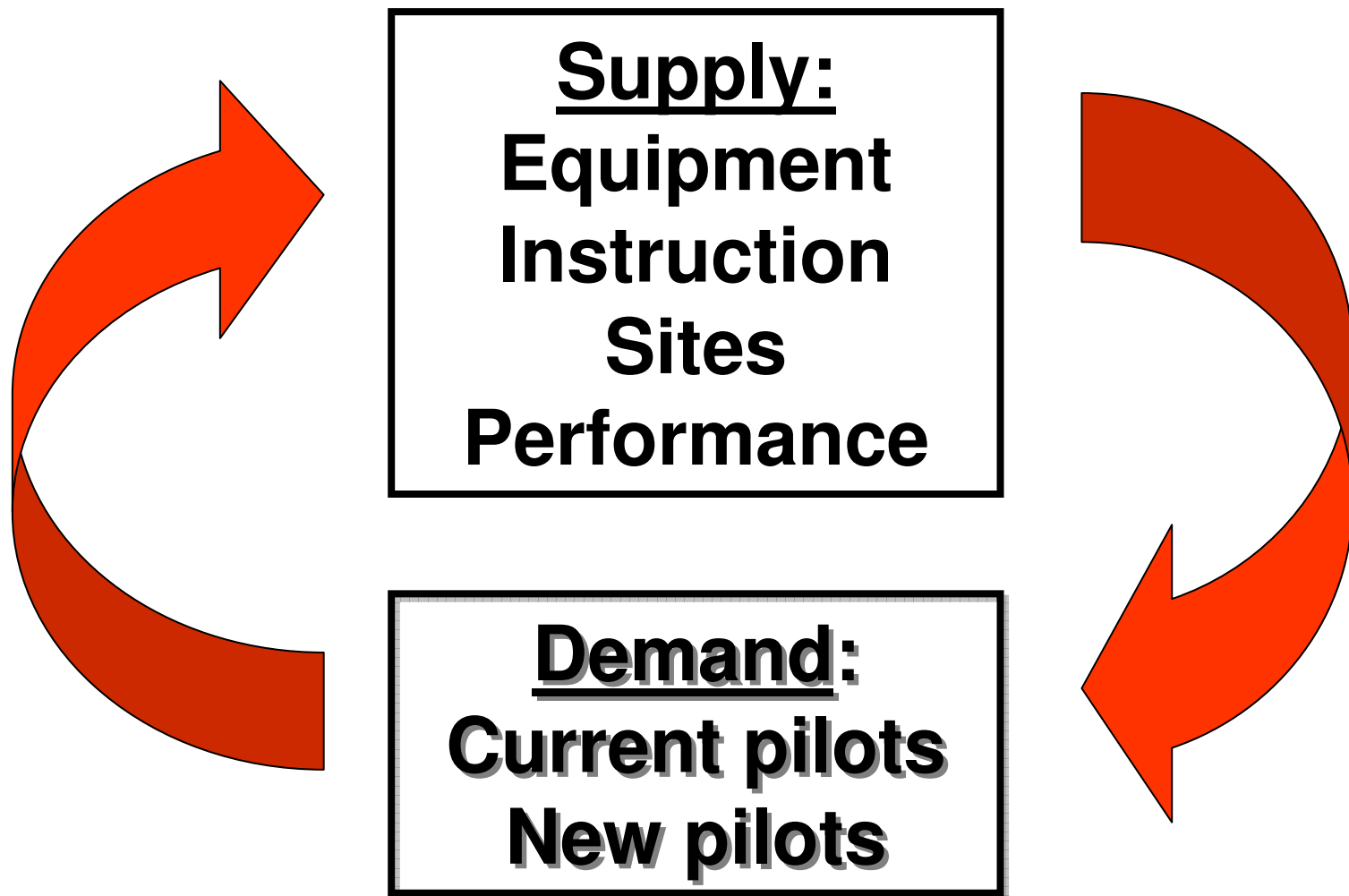
Key issue: how to close the "Growth Gap"



Failure to halt declining numbers threatens viability of our sport

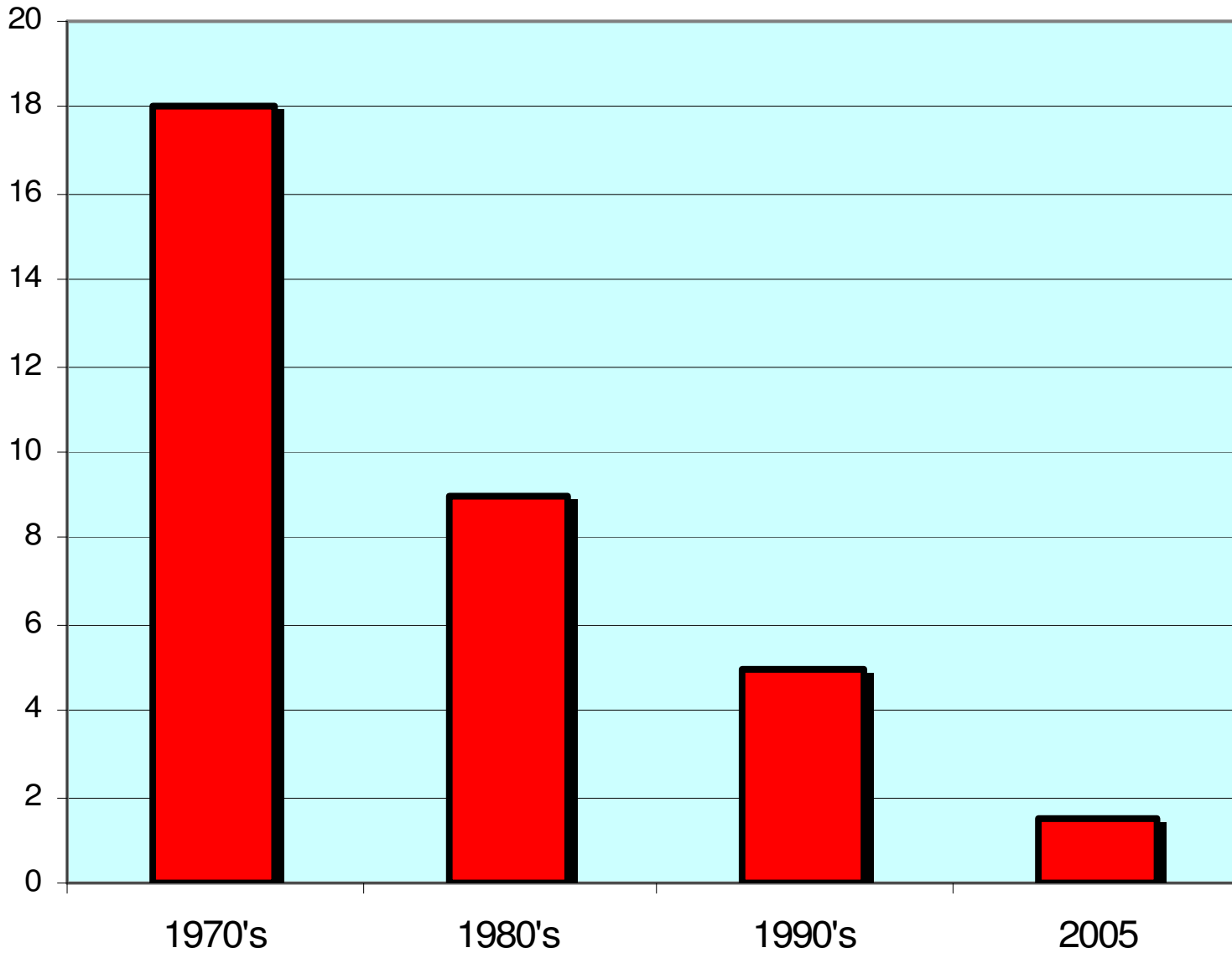
- Profitability of HG/PG manufacturers, dealers, schools already under pressure
- Declining market size reduces economies of scale
- Reduced incentive for R&D investment
- Likely result: “vicious circle” of decline

Supply/demand in our sport is a chicken-and-egg issue....



US HG manufacturing industry has already experienced dramatic consolidation

Makers



Further reductions in R&D would be especially damaging for our sport...

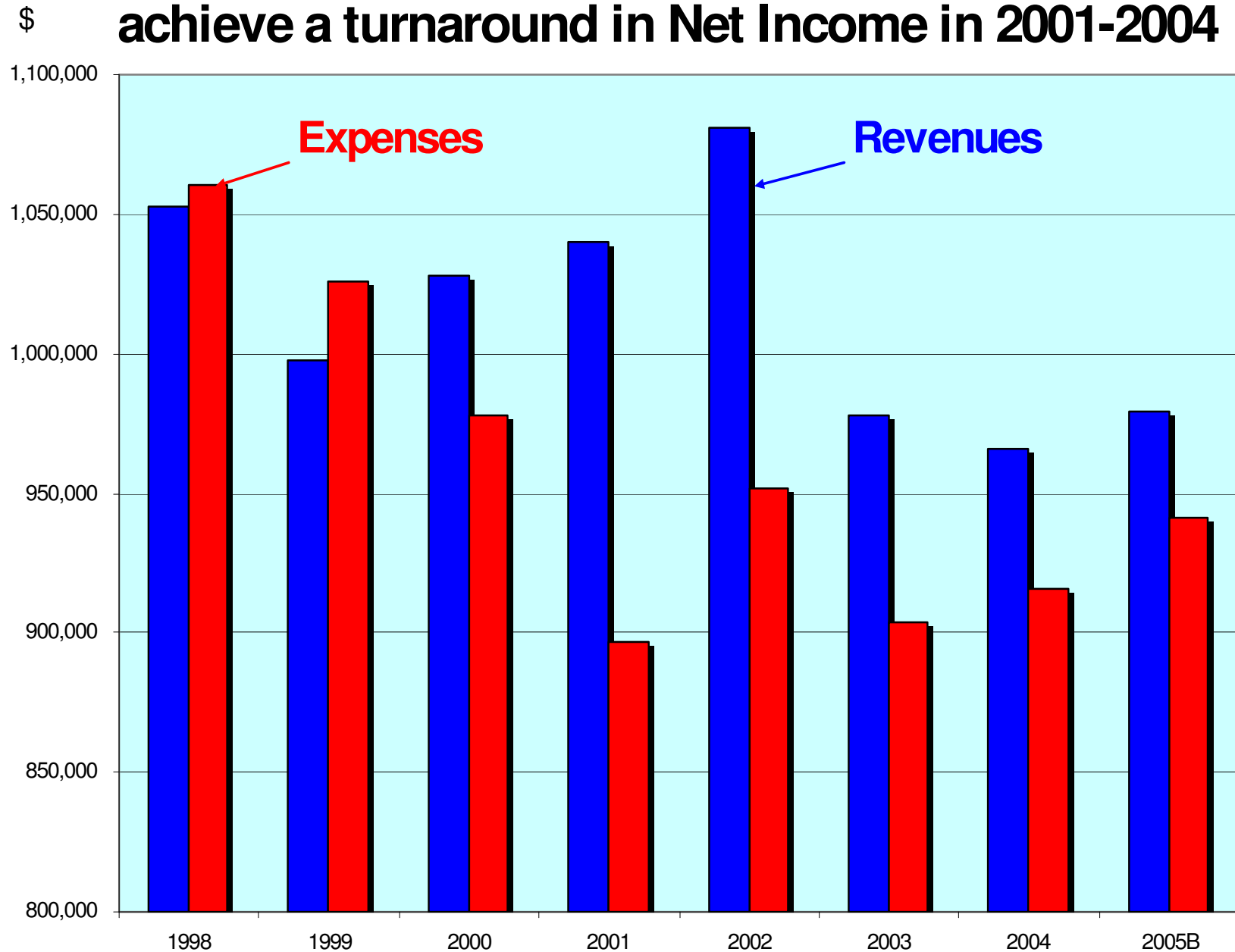
- R&D is best hope for enhancing the attractiveness of our sport, through:
 - Lighter/more portable gliders
 - Safer/easier to use
 - Better performance/lower cost
- But weak demand reduces incentive for makers to continue investing in R&D
 - Already, bulk of manufacturers' R&D spending goes to "D" only

Age profile of industry leaders is another cause for concern

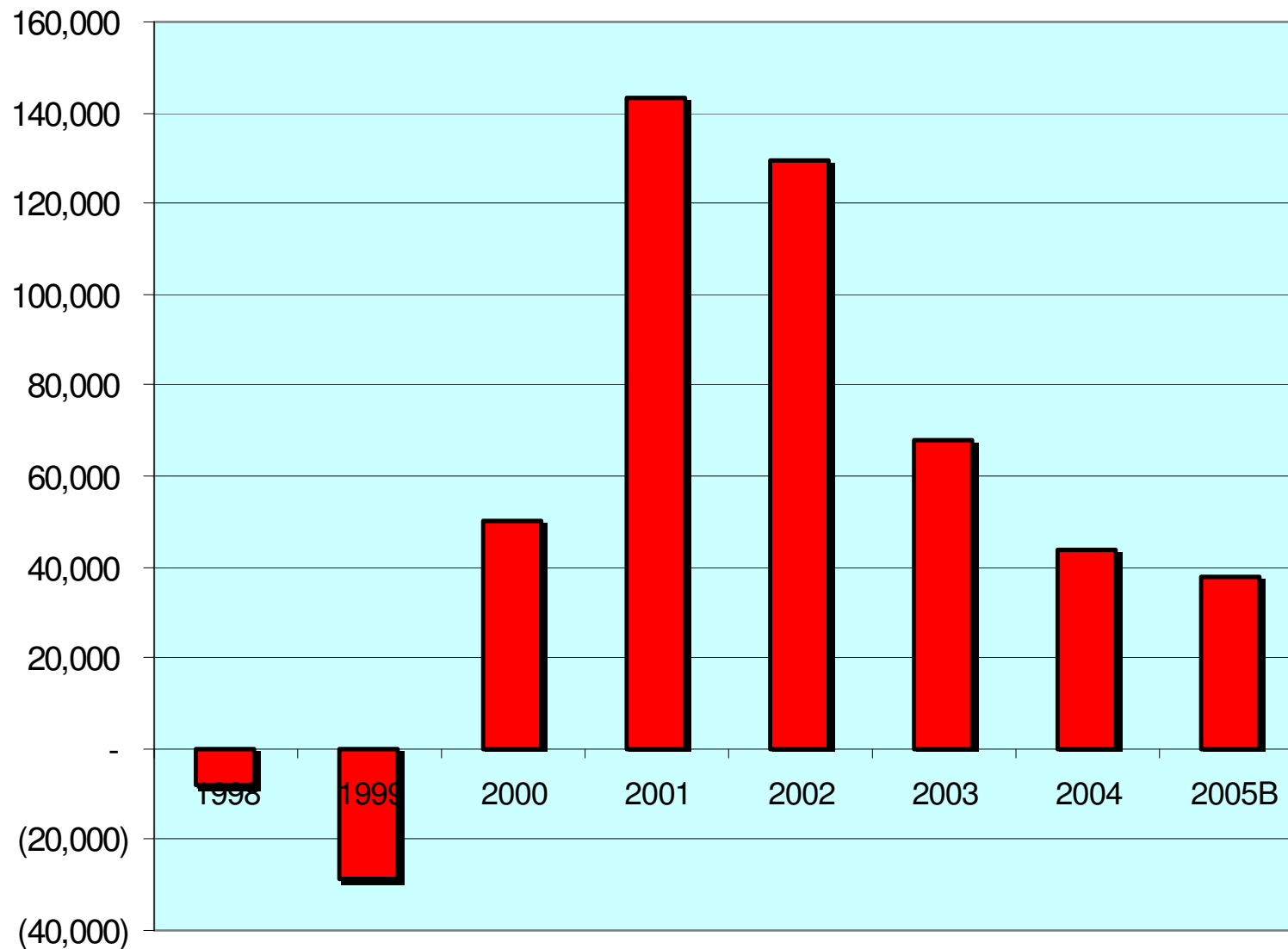
- Manufacturers, dealers, schools largely owned & operated by founders
- Typically, enthusiastic entrepreneurs who started in the 1970s
- Now nearing retirement
- Declining profitability may deter potential successors...

Declining membership also
threatens viability of USHGA itself

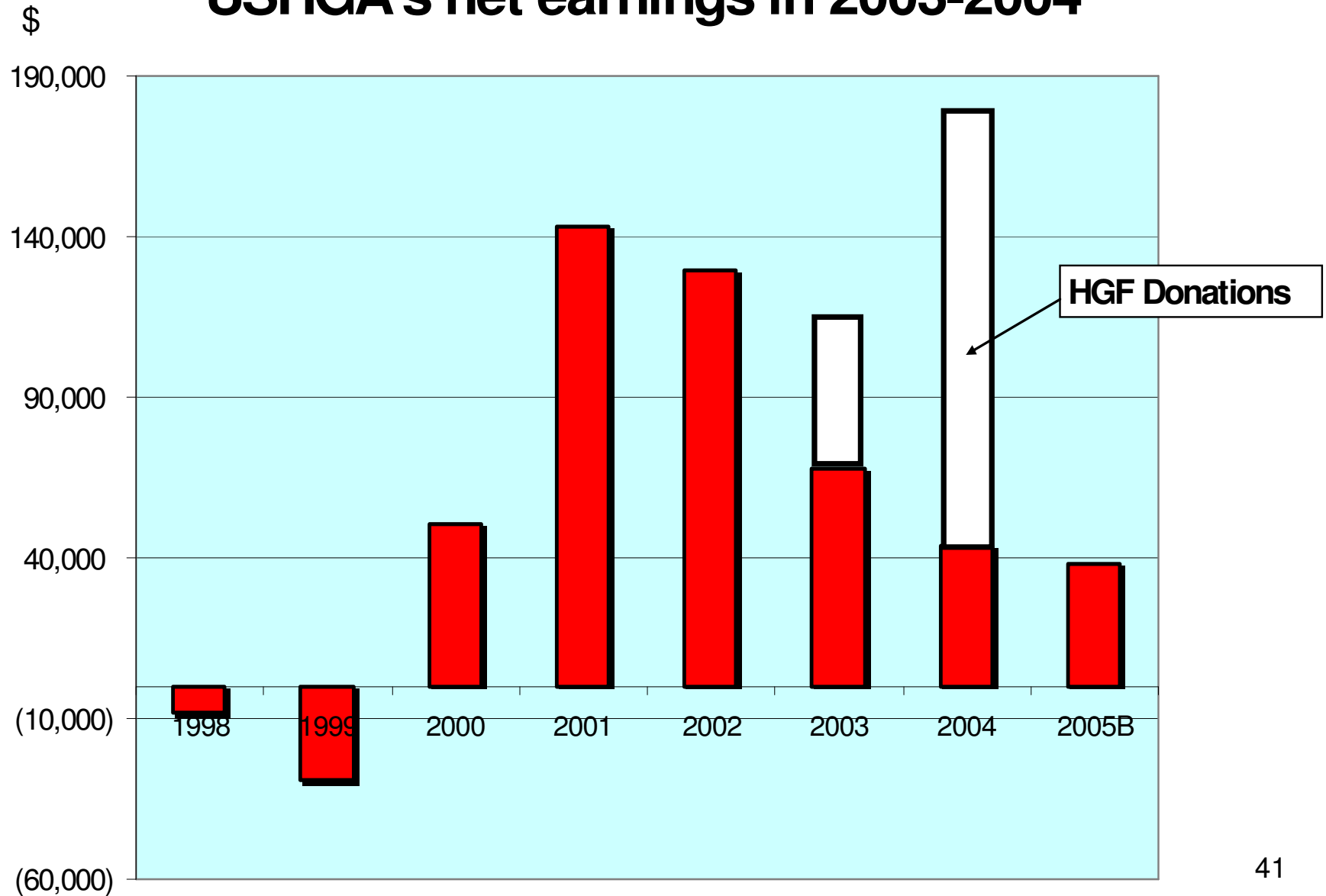
Tighter control of Opex enabled USHGA to achieve a turnaround in Net Income in 2001-2004



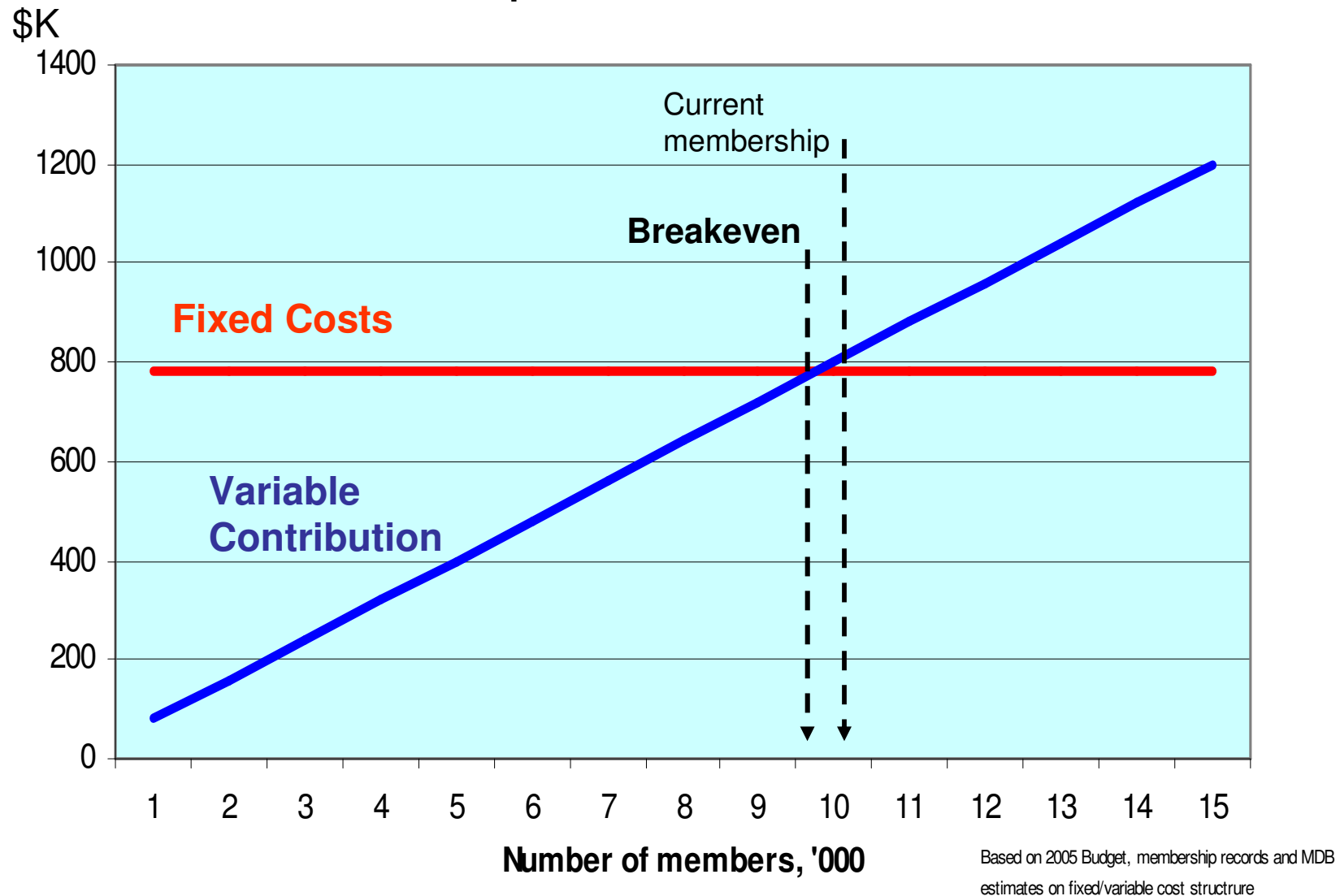
After achieving a major turnaround in 2001-02, net income declined sharply



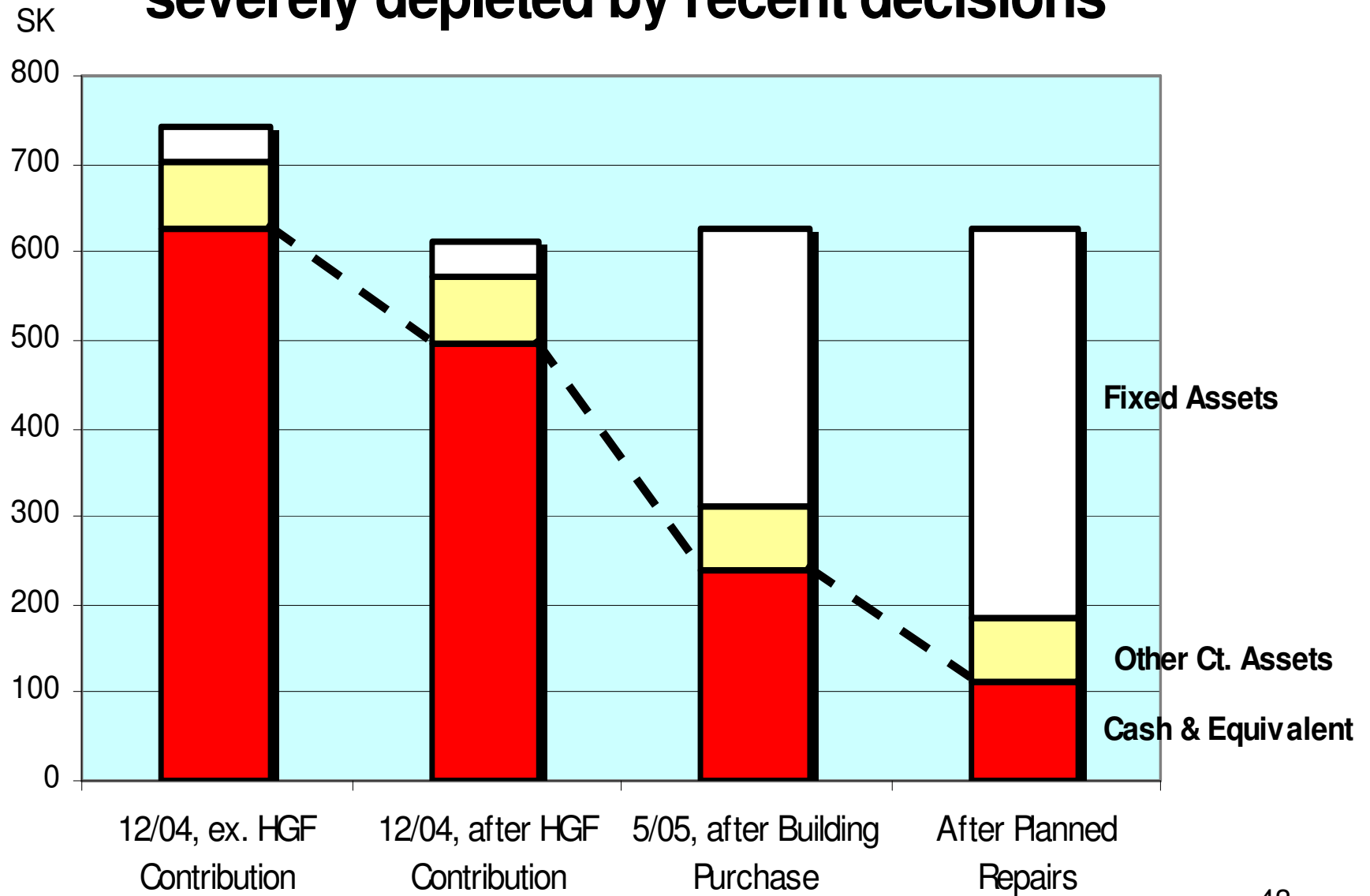
Donations to HGF had a major impact on USHGA's net earnings in 2003-2004



Still, with high fixed overheads, even a 5% decline in members would put USHGA below breakeven...



Cash available for promoting growth has been severely depleted by recent decisions



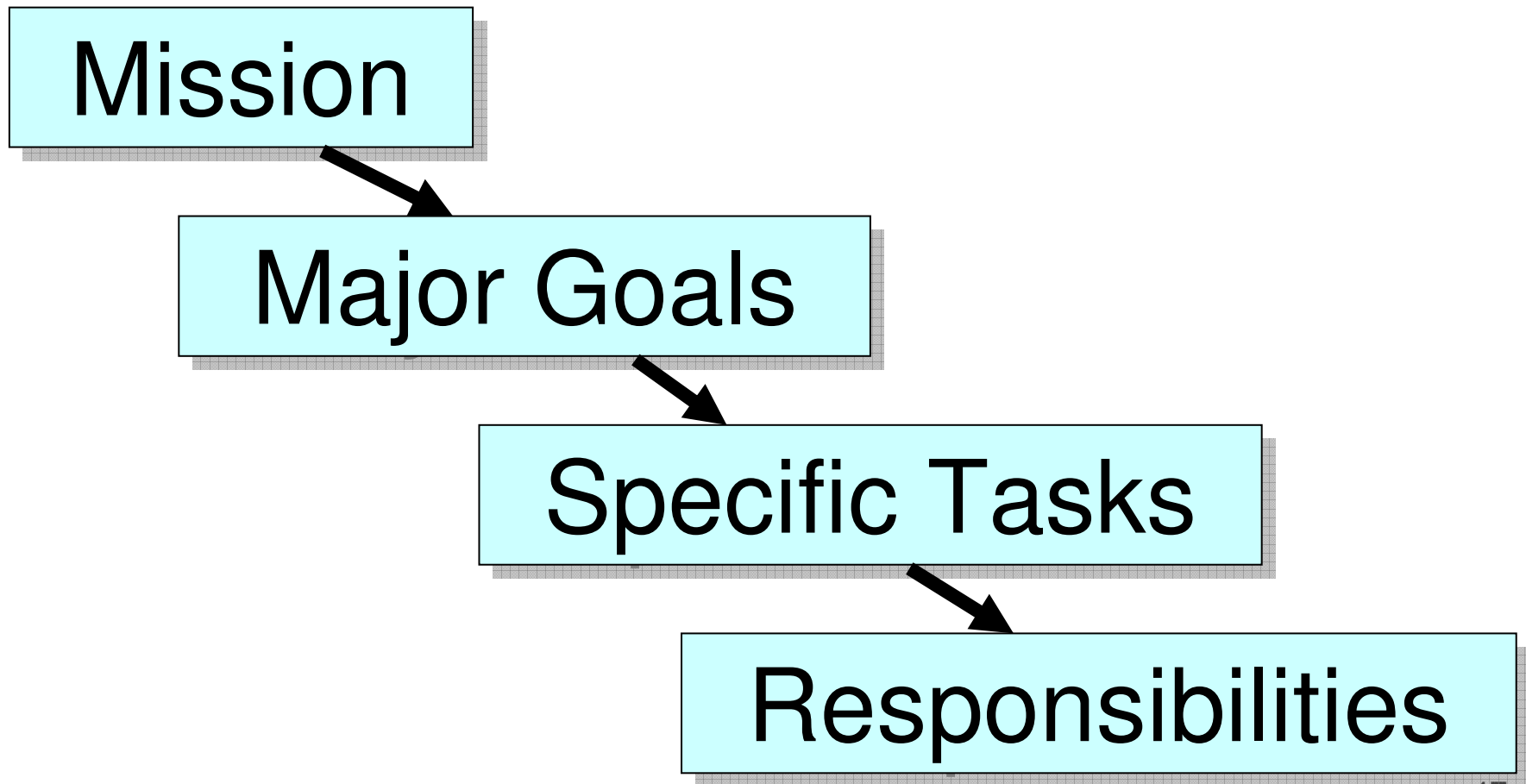
- Unless we address these problems effectively, discussion of long term “Vision Statement” may prove academic...

Why do we need a “Vision Statement”?

Mission Statement already defines USHGA's overall purpose

- Clear, simple definition
- Rightly, leaves room for future R&D
 - Who knows what kind of “soaring aircraft” will be around in 20 years time?
- Provides basis for specific goals, tasks, responsibilities...

Mission Statement provides basis for defining goals, tasks & responsibilities



“Vision Statement” adds inspirational ideals – and some specific targets

- “Safely overcome the physical limitations of man”
- “Fulfill the primordial dream of humankind to soar like a bird, effortlessly through the sky”
- “Double the number of active free flight pilots every 10 years”

To be useful, “Vision Statement” should reflect realistic assumptions about USHGA’s role and its capability to influence demand

- Avoid duplicating Mission Statement
- Avoid “motherhood” aspirations
- Goals should be realistic
- Address causes of decline
- Clarify what USHGA can/can’t do...

End of Part 1

Part 2

What's causing the decline?

We don't know exactly why demand for our sport isn't growing

- Little market research available
- Internal data incomplete
- Mainly anecdotal evidence and personal observation..

Market Research would be helpful

- Especially, about the kind of people who are our “target consumers”
 - Who are they?
 - Why do or don't they fly HG/PG?
 - What, if anything, would persuade more people to take up HG/PG?

Which of the “Five P’s” is the main cause of declining growth?

- People – i.e. “consumers” and their changing desires and values?
- Product – the overall features and benefits of our sport, and how well they meet consumers’ needs
- Pricing of hardware, support, etc
- Protagonists – i.e. competing sports
- Perception – i.e. what is the image of our sport among target consumers?

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- People – i.e. “consumers” and their changing values?
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- Protagonists – i.e. competing sports?
- Persuasion – i.e. creating better “image” through advertising and PR?

Demographic & economic factors discourage the level of commitment that HG/PG demands

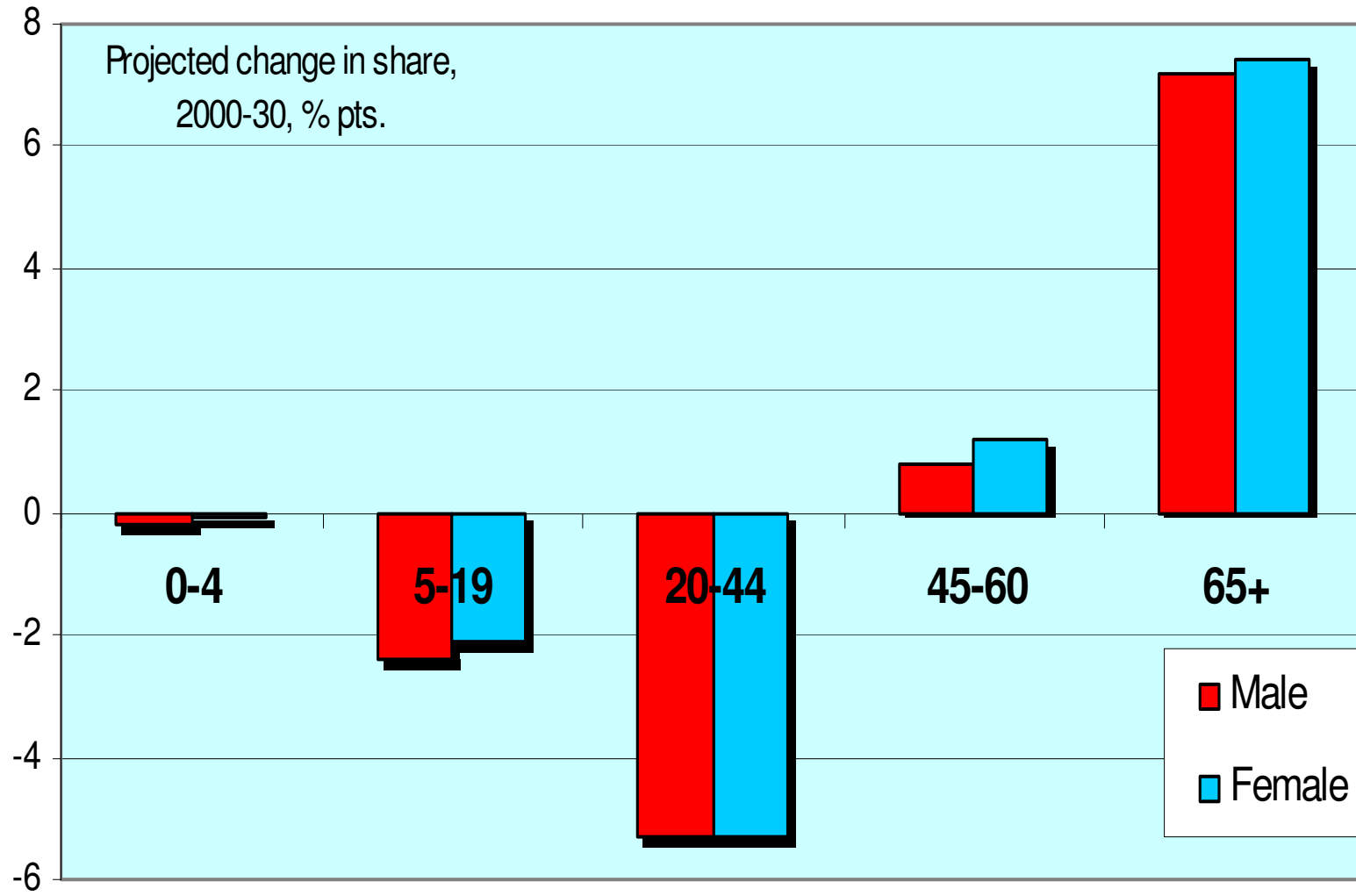
- Reduced leisure
- Aging population
- Economic & Career Pressures
- Cultural changes since 1970s
 - More materialistic, ambitious?
 - More risk-averse?
 - “Instant Gratification”
 - Less adventurous?

Average weekly work hours have risen, leaving less time for hang gliding....



Source: DOL

Our prime age group is losing share of total population



Source: US Census Bureau

USHGA must respond to socio-economic and demographic trends but can't control them...

Which of the “Five P’s” is the main cause of declining growth?

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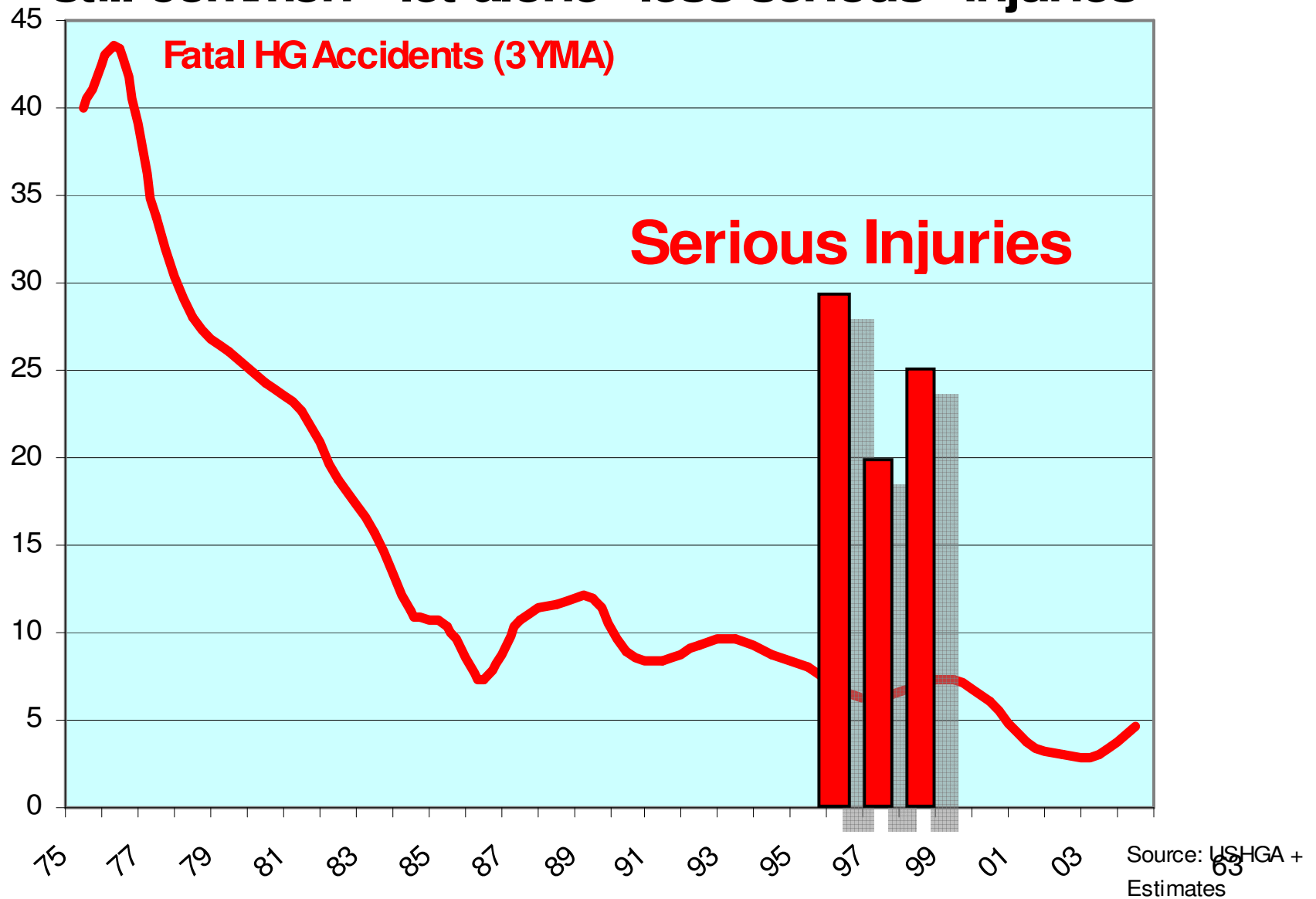
Joys of our sport are self evident



Despite its attractions, some features of our sport **do** deter potential pilots

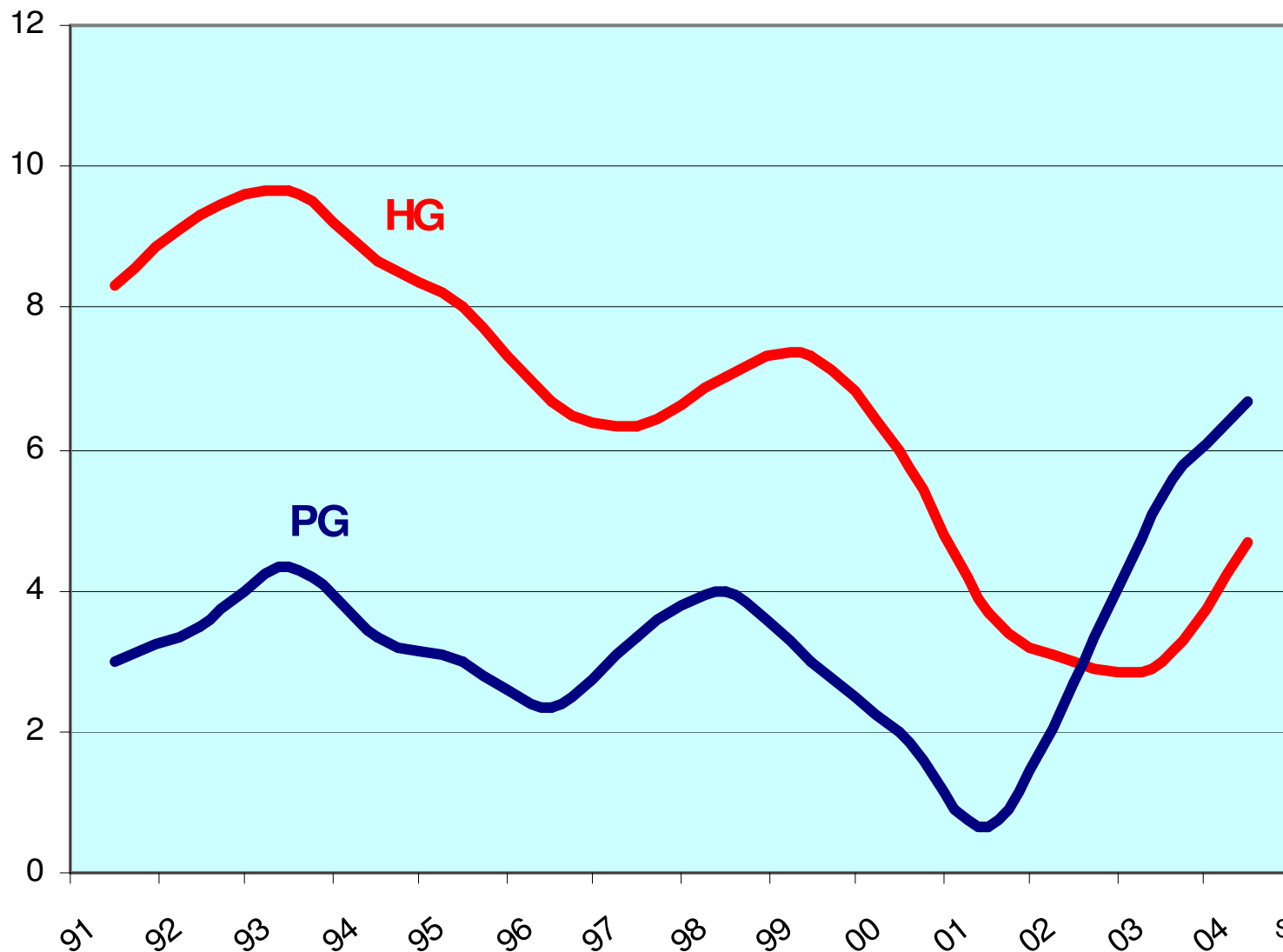
- Dangerous
 - Fatalities are down
 - But serious injuries still far too many...
- Difficult
 - To learn
 - To fly

HG fatalities are down but "serious" injuries are still common - let alone "less serious" injuries



3-year moving
average

PG recently had more fatalities than HG



Source: USHGA +
Estimates

Other features also detract from our sport's attractiveness:

- Heavy, cumbersome equipment (HG)
- Commitment required
- Physically demanding
- Travel, setup, hang waiting, breakdown, retrieval logistics...
- Dependence on fickle weather...
- Unsociable - not a “family” or “social” sport

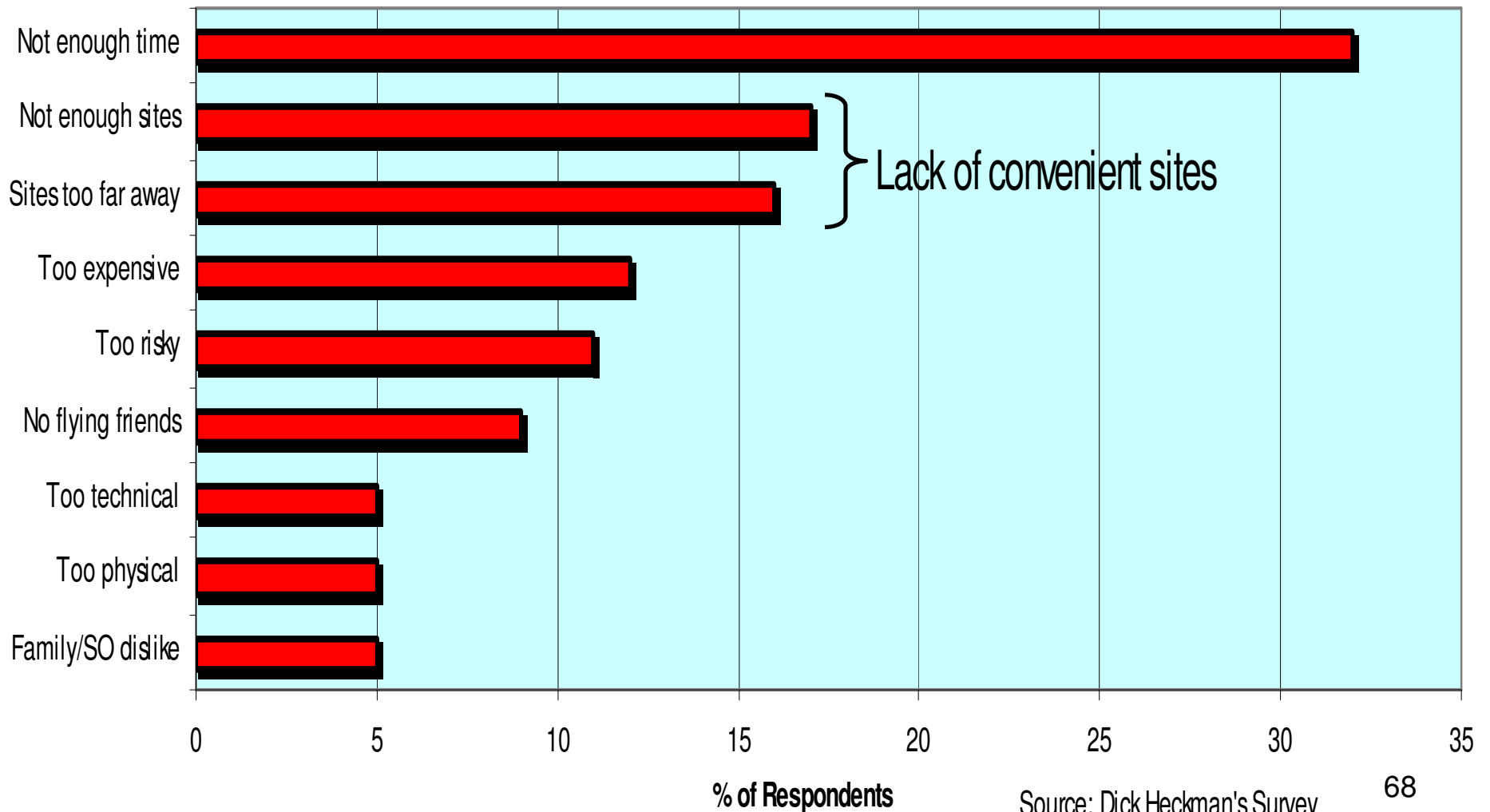
Potential new pilots are also deterred by obstacles to getting started:

- Difficult to find local instructors
- Difficult to find local training sites
- Time and effort needed for training
- Cost of lessons

Lack of training sites is a major deterrent to potential new pilots

- **“All we need is 20 more Kitty Hawks”**

For existing pilots, "lack of sites" is major reason for dropping out of our sport



Which of the “Five P’s” is the main cause of declining growth?

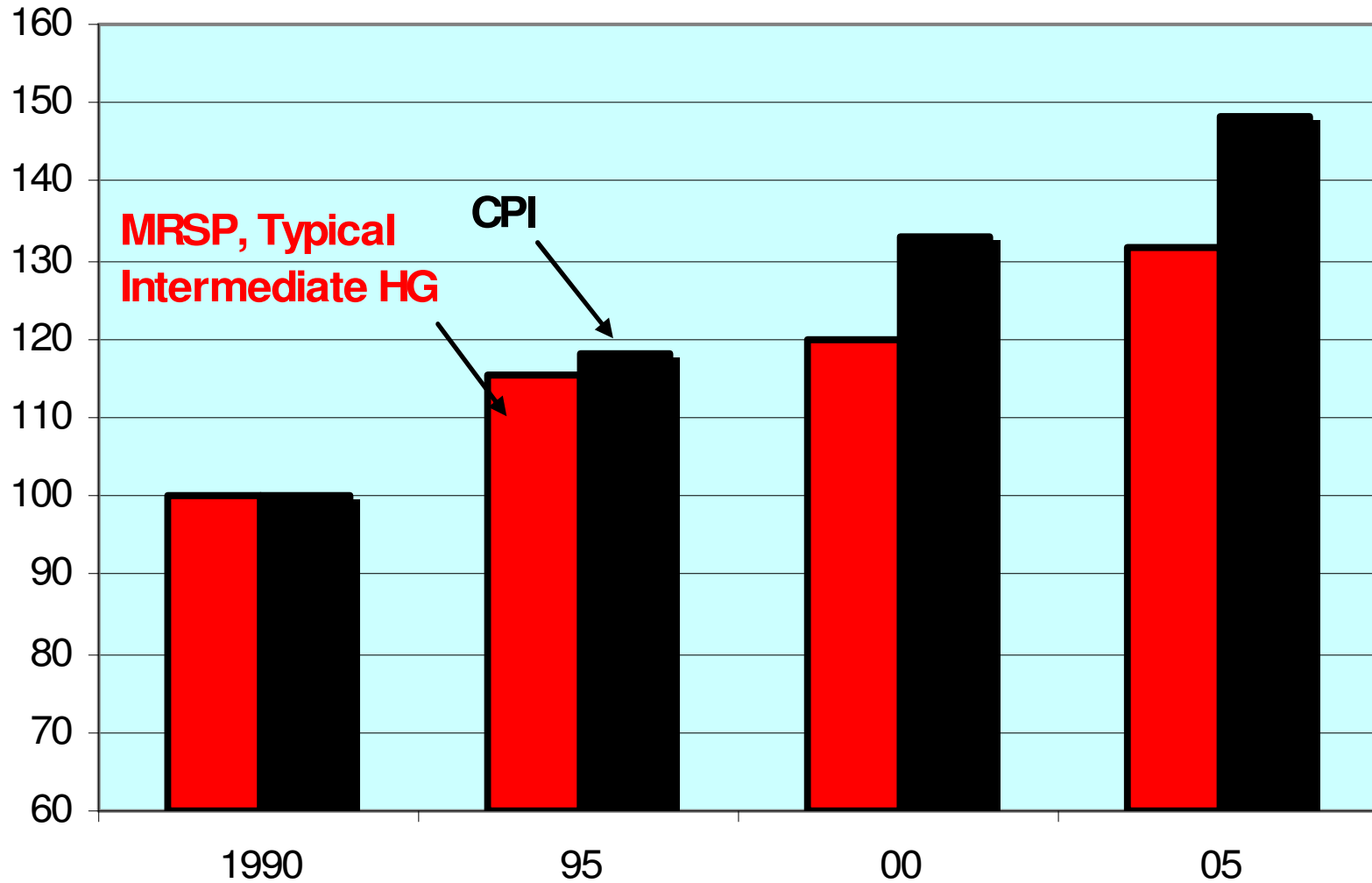
- People – i.e. “consumers” and their changing desires and values?
- Product – the overall features and benefits of our sport, and how well they meet consumers’ needs
- **Pricing** of hardware, support, etc
- Protagonists – i.e. competing sports
- Perception – i.e. what is the image of our sport among target consumers?

As far as we can tell, pricing isn't a major deterrent

- Prices for advanced, competition-level gliders are admittedly high
 - Reflects increasing sophistication, higher technology & materials content, etc
 - Especially compared with early “DIY” and kits
- However, real prices seem to have declined – at least for typical intermediate gliders

Real prices of typical intermediate HGs have actually declined...

Index vs
1990=100



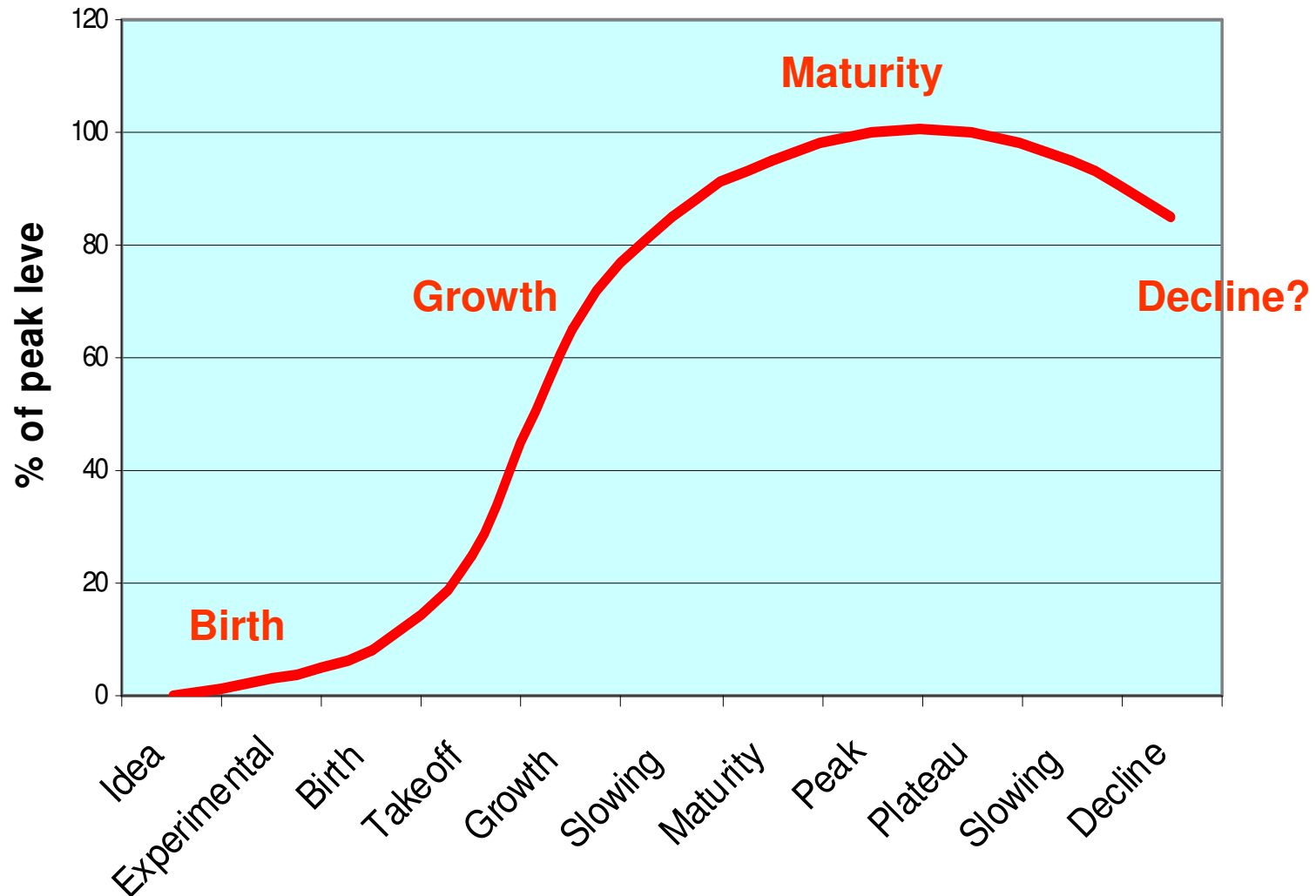
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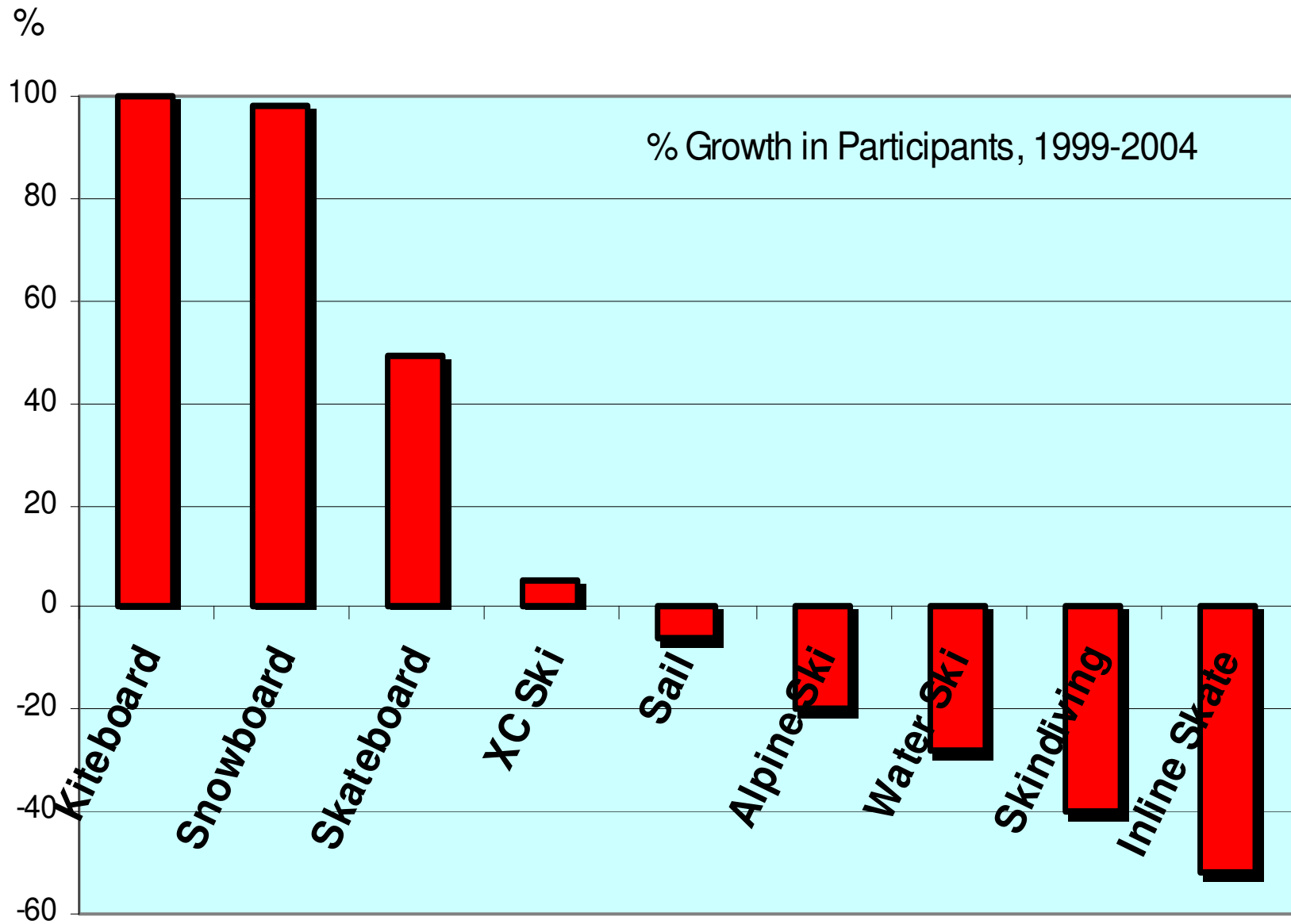
HG/PG is one of several “lightweight flying” sports and related sports...

- | | |
|-----------------------|----------------|
| • HG/PG | USHGA |
| • PPG | USHGA |
| • Powered HG | USUA |
| • Ultralights | USUA |
| • Kiteboarding | Regional KBA's |
| • Skydiving | USPA, NSA |
| • Sailplanes | SSA |
| • Airsports (overall) | PASA |

Active sports typically go through an "S Curve" of growth, maturity and decline...



Rise and Fall of Active Sports



Competition from other sports can be fierce....



Like kiteboarding....



...or skydiving



...even for Oldies



Or Snowboarding....



Or Skateboarding....



+49%

Which of the “Five P’s” is the main cause of declining growth?

- People – i.e. “consumers” and their changing desires and values?
- Product – the overall features and benefits of our sport, and how well they meet consumers’ needs
- Pricing of hardware, support, etc
- Protagonists – i.e. competing sports
- Perception – i.e. what is the image of our sport among target consumers?

Informal/anecdotal evidence suggests key aspects of our sport's public image include:

- Positive
 - “Exciting, thrilling,
 - “Beautiful”
- Negative
 - “Dangerous”
 - “Difficult”
 - “Demanding”



Risks of coastal flying are sometimes exaggerated...

Loss of “novelty” is probably a major (but unarticulated) cause of our declining growth

- In its growth phase, HG was seen as a new, exciting, “cool” sport
- Mainly for young, adventurous people

Hang gliding was a young, new, cool sport....



But pilots are now older....

An Old Hang Glider Pilot

PAINTINGS

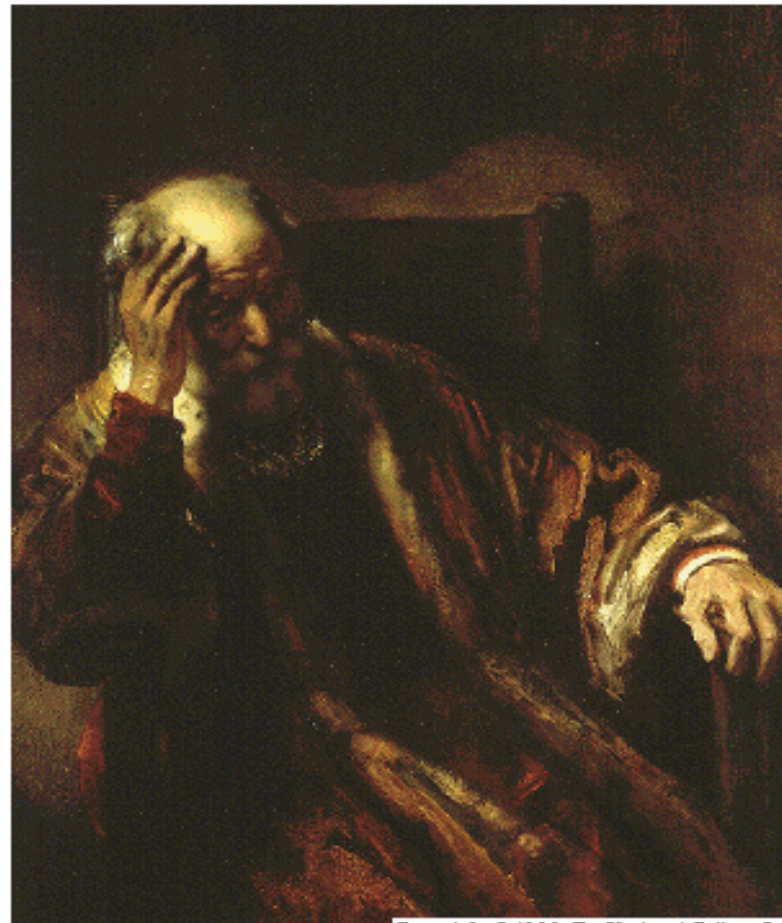
REMBRANDT (Follower)
Late 17th or early 18th century

*Signed and dated, top right:
Rembrandt. f. 1652
Canvas, 111 x 88 cm. No. 6274,
Acquired from the Duke of Devonshire, 1957.*

An elderly man is portrayed seated, wearing a fur robe, and staring downwards in contemplation. The composition and technique are reminiscent of Venetian portraiture, particularly that of ► **Tintoretto**.

At the time of purchase in 1957 this was thought to be a late Rembrandt but it has now been reattributed to an unknown follower of Rembrandt from the late 17th or early 18th century. In particular the head and hands lack Rembrandt's finesse. It is none the less an impressive painting.

NEXT PAGE... Source of the Image



Copyright © 1993, The National Gallery, London

Part 3: What can USHGA do?

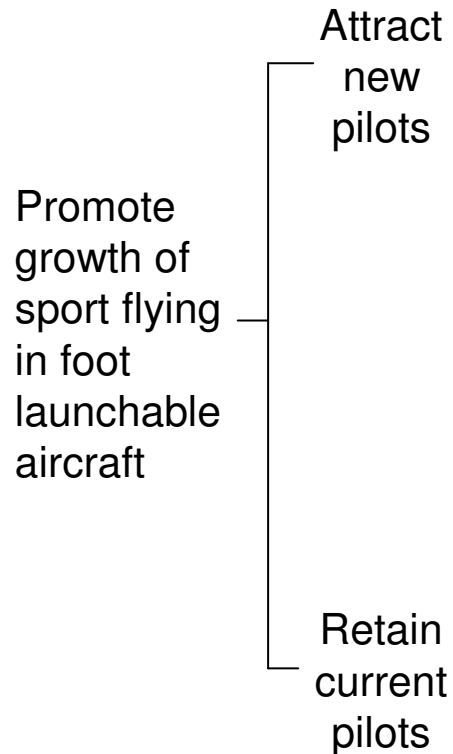
Several of the above factors are largely outside USHGA's control

- Some things we can't do anything about (e.g. demographic, social, cultural shifts)
- Some things are best done locally (e.g. by individual pilots, clubs, schools)
- Some by manufacturers, dealers
- A few things where USHGA can make a bigger difference

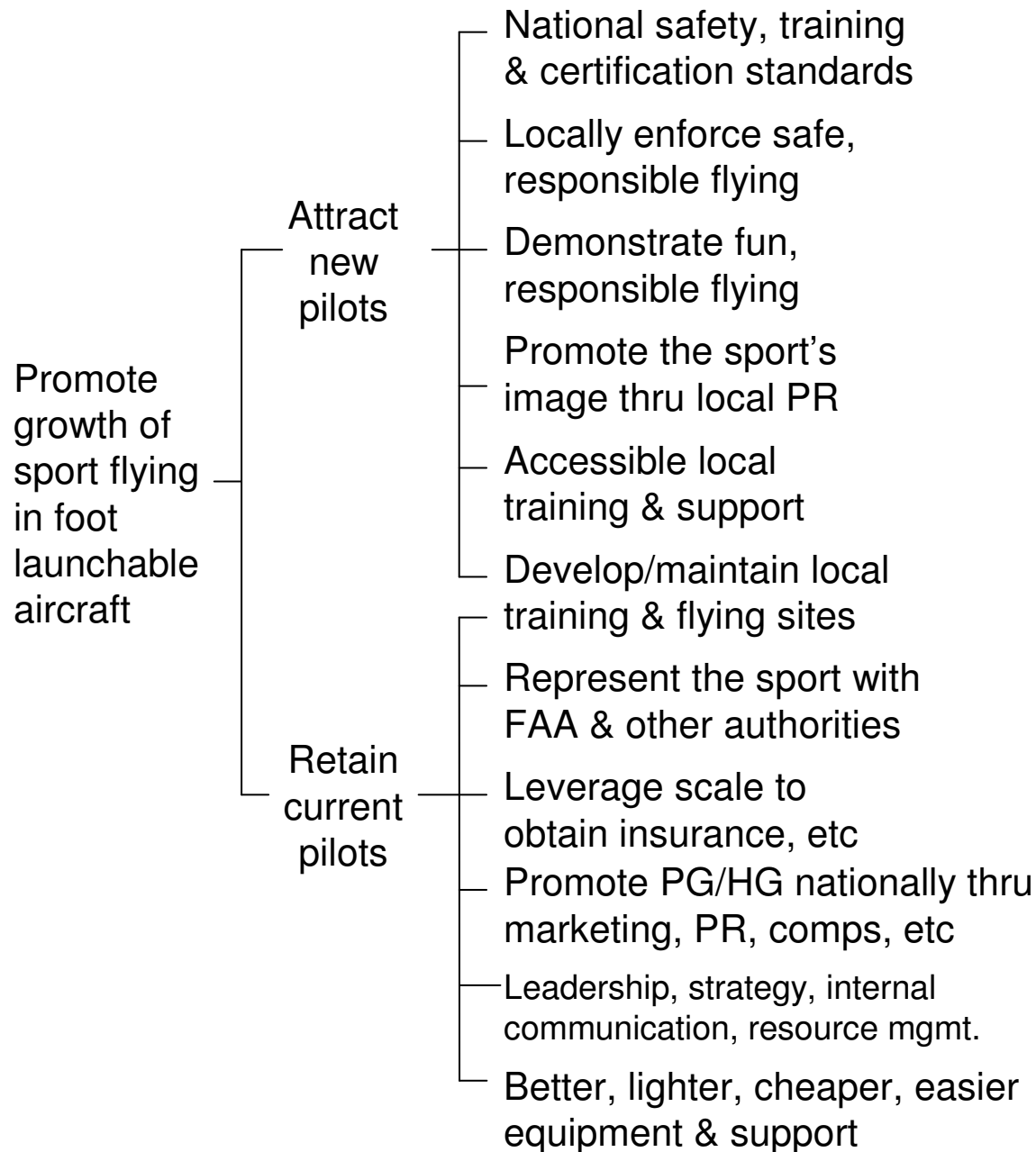
O Lord, give us:

- Patience to endure those things we cannot change
- Courage to change those things we can change, and
- Wisdom to distinguish between them

Mission Statement provides basis for defining major goals...



...and for identifying key tasks:



USHGA already plays a vital role...

USHGA already plays a vital role...

		<u>Pilots</u>	<u>Clubs</u>	<u>Schools/ Dealers</u>	<u>Mfrs.</u>	<u>USHGA</u>
Promote growth of sport flying in foot launchable aircraft	Attract new pilots	National safety, training & certification standards				
		Locally enforce safe, responsible flying				
		Demonstrate fun, responsible flying				
		Promote the sport's image thru local PR				
		Accessible local training & support				
	Retain current pilots	Develop/maintain local training & flying sites				
		Represent the sport with FAA & other authorities				
		Leverage scale to obtain insurance, etc				
		Promote PG/HG nationally thru marketing, PR, comps, etc				
		Leadership, strategy, internal communication, resource mgmt.				
Better, lighter, cheaper, easier equipment & support						

93

Pilots are skeptical about what more USHGA can do to grow the sport

- “There’s not much more USHGA can do to get more pilots, beyond what they’re already doing...”
- “If people really want to fly, they’ll find a way to fly”
- “If not, there’s not much USHGA or anybody can do about it....”

However, USHGA could make a difference by strengthening its support of local activities in three key areas:

1. Focused, low cost PR
2. Training and support of instructors and schools
3. Site development & retention

1. Focused, low cost PR support

- Key “public relations” tasks are largely driven at local level, by
 - Individual pilots
 - Local clubs
 - Schools, Dealers
- But USHGA could help by leveraging collective expertise to support clubs’ local, low cost PR activity

Support activities could include:

- Guidance on PR and marketing issues, pooling USHGA's collective experience
- Develop a “How To” PR booklet for guidance of local clubs, shops & schools*

*or retrieve and update earlier material

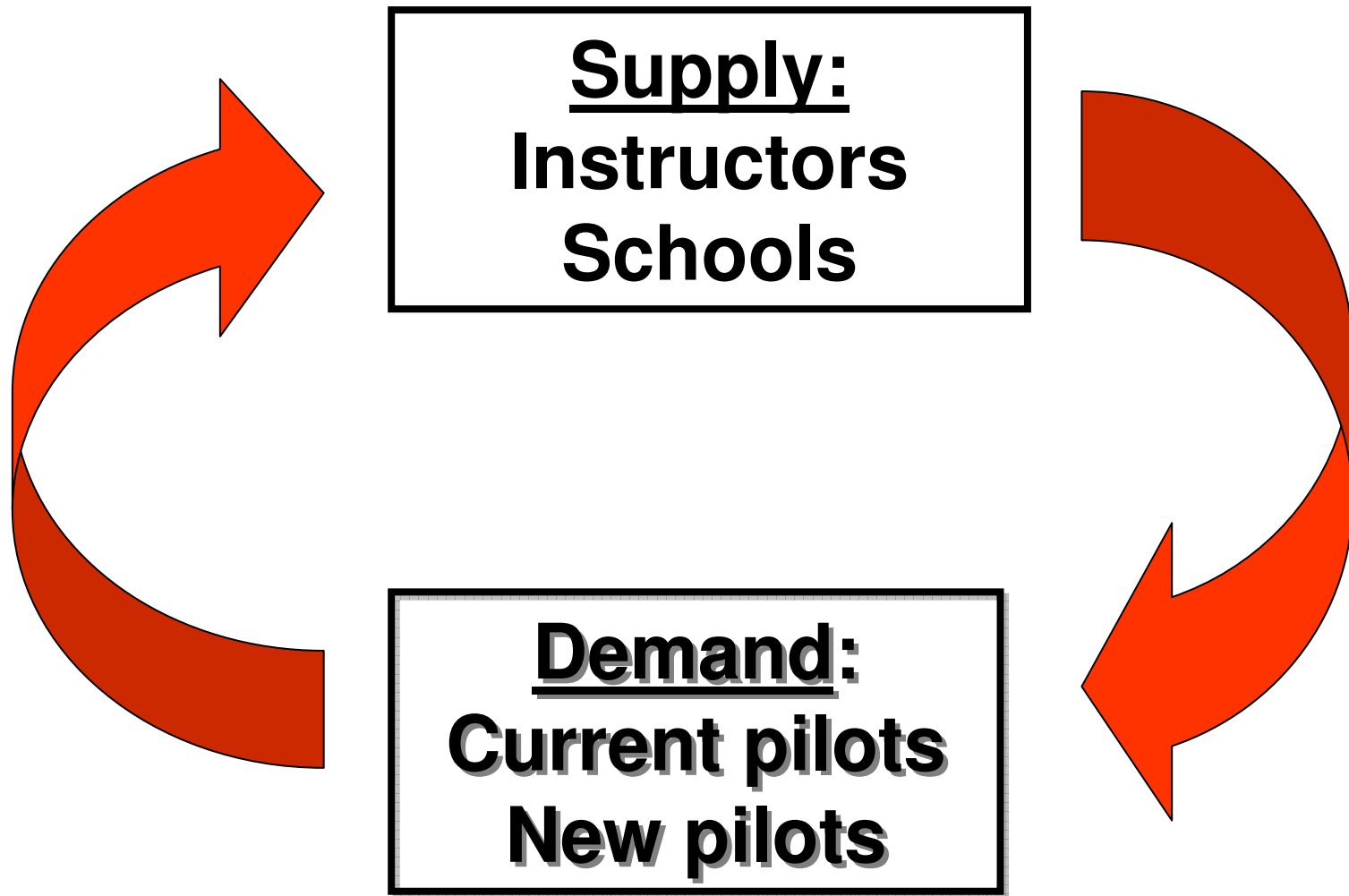
Low cost but broadscale PR exposure should also be a high priority

- Media are hungry for attention-getting content
- Documentaries on exciting/novel sports can reach huge numbers of “consumers” at very low cost or even free..
- USHGA needs to cultivate high level media contacts and “market” our sport...
- See LandRoller for recent example

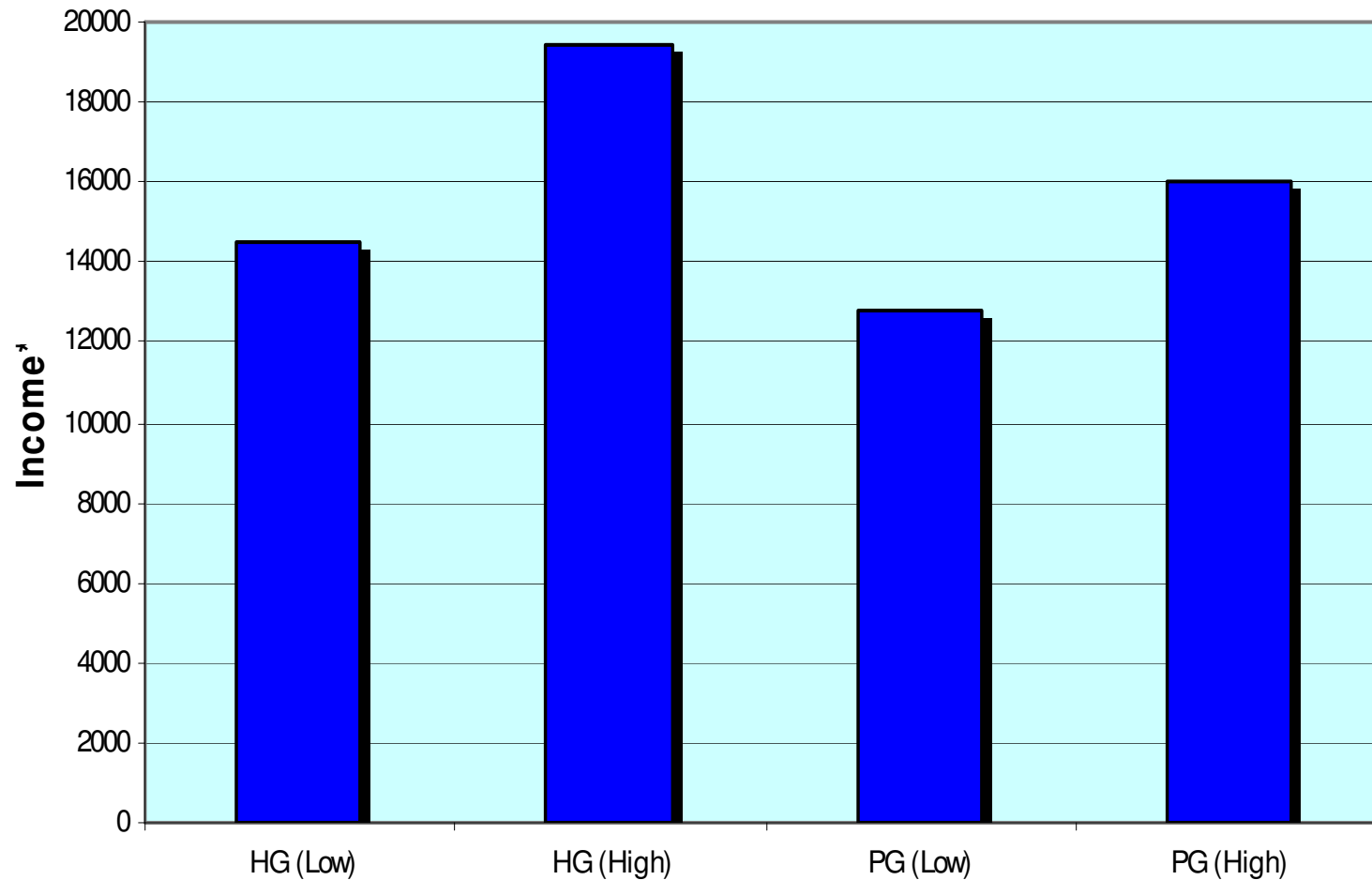
Good PR can produce excellent media exposure at very little cost....

- This coming Monday, my new product, LandRoller skates will be shown on **Good Morning America**. I am told that a part of **Times Square** will be blocked off from the public so that Co-anchors Diane Sawyer and Charles Gibson and co-hosts Tony Perkins and Robin Roberts will be able to skate down the sidewalk on LandRollers with Olympic gold medalist speedskater Apolo Ohno. am).
- By the way, we were in **Popular Science** and **BusinessWeek** Online and are in the current issue of **Maxim**. We will be featured in upcoming editions of Playboy, **People**, **Men's Health**, **Fit**, **Men's Journal**, **Wired**, **Sync**, **Health Magazine** and a slew of other publications (**LA Times** and **New York Times**, of course). We also have segments on a number of national **high-profile TV shows** planned.

2. USHGA could probably do more to increase supply of instructors & schools



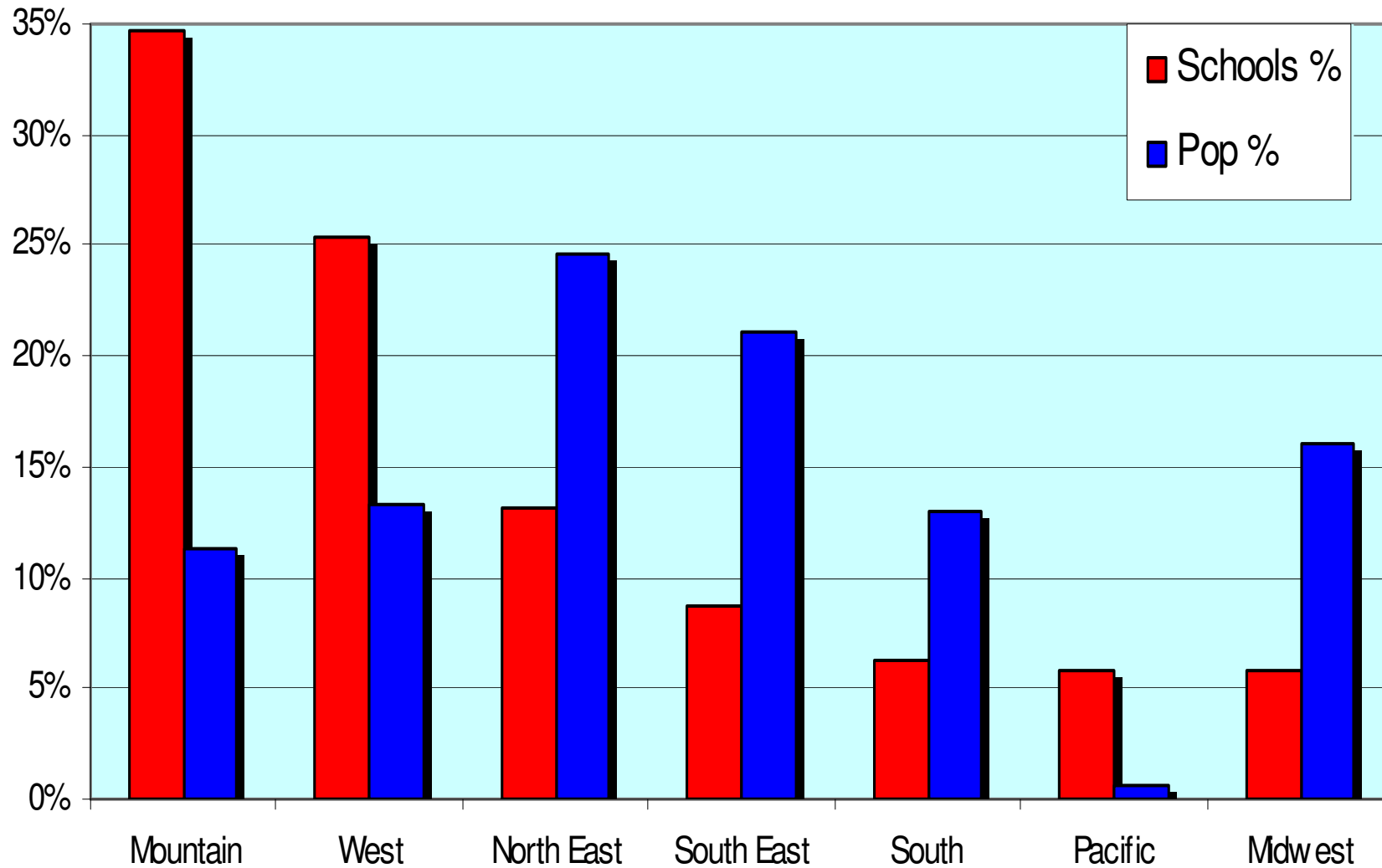
Based on estimated incomes from instruction, many instructors are probably operating only part-time



* based on industry estimates of average number of pupils per instructor, days training per pupil, and instruction rates. Source: industry estimates

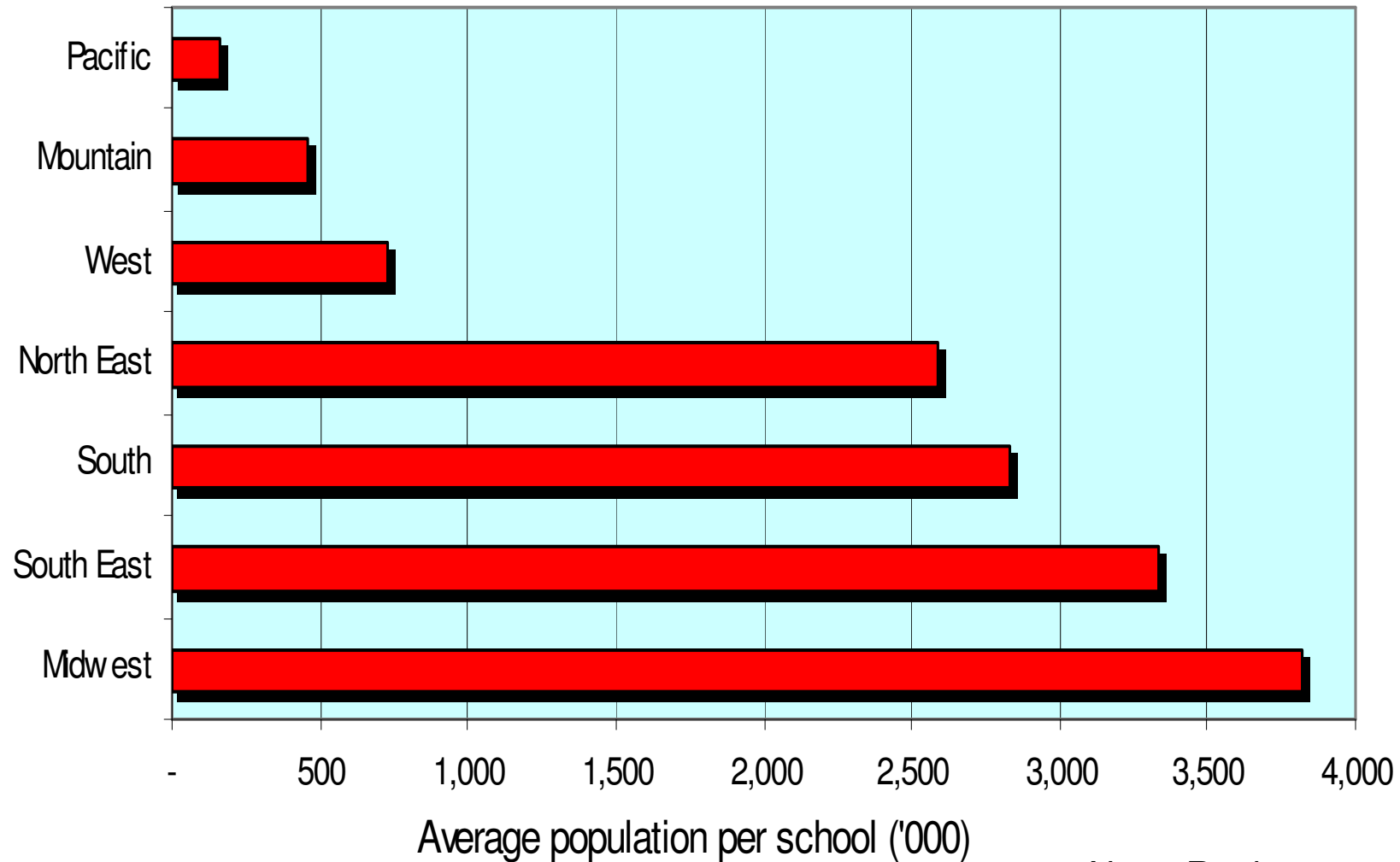
Schools are largely concentrated in the Mountain and Western regions

% of total



Note: these are not USHGA regions

Availability of schools per person varies enormously by region



Note: Regions are
not USHGA regions

Proactive steps to help increase supply of instructors

- Programs to train and motivate potential new instructors
- Develop instructor/school insurance programs
- A “How To” manual for aspiring and current instructors and schools
- Drawing on the cumulative expertise available within USHGA...

3. Site Development

Development and retention of sites is driven primarily at local level, by

- Local clubs
- Schools
- Individual pilots
- Local initiative, knowledge, enthusiasm are often the driving factors...

USHGA already plays a key supporting role in site development, by:

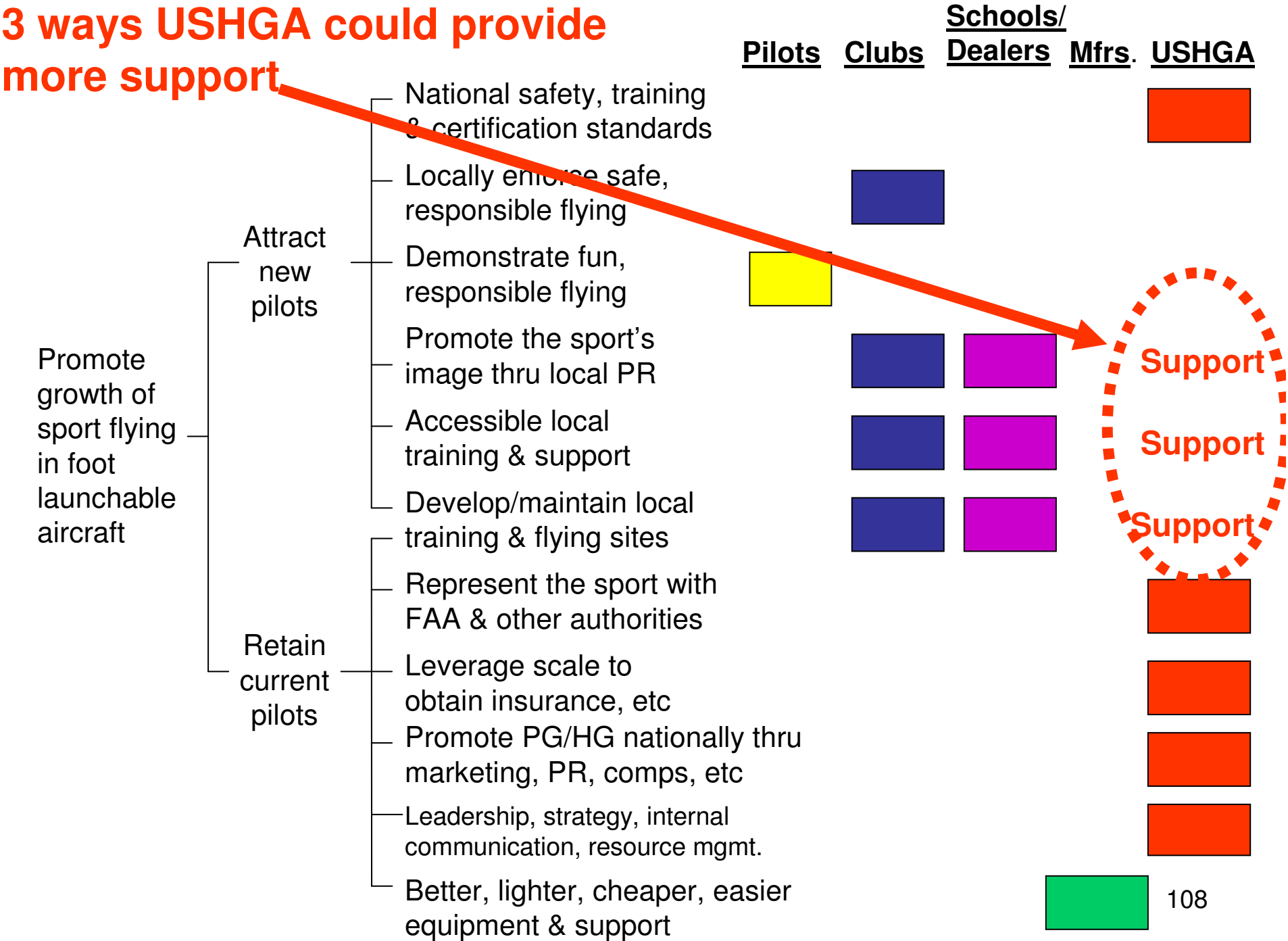
- Leveraging scale to obtain centrally-managed insurance coverage
- Representing the sport with FAA and other regulators

Still, USHGA could provide more proactive support for local site development activities

- Leverage the professional skills and experience available within USHGA
- Develop a comprehensive USHGA Guide to Site Development & Retention*
- Seminars on site development know-how could also help fill the gap

* Or retrieve and update earlier material

3 ways USHGA could provide more support



- All the above to include “How To” Guides and training, drawing on our collective skills and experience*
- Plus more focus on these key activities in USHGA magazine

* And by retrieving/updating earlier material
where available....

End of Part 3

Part 4

Implications for “Vision Statement”

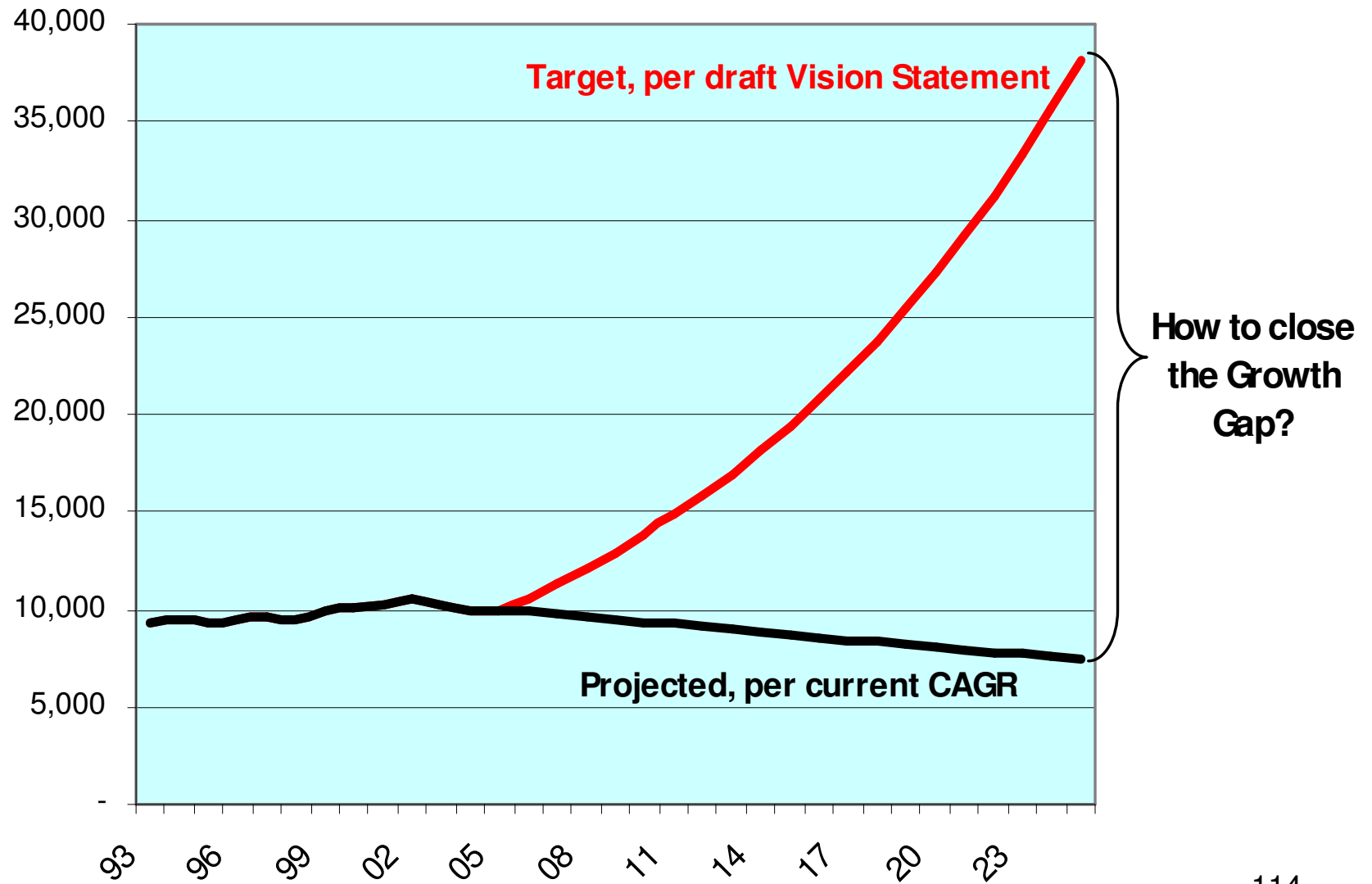
“Vision Statement” should define what kind of organization USHGA should be...

- Basic role and objectives
- Scope and limitations of activities
- Things it is capable of doing
- Things it isn't equipped to do and/or should leave to others...

USHGA could implement the above actions without radically expanding its current role

- Most of the required expertise and resources already exist within USHGA
- Assumes substantial volunteer/pro bono effort from in-house sources
- Possibly with some outside professional support (e.g. a good PR person)

But these actions may not be enough to close the Growth Gap...



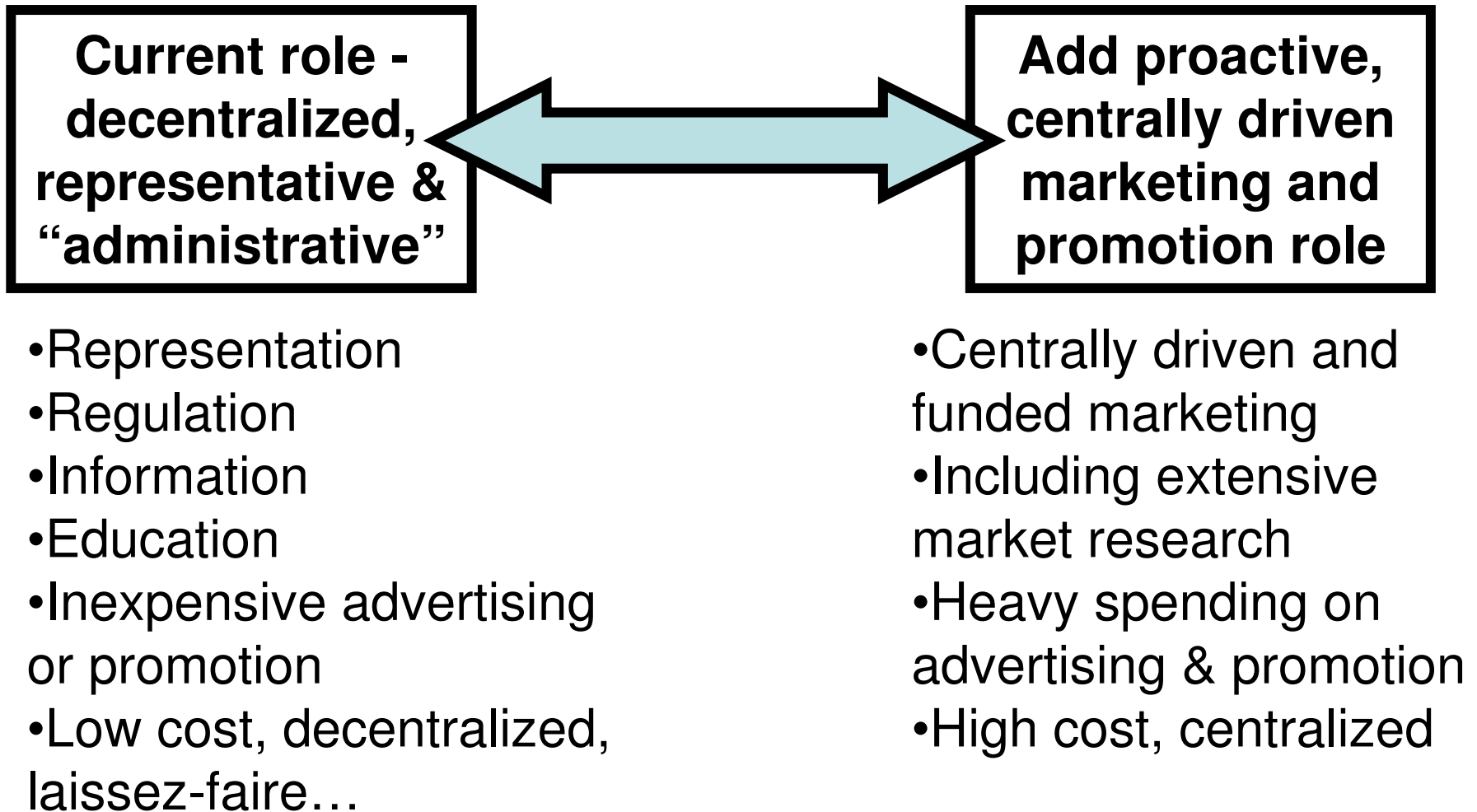
Vision Statement should therefore reflect a business model that is:

- Based on realistic goals & aspirations
- Distinguishes between things that USHGA can and cannot do
- Capable of continuing to function if growth remains slow, or even negative

Draft “Vision Statement” targets dramatic improvements in our sport’s public image

- “Increase public awareness of personal aspects of the sport”
- “Promote the ‘cool factor’ of the sport”
- “The goal is for 90% of the general public to think it’s a safe sport...”
- ..in addition to very ambitious membership goals (“double membership in 10 years”)

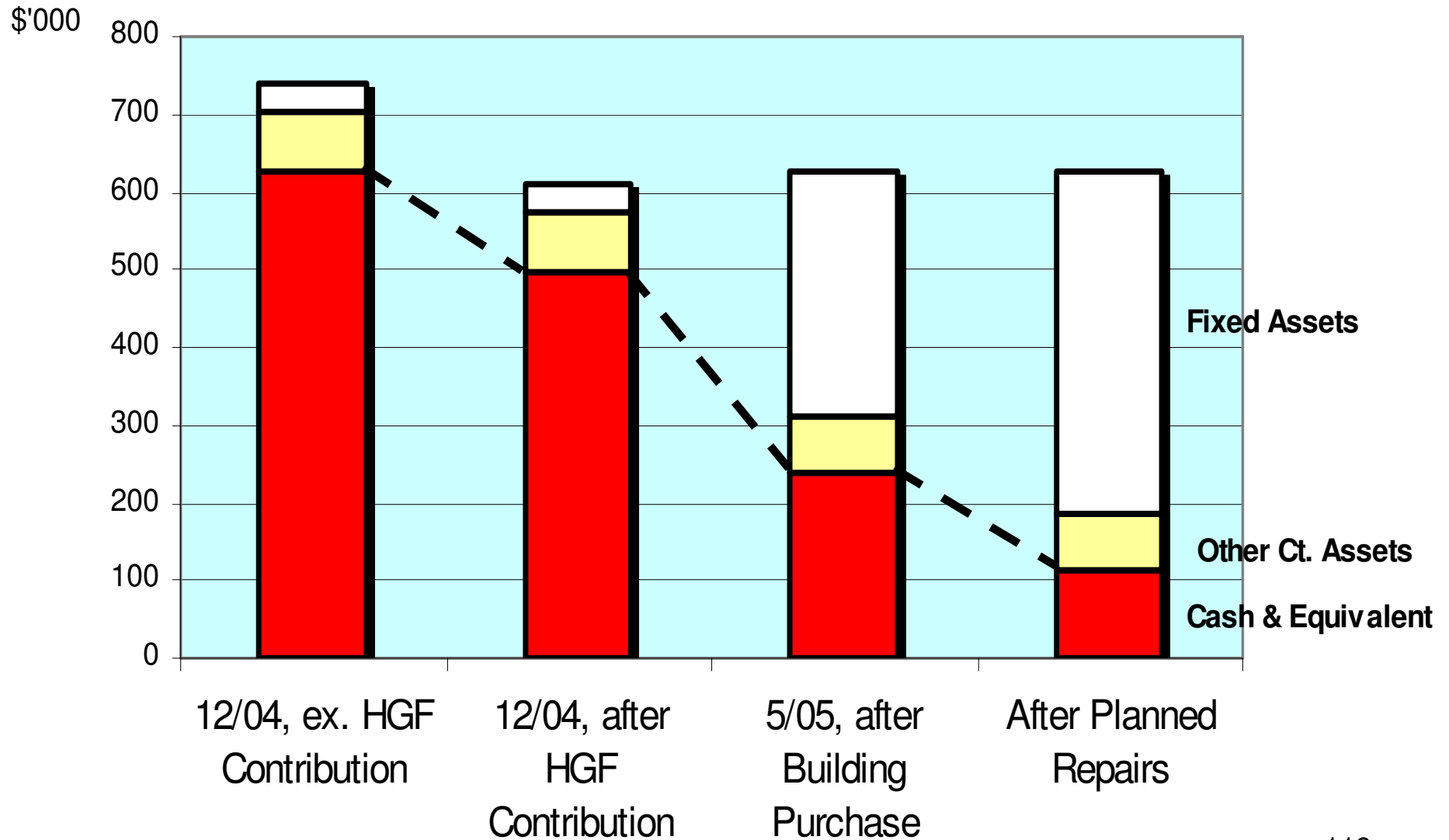
Should USHGA adopt a more proactive, centrally-driven “marketing” role?



This kind of transformation would require major additional resources

- Proposed target represents a dramatic transformation in our public image
- ..and a major expansion in USHGA's role
- Major advertisers spend \$ billions to create comparable image transformations...
- As a tiny niche sport, USHGA doesn't have the resources to become a major "marketing" organization

Even these limited actions entail very efficient use of USHGA's limited resources



Growth of active sports typically doesn't depend on expensive marketing

- “Promotion” consists largely of word-of-mouth and personal observation...
- In many cases “novelty” is a key factor
- “If the product isn't consumer-right, don't waste money advertising it...”
- Low cost, targeted PR probably more effective and affordable...
- Favorable “image” boosted locally by demonstrating safe, fun, responsible flying

USHGA should probably concentrate on using resources more effectively in its current role

- Focus on things that USHGA is best able to do
- “Marketing” should use mainly low cost/high impact PR (see earlier)
- Clearly define and communicate goals and strategies
- Focus on mission-relevant use of resources

BoD could help achieve this, by
strengthening management focus and
communication

- Defining & communicating clear strategies and priorities
- Focus on mission-relevant applications
- Strengthening transparency and accountability
- Improving grass-roots communication and support

Transparency & accountability are important in gaining member support...

- Members want to know how their money is spent
- Ensure mission-relevant resource allocation
- Measure and report results
- Opportunity to strengthen members' understanding, involvement and support...

BoD has identified improvement opportunities in its own management style

- “Insufficient vision or clear strategy”
- “Muddling through, directed by those with most clout or most strident”
- “Lack of focus, specific goals”
- “Lack of follow-through”
- “Poor communication with members”
- “Internal conflict, self promotion, self-interest”

Members typically express similar concerns* about the BoD & EC

- “Secretive, lack of transparency”
- “Preoccupied with minor issues, but fail to address big issues”
- “Clique-ridden, political, remote from grass roots...”
- “Not accountable to membership...they don’t tell us how they’re using our money...”

*See Appendix 1 for some recent examples

Improving strategic clarity,
communication and accountability could
be a major opportunity for the BoD

- To use our limited resources more effectively to achieve USHGA's mission
- To build understanding and support among the membership at large
- Regional directors can (and often do) play an important role in 2-way communications

End of Part 4

Appendices

1. Resource Allocation Issues
2. Suggested Action Priorities

Appendix 1

Some examples of resource allocation issues

Members have expressed concerns about recent resource allocations, e.g.

Recent major resource allocations	\$K	Mission-relevant? Strategic fit?	Members consulted/ informed?	Account-ability?
“Database fiasco” **	150	n/a	?	?
HGF Donation	130	?	?	?
Building Purchase*	410	?	?	?
Total	690	Not clear...	Not much	Not clear

130

* Including necessary repairs ** Capitalized, not expensed

Purchase of HQ Building

Members wonder if the new building really helps meet our strategic needs

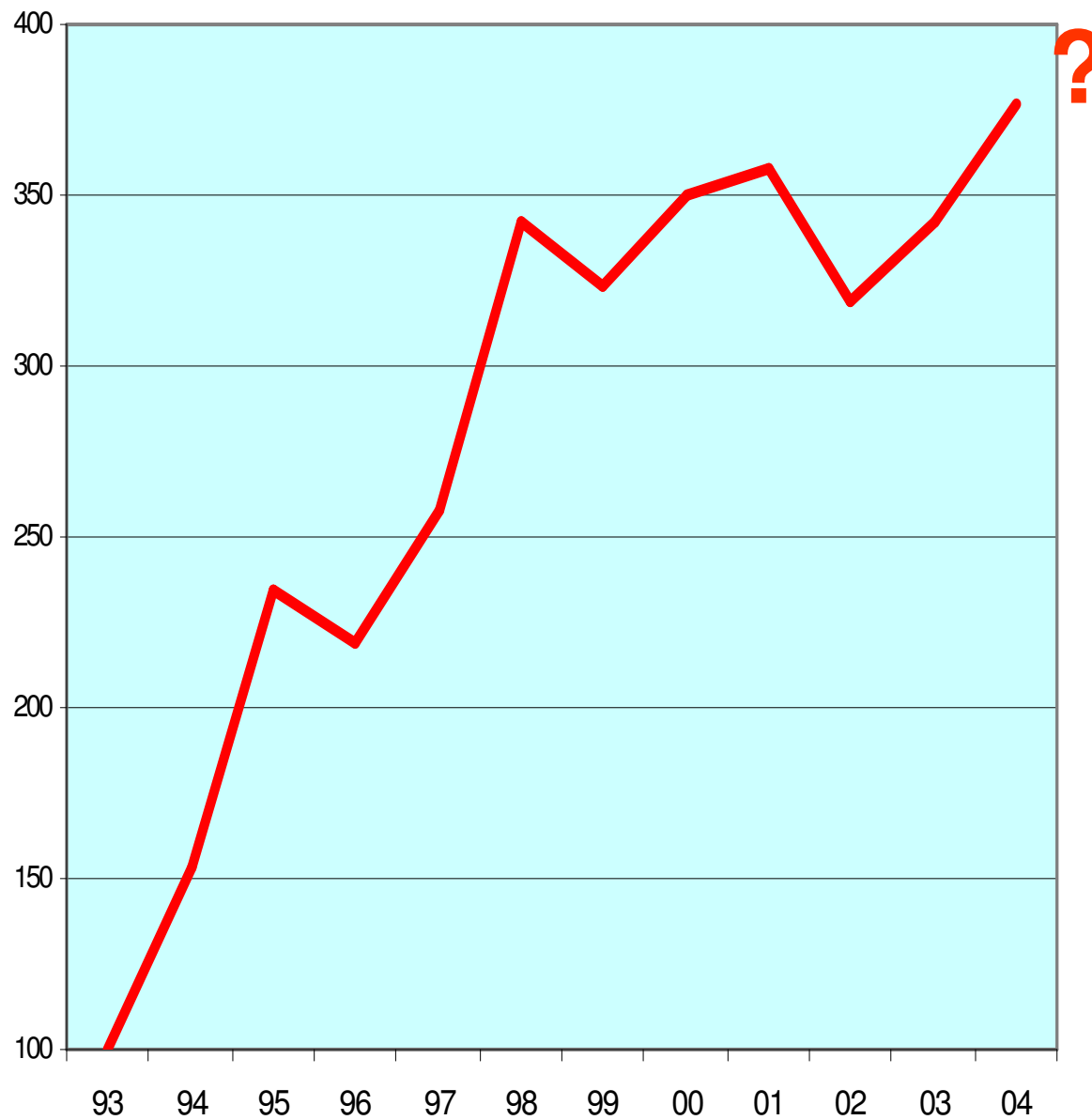
- Members feel they were not consulted or even aware their funds were used this way
- 6,700 sq ft office space for staff of 5?
- Should USHGA be diversifying into the real estate and rental business?
- Diverts \$410,000 cash from mission-relevant priorities
- Major diversion of management time, too

New building (cont.)

- Shouldn't we focus resources more on achieving USHGA's primary mission?
- Economic advantages not clear
- Purchase creates substantial risk exposure and liabilities
 - Financing includes taking on substantial debt
 - May actually increase legal exposure
 - Peak of real estate bubble; capital risk?

Cost/SF Index
(1993 = 100)

Cost of office space, Colorado Springs



USHGF Role and Donations

Members also wonder about the purpose & value of HGF “donations”

- Members not consulted or fully informed about donations (\$130,000 in 2004)
- Depletes resources available for USHGA’s mission-relevant applications
- Little apparent accountability for how members’ funds are used
 - “They never tell us what they’re doing with our money...”

Members wonder why we shouldn't keep funds under USHGA control...

- Minimal reporting by HGF about how the money is used
- Requests to HGF for grants apparently go unanswered
- Why not retain management control and accountability within USHGA?
 - Almost identical USHGA/HGF boards
 - Both are 501(c) 3 organizations, so no apparent “asset protection” advantage

Database/Website Development

Members feel “kept in the dark” about huge losses on database development

- Effective write-off of about \$150,000 development expenses
- Plus substantial investment of “pro bono” time for remedial work (est. \$200,000)
- Readily available software could probably have met USHGA’s needs for vastly less

Database (continued)

- Other prepaid fees apparently not recovered - despite lack of delivery
- Who did these payments go to?
- Cumulative expenses “capitalized”?
- Little information or explanation....

Appendix 2

Some suggested action priorities

1. Review role & governance of BoD and suggest improvement opportunities, including:
 - A basic Planning and Control system
 - Clearly defined roles, responsibilities, authorities and accountability of President, EC, ED, directors
2. Improve open-ness, strategic clarity and communication between BoD & members
 - Plans, decisions and implementation to follow procedures per #1 above
 - Strengthen role of Regional Directors in communication between Members & BoD
 - Increase coverage of major issues and BoD decisions in the HG & PG magazine

3. Finalize “Vision Statement” – to reflect agreed policy re USHGA’s role and scope of activities (see Slide #117)
4. Move on rapidly to develop and implement practical action plans:
 - Long Term Goals and Strategies, reflecting the agreed “Vision Statement”
 - Annual Operating Plans and Budgets, reflecting agreed Long Term Goals and Strategies
 - Both to be developed and managed per the agreed Planning and Control system (#1 above)

5. Annual Operating Plans to include plans to strengthen central support of local activities in three areas:
 - Local PR and image building
 - Development of schools and instructors
 - Site development and retention
6. All the above to include USHGA “How To” Manuals* and other training material
7. Develop high-exposure/low-cost PR programs, using high level media contacts (probably using a professional PR agent)

* Retrieve & update existing material if available

8. Review roles, responsibilities and accountability of USHGF; plus USHGA's \$130,000 "donation" & future donation policy
9. Review history & status of \$150,000 website/database write-off
10. Review \$410,000 cost of 1685 W. Uintah Street, and basis for purchase decision
11. Provide members with a full accounting of items 8, 9 & 10 above
12. Ensure procedures for future resource allocation decisions are clearly defined, communicated & implemented (per #1)

13. Design low-cost market research programs as input to marketing/PR plans
14. Support local clubs in finding ways to develop pilot population in sectors of relatively low HG/PG penetration, e.g:
 - “flatland” areas
 - women pilots
15. Assess potential opportunities to work more closely with other “lightweight flying” sports and organizations

End of Presentation