2023 ANNUAL REPORT

First Battalion Ninth Marines Association

March 2024



FIRST BATTALION NINTH MARINES ASSOCIATION, INC.

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A MESSAGE FROM THE PRESIDENT

Dear Members, Veterans, and Families of the Association,

I am excited to present to you the 2023 Annual Report of the First Battalion Ninth Marines Association. On behalf of the officers, directors, and volunteers, I extend our warmest greetings and profound gratitude to each of you. This year, as we reflect on our achievements and the strides we've made together, it is clear that our collective resolve, dedication, and unwavering spirit have been the driving forces behind our progress.

The dimensions of growth and impact highlighted in this report are a testament to your commitment and contribution to our mission. Your involvement and support have enabled us to not only meet but exceed our goals, fostering an environment of kinship, support, and resilience. It is your faith in our mission that has propelled us towards achieving remarkable milestones and in continuously striving for excellence.

Looking ahead, we are inspired by the promise of what we can accomplish together. With your continued support, we will forge new paths, tackle challenges head-on, and seize opportunities that align with our strategic objectives. It is an honor to serve alongside you, to share in your stories of courage and camaraderie, and to work collectively towards a future where our association stands stronger and more united than ever.

Thank you for your steadfast loyalty, your generous contributions, and for being an integral part of this distinguished community. Here's to another year of making a difference, together.

Semper Fidelis,

James Vierstra, President
First Battalion Ninth Marines Association

EXECUTIVE SUMMARY

The First Battalion Ninth Marines Association has stood resolute in its dedication to its members, all while nurturing a rich sense of camaraderie and support within its community. This executive summary offers a detailed analysis of the organization's activities and achievements throughout the reporting period, spotlighting the remarkable progress across its various committees.

Achievements and Highlights

In 2023, the Association achieved significant milestones, showcasing a unified effort to bolster member engagement and support. The Strategic Planning Committee spearheaded the development and execution of strategic blueprints to drive the organization's future growth and sustainability. The Finance Committee excelled in financial stewardship, ensuring transparency and accountability in the dispersal of resources. The Communications Committee launched innovative endeavors, such as live monthly video calls, to promote open communication between the membership and leadership. The Membership Committee intensified its outreach and enhanced member benefits, strengthening the bonds within our community. The Reunion Committee offered a structured approach to reunion organization, improving both attendance and participation rates. The Scholarship Committee overhauled its offerings, providing greater support and opportunities for academic advancement. The Association Store Committee saw notable growth by strategically enhancing product development and member engagement.

Financial Summary

The organization witnessed a trajectory of steady financial improvement, characterized by diversified revenue streams and careful budget management that guaranteed the continuation and sustainability of its programs and projects.

Impact and Outcomes

The initiatives and programs undertaken by the association have continued to positively impact the lives of its members, offering essential support and reinforcing a sense of belonging and mutual respect.

Strategic Direction

Moving forward, the association remains unwavering in its mission and strategic objectives, with a concerted focus on innovation, engaging the community, and achieving sustainable growth.

Recognition and Acknowledgments

Deep gratitude is extended to our donors, sponsors, volunteers, and members, whose steadfast support and dedication have been pivotal to the association's accomplishments.

Conclusion

In summary, the First Battalion Ninth Marines Association has made formidable progress in furthering its mission and serving its esteemed members. Looking ahead, the organization is committed to upholding its legacy, supporting its members, and building a resilient and tight-knit community.

MISSION AND VISION RECAP

Our mission is to foster a sense of community, inclusivity, and mutual support among our members, providing a platform for engagement, historical preservation, and assistance. We aim to create an environment where veterans and their families feel welcomed, understood, and valued. Through our initiatives, we strive to honor our unit's rich history, support one another in times of need, and uphold the values of honor, courage, and commitment that define us as Marines.

Our vision is to be a leading organization that empowers veterans, safeguards our unit's rich history, and cultivates lifelong connections among members. We envision a future where every member of the First Battalion Ninth Marines Association feels empowered to thrive in civilian life, supported by a strong network of veterans and family who understand their journey and stand by their side.

As veterans and families of the First Battalion Ninth Marines, we share a legacy that extends beyond active duty. We recognize the challenges of transitioning into civilian life and the importance of finding purpose and belonging beyond the uniform. That's why we are committed to providing resources, support, and camaraderie to our members as they navigate this journey.

Our initiatives reflect our commitment to our mission and vision. From preserving our history and personal stories to providing humanitarian aid, offering scholarships, organizing in-person and virtual events, and hosting a bi-annual national reunion, we are dedicated to serving our members and honoring our shared heritage.

We are more than just an association; we are a family. Our members hail from multiple generations, spanning from the Vietnam era through OIF and OEF. Together, we stand united in our commitment to honoring our past and building a future where every veteran feels seen, heard, and supported. Your journey doesn't end after service; it continues with us.

In 2023, our organization remained dedicated to our mission and vision, focusing not only on visible initiatives but also on vital administrative work that underpins our operations. Behind the scenes, we made significant strides in modernizing workflow, updating policies, and refining procedures to provide our association with a strong foundation for success. While this administrative work may not always be visible to our members, it plays a crucial role in empowering our leadership and volunteers, enabling them to perform their roles more effectively. Additionally, our continued efforts in hosting events, providing humanitarian aid, and preserving our unit's history all align with our mission of fostering community, inclusivity, and mutual support among our members. As we reflect on the past year, we recognize that our administrative efforts, combined with our visible initiatives, have brought us closer to achieving our vision of being a leading organization that empowers veterans, safeguards our unit's rich history, and cultivates lifelong connections among members.

ACHIEVEMENTS AND MILESTONES

- Introduction of Monthly Video Calls: The Communications Committee successfully introduced live monthly video calls, facilitating direct communication between members and association leadership.

- Expansion of Newsletter and Magazine: The Communications Committee elevated the scope and frequency of newsletters and the “Proud Warrior” magazine, enhancing member engagement and connection.

- Improved Reunion Planning: The Reunion Committee reformed its planning process, establishing a structured approach, and achieving increased attendance and engagement at reunions.

- Strategic Planning Implementation: The Strategic Planning Committee developed and implemented comprehensive strategic plans to guide the organization’s growth and sustainability.

- Financial Management Improvements: The Finance Committee made significant strides in financial management, ensuring transparency, accountability, and sustainability in resource allocation, resulting in a net positive revenue trend since October 2023— a milestone not achieved since 2020.

- Enhanced Scholarship Program: The Scholarship Committee revamped its program, providing increased financial support and opportunities for educational pursuits to members and their families.

- Association Store Growth: The Association Store Committee achieved remarkable growth through strategic product development, improved design standards, and enhanced member engagement.

- Community Building Initiatives: The Membership Committee focused on expanding outreach efforts and enhancing member benefits, fostering a stronger sense of community and support.

- Documentation of Association Traditions: Efforts were made to research and document association traditions, preserving the organization’s heritage and guiding future leadership.

- Mission-Centric Reunion Planning: Reunion planning efforts were aligned with the organization’s mission, emphasizing camaraderie, support, and shared military history.

FINANCE COMMITTEE

PURPOSE

The purpose of the finance committee within an organization, such as the First Battalion Ninth Marines Association, is multifaceted and critical to its overall success. Below is a summary outlining the primary objectives and responsibilities of the finance committee:

Financial Oversight

The finance committee is responsible for providing oversight and guidance on all financial matters within the organization. This includes monitoring the budget, financial statements, and accounting practices to ensure compliance with regulatory requirements and best practices.

Budget Planning and Management

One of the core functions of the finance committee is to assist in the development and management of the organization's budget. This involves working closely with other committees and stakeholders to establish financial priorities, allocate resources effectively, and ensure that financial goals are aligned with the strategic objectives of the organization.

Financial Planning and Forecasting

The finance committee plays a key role in long-term financial planning and forecasting. By analyzing financial trends, projecting future revenue and expenses, and identifying potential risks and opportunities, the committee helps the organization make informed decisions and adapt to changing economic conditions.

Fundraising and Revenue Generation

In collaboration with other committees and fundraising teams, the finance committee helps develop strategies to generate revenue and secure funding for the organization's programs and initiatives. This may involve overseeing fundraising campaigns, cultivating donor relationships, and exploring new revenue streams.

Financial Policies and Procedures

The finance committee is responsible for establishing and reviewing financial policies, procedures, and internal controls to safeguard the organization's assets and ensure financial transparency and accountability. This includes monitoring compliance with legal and regulatory requirements and recommending updates to financial policies as needed.

Risk Management

Identifying and managing financial risks is another important function of the finance committee. This may include assessing and mitigating risks related to investments, cash flow, fundraising activities, and financial reporting to protect the organization's financial stability and reputation.

Overall, the finance committee plays a crucial role in ensuring the financial health and sustainability of the organization, enabling it to fulfill its mission and serve its members effectively. Through diligent oversight, strategic planning, and responsible stewardship of resources, the committee contributes to the overall success and impact of the organization.

REVIEW OF 2022

In 2022, we recorded a total income of $15,292.83, comprising revenue streams from our association store, member dues, donations, and bank interest. However, our total expenses amounted to $20,677.13, resulting in a net loss of -$5,384.30. This financial snapshot underscores the importance of fiscal responsibility and strategic financial management.

Transparency in resource allocation is fundamental to maintaining trust and accountability within our organization. Of our total expenses, 87% ($17,983.37) was directed towards business operations, covering essential administrative costs such as software, postage/shipping, payment processing, and travel costs associated with reunion logistics. The remaining 13% ($2,693.76) was allocated to direct member benefits, including scholarships and other initiatives aimed at supporting our valued members.

While financial challenges inevitably arise, they also present opportunities for growth and improvement. In 2022, we encountered valuable lessons that have informed our approach to financial management moving forward. We remain committed to enhancing our budgeting processes, exploring revenue diversification strategies, and optimizing resource allocation to better serve our members.

COMMITTEE WORK IN 2023

In 2023, our organization reported a total income of $24,406.85. However, total expenses for the year amounted to $26,126.27, resulting in a net loss of -$1,719.42. While operating at a loss presents its challenges, it also underscores the importance of diligent financial management and strategic planning.

The breakdown of expenses reveals a dual focus on sustaining operational efficiency and delivering impactful member services. Business operations accounted for 66.1% of total expenses, encompassing essential costs such as merchandise, software, travel, shipping/postage, administrative expenses, payment processing, and nonprofit registration. On the other hand, 33.9% of expenses were allocated towards member services, including scholarships, mini reunion events, video projects, member aid, and flowers.

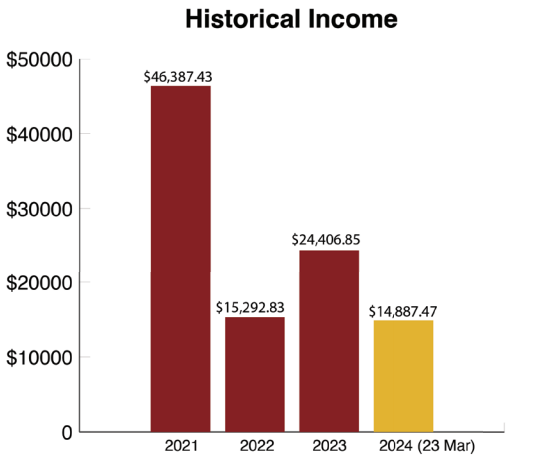
Operating at a net loss for the year highlights the financial challenges we encountered in 2023. These challenges were compounded by the need to balance operational requirements with our commitment to delivering meaningful services and support to our members. However, in every challenge lies an opportunity for growth and improvement. By identifying areas for optimization, enhancing revenue generation strategies, and streamlining operational processes, we can position our organization for long-term financial sustainability and impact.

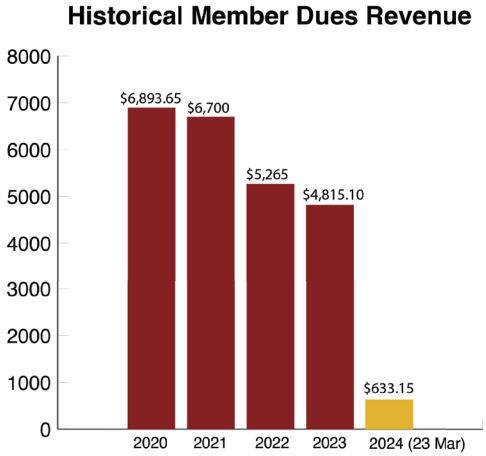
Despite the financial hurdles faced in 2023, our commitment to transparency, accountability, and responsible stewardship of resources remains unwavering. We recognize the trust placed in us by our members and supporters and are committed to upholding the highest standards of financial integrity and governance.

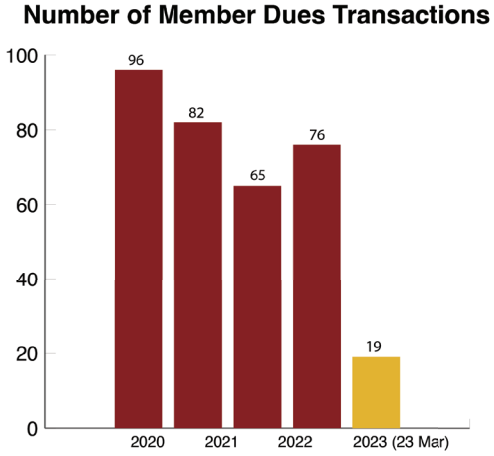
Interventions in October 2023

Although a finance committee was established years ago, there was never any regular meeting of the committee, nor was it appropriately staffed. We also found that the committee work was lacking in a strategic plan, needs assessment, as well as implementation of appropriate workflows that ensured mandatory documentation and reporting to the board of directors. In October 2023, the finance committee underwent significant changes with the introduction of new leadership and the addition of new members, marking a pivotal moment in our financial management efforts. These changes included establishing a regular monthly committee meeting, mandatory financial training for anyone handling association finances, and development of a financial strategic plan. This enhanced structure allows for greater accountability, more precise financial tracking, and direct alignment with our association's long-term goals. Our reinvigorated approach signifies a crucial step forward in our mission to uphold fiscal responsibility while striving for growth and sustainability.

In retrospect, the financial landscape of 2024 illustrates a testament to resilience and strategic planning. After navigating through periods of significant volatility and downturns, the organization has emerged on a path of recovery and growth. The gradual but steady improvement







in bank balances, culminating in February 2024's encouraging figures, reflects the effective implementation of corrective measures and adaptive strategies. This forward momentum not only reinstates confidence in the organization's fiscal management but also sets a solid foundation for future prosperity and sustainability.

Membership Revenue Stream

- 2020: Total Membership Dues - $6,893.65 (96 total member transactions)
- 2021: Total Membership Dues - $6,700 (82 total member transactions)
- 2022: Total Membership Dues - $5,265 (65 total member transactions)
- 2023: Total Membership Dues - $4,815.10 (76 total member transactions)

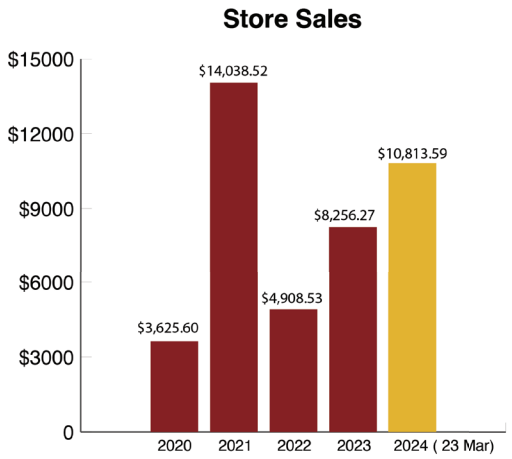
In reflecting on the financial health of our organization over the past four years, a notable trend emerges from the analysis of membership dues. There has been a consistent decline in the total amount of membership dues collected, from $6,893.65 in 2020, covering 96 member transactions, to $4,815.10 in 2023, across 76 transactions. This downward trajectory highlights a critical challenge in maintaining member engagement and retaining members, as evidenced by the fluctuating number of transactions during this period.

Despite the relatively stable average amount per transaction, the overall reduction in total dues and member transactions signals a need for deeper introspection into the factors influencing these trends. The declining trend in membership dues and transactions suggests challenges in maintaining member engagement and retention within our association. Factors contributing to this decline may include economic factors, changes in member demographics, and shifts in member preferences or priorities. It's crucial for our organization to conduct further analysis and gather feedback from members to understand the underlying reasons behind the decline in dues and transactions.

Association Store Sales

- 2020: Association Store Sales Revenue - $3,625.60
- 2021: Association Store Sales Revenue - $14,038.52
- 2022: Association Store Sales Revenue - $4,908.53
- 2023: Association Store Sales Revenue - $8,256.27
- 2024: Association Store Sales Revenue - $10,589.46

In 2020, the association store generated sales revenue of $3,625.60, marking the beginning of our analysis period. Following this, association store sales revenue saw a notable increase in 2021, surging to $14,038.52. This substantial growth indicates a heightened demand



for merchandise among our members and supporters. However, a subsequent decline in 2022 brought the sales revenue down to $4,908.53. The drop could be attributable to a variety of influences such as changes in product offerings, shifts in marketing strategies, or external economic factors. The year 2023 saw a recovery in sales revenue to $8,256.27, suggesting effective strategies to rejuvenate the store's performance. Moving forward to 2024, the sales revenue to date further rose to $10,589.46, indicating a sustained positive growth trajectory for this revenue stream.

Our investigation into the fluctuations in sales revenue revealed critical insights regarding the quality and marketing of merchandise. We found that a notable portion of the merchandise offered suffered from substandard design and material quality. This inadequacy in quality significantly impacted the desirability of these items among our members, leading to diminished enthusiasm for purchases. Furthermore, certain merchandise purchases were made with a short lead time, resulting in higher acquisition costs. This not only increased the prices for our members but also led to the association facing substantial losses on items that did not sell, consequently burdening us with unsold inventory.

Another pivotal factor identified was the lack of effective marketing for our merchandise. In many instances, there was minimal to no marketing communication to inform members and potential customers about the new or existing products available in the association store. This absence of marketing meant that even if we had desirable products in our inventory, the lack of awareness among our audience hindered sales potential.

These findings underline the importance of not only ensuring high-quality merchandise in terms of both design and material but also the necessity of strategic marketing efforts to effectively communicate the availability and value of our products to our members and supporters.

Additionally, our examination revealed a significant oversight in financial management concerning the merchandise. There was no documentation of the acquisition cost of store merchandise, nor was there a systematic sales calculation to determine the cost of goods sold (COGS) and establish an appropriate sales price. This lack of financial oversight led to instances where items were sold below their COGS, resulting in the association incurring losses rather than profits on these sales. Similarly, this absence of proper pricing and cost analysis meant that the association received a low return on its merchandise investments, further exacerbating the financial inefficiencies within this revenue stream. This discovery highlights the critical need for implementing a robust financial tracking and management system to ensure the profitability and sustainability of our merchandise offerings.

Donations

Until late 2023, donations to the association were primarily collected through in-person contributions made during reunions. While these donations were greatly appreciated, the lack of an official campaign or platform limited our ability to maximize contributions, document donations, properly account for donations, and reach a broader audience of potential donors. In late 2023, recognizing the importance of diversifying revenue streams and expanding fundraising efforts, the association launched an official donations campaign. This campaign aimed to provide a structured platform for individuals to contribute to the association's mission and initiatives conveniently and securely.

The introduction of the donations campaign marked a significant milestone for the association, allowing us to formalize our fundraising efforts and engage with donors in a more systematic manner. While it is still early to gauge the full impact of the donations campaign, initial responses and contributions have been promising, demonstrating the willingness of our members and supporters to invest in our cause.

PLANS FOR 2024

As we look forward into the strategic financial planning and future outlook of our association, the greatest challenge we encountered was the absence of comprehensive reporting and documentation related to our revenue and expense activities. This shortfall made it difficult for the leadership team to identify and analyze trends that have been unfolding within our financial landscape. Without a clear understanding of these trends, devising strategies that are both proactive and responsive to our financial realities proved to be a strenuous task. Recognizing the critical nature of this issue, the association has initiated efforts to implement a robust financial tracking and reporting system. This system is designed to provide a transparent overview of our financial activities, enabling us to make informed decisions and strategically plan for a sustainable future.

Armed with new software and capabilities to appropriately track data trends across association operations, we can now monitor, report, and act on changing trends. This technological advancement enables us to identify financial opportunities and challenges early on, allowing for proactive adjustments to our financial strategies. Furthermore, this enhanced visibility into our operations paves the way for greater transparency with our donors and stakeholders, fostering trust and encouraging continued support for our association's mission and initiatives.

In response to the noticeable decline in membership renewals and new members, our association has vigorously put in place a comprehensive member recruitment and retention plan. This strategic approach is aimed at not only stemming the tide of declining memberships but also at stimulating growth by attracting new members. Central to this plan is enhancing the value proposition of our membership, through offering more relevant benefits, engaging content, and creating a sense of community among members. We are optimistic that these efforts will lead to a revitalization of member engagement and an uptick in membership transactions. This renewed energy and confidence among our current membership are expected to serve as a catalyst, fostering an environment of enthusiasm and support for our shared goals. Through these concerted efforts, we anticipate a positive shift in our membership dynamics, reinforcing the foundation of our association for years to come.

Building on our efforts to enhance member engagement, we've also identified the decline in store sales as a critical issue requiring immediate attention. In response, we've developed a strategic plan for the store, focusing on three key areas: offering top-quality merchandise, curating items that our members genuinely desire, and significantly improving customer service. A new purchasing system has been implemented to guarantee the quality of merchandise while ensuring that pricing strategies are aligned with the association's financial goals, specifically aiming for a standard net revenue. This overhaul is designed to address and rectify the issues previously encountered due to poor management practices. Our proactive steps in reforming the store's operational strategies are expected to contribute positively to our association's overall financial health and member satisfaction, complementing our broader objectives of membership renewal and growth.

In a significant move towards enhancing our financial transparency and accountability, the finance committee

has recently acquired a subscription to QuickBooks. This new tool will revolutionize how we prepare and present financial reports, not only to the board of directors but also, for the first time, to our valued membership. In the past, our reporting methods did not adhere to the Generally Accepted Accounting Principles (GAAP), a gap we recognized as a critical shortfall in our operations. The adoption of QuickBooks marks the beginning of a new era for our association, setting a robust standard for financial reporting that aligns with our commitment to transparency and excellence. We are optimistic that this initiative will bolster trust and confidence among our members, ensuring they feel more connected and informed about the financial health and direction of our association.

Although a finance committee was established years ago, there was never any regular meeting of the committee, nor was it appropriately staffed. We also found that the committee work was lacking in a strategic plan, needs assessment, as well as implementation of appropriate workflows that ensured mandatory documentation and reporting to the board of directors. We have since established a regular monthly committee meeting, mandatory financial training for anyone handling association finances, and development of a financial strategic plan. This enhanced structure allows for greater accountability, more precise financial tracking, and direct alignment with our association's long-term goals. Our reinvigorated approach signifies a crucial step forward in our mission to uphold fiscal responsibility while striving for growth and sustainability.

When analyzing the account balances from the available information of all accounts for the association, a clear pattern emerges. Initially, April 2021 represented a financial zenith with a balance of $104,585.20—the highest in the recorded period. Subsequent months, however, saw a series of fluctuations. By May 2021, a slight dip to $103,685.72 hinted at an emerging volatility, further evidenced by the June 2021 temporary rebound to $104,831.49. Despite this brief recovery, instability became a recurring theme, with the account balances notably divergent from the April peak, especially from July 2021 onwards.

The period of fluctuation morphed into a discernible decline in bank balances starting around May 2021, which endured through the following months and years. This trend is particularly illustrated by the net losses recorded annually: 2021 to 2022 saw a decrease of $5,384.30, followed by a further dip of $2,136.64 from 2022 to 2023. Yet, by February 2023 to 2024, a remarkable turnaround occurred, reflecting a net gain of $4,044.67, indicative of a hopeful recovery phase.

This shift towards financial recuperation becomes more pronounced in the latter part of 2023. October's balance of $76,948.43 initiated a sequence of steady growth, with each subsequent month—November ($81,184.41), December ($86,655.89), January 2024 ($89,234.40), and February 2024 ($90,700.56)—registering higher balances. This sustained increase through to February 2024 underscores a positive trajectory in the organization's financial health, suggesting effective management strategies and the potential for achieving long-term stability and growth.

In retrospect, the financial landscape of 2024 illustrates a testament to resilience and strategic planning. After navigating through periods of significant volatility and downturns, the organization has emerged on a path of recovery and growth. The gradual but steady improvement in bank balances, culminating in February 2024's encouraging figures, reflects the effective implementation of corrective measures and adaptive strategies. This forward momentum not only reinstates confidence in the organization's fiscal management but also sets a solid foundation for future prosperity and sustainability.

Budget Cycle

The Finance Committee has established a clear process and timeline for developing our operational budget throughout the fiscal year. As we approach the end of each fiscal year, typically in the last quarter, the committee initiates a comprehensive review of the association's needs and the performance of various committees. During this phase, a preliminary budget draft is crafted and presented to the Board of Directors for thorough examination. Any necessary revisions are then incorporated into the draft.

The final approval of the budget for the upcoming fiscal year occurs at the last Board of Directors meeting of the current fiscal year. Once approved, this budget becomes effective on the first day of the new fiscal year, guiding our financial decisions and allocations.

Throughout the fiscal year, our financial performance is closely monitored. In the first and second quarters, we assess our progress and make any necessary adjustments. By the end of the second quarter, we conduct a mid-year budget review, during which the Finance Committee evaluates our financial performance and provides recommendations to the Board of Directors. These recommendations help us navigate any unexpected financial challenges or opportunities that may arise in the latter half of the fiscal year.

As we enter the third quarter, the Committee initiates the process of gathering data to prepare the budget

for the following fiscal year. This cyclical approach ensures that we maintain fiscal responsibility and adaptability, allowing us to effectively plan for the future while addressing current needs and circumstances.

Budget Prioritization

Aligned with the strategic plan adopted in 2023, the First Battalion Ninth Marines Association is committed to prioritizing funding towards initiatives aimed at enhancing and fortifying our community of First Battalion Ninth Marines veterans. This strategic focus underscores our dedication to fostering a sense of belonging, support, and camaraderie among our members.

Specific initiatives receiving increased financial support include:

Peer Support Programs

Strengthening and expanding peer support programs to provide veterans with a comprehensive array of resources and support. This includes education on critical topics such as suicide prevention, anxiety management, PTSD/trauma coping strategies, depression awareness, and techniques to combat isolation. Additionally, these programs will offer guidance on crisis intervention and development of personalized crisis plans. While we do not offer counseling services, our peer support initiatives are designed to help connect individuals to resources and support networks that can provide professional assistance as needed.

Community Engagement Events

Increasing the frequency and scale of community engagement events, including reunions, local gatherings, and virtual meet-ups, to facilitate connections and foster a sense of camaraderie among members.

Emergency Assistance

We provide timely assistance to our community members during times of crisis or unexpected hardships. Whether it's offering financial aid to cover essential expenses during a temporary setback or guiding individuals towards additional resources and support networks, our aim is to ensure that no member faces adversity alone. We're committed to upholding the ethos of camaraderie and mutual support that defines our association, standing ready to lend a helping hand when our members need it most.

Educational Assistance

We support members in their pursuit of academic and professional advancement. We believe that by investing in education and advancement, our members can thrive and achieve greater financial stability and success.

To ensure effective allocation of resources, we have implemented specific metrics to gauge the impact and efficacy of each initiative. These metrics serve as invaluable tools in assessing the outcomes and guiding future investment decisions. By employing a data-driven approach, we can confidently direct our financial support towards initiatives that yield the greatest benefits for our community.

Fundraising and Revenue Generation Initiatives

As we move forward into the current year, the Finance Committee is actively spearheading fundraising and revenue generation initiatives to ensure the financial stability and growth of the association. Here's a glimpse into our ongoing efforts:

Fundraising Campaigns

Our current fundraising campaigns include the 1/9 Pledge Campaign and the Reunion Sponsorship Campaign. The 1/9 Pledge Campaign is a sustained commitment initiative aimed at honoring and preserving the legacy of the First Battalion Ninth Marines. Supporters contribute monthly donations, providing a reliable source of support to better plan and invest in our programs and initiatives. Alongside this, our Reunion Sponsorship Campaign invites businesses and individuals to donate directly to our upcoming national reunion. These campaigns play a vital role in ensuring the continuity of essential services for our members while also supporting the success of significant events like our national reunion.

Exploration of New Revenue Streams

In line with our commitment to financial diversification, we are exploring new revenue streams to supplement traditional sources of income. This includes exploring opportunities for corporate partnerships, sponsorships, and grants, as well as expanding our online fundraising presence. By diversifying our revenue streams, we can reduce dependency on any single source of funding and ensure long-term financial sustainability.

Strengthening Donor Relationships

Building and nurturing strong donor relationships is a top priority for us this year. We are dedicated to expressing gratitude to our donors, keeping them informed about the impact of their contributions, and providing opportunities for meaningful engagement. By fostering strong donor relationships, we aim to inspire continued generosity and support for our mission.

Membership Dues Revenue

Ensuring consistent membership dues revenue is crucial for sustaining our association's operations and advancing our mission. Moving forward, our focus is on re-establishing confidence and enthusiasm among our membership base. This involves reconnecting with members whose memberships have lapsed or who have not been active, encouraging them to renew and become current on their dues. By fostering a sense of community, inclusivity, and mutual support, we aim to reignite the passion and commitment of our members, thereby ensuring the continued vitality and impact of our association for years to come.

As we embark on these fundraising and revenue generation initiatives, we are excited about the potential to strengthen our financial position and enhance our ability to serve our community. With the support and engagement of our members and supporters, we are confident in our ability to achieve our fundraising goals and secure the resources needed to drive our mission forward.

Financial Policies and Procedures Review

As we look ahead to the fiscal year 2024, the Finance Committee is committed to further enhancing our financial policies, procedures, and internal controls. Our goal is to implement strategic improvements that promote transparency, accountability, and compliance with regulatory requirements while strengthening our financial management practices.

Emphasis on Financial Transparency and Accountability

Building on the foundation laid in 2023, where we established systems for expense approvals using monday.com as our workflow management software, in 2024, we will focus on streamlining processes for the review, assessment, and approval of expenses. This refined system enables us to appropriately document each and every expense incurred, ensuring alignment with our overall mission and vision, adherence to our founding documents and bylaws, and compliance with our nonprofit status. By enhancing our expense approval procedures, we aim to further transparency and accountability in our financial operations, reinforcing the trust and confidence of our members and stakeholders.

Future Recommendations and Best Practices

Looking forward, we aim to identify and implement best practices that align with industry standards and promote effective financial governance. This may involve providing ongoing training and development opportunities for Association Officers, Directors, and Volunteers, conducting regular reviews and assessments of our financial procedures, and fostering a culture of ethical conduct and integrity across the organization.

Conclusion and Future Directions

The journey towards financial health and sustainability has been marked by significant transformations in recent years. Prior to 2022, the organization faced substantial financial challenges, with a trajectory that seemed unsustainable. This was reflected in the financial snapshot of 2022, where a net loss of -$5,384.30 was recorded amidst total expenses surpassing income. The outlook was dire, highlighting the critical need for strategic intervention.

Recognizing the urgency of the situation, the Finance Committee, under new leadership and bolstered by the addition of new members in October 2023, took decisive action. These changes were instrumental in establishing foundational procedures, policies, and standards that were previously lacking. These initiatives laid the groundwork for a more robust financial management framework, addressing long-standing deficiencies and setting the stage for transformational change. Despite these efforts, 2023 still saw total expenses outpacing income, resulting in a net loss of -$1,719.42. However, it's worth noting that there has been a net positive change in revenue since the last quarter of 2023, signifying progress towards financial sustainability.

As we enter 2024, the Finance Committee remains resolute in its commitment to further enhancing financial policies, procedures, and internal controls. The emphasis on transparency, accountability, and compliance with regulatory requirements continues to guide our efforts. Key priorities include streamlining expense approval processes, identifying and implementing best practices, and fostering a culture of ethical conduct and integrity across the organization.

Looking ahead, the Finance Committee is focused on leveraging newfound insights and capabilities to drive continued progress. By investing in member engagement, exploring new revenue streams, and enhancing financial reporting and transparency, we aim to solidify the organization's financial foundation and support its mission and objectives for years to come.

The stark contrast between the financial landscape prior to our interventions and the transformative initiatives undertaken in subsequent years underscores the significant strides made towards financial sustainability. With a clear roadmap and unwavering dedication, we prevented the association from heading off a cliff and are now poised to navigate challenges and seize opportunities, ensuring a prosperous future for the First Battalion Ninth Marines Association.

STRATEGIC PLANNING COMMITTEE

- Implementation rate of current Strategic Plan: 11% Complete, 26% in progress, 63% scheduled.
- Alignment with Organizational Goals:
- Innovation metrics:
- Number of surveys: 2 since implementation in summer of 2023. Scheduled for once a quarter.
- Survey participation: 79 Q4, 167 Q2 2023

COMMITTEE PURPOSE

The purpose of a Strategic Planning Committee is to provide guidance and direction for the organization by developing a long-term plan that outlines the organization's goals and objectives, as well as the strategies and actions that will be taken to achieve them. The committee is typically responsible for conducting research, analyzing data, and gathering input from stakeholders in order to create a comprehensive plan that aligns with the organization's mission and values. The ultimate goal of the committee is to ensure that the organization is able to effectively serve its constituents and achieve its goals in a sustainable manner.

STATE OF THE COMMITTEE IN 2022

In 2022, the committee made its inception in December, arising from a critical need to establish a strategic direction for the Association. This formation was motivated by the growing necessity to devise a long-term plan to navigate various challenges. During its initial stage, the committee was primarily focused on laying down the groundwork, setting a foundation for the Association's future strategies. The goal was to ensure our actions remain aligned with the larger strategic objectives of the organization, effectively addressing and overcoming any obstacles that may arise.

2023 COMMITTEE UPDATE: TRANSFORMATION AND ACHIEVEMENT

The year 2023 marked significant changes and advancements for our association. We laid the cornerstone of our transformation by establishing regular committee meetings, which saw active participation from all directors and officers, ensuring a robust and inclusive planning process.

Early in the year, we assessed both internal and external challenges, providing us with valuable insights to navigate the shifting landscape. We augmented this assessment with a comprehensive member survey, enabling us to gauge our performance from the members' perspective and understand their needs and preferences. These insights were instrumental in crafting a strategic plan that reflected the aspirations of our community.

In tandem, we formalized the association's mission and vision statement to serve as a beacon, guiding all operations and services for the 1/9 association community. We prioritized committee operations to align with this strategic plan, ensuring a consistent and focused approach.

We also modernized our workflows and operations. Key steps included creating a central repository for operations, defining roles and responsibilities, establishing volunteer policies and conduct standards, streamlining operations, and implementing documentation standards. This approach has significantly enhanced our operational efficiency.

We further established key performance indicators to measure our performance and effectiveness, keeping us accountable and driving continuous improvement. A noteworthy modification to our association bylaws now allows for the removal of a Director due to non-attendance, lack of participation, or other causes. This change responded to a long-standing issue affecting several Boards of Directors, and it will help ensure an engaged and contributive Board.

In summary, 2023 was a pivotal year, marked by transformation, modernization, and strategic alignment. We are proud of our achievements and are confident that these foundations will serve us well in our future endeavors.

FOWARD TO 2024

In 2024 the strategic planning committee will be working with each committee to strategically plan their development throughout the year. It will monitor implementation progress of the strategic plan. It will seek feedback from the members on the association's effectiveness and performance. It will make recommendations for changes in operations based on member feedback and qualitative data.

SUMMARY OF INTERNAL ASSESSMENT FINDINGS

Our initial assessment identified several areas for improvement. A predominant issue was the inconsistency

in documentation of operations, which encompassed every operational area.

One of the key findings was the need for a comprehensive long-term strategic plan and the establishment of a mission and vision statement. These elements are crucial for providing clear direction and goals for the association's future.

Communication with members also emerged as a concern in terms of consistency and transparency. This finding underscored the need for a sustainable mechanism for conveying updates to members, and spotlighted the importance of enhancing member experiences for renewals and new memberships.

Member services and benefits lacked uniformity in standards and service quality. The association's social media presence was found to be irregular, and the regional coordination program was largely neglected. The lack of regular local events signaled a need for more robust engagement strategies.

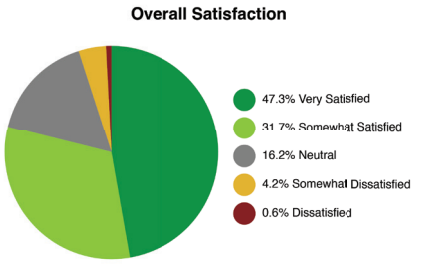
The online store raised multiple issues, including design quality, lack of new merchandise support and merchandise standards. The 'Proud Warrior' was similarly understaffed and under-supported, while the member roster required significant data cleanup.

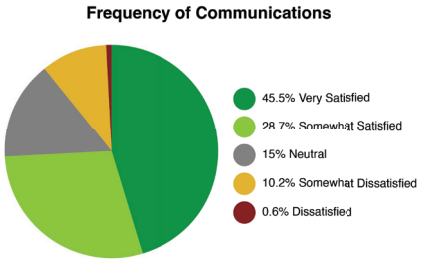
The study further revealed absence of well-defined member recruitment and retention plans, and the website was in dire need of an overhaul to boost user experience and update information.

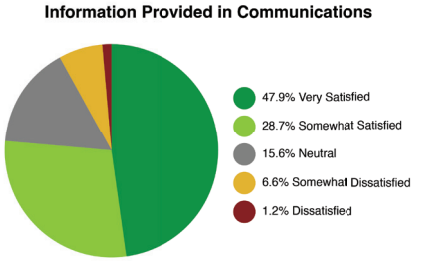
Moreover, excessive absences at BOD meetings were observed, indicating the need for a more engaged and accountable leadership. Lastly, outdated contact information in the member roster and lack of plans for regular updates emerged as critical issues to address.

In summary, our internal assessment has identified significant areas of improvement that will guide our strategic and operational initiatives moving forward.

Q2 2023 Survey Charts

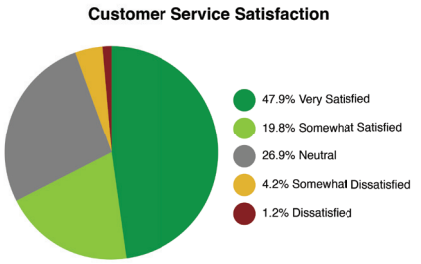






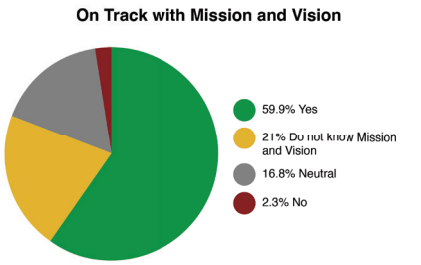
UNDERSTANDING MEMBERSHIP PERSPECTIVE OF THE ASSOCIATION

In 2023, we conducted two member surveys in Q2 and Q4 as part of our commitment to member participation, transparency and continuous improvement. Both of these surveys were crucial in giving our members a voice and providing valuable feedback to guide our future initiatives.



Q2 2023 Survey Results

- 167 respondents
- Age of respondents: 79% were 65+, 8.4% were 55-64, 7.8% were 45-54, 3.6% were 35-44, 1.2% were 25-34.
- Respondents time with the association: 62.9% have 10+ years, 20.4% have 5-9 years, 13.8% had 0-4 years, 3% were not members.
- Member status of the respondents: 76% were current members, 21% were expired members, 1.8% were not members, 1.2% were family members.



Overall Satisfaction with the Association

47.3% were very satisfied, 31.7% were somewhat satisfied, 16.2% were neutral, 4.2% were somewhat dissatisfied, 0.6% were dissatisfied.

Frequency of Communications

45.5% were very satisfied, 28.7% were somewhat satisfied, 15% were neutral, 10.2% were somewhat dissatisfied, 0.6% were dissatisfied.

Information Provided in Communications

47.9% were very satisfied, 28.7% were somewhat satisfied, 15.6% were neutral, 6.6% were somewhat dissatisfied, 1.2% were dissatisfied.

Customer Service Satisfaction

47.9% were very satisfied,19.8% were somewhat satisfied, 26.9% were neutral, 4.2% were somewhat dissatisfied, 1.2% were dissatisfied.

On Track with Mission and Vision

59.9% said yes, 21% did not know the mission and vision, 16.8% were neutral, 2.4% said no.

Q2 2023 Analysis

Demographics

- Majority of respondents are 65+ years old (79%).
- 62.9% have been with the association for 10+ years.
- 76% are current members.

Overall Satisfaction

- Overall satisfaction is high, with 47.3% very satisfied.
- 45.5% are very satisfied with the frequency of communications.
- 47.9% are very satisfied with information provided in communications.
- 47.9% are very satisfied with customer service.

Mission and Vision

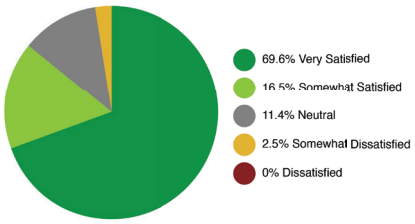
- 59.9% believe the association is on track with its mission and vision.

Observations

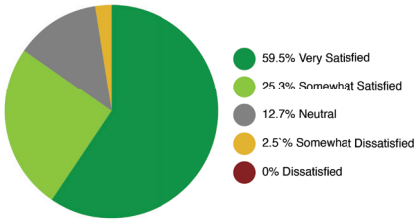
- Mission and Vision Awareness: There is a notable lack of awareness about the mission and vision, indicating a need for clearer communication and education.
- Communication and Updates: Members express a consistent desire for more frequent updates, more information about the association, and improved communication from the Board of Directors.
- Local Engagement: Members express interest in more local events and a member directory, indicating a desire for increased local engagement and networking.
- Commemorating Member Contributions: Members show interest in hearing about unit history, emphasizing the importance of preserving and sharing the association's heritage.
- Customer Service and Satisfaction: Concerns about customer service

Q4 2023 Survey Charts

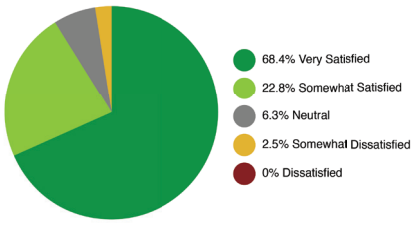
Overall Satisfaction



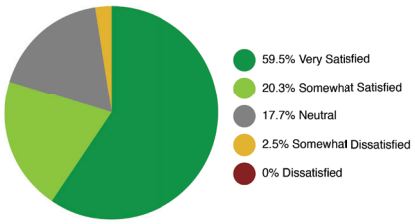
Frequency of Communications



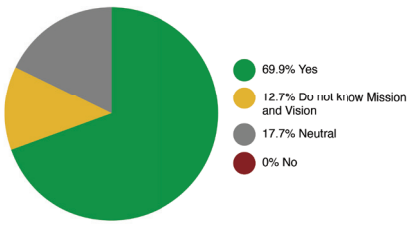
Information Provided in Communications



Customer Service Satisfaction



On Track with Mission and Vision



and follow-up highlight an area for improvement in member support and satisfaction.
- Proud Warrior and Reunion Information: Members express interest in receiving a new issue of the Proud Warrior and more published reunion information, suggesting a desire for regular and timely association updates.
- Communication Effectiveness: There are mentions of dissatisfaction and concerns, emphasizing the need for improved communication effectiveness and addressing member concerns promptly.

Q4 2023 Survey Results

- 79 respondents
- Age of respondents: 65.8% were 65+, 15.2% were 55-64, 10.1% were 45-54, 7.6% were 35-44, 1.3% were 25-34.
- Respondents time with the association: 53.2% have 10+ years, 24.1% have 5-9 years, 20.3% had 0-4 years, 2.5% were not members.
- Member status of the respondents: 91.1% were current members, 5.1% were expired members, 3.8% were not members

Overall Satisfaction with the Association

69.6% were very satisfied, 16.5% were somewhat satisfied, 11.4% were neutral, 2.5% were somewhat dissatisfied, 0% were dissatisfied.

Frequency of Communications

59.5% were very satisfied, 25.3% were somewhat satisfied, 12.7% were neutral, 2.5% were somewhat dissatisfied, 0% were dissatisfied.

Information Provided in Communications

68.4% were very satisfied, 22.8% were somewhat satisfied, 6.3% were neutral, 2.5% were somewhat dissatisfied, 0% were dissatisfied.

Customer Service Satisfaction

59.5% were very satisfied, 20.3% were somewhat satisfied, 17.7% were neutral, 2.5% were somewhat dissatisfied, 0% were dissatisfied.

On Track with Mission and Vision

69.9% said yes, 12.7% did not know the mission and vision, 17.7% were neutral, 0% said no.

Q4 2023 Analysis

Demographics

- 65.8% of respondents are 65+ years old.
- 53.2% have been with the association for 10+ years.
- 91.1% are current members.

Overall Satisfaction

- Overall satisfaction is higher in Q4, with 69.6% very satisfied.
- 59.5% are very satisfied with the frequency of communications.
- 68.4% are very satisfied with information provided in communications.
- 59.5% are very satisfied with customer service.

Mission and Vision

- 69.9% believe the association is on track with its mission and vision.

Observations

- Local Engagement: The recurring request for more local events indicates a consistent desire for increased local engagement among members.
- Positive Feedback: Positive feedback and expressions of satisfaction demonstrate member appreciation for the association's efforts and changes.
- Content Preferences: Interest in live interviews, podcasts, personal stories, and combat stories suggests a preference for diverse and engaging content.
- Communication Effectiveness: Members express satisfaction with the information flow, indicating effective communication strategies.
- Association Direction: Positive sentiments about the association moving in the right direction reflect member confidence in leadership and organizational improvements.
- Merchandise and Store: Requests for better merchandise, more items in the store, and improved 1/9 merchandise highlight opportunities for enhancing the association store.
- Outreach and Representation: Calls for outreach to the OIF/OEF generation and recruiting more members emphasize the importance of inclusivity and representation.
- Humanitarian Assistance: Interest in information on members needing humanitarian assistance indicates a concern for supporting fellow members in need.

Comprehensive Analysis of Q2 2023 and Q4 2023 Member Surveys

Demographic Overview

- Q2: 167 respondents; predominant age group 65+; 62.9% with 10+ years in the association.
- Q4: 79 respondents; similar age distribution; 53.2% with 10+ years in the association.

Overall Satisfaction

- Q2: 47.3% very satisfied; 16.2% neutral; 4.2% somewhat dissatisfied.
- Q4: 69.6% very satisfied; 11.4% neutral; 2.5% somewhat dissatisfied.

Communication Feedback

- Q2: Improvements needed in mission/vision awareness, frequency of updates, more local events, member directory, and customer service.
- Q4: Positive feedback on information flow; desire for more local events, personal stories, and OIF/OEF generation representation.

Association Direction

- Q2: 59.9% felt on track with mission/vision; concerns about rift among membership, website improvement, and better communication from the board.
- Q4: 69.9% felt on track with mission/vision; positive sentiments about the association's direction.

Merchandise and Store

- Q2: Desire for better merchandise representation and improved store communication.
- Q4: Requests for better 1/9 merchandise, more items in the store.

Special Requests and Feedback

- Q2: Member requests included more updates, local events, member directory, unit history, better customer service, and improved communication.
- Q4: Members expressed satisfaction, appreciation for changes, and desires for more local events, unit history, and OIF/OEF representation.

Recommendations for Improvement

- Local Engagement: Continue prioritizing local events to meet member expectations and foster community connections.
- Content Diversity: Maintain diverse content creation, including personal stories, combat stories, and podcasts to cater to varied interests.
- Communication Strategy: Strengthen communication strategies to address member requests for more updates, improved customer service, and better communication from the board.
- Merchandise and Store: Enhance the store by improving merchandise representation, expanding product offerings, and ensuring effective communication.
- Inclusivity: Address requests for OIF/OEF representation and recruit more members to ensure a diverse and inclusive association.
- Mission/Vision Awareness: Continue efforts to improve awareness of the mission and vision among members.
- Feedback Loop: Establish a continuous feedback loop to keep members engaged and address evolving needs.

Conclusion

The surveys highlight positive trends in overall satisfaction and a desire for continued improvement in communication, local engagement, and merchandise offerings. Addressing member feedback and maintaining open lines of communication will contribute to the association's ongoing success and member satisfaction.

OVERALL ANALYSIS OF IMPLEMENTATION

Foundational Work and Training

Recognizing the challenges posed by remote work, we have embarked on a comprehensive program to effectively equip our volunteers. This foundational work includes custom training and education to assist our team in overcoming the obstacles associated with remote work. We have integrated tools for clear communication and collaboration, including a common calendar for scheduling, video conferencing for real-time discussions, and a cloud-based workflow management system for task tracking. We regularly schedule committee meetings to maintain communication, align goals, and facilitate decision-making.

New Policies Implementation

We have instituted a series of policies for the governing

body inclusive of the board of directors, officers, and volunteers to ensure consistency and professional conduct. Our established policies include a Code of Conduct, Confidentiality, Conflict of Interest, Conflict Management, Financial Management, Media and Public Relations Policy, and Social Media Guidelines, all designed to provide a clear framework for expectations and standards.

Meeting Structure

Our committee meetings serve as the cornerstone of our collaborative efforts. We have established a regular cadence for these gatherings, incorporating a flexible format that caters to both in-person and virtual attendance, thus accommodating our diverse volunteer base. Each meeting includes components such as a review of previous meeting's minutes, progress updates, discussion of challenges, strategic planning focus, upcoming tasks and assignments, and closing remarks.

Software Training

We aim to enhance proficiency and standardize the use of our digital tools. To that end, we are conducting comprehensive training sessions on our software tools to ensure all volunteers are well-versed in the relevant applications.

Documentation Standards

Our objective is to promote consistency across the organization. We are developing specific documentation standards for each committee area that will clearly document roles and responsibilities, thus providing clarity on individual contributions.

Internal Communication Protocols

We are implementing protocols to ensure a smooth flow of information, track action items to completion, and provide regular updates. These protocols will facilitate effective communication between committees and the Board of Directors.

Training on Remote Work Best Practices

To equip our volunteers for success and foster a sense of camaraderie, we offer training sessions on remote work best practices. This guidance focuses on maintaining motivation, managing time effectively, and overcoming challenges associated with virtual collaboration.

By implementing these measures, we aim to enhance our operational efficiency, streamline onboarding, and foster a collaborative and informed environment within our association. This approach ensures every member has the necessary tools to contribute effectively to our shared mission.

Standardization Mechanisms

To unify our operations and maintain a high standard of quality, the First Battalion Ninth Marines Association has implemented several standardization mechanisms across all committee areas. These mechanisms include clear documentation guidelines and Standard Operating Procedures (SOPs), ensuring consistency and quality of records and procedures. Regular internal audits are conducted to assess adherence to these standards and swiftly address any deviations. To enhance collaboration and knowledge sharing, we encourage cross-committee collaboration, backed by a mentorship program and forums for discussion. Continuous training programs cater to skill enhancement and alignment with evolving organizational requirements and industry standards. Feedback loops have been established for iterative improvement of processes, allowing members to contribute towards refining our standardization mechanisms. These initiatives not only ensure consistency across the board but also promote a culture of continuous improvement, fostering an adaptive, resilient organization that remains committed to serving our members and fulfilling our mission.

Success Metrics: Measuring Impact and Effectiveness

The First Battalion Ninth Marines Association employs a comprehensive system of Key Performance Indicators (KPIs) and success metrics to evaluate the success and impact of its strategic initiatives. These metrics cover a broad spectrum of organizational areas, such as Membership Engagement, Communication Effectiveness, Committee Performance, Operational Efficiency, Member Satisfaction, Financial Performance, Training and Development, and Continuous Improvement. By tracking data such as active membership percentages, communication engagement rates, project completion timelines, satisfaction survey results, fundraising effectiveness, training participation, and process improvement implementations, we can quantitatively and qualitatively assess our performance. These measures reflect our commitment to excellence and strategic alignment, ensuring that we deliver tangible value to our members and contribute to the association's growth and success.

MEMBERSHIP COMMITTEE

PURPOSE

The purpose of the Membership Committee is to support the growth and engagement of the organization's membership base. This involves recruiting new members, retaining current members, and providing support and benefits to members. The Membership Committee may also be responsible for developing and implementing strategies for increasing membership, and for overseeing the organization's membership records and communications. Overall, the membership committee plays a critical role in ensuring that the organization has a strong and active membership base, and in supporting and engaging with members.

THE COMMITTEE IN 2022

In the past, the management of our membership roster posed significant challenges. Maintained on a spreadsheet, it failed to offer advanced features such as dues payment history tracking, enhanced filtering, change history, and robust data entry safeguards. This inefficient system obscured our understanding of expired memberships, active members, and the overall demographics of our membership. Moreover, we lacked defined plans for membership retention and recruitment, and the workflow for member applications was undocumented, opaque, and often slow.

ACHIEVEMENTS IN 2023

Realizing these shortcomings, the Membership Committee set out to revolutionize our capabilities in 2023. Transitioning our member roster from a spreadsheet to a database introduced the much-needed functionality for advanced filtering and data entry. It allowed us to quantify the number of expired members, spearhead an outreach campaign to rectify the gap in annual member dues payments, and gain a deeper understanding of our membership's demographic makeup.

Armed with these insights, we developed a strategic plan for retaining current members and recruiting new ones. We streamlined the membership application process, enabling multiple volunteers to coordinate their efforts efficiently. By committing to documenting processes, we ensured that future volunteers could quickly learn and adapt, shortening the learning curve.

Acknowledging the importance of our members' wellbeing and their voice, we established an outreach initiative to check-in on them, update contact information, and provide an open channel for them to voice concerns. We also implemented a quarterly member survey, a step forward in understanding our members' perceptions and needs, guiding necessary changes within the association.

VISION FOR 2024

The Membership Committee has implemented efficient workflows and tools, enabling us to create a strategic plan to energize our association in 2024. Our primary focus is on recruiting and retaining members, strengthening our community, and addressing the needs of our membership. As caretakers of the legacy of the First Battalion Ninth Marines, we are committed to ensuring continuity, camaraderie, and a shared sense of purpose.

With the adoption of innovative tools, our ability to monitor membership trends has significantly improved. This data-driven approach allows us to promptly identify variations and refine our strategies effectively. Stagnation is no longer an issue, and we are well-positioned to consistently expand our membership.

Moving forward, we will leverage these insights to tailor our recruitment strategies, ensuring a steady influx of new members while nurturing and retaining our existing ones. Together, we will continue to uphold the legacy and strength of our association.

EVENTS AND REGIONAL COORDINATION

Events and regional coordination play a crucial role within the Membership Committee, serving as vital mechanisms to foster camaraderie, strengthen connections, and promote the sense of belonging among our members. These initiatives aim to create meaningful opportunities for current and former members of the First Battalion Ninth Marines, as well as their families, to come together, share experiences, and build lasting relationships. Through carefully planned events and strategic coordination at the regional level, we not only celebrate our shared history and achievements but also provide avenues for networking, support, and mentorship. By facilitating engagement across diverse geographic areas, events and regional coordination initiatives ensure that our association remains vibrant, and responsive to the

needs and interests of our esteemed community

Events and Regional Coordination in 2022

In 2022, the First Battalion Ninth Marines Association dedicated its efforts towards fostering unity and camaraderie among its members, albeit faced with challenges in organizing local regional events as frequently as desired. Despite the limitations, the highlight of our event calendar was undoubtedly the highly anticipated National Reunion held in Gettysburg, Pennsylvania.

The National Reunion served as a cornerstone event, drawing together veterans and families from across the nation to commemorate our shared history and bond over the experiences forged in service. This gathering provided a poignant opportunity for members to reconnect, reminisce, and honor the sacrifices made by our brothers in arms.

While the National Reunion held in Gettysburg, Pennsylvania, was a significant event on our calendar, it did not see the attendance we had hoped for. This underscores the importance of local events in maintaining participation and engagement within our community. Despite the challenges faced in organizing such gatherings, we remain steadfast in our commitment to expanding outreach efforts and revitalizing regional coordination. It is imperative that we prioritize local events to ensure that every member has frequent opportunities for connection, camaraderie, and support within our association. As we move forward, our dedication to strengthening bonds and supporting our community remains unwavering.

Events and Regional Coordination in 2023

In 2023, the First Battalion Ninth Marines Association made significant strides in bolstering participation and engagement through a series of impactful events held across the country. In January, the association organized simultaneous gatherings in eight cities nationwide, drawing over 60 attendees collectively. These events served as vibrant platforms for members to reconnect, share stories, and forge new connections, revitalizing the spirit of camaraderie within our community.

One of the significant challenges we have in regional coordination is a team of dedicated volunteers to take charge of local and regional events. Additionally, the volunteers we need must be supported by the association with the tools to do their job.

Building on this momentum, a mini-reunion took place in Southern California in June, bringing together a dozen individuals to reminisce and celebrate shared experiences. This intimate gathering provided a unique opportunity for members to strengthen bonds and deepen friendships in a relaxed and informal setting, reinforcing the enduring sense of brotherhood that defines our association.

Additionally, June marked a poignant moment of remembrance as the association hosted a memorial event in Hawthorne, honoring the Marines who made the ultimate sacrifice. Veterans, families, and community members came together to pay tribute to our fallen heroes, reflecting on their courage, dedication, and selflessness. This solemn occasion served as a powerful reminder of the profound impact of service and sacrifice, reaffirming our commitment to honoring the legacy of those who have gone before us.

Events and Regional Coordination in 2024

In 2024, the First Battalion Ninth Marines Association is poised to embark on a series of impactful initiatives aimed at enhancing connectivity, engagement, and community building among our esteemed members. As part of our commitment to fostering camaraderie and strengthening bonds, we have strategically planned three national mini reunions and a national reunion throughout the year. These gatherings will provide opportunities for veterans, active-duty personnel, and families to come together, share experiences, and celebrate the enduring spirit of brotherhood that defines our association.

In tandem with these events, the association is diligently working on developing a comprehensive member directory and a coordination “tool kit.” This directory will serve as a valuable tool, empowering members to connect with one another, plan their own gatherings, and nurture friendships beyond formal events. The coordination “tool kit” will equip coordinators with the tools they need to successfully do their jobs. By providing members with the resources they need to initiate and facilitate meaningful interactions, we aim to cultivate a vibrant and interconnected community that thrives on mutual support and camaraderie. We are also seeking local volunteers to assist us in these endeavors.

Furthermore, the association is actively exploring the formation of local areas to complement our existing regional structure. By establishing smaller, more localized groups, we seek to create opportunities for members to convene in central locations closer to home. This strategic approach not only enhances accessibility but also fosters a greater sense of belonging and engagement within our community.

Central to our endeavors in 2024 is our unwavering commitment to aligning our events with the mission and values of the association. Each gathering will be thoughtfully curated to provide opportunities for reflection,

remembrance, and celebration of our shared heritage and sacrifices. Through these initiatives, we aim to honor the legacy of the First Battalion Ninth Marines while forging new connections and strengthening the bonds that unite us as Marines and members of this esteemed association.

DATA

Review of Membership Patterns (2020-2023)

During the four-year span from 2020 through 2023, the First Battalion Ninth Marines Association has displayed a variety of membership patterns, signifying both obstacles and triumphs. In 2020, the association greeted 17 newcomers, along with a significant count of renewing and rejoining members, highlighting a strong core. Yet, 2021 marked a substantial surge in new memberships, hitting a total of 29, illustrating an increasing interest in being part of the association. The following year, 2022, witnessed a modest reduction in new members, paired with a considerable decrease in returning members. Despite these variances, the committee's focused strategies in 2023 resulted in a praiseworthy increase in new memberships by 18.9%, showing a successful rebound. The persistent attention to outreach, strategic foresight, and efficient processes has not only mitigated challenges but positioned the association for persistent growth and community participation. As the association steps into 2024, these insights will inevitably guide future strategies for ongoing success and community development.

2023

14 new memberships (18.9%), 39 renewing members (52.7%), 21 returning members (28.4%). New memberships are individuals who have never been a member of the association. Renewing members are members who have not lapsed in their membership. returning members are members who have lapsed for 1 or more years.

2022

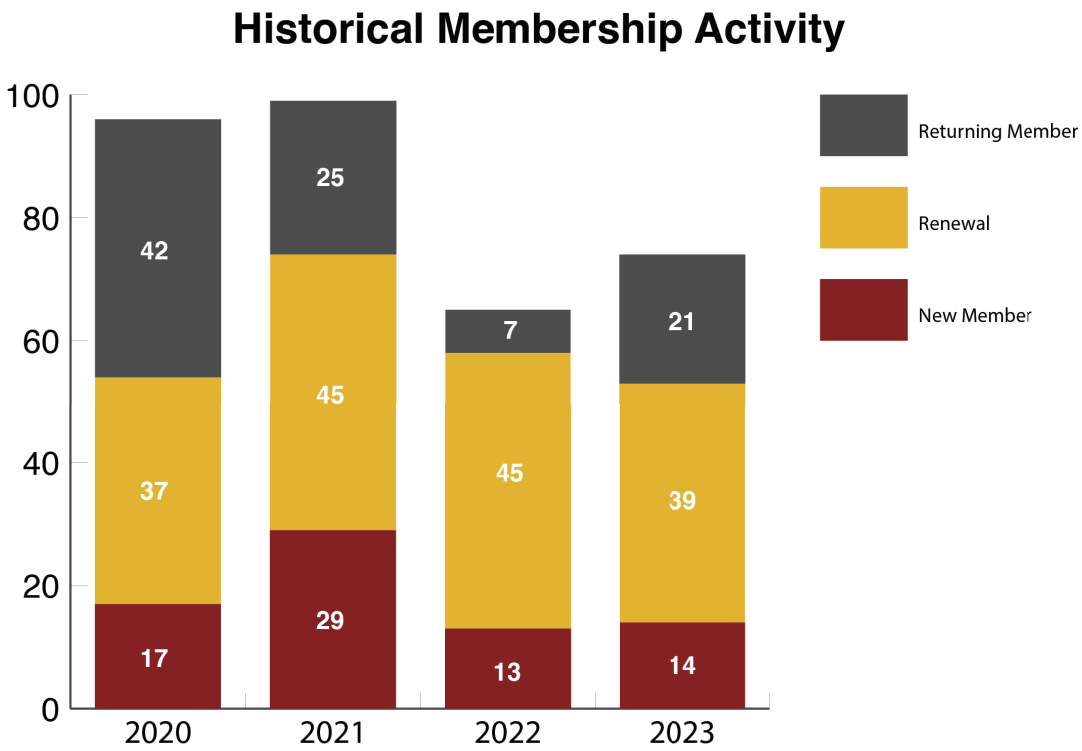
13 new memberships, 45 renewing members, 7 returning members. New memberships are individuals who have never been a member of the association.

2021

29 new memberships, 45 renewing members, 25 returning members. New memberships are individuals who have never been a member of the association.

2020

17 new memberships, 37 renewing members, 42 returning members. New memberships are individuals who have never been a member of the association.



Membership Demographics

In 2024, the First Battalion Ninth Marines Association is proud to host a vibrant and diverse membership community, composed of a total of 1483 members who contribute to the enduring legacy of the organization. Our composition includes 924 Annual Members, 455 Lifetime Members, 43 Associate Members, and 61 Family Members, reflecting a broad spectrum of engagement levels within the association.

Examining our era demographics, our membership spans generations of military service, with a predominant representation from the Vietnam War era, making up a substantial 76.9% of our membership. Our commitment to fostering a multi-generational community is palpable, with significant contributions from members who served in conflicts such as the Cold War, Gulf War, Somalia, and OIF/OEF.

This demographic diversity underscores the association's dedication to creating a supportive and inclusive environment where members from different eras can find common ground and shared experiences. As we move forward, this analysis offers valuable insights, helping us tailor programs, events, and outreach initiatives that resonate with the unique needs and perspectives of our entire membership base.

Membership Dues Status

Our current membership standing exhibits a pivotal area for improvement and potential growth. As of now, we have a total of 577 active members, which constitutes 38.9% of our total membership community. In contrast, there are 906 members with expired memberships, accounting for 61.1% of our total. This high percentage of expired members indicates a pressing need for enhanced engagement and renewal initiatives to ensure that the historical legacy and camaraderie of the First Battalion Ninth Marines Association continues to thrive.

Membership Activity and Engagement

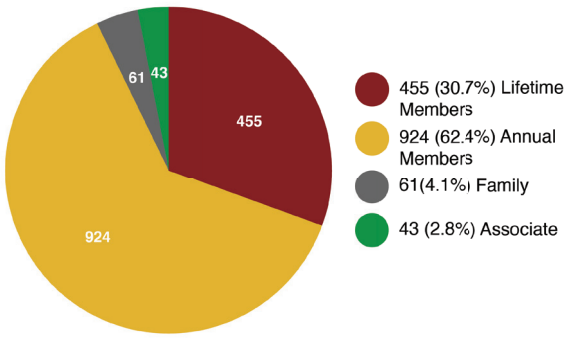
In the context of Membership Activity and Engagement, our definition of 'Active Members' includes those who have renewed their membership in the last 4 years, participated in a membership survey, made contact with the Association via CRM, or opened an email from the Association. On the other hand, 'Inactive Members' are those with whom the Association has had no contact. As per our current statistics, we have 658 active members, which constitutes 44.8% of our total members, and 810 inactive members, accounting for the remaining 55.2% of our membership community.

The Figure "Active Members by Type" provides a detailed breakdown of active members by type. Of the 658 active members, a substantial 57.8% (380 members) are Lifetime Members. Annual Members constitute the next large segment at 38.6%, corresponding to 254 members. Family Members and Associate Members make up smaller proportions with 2.3% (15 members) and 1.3% (9 members) respectively. This classification helps us identify and understand the varying engagement levels within our association, thereby enabling us to develop tailored strategies for member retention and engagement.

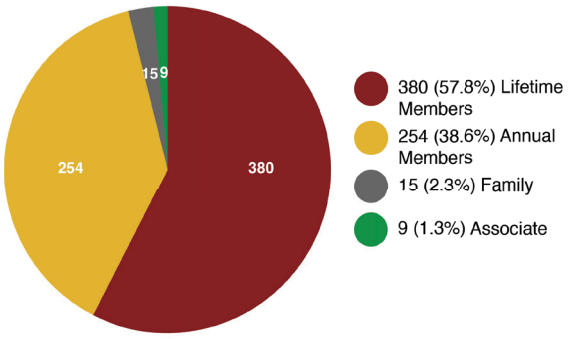
Requests from the Members

2023 was the first year we launched our record keeping for requests for assistance. We received 60 requests for membership assistance, making up 48% of the requests (125) in 2023.

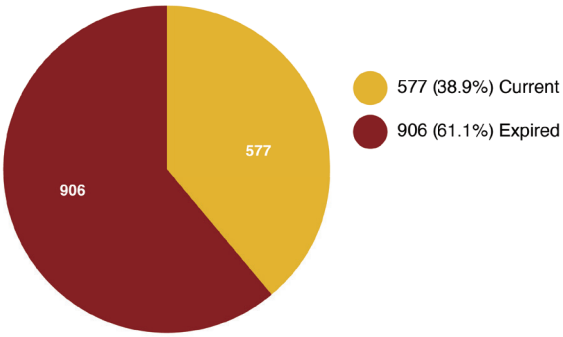
Total Members by Type



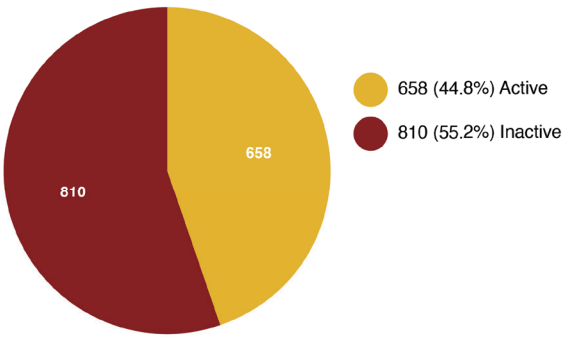
Active Members by Type



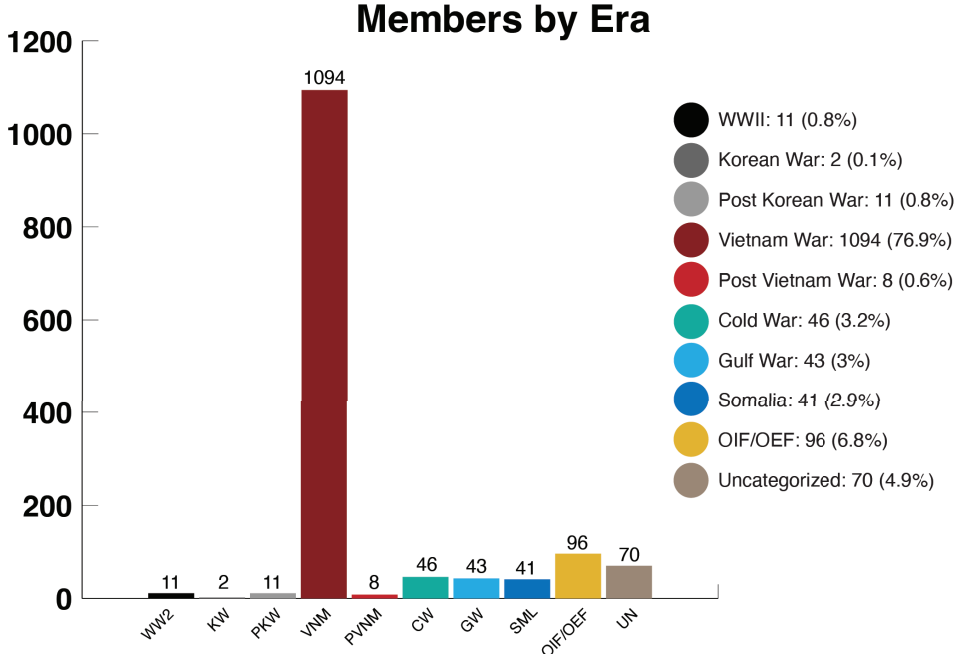
Current vs Expired Members



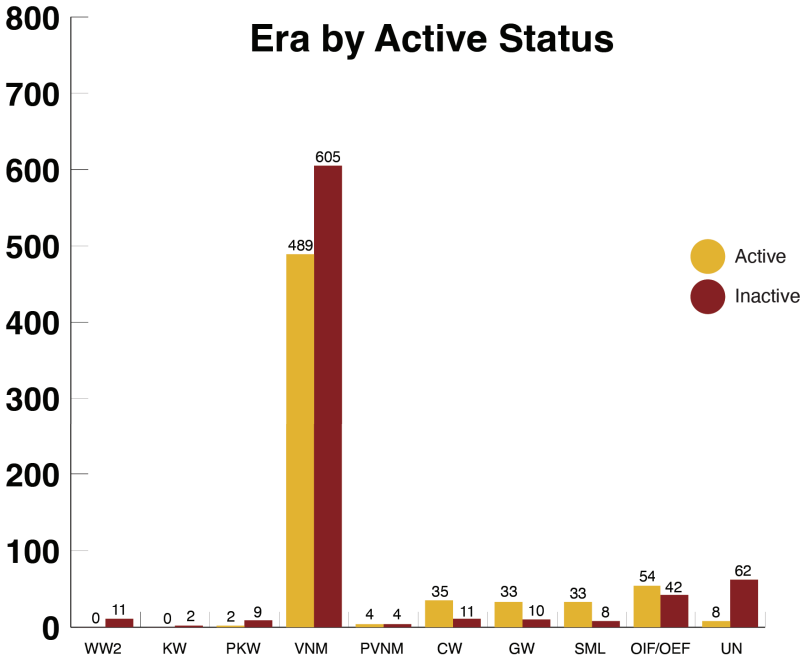
To-date Active vs. Inactive Members



Members by Era



Era by Active Status



COMMUNICATIONS COMMITTEE

The purpose of the Communications Committee is to support the organzation's efforts to effectively communicate its message and activities to its stakeholders. This involves developing and implementing a communications plan, managing the organization's website and social media presence, and responding to inquiries from the media. The Communications Committee is be responsible for creating and disseminating promotional materials, such as newsletters and press releases, and for representing the organization in public appearances. Overall, the Communications Committee plays a critical role in ensuring that the organization's message is effectively conveyed to its stakeholders, and in managing its public image and reputation.

The Communications Committee in 2022

Transitioning from 2021 to 2022 posed unexpected challenges for the Communications Committee, leading to a notable drop in email communication from 19 in 2021 to 9 in 2022. This decline was not intentional but rather a consequence of leadership lacking prioritization during that time. Despite having adequate staff, communication efforts were neglected, causing a temporary halt in regular updates and newsletters in 2022. This situation underscored the critical need for better coordination and prioritization of communication within the association.

On a positive note, the committee managed to release 2 editions of the "Proud Warrior", demonstrating their dedication to this traditional communication platform. Recognizing the importance of this issue, subsequent actions were taken to rejuvenate communication channels and enhance engagement in 2023.

Committee Work in 2023

At the close of 2022, the organization's Board of Directors acknowledged the shortcomings in their communications strategy and took decisive action to address them. In a strategic move, three directors were appointed to fortify the Communications Committee. A comprehensive analysis unveiled several areas in need of significant improvement. The absence of a regular newsletter publishing schedule and the lack of standardized reporting within the committee were noted as primary concerns. Furthermore, a clear editorial workflow for "The Proud Warrior" was missing, especially after the transition from management the previous year. The committee also identified the absence of a content calendar, a robust social media strategy, and a strategic approach to email marketing. With no community management on social media or established content library, the committee had its work cut out. Moreover, the lack of metrics or key performance indicators (KPIs) meant that the committee was unable to measure the effectiveness of their communications. In response, the newly strengthened committee began developing systems to integrate with other committees and ensure a cohesive approach to the association's communications going forward.

In 2023, the Communications Committee saw a notable increase in activity, promoting better engagement and connectivity within the First Battalion Ninth Marines Association. Throughout the year, the committee sent out a total of 24 emails, showing a proactive stance on communication and sharing information. The "Proud Warrior" magazine continued its biannual publication, upholding tradition and providing comprehensive insights. Moreover, the committee successfully introduced three newsletters, revitalizing regular updates and ensuring members stay informed consistently. This uptick in communications underscores the committee's commitment to strengthening ties, delivering timely information, and fostering a more vibrant and united community among the association's members.

In addition to the existing issues, a critical deficiency was the absence of a feedback mechanism enabling direct communication between members and leadership. The lack of a structured system to gather member insights and concerns made it difficult to gauge the community's sentiments and address issues comprehensively. This shortcoming hampered the Board and committees' capacity to proactively and promptly respond to member needs, hindering the development of a member-centered culture crucial for fostering a sense of belonging and engagement within the association. Acknowledging this gap, the Communications Committee prioritized establishing an accessible feedback system. This system aims not only to continuously monitor member concerns but also to ensure timely responses and resolutions, fostering trust and improving the association's responsiveness.

Building upon the groundwork laid by the Communications Committee, a critical evaluation of the association's existing website became paramount. It was evident that the site was in dire need of updating and modernization to support the revamped communication strategies. A thorough assessment highlighted dated design elements, poor user experience, and the use of outmoded technologies that hindered responsiveness and accessibility. Recognizing the website's role as the digital face of the association, the committee underscored the importance of a responsive design that seamlessly adapts to mobile devices, given

the increasing use of smartphones for information access. In response to these findings, plans were drafted for a website overhaul. This renovation would adhere to modern web standards, improve navigation, and ensure compatibility with the latest devices, all while maintaining the association's storied brand identity.

As the website's overhaul progressed, addressing the visual content became an equally significant undertaking, particularly within the online store. Professional marketing photos were commissioned to replace the existing imagery which lacked cohesiveness and failed to capture the professional essence of the association's offerings. These new photos, consistent in style and quality, are aimed at elevating the user's browsing experience, enhancing product appeal, and driving engagement. By meticulously curating the product visuals, the Association's commitment to excellence is now reflected in every aspect of the online store, setting a new standard for the association's digital presence.

To further fortify the association's communication infrastructure, the integration of a comprehensive Customer Relationship Management (CRM) system was implemented. This CRM, seamlessly embedded within the new website, serves as a cornerstone for the association's operations. It is ingeniously designed to enable leadership to receive, track, follow-up, and resolve member issues efficiently. One of the CRM's most impactful features is its capability to identify and categorize recurring problems. Through this, the association can discern patterns and implement changes at the structural level, thereby ensuring lasting solutions to persistent challenges and substantially enhancing overall member satisfaction.

The association has introduced live monthly video calls as a platform for member discussions. This innovative initiative allows members to join sessions with the association's leadership, granting them direct access to the latest updates and developments. These virtual gatherings not just break down the barriers between the association's members and its leaders but also create a forum for transparent, real-time dialogue. Members can now ask questions directly, voice concerns, and provide feedback, fostering a sense of community and involvement that was previously unattainable. This level of member engagement is set to revolutionize the dynamic of the association, signifying a milestone in its commitment to open communication and collaborative growth.

The Committee Headed into 2024

As we move forward into 2024, the Communications Committee is energized to expand upon the progress we've established. Building on the momentum of our regular newsletters, our goal is to ensure that these become a more anticipated and integral part of our members' connection with the association. Furthermore, we are elevating the scope and frequency of our "Proud Warrior" magazine to a quarterly publication. An editorial schedule, meticulously crafted to encompass the significant moments and stories within our community, has been set and made publicly available on the association website.

In recognition of our members' diverse preferences, we are exploring avenues to offer a printed version of "Proud Warrior" for those who cherish physical copies. To facilitate this, we're diligently seeking funding sources such as sponsorships and advertising, with the dual aim of reducing publication costs and enhancing the reach and quality of our magazine.

Our digital footprint is another key focus for 2024. We aim to build a robust online presence, starting with deploying a regular cadence of engaging social media posts. These will not only inform but also resonate with our community, fostering an online space that mirrors the camaraderie and spirit of our association. Through these endeavors, we're set on fortifying our commitment to a vibrant, informed, and tightly knit community in the coming year.

REUNION COMMITTEE

PURPOSE

The Reunion Committee is dedicated to the meticulous planning and execution of the bi-annual reunion, aiming to create a welcoming and memorable experience for all attendees. This event serves as a crucial platform for veterans and their families to reconnect, celebrate shared successes, and honor the sacrifices made during military service. By managing every aspect of the reunion, the committee strives to foster a sense of community, ensuring that each reunion remains a foundational pillar of the Association, embodying the unity and resilience of the First Battalion Ninth Marines.

HISTORICAL ANALYSIS OF REUNION ATTENDANCE

Number of Attendees:

2018: 218 parties, 375 total attendees

2021: 90 parties, 160 total attendees

2022: 69 parties, 123 total attendees

The historical attendance figures reveal a noticeable trend in the number of parties and total attendees over the specified years. In 2018, the reunion experienced robust participation with 218 parties and a total of 375 attendees, reflecting a vibrant gathering that attracted a substantial number of individuals and families. However, there was a significant decline in attendance by 2021, with only 90 parties and 160 total attendees, signaling a notable decrease in both the number of participating groups and the overall turnout.

This decline continued into 2022, with a further reduction to 69 parties and 123 total attendees. The consecutive decrease in attendance figures from 2018 to 2022 suggests a potential challenge in sustaining the initial high levels of engagement. Understanding the factors contributing to this decline, such as changes in member demographics, outreach strategies, or external circumstances, will be crucial in formulating strategies to reverse this trend and revitalize attendance numbers in future reunions. It may also be beneficial to explore innovative approaches to attract a broader spectrum of participants and enhance the overall reunion experience, ensuring the continued success and significance of these annual gatherings.

COMMITTEE STATUS IN 2022

The year 2022 marked a period of reformation for the Reunion Committee. The committee reforms at the start of each reunion cycle and disbands at the conclusion. In 2022, there was no established strategic plan for the new formations of the committee to follow. Additionally, there was no planning template, no centralized place for previous reunion data, and no designated place for committee members to collaborate and store documents. The committee also lacked a formal structure, team, and a fundraising plan specifically for the 2024 reunion. Moreover, there was no formal methodology for tracking reunion expenses, donations, or association assets. The absence of regular committee meetings, defined timelines for execution, and regular reporting to members or the Board of Directors on the planning progress further compounded these challenges.

CHANGES AND ACHIEVEMENTS IN 2023

The year 2023 was a time of significant change and achievement for the Reunion Committee. We established a well-structured committee with clearly defined roles and responsibilities, including the establishment of the reunion committee with roles and responsibilities. We also developed a comprehensive strategic plan for the 2024 reunion, which also serves as a template for future reunions. Additionally, we implemented a detailed reunion planning timeline and roadmap.

To facilitate remote collaboration and planning, we established tools and methodology for committee members to collaborate remotely on the planning process. We also implemented a documentation system for donations and financial reporting.

In terms of fundraising, we initiated fundraising efforts and held regular committee meetings to ensure smooth operations. We also provided regular updates to the membership and BOD. Furthermore, we established a communications and marketing plan for the 2024 reunion, which will also serve as a template for future reunions.

A significant achievement was the successful integration of data from previous reunions, which allowed us to analyze important trends in attendance. Combined with the new membership data capabilities, this information will guide us in planning for the 2024 reunion and beyond.

COMMITTEE'S DIRECTION IN 2024

Looking ahead to 2024, the committee is set to execute the strategic plan, which is divided into pre-planning, pre-event logistics, and event execution phases. Detailed planning for every element of the reunion is underway, complete with associated timelines and responsibilities. Our focus is to enhance the attendee experience through meticulous advanced planning, allowing us to ensure a seamlessly organized event. The committee aims to facilitate healing, foster community resilience, honor our military roots, and celebrate the incredible history of the First Battalion Ninth Marines, staying true to the objectives set forth.

Execution of the reunion strategic and implementation plan is underway. Our plan is split into 3 phases: pre-planning, pre-event logistics, and event execution. Each member of the committee contributed to listing every element that needs planning. Each element has an associated timeline which it will be worked on and completed. Each element is assigned to a committee member. We anticipate that the time spent on the reunion planning will pay dividends in helping us be prepared for the reunion. Because each element of the reunion is taken care of in advance, it allows the committee to focus on making sure attendees are having the best experience possible.

2024 Reunion Objectives

- Strengthening Mission Integration: In the upcoming year, our primary objective is to fortify the integration of our mission into every facet of the reunion. This involves a comprehensive evaluation of each planned activity, ensuring alignment with the core values and goals of the First Battalion Ninth Marines Association. By weaving the mission seamlessly into the fabric of the reunion, we aim to enhance the overall experience for attendees, creating a more immersive and purpose-driven event.
- Facilitate Healing and Support: Our primary objective is to provide a nurturing and supportive environment, enabling members to share experiences and foster emotional well-being. This reunion will serve as a platform for healing, allowing us to lean on each other and grow stronger together.
- Strengthen Community Resilience: As a community, our strength lies in our unity, understanding, and mutual support. This reunion aims to further cultivate these elements, contributing positively to the overall resilience of our community.
- Honor Military Roots: Recognizing our military heritage is integral to our identity. This reunion intends to pay tribute to this shared history, acknowledging it as a source of our collective strength and perseverance.
- Celebrate Battalion History: Acknowledging and celebrating our battalion's legacy and milestones is crucial. This reunion is an opportunity to commemorate our collective achievements and history, reinforcing our sense of identity and unity.
- Evaluating Reunion Success Based on Mission Adherence: A key focus for 2024 is the thorough evaluation of reunion success through the lens of mission adherence. We recognize that the degree to which the planned events and activities align with our mission directly correlates with the event's impact and significance. By establishing clear metrics and evaluation criteria, we aim to measure success not only by the number of attendees but, more importantly, by the extent to which the reunion fulfills its mission in fostering camaraderie, supporting members, and celebrating our shared military history. This approach ensures that our reunions remain not just gatherings but meaningful expressions of our commitment to the Association's mission and values.

2024 Reunion Key Performance Indicators (KPI)

- Facilitate Healing and Support: Measure the success of this goal through post-reunion surveys, determining whether participants felt a sense of support and emotional well-being. Look for an increase in positive responses, with a target of 70% of participants indicating they felt supported and healed.
- Strengthen Community Resilience: Evaluate this objective by assessing the level of interaction and engagement during reunion events. Aim for a target of 80% active participation in all activities.
- Honor Military Roots: Gauge the effectiveness of this objective by tracking the attendance at military heritage-focused events during the reunion. Aim for at least 50% of attendees to participate in these events.
- Celebrate Battalion History: Measure this by collecting feedback from participants about their understanding and appreciation of the battalion's history post-reunion. The goal is for 75% of respondents to express an increased understanding and appreciation.
- Evaluate Total Attendance: Evaluate the overall turnout by comparing the number of registered attendees to the actual number of attendees. A target of 90% attendance from the registered guests could indicate a successful reunion.
- Track Donations: Measure the reunion's success in

fundraising by comparing the total donations received against the target amount. A goal could be to reach or exceed the set fundraising target.

- Monitor Merchandise Sales: Monitor the sale of reunion-related merchandise as an indication of participants' engagement and support. A measurable goal might be for at least 60% of attendees to purchase merchandise.
- Social Media Engagement: Measure the level of online engagement before, during, and after the reunion through metrics like shares, likes, and comments on posts related to the reunion. Aim for a steady increase in engagement rates throughout the reunion period.
- Survey Satisfaction Rates: Post-reunion, distribute a satisfaction survey evaluating the overall experience. Strive for at least 80% of the respondents rating their experience as 'good' or 'excellent'.

Documentation of Association Traditions

At the heart of our association lies a deep respect for tradition. They are the threads that weave together the vibrant tapestry of our shared history, strengthening our connection to the past and guiding us forward into the future.

In recognition of the integral role that traditions play in our reunion events, we are dedicating concerted efforts towards researching and documenting each tradition held at every reunion. Our goal is to meticulously examine every facet of these reunions, ensuring that the traditions established in prior years are not only honored, but also accurately recorded for posterity. This initiative is not merely about preserving the past; it's about paving the way for the future. By documenting these traditions, we provide a valuable resource for future generations of Association leadership, enabling them to maintain consistency and uphold the respect for the traditions that are so integral to our identity.

Maintaining a Mission-Focused Reunion

Taking a mission-centric approach to reunion planning is crucial for ensuring the success and significance of the event. It serves as a guiding light, ensuring that every aspect of the gathering aligns with the core values, goals, and identity of the First Battalion Ninth Marines Association.

By prioritizing the mission, we reinforce the primary goals of the Association. We emphasize camaraderie, support, and shared experiences among members. Each planned activity becomes an opportunity to strengthen the bond within our community, celebrating our shared military history, sacrifices, and triumphs.

This approach cultivates a deeper connection to the values and mission of the Association. It creates an environment where attendees feel a profound sense of belonging, understanding, and shared identity, enriching their overall experience. By aligning activities with our core values, every planned activity strategically resonates with the principles that define our collective identity. This alignment ensures that the reunion serves as a platform for members to not only reminisce but also actively engage with the principles that shape who we are.

This mission-driven approach transforms the reunion; becoming a catalyst for lasting impact. Attendees leave with a renewed commitment to the Association's mission, further enhancing its influence within the community and beyond. By optimizing our planning process and staying true to our mission, we can create a reunion that is not only memorable but also meaningful for all those involved.

SCHOLARSHIP COMMITTEE: EMPOWERING FUTURES THROUGH EDUCATION

PURPOSE

The Scholarship Committee is dedicated to providing financial assistance to 1/9 members and their families, fostering educational pursuits. With a commitment to empowering veterans and families through education, the committee strives to offer the necessary financial support for individuals to achieve their academic goals.

COMMITTEE STATUS IN 2022

In 2022, the committee awarded $2,000 in scholarships. Scholarship information was absent from the website, and there was a lack of organized efforts to raise awareness about the program among the members.

CHANGES AND ACHIEVEMENTS IN 2023

In 2023, significant strides were made to revitalize the Scholarship Committee. Scholarship information was integrated into the new website, and three scholarships were successfully awarded. The committee, now properly manned with three directors, integrated documentation into the Association's workflow management system, enhancing record-keeping and streamlining processes. The application process was revamped for user-friendliness and reduced paperwork. The awarding and funding process was streamlined for faster payments to schools. Awareness efforts were implemented through the Proud Warrior and the website, garnering community support for the recipients.

VISION FOR 2024

Looking ahead to 2024, the Scholarship Committee aims to elevate its impact. The budget for scholarships has been increased to $2500, with $2000 budgeted from the association's general fund and an additional $500 donation. Fundraising initiatives will be launched to ensure the longevity of the program. Enhanced marketing strategies will be employed to increase awareness of the scholarship, reaching a broader audience. A new requirement has been introduced, asking applicants to contribute back to the association through service or project work, fostering a spirit of community engagement and reciprocity.

In summary, the Scholarship Committee's journey from challenges in 2022 to accomplishments in 2023 sets the stage for a robust and impactful 2024. As we continue to invest in education, we not only empower individuals but contribute to the enduring legacy of the First Battalion Ninth Marines Association.

ASSOCIATION STORE

PURPOSE

The Scholarship Committee is dedicated to providing financial assistance to 1/9 members and their families, fostering educational pursuits. With a commitment to empowering veterans and families through education, the committee strives to offer the necessary financial support for individuals to achieve their academic goals.

STORE PERFORMANCE

In 2020, the Association Store saw modest sales, with gross sales amounting to $3,393.40 from 136 orders. The average order value for the year stood at $24.95, with a total of 685 units sold. This was the base year for our analysis, which marked the commencement of an upward trajectory.

In 2021, a significant surge in sales was observed. The year closed with gross sales of $19,818.42, a substantial increase from the previous year. The volume of orders also rose to 286. The Average Order Value climbed to $69.29, reflecting a greater purchasing power among our members. A total of 878 units were sold, marking an increase in demand for our merchandise.

Sales in 2022 saw a slight contraction. Gross sales fell to $7,084.34, and the number of orders reduced to 127. However, the average order value rose slightly to $55.78, indicating that while fewer orders were placed, those that were made were of higher value. Total units sold decreased to 428.

As we moved into 2023, the store's performance improved. Gross sales increased to $9,262.23 from 196 orders. The upward trend in the average order value continued, reaching $47.25. A total of 557 units were sold during the year, showcasing a moderate increase in demand.

In conclusion, while fluctuations in yearly sales were observed, the Association Store has shown resilience and an overall increasing trend in gross sales and average order value. This report underscores the importance of the store in generating revenue and supporting the activities of the First Battalion Ninth Marines Association.

ACHIEVEMENTS IN 2023

In the past year, we made significant strides in improving our store offerings based on our member preferences. A comprehensive survey conducted among our members provided valuable insights into their merchandise preferences, interests, hobbies, and price ranges. This data has been instrumental in shaping our product offerings.

One of our major achievements in 2023 was the implementation of a new design standard. We partnered with a professional graphic designer to enhance the quality of our merchandise, particularly items with a graphic element. By doing so, we have taken our product design to a new level, aligning it with industry standards and member expectations.

In a move to ensure the longevity of our products' relevance and demand, we focused on "evergreen" merchandise. These are products that aren't tied to a specific date or event, thus preventing their demand from diminishing over time due to their "expiry".

We also revamped our product research workflow, incorporating a detailed cost of goods sold (COGS) calculation. This has ensured that our products are priced appropriately to generate a net positive profit, an approach that was absent in the past.

Attention to detail has been key in our achievements this year. We invested time crafting detailed product descriptions and specifications, and took professional photographs of our products. This not only offers potential buyers a better understanding of the product but also gives them a visual representation of what they're purchasing.

Lastly, we established a store committee, assigned with the task of designing and reviewing product offerings. This committee plays a crucial role in ensuring the quality and relevance of our merchandise, contributing significantly to our store's ongoing success.

STRATEGIC GOALS FOR THE UPCOMING YEAR

- Achieve a 15% increase in gross sales compared to the previous year.
- Expand the range of merchandise with at least 15 new products in the next year.
- Increase the average order value by 10% through bundle deals and promotions.
- Achieve a 20% increase in positive customer feedback regarding the online shopping experience.
- Increase website traffic by 25% through targeted marketing campaigns.
- Receive at least 50 user-generated content submissions featuring association merchandise.
- Reduce excess stock by 15% through optimized

inventory management.
- Acquire 20% new customers beyond the current association membership.

PRODUCT DEVELOPMENT INITIATIVES

In alignment with our commitment to continually enhance our product selection, we are excited to announce upcoming additions to our merchandise lineup. We will introduce an essential collection featuring a classic T-shirt and hoodie with the 1/9 unit logo.

In addition to the clothing, we will soon introduce a standard 1/9 coin featuring our logo, expected to appeal to collectors and members. Also in 2024, we will add to our commemorative coins to include designs for Charlie and Weapons Companies, honoring their legacies.

We are currently developing a special commemorative shirt and coin set for release at the 2024 reunion. Drawing on past experiences, we have made strategic adjustments to create designs that are timeless and not tied to specific event details. This will make the merchandise valuable long after the reunion, providing our members with a collectible piece of memorabilia that stands the test of time.

By consistently listening to our community and recognizing the shifting trends and demands, we ensure that our merchandise remains both relevant and desirable.

Store Administration and Management

The operational backbone of our Association store is supported by the diligent efforts of our Store Manager, whose overarching responsibility is the successful functioning of our marketplace. Transparent and strategic planning has set the course for our envisioned store growth, sales targets, and overall store performance. Close collaboration with various committees ensures our store activities remain integrated with the Association's broader goals.

Inventory Management

Efficient inventory management is crucial for the seamlessness of our operations. Continuous monitoring and judicious balancing of stock levels to prevent surpluses reflects our commitment to efficiency. The implementation of sophisticated inventory tracking systems has substantially enhanced our ability to oversee the entire restocking and order fulfillment process with great precision.

Order Processing and Fulfillment

Our operational ethos places immense value on the accuracy and promptness of order processing and fulfillment. A well-coordinated mechanism with our suppliers and logistics partners ensures timely deliveries, while adept management of returns, exchanges, and customer inquiries exemplifies our pledge to customer satisfaction.

Product Sourcing and Merchandising

We continuously identify and introduce new products that resonate with our members' interests in our online store. By forming partnerships with vendors and designers for merchandise creation and implementing visual merchandising strategies, we ensure an inviting and engaging online shopping experience.

Customer Service

In upholding our association's values, providing superior customer service remains at the forefront of our store's mission. We are dedicated to swiftly addressing any customer inquiries, concerns, or feedback through various communication channels to ensure a positive and hassle-free online shopping experience.

Financial Management

Rigorous budgeting and meticulous financial planning form the foundation of our store's financial management practices. Constant tracking and analysis of sales data and financial metrics enable us to maintain a healthful fiscal stature. Such collective efforts culminate in comprehensive financial reports to the association board, ensuring transparent governance.

Reporting and Analysis

Critical to our strategy formulation is the generation and examination of reports detailing store performance and relevant metrics. The data-driven analysis not only boosts our decision-making processes but also helps us present refined insights and recommendations that guide the leadership of the association in steering our collective endeavors toward enhanced success.