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Expert Report of Scott Nichols**SCOPE**

In April 2024, I was hired by Brewer, Attorneys & Counselors as a consultant on behalf of their client the *National Rifle Association of America ("NRA")*, in the matter of *People of the State of New York, by Letitia James, Attorney General of the State of New York v. The National Rifle Association of America, et.al.* My compensation is \$500 per hour.

My assignment is to determine the impact, if any, that the placement of a monitor with oversight and/or reporting responsibility regarding the NRA will have on the membership and fundraising revenue of the organization and its affiliates-all part of the NRA.

QUALIFICATIONS¹

I have worked in fundraising and donor development for over 50 years, representing colleges, universities, and nonprofit entities. In October 2019, I retired from Boston University as Senior Vice President for Development and Alumni Relations, where I oversaw a staff of 230. I was responsible for all areas of advancement and led the University's first campaign, which had an original goal of \$1 billion. The Campaign concluded in September 2019 and raised \$1.85 billion from more than 150,000 donors, including over 1,300 commitments of \$100,000 to \$150,000,000. After retirement, I served as a Senior Consultant for the University.

Formerly, I was chief advancement officer and Associate Dean at Harvard Law School for 20 years. During my tenure, all advancement functions were consolidated, and I helped engineer two long range planning processes that led to successful campaigns. The first was the \$150,000,000 *Campaign for Harvard Law School*, an unprecedented effort that was five times larger than any campaign previously attempted in legal education. The Campaign exceeded its goal by \$33,000,000. Subsequently, I spearheaded *Setting the Standard: The Harvard Law School Campaign* to raise \$400,000,000, which ultimately exceeded goals and achieved \$480,000,000.

I served DePaul University from 1980-86, initially as Director of Development then as Associate Vice President. Prior to that, I was Director of Annual Giving at Northwestern University and held a variety of advancement positions at Bucknell University, including Director of Alumni Relations. I began my career teaching in Morocco as a Peace Corps Volunteer.

I received an undergraduate degree in economics from Bucknell and obtained a master's and doctorate degree in educational administration from the University of Pennsylvania. My doctoral dissertation was on volunteerism in higher education, and I also received the William E. Arnold Award at Penn for Outstanding Promise of Leadership.

¹ See my resume at Exhibit 1.

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I served as a trustee of Bucknell University for 20 years. At Boston College, I served as an Advisory Board Member for the Center on Wealth and Philanthropy. I was also a longstanding trustee of the Council for the Advancement and Support of Education (CASE), where I continue to serve as a Trustee Laureate and was also on the Boston Board of the Association of Fundraising Professionals. Currently I serve on the Board of the Peace Corps Commemorative Foundation and the Shawnee Institute, a globally recognized 501 (C) 3 located in Pennsylvania. As co-author of five books on fundraising (Jossey-Bass publishers), I am widely published on matters pertaining to fundraising.

I teach at Harvard's New Presidents Seminar and have taught at the Harvard Institute for Educational Management and the Harvard Management Development Program. I have also served as consultant and fundraising coach to over 100 different non-profits (Exhibit 1) and still maintain an active consultancy.

METHODOLOGY

Many firms and organizations develop tools for measuring fundraising programs.² Fundraising programs are analyzed by determining:

- The effectiveness and efficiency of the fundraising operation;
- The identification of distinct variables that impact the fundraising effort;
- The steps that may be taken to improve results.

Often a checklist is used, such as the Management Checklist for Development developed by the Philanthropy Commission of the Council for the Advancement and Support for Education (CASE). Another generally accepted guide is the IRS Audit Technique Guide – Fundraising Activity.³

As mentioned, I have assessed fundraising programs for over 50 years. I have designed program assessments and tailored them to reflect the characteristics and challenges in the varied world of nonprofit organizations. The program assessment steps generally include:

- **Interviews⁴:** I conduct interviews with senior staff, board members, donors, and other related individuals to the organization. These interviews allow me to understand the culture of the fundraising operation, and the perceptions and facts that impact fundraising. I identify consistent and inconsistent messages received from the interviewees for clarification and further analysis.
- **Data analysis⁵:** I gather key data including fundraising results, trends over time, cycles of activity, and work output.

² I utilize consulting firm sources such as GonserGerber, Marts & Lundy, Grenzebach Glier and Associates, Bentz Whaley Flessner & Associates.

³ While many books have been published about the subject, some of the leading ones are *The Fundraising Audit Handbook*, E.H. Mallabone, Civil Sector Press, 2010, *Fundraising Management, Analysis, Planning and Practice*, Adrian Sargent, Jayne George, Routledge, 2022 and *Fundraising, second edition*, James Greenfield, AFP/Wiley Fund Development Series.

⁴ During my work on this case, I interviewed Tyler Schropp and Derek Robinson. Further, I reviewed sworn testimony of John Commerford and Tyler Schropp.

⁵ Resources for data analysis include IRS 990s, audited financial statements, state charitable fundraising reports and public reports. Policy guides, guiding principles and procedures are reviewed. Wealth screening analysis is also assessed, pursuant to my conversation with Tyler Schropp, this is utilized at the NRA. I also refer to public media accounts. During my work in the case, I reviewed all the above.

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- **Investigation:** I resolve some inconsistencies obtained from interviewees by checking for external sources for industry standards. I also consult pertinent public records and current events.
- **Determine critical variables:** I determine which variables influence fundraising and need to be addressed. For example, resources, target markets, and long-term planning.
- **Provide recommendations:** Through detailed analysis, I determine and communicate which variables to adjust to optimize fundraising results, enhance donor engagement, and position an entity for long-term development success.

OPINIONS

1. Based on my discussions with NRA executives, data analysis, and review of sworn testimony and reports, the significant and precipitous decline in membership dues and contributions at NRA and its affiliates is a direct result of the investigation and pursuit of the NRA by the New York State Attorney General.
2. The NRA's documented governance reforms will be recognized and appreciated by prospects and donors.
3. The appointment of an outside administrator will exacerbate the decline in membership and philanthropic support at NRA and its affiliates.

COMMENTARY

Opinion 1. Based on my discussions with NRA executives, data analysis, review of sworn testimony and reports, the significant and precipitous decline in membership dues and contributions at NRA and its affiliates is a direct result of the investigation and pursuit of the NRA by the New York State Attorney General.

The investigation of the New York State Attorney General has significantly and negatively affected fundraising. Revenue at the NRA has declined by over \$150,000,000 in the last five years.⁶

The members and donors to the NRA are atypically passionate, loyal, engaged and committed. This is evidenced by the size of the membership base⁷ and the focused support of the Second Amendment.⁸

⁶ See Exhibit 2

⁷ See Exhibit 3 December 2023 - 3,905,694

⁸ NRA-NYAGCOMM DIV-01569308 April 17, 2023, NRA Bylaws, Article II, 1, "To protect and defend the constitution of the United States, especially with reference to the God-given inalienable right of the individual American citizen guaranteed by such Constitution to acquire, possess, collect, exhibit, transport, carry, transfer ownership of, and enjoy the right to use, keep and bear arms, in order that the people may exercise their individual rights of self-preservation and defense of family, person, and property, and to serve in militia of law-abiding men and women for the defense of the Republic and the individual liberty of the citizens of our communities, our states and our great nation."

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Members and donor commitment to the organization run deep with resulting high participation in programs.⁹

NRA Annual Meetings are well attended; Dallas news stations reported that approximately 70,000 people attended the recent annual meeting in Dallas which began on May 17, 2024.¹⁰ By comparison, the American Bar Association and the American Medical Association had only an estimated attendance of 6,000 and 700 members for their respective 2023 annual meetings.¹¹ Predictably, donors are watching the investigation as it unfolds in the news media, social media and public forums from the sidelines.¹²

The ensuing budget cuts during the investigation of the NRA have negatively and severely impacted the Advancement Department. For example, staff reductions¹³ have led to abolishing a full-time position devoted to identifying, cultivating, soliciting and stewarding those who made a \$1 million or more commitment to the NRA (the Golden Ring of Freedom members).¹⁴ The planned giving program has had amazing success with documented estate intentions totaling \$340 million in future gifts to the NRA.¹⁵

The NRA believes that if injunctive relief is ordered by the Court following the July proceedings, it would significantly hinder their ability to recruit and retain members, citing a steady decline in membership and donor support since the investigation began in 2019.¹⁶ The decline of membership and donor support has been compounded by negative media coverage and perceived determination of New York State to damage the NRA.¹⁷ The NRA attributes the membership decline primarily to ongoing legal actions and adverse public opinion generated by these actions.¹⁸ Over the years fundraising and membership revenue, although generally increasing, have fluctuated. Since 2018, there has been a steady decline in revenue and philanthropy that has not been experienced before. Philanthropy totals in the United States have increased an average of 5.6% from 1981 to 2021.¹⁹ A unique variable that changed and continues to have influence over NRA members and donors is the New York Attorney General's investigation with the pursuit of the appointment of a monitor. Exhibit 3, which includes NRA's membership statistics, illustrates that NRA's membership declined from roughly 5.3 million to 3.9 million.²⁰

⁹ For example, the NRA website on May 24, 2024, states that Friends of NRA had 13,000 volunteers overseeing 660 events annually.

¹⁰ "Dallas could spend about \$138,000 to host NRA convention" – WFAA Article dated May 13, 2024.

¹¹ ABA attendance estimated to be 6,000 at the 2023 Annual Meeting per Events in America website; 2023 AMA Annual Meeting attendance was estimated at 700 physicians and medical students per AMA website.

¹² 5/16/2024, Deposition of Tyler Schropp; pp. 17:23-18:25, and pp. 24:25-26:8

¹³ Total advancement department employees in 2018 were 43 at 5/8/2018 per NRA-NYAGCOMMDIV-00834721; Total advancement department employees in 2024 were 23 at 3/26/2024 per NRA-NYAGCOMMDIV-01575253

¹⁴ A comparison of NRA-NYAGCOMMDIV-00834721 and NRA-NYAGCOMMDIV-01575253 indicates Tyler Vollmer and Cindy Chao are no longer employees of the Advancement Office and no one is currently assigned full-time to Ring of Freedom responsibilities according to Tyler Schropp.

¹⁵ See exhibit 4

¹⁶ Derek Robinson affidavit dated March 13th, 2023.

¹⁷ Deposition of John Commerford, May 15th, 2024, pp. 12:12-13:25 and affidavit of John Commerford, dated March 8th, 2023.

¹⁸ Deposition of John Commerford, May 15th, 2024, pp. 22:21-25:18.

¹⁹ Giving USA: Annual Report on Philanthropy 2022 (2022 Giving Overview) p.38.

²⁰ See Exhibit 3.

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Opinion 2. The NRA's documented governance reforms will be recognized and appreciated by the prospects and members.

Effective governance reforms have been undertaken at the NRA. Adoption of standard and best practices has happened and appears to be having a significant, positive effect.²¹ Examples of this include strong policy improvements including updated policies and Integrity Hotline for whistleblowers²², compliance with conflict of interest and related policies²³ the performance of a risk assessment and the adoption of the COSO framework²⁴. Perhaps the biggest improvement is the change to the bylaws to add a Compliance Officer position that reports directly to the Audit Committee²⁵. In addition, the Compliance Officer has hired an internal auditor²⁶.

In my experience, the compliance policies are among the strongest I have seen in the nonprofit world. Recent efforts by the NRA to introduce reforms in policies, oversight controls, and good business practices need to be communicated loudly and clearly to rebuild trust with the donors and members. This is important to the NRA and will only be effective without oversight from the New York Attorney General. Over time the "course correction" will do much to ameliorate prospect and donor confidence in the NRA.

Finally, evidence of a "new NRA" is reflected in the results of the NRA's recent Board and officer elections. Although many directors with persistent grassroots and leadership support were re-elected, they were joined by four "dissident" activists candidates who successfully sought Board seats by petition, without endorsement from the Nominating Committee, on a "reform" platform antagonistic to leadership: Philip Journey, Roscoe Marshall, Jeffrey Knox and Dennis Fusaro. When the NRA's combined "new" and "old" directors convened to elect officers, they chose a combined slate of leaders who either helped lead the NRA's course correction (Bob Barr, John Frazer) or sought office in the wake of the jury verdict on a platform that explicitly challenged prior leadership (Bill Bachenberg, Mark Vaughn, Doug Hamlin).²⁷

Opinion 3. The appointment of an outside administrator will exacerbate the decline in membership and philanthropic support at NRA and its affiliates.

Fundraising results are heavily influenced by the leaders of an organization. A monitor will be considered a de facto "leader" by NRA members and donors and will not be trusted by the NRA constituency; particularly, if he or she is linked to the New York Attorney General's Office. The NYAG's second amended verified complaint requests that the NRA install a monitor that will report to the NYAG

²¹ Michael Erstling's testimony, February 8th, 2024, pp. 3827:2-3830:24

²² See Whistleblower policy NRA-NYAGCOMMDIV-01566507; Michael Erstling testimony, January 11, 2024, pp. 624:10-625:2

²³ See September 2023 Board of Directors – Compliance Basics PowerPoint, NRA-NYAGCOMMDIV-01546154; See John Frazer testimony, January 30, 2024, pp. 2565:21-2566:3; Sonya Rowling testimony, January 17, 2024, pp. 1154:20-1156:3

²⁴ See Risk Assessment, NRA-NYAGCOMMDIV-01568419

²⁵ See April 17, 2023, Board minutes, NRA-NYAGCOMMDIV-01545879; also see American Rifleman article entitled "2024 Board of Directors Election Results"

²⁶ See Medrano executed offer letter NRA-NYAGCOMMDIV-01568483

²⁷ See NRA-ILA article on May 20, 2024 "Bob Barr elected NRA President, Doug Hamlin elected to serve as NRA Executive Vice President & CEO."

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and the Court²⁸. The placement of an independent compliance monitor with responsibility for reporting to the Attorney General or the Court will exacerbate and continue the loss of philanthropic support. NRA members and donors certainly have concerns about the NYAG's prior adverse statements against the NRA, and they view her as oppositional to the organization's stated mission. They would interpret administrative oversight as intrusive and potentially detrimental to the activities to the NRA, particularly its support of pro Second Amendment candidates.

The NYAG's investigation has led to a disruption of leadership, which has caused the further reduction in membership and philanthropic support. Fundraising results are in a free fall. Further disruption will compound the problem and perhaps be an existential threat to the NRA.

²⁸ NYAG Second Amended Verified Complaint "the appointment of an independent compliance monitor with responsibilities to report to the Attorney General and the Court."

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Signature Page



Scott G. Nichols, Ed. D.

Date, May 24, 2024

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Documents Considered

Date	Description
7/12/2018	NY Daily News - Letitia James says she'd investigate NRA's not-for-profit status if elected attorney general
7/12/2018	Tish James Announces Attorney General Platform to Protect New Yorkers from Gun Violence
7/12/2018	Tish James Press Release - Taking on the Scourge of Gun Violence and keeping new yorkers safe.
8/26/2018	James tweets that New York needs as Attorney General that will, among other things, focus on the NRA.
9/4/2018	James tweet regarding insult impacted by gun violence.
9/6/2018	Time Press about Attorney General Candidate, Public Advocate Letitia James
9/28/2018	Tish James tweet re she meet with leaders on Long Island to discuss how to keep their communities safe from gun violence.
10/8/2018	Tish James tweet re investigation on non-profit status of the NRA.
10/10/2018	James tweets that New York needs as Attorney General that will, among other things, focus on the NRA.
10/22/2018	James tweets that New York needs as Attorney General that will, among other things, focus on the NRA.
10/31/2018	Ebony - Letitia Tish James on Becoming New Yorks Next Attorney General
11/5/2018	2017 CHAR500, 990 Form, Audited Financial Statement
11/8/2018	Tish James tweet re investigation on non-profit status of the NRA.
10/20/2020	John Commerford Deposition Exhibit 2 2020-10-20 T. Martin email to T. Grable and D. Robinson re top reasons for those who decline to give NRA-NYAGCOMMDIV-00533979-00533980
11/16/2020	2019 CHAR500, 990, 8453-EO Form, Audited Financial Statement, NRA Board of Directors List
11/18/2020	2019 CHAR500, 990 Form, Audited Financial Statement
5/13/2021	Chapter 11 Bankruptcy May 13, 2021 Order Granting Motions to Dismiss NRA Bankruptcy filed in case no. 11-30085 as Docket Entry 745
5/2/2022	Second Amended Verified Complaint as filed in NYSCEF 451625-2020 Docket Entry 646
9/16/2022	Expert Report for Sullivan and Blacker
10/7/2022	Expert Report for Sullivan and Blacker
10/13/2022	Answer of The National Rifle Association of America to The Second Amended Verified Complaint as filed in NYSCEF 451625-2020 Docket Entry 857
12/31/2022	2022 CHAR500, 990 Form, Audited Financial Statement
2022	"Giving USA Key Findings The Annual Report on Philanthropy for the Year 2021"
1/7/2023	Tyler Schropp Deposition Exhibit 2 Minutes of the meeting of the NRA BOD NRA-NYAGCOMMDIV-01545659-01545742

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Date	Description
3/8/2023	Affidavit of John Commerford as filed in NYSCEF 451625-2020 Docket Entry 1409
3/8/2023	Affidavit of John Commerford Exhibit 01 as filed in NYSCEF 451625-2020 Docket Entry 1468
3/8/2023	Affidavit of John Commerford Exhibit 02 as filed in NYSCEF 451625-2020 Docket Entry 1469
3/8/2023	Affidavit of John Commerford Exhibit 03 as filed in NYSCEF 451625-2020 Docket Entry 1470
3/8/2023	Affidavit of John Commerford Exhibit 04 as filed in NYSCEF 451625-2020 Docket Entry 1471
3/8/2023	Affidavit of John Commerford Exhibit 04a as filed in NYSCEF 451625-2020 Docket Entry 1472
3/8/2023	Affidavit of John Commerford Exhibit 05 as filed in NYSCEF 451625-2020 Docket Entry 1473
3/8/2023	Affidavit of John Commerford Exhibit 06 as filed in NYSCEF 451625-2020 Docket Entry 1474
3/8/2023	Affidavit of John Commerford Exhibit 07a as filed in NYSCEF 451625-2020 Docket Entry 1476
3/8/2023	Affidavit of John Commerford Exhibit 08 as filed in NYSCEF 451625-2020 Docket Entry 1477
3/8/2023	Affidavit of John Commerford Exhibit 09 as filed in NYSCEF 451625-2020 Docket Entry 1478
3/8/2023	Affidavit of John Commerford Exhibit 09a as filed in NYSCEF 451625-2020 Docket Entry 1479
3/8/2023	Affidavit of John Commerford Exhibit 10 as filed in NYSCEF 451625-2020 Docket Entry 1480
3/8/2023	Affidavit of John Commerford Exhibit 11 as filed in NYSCEF 451625-2020 Docket Entry 1481
3/8/2023	Affidavit of John Commerford Exhibit 12 as filed in NYSCEF 451625-2020 Docket Entry 1482
3/8/2023	Affidavit of John Commerford Exhibit 13 as filed in NYSCEF 451625-2020 Docket Entry 1483
3/8/2023	Affidavit of John Commerford Exhibit 14 as filed in NYSCEF 451625-2020 Docket Entry 1484
3/8/2023	Affidavit of John Commerford Exhibit 15 as filed in NYSCEF 451625-2020 Docket Entry 1485
3/8/2023	Affidavit of John Commerford Exhibit 16 as filed in NYSCEF 451625-2020 Docket Entry 1486
3/8/2023	Affidavit of John Commerford Exhibit 17 as filed in NYSCEF 451625-2020 Docket Entry 1487
3/8/2023	Affidavit of John Commerford Exhibit 17a as filed in NYSCEF 451625-2020 Docket Entry 1488
3/8/2023	Affidavit of John Commerford Exhibit 18 as filed in NYSCEF 451625-2020 Docket Entry 1489
3/8/2023	Affidavit of John Commerford Exhibit 19 as filed in NYSCEF 451625-2020 Docket Entry 1490
3/8/2023	Affidavit of John Commerford Exhibit 20 as filed in NYSCEF 451625-2020 Docket Entry 1491
3/8/2023	Affidavit of John Commerford Exhibit 21 as filed in NYSCEF 451625-2020 Docket Entry 1492
3/8/2023	Affidavit of John Commerford Exhibit 22 as filed in NYSCEF 451625-2020 Docket Entry 1493
3/8/2023	Affidavit of John Commerford Exhibit 23 as filed in NYSCEF 451625-2020 Docket Entry 1494
3/8/2023	Affidavit of John Commerford Exhibit 24 as filed in NYSCEF 451625-2020 Docket Entry 1495
3/8/2023	Affidavit of John Commerford Exhibit 25 as filed in NYSCEF 451625-2020 Docket Entry 1496
3/8/2023	Affidavit of John Commerford Exhibit 26 as filed in NYSCEF 451625-2020 Docket Entry 1497
3/8/2023	Affidavit of John Commerford Exhibit 27 as filed in NYSCEF 451625-2020 Docket Entry 1498
3/8/2023	Affidavit of John Commerford Exhibit 28 as filed in NYSCEF 451625-2020 Docket Entry 1499
3/8/2023	Affidavit of John Commerford Exhibit07 as filed in NYSCEF 451625-2020 Docket Entry 1475
3/13/2023	Affidavit of Derek Robinson as filed in NYSCEF 451625-2020 Docket Entry 1411
4/6/2023	2021 CHAR500, 990 Form, Audited Financial Statement
4/6/2023	2021 CHAR500, 990 Form, Audited Financial Statement
5/3/2023	"Friends of NRA Announces 2022 Volunteers of the Year" - NRA Website
6/8/2023	"2023 AMA Annual Meeting: 7 issues to watch" - AMA-Assn Article
8/1/2023	Tish James on Twitter
8/8/2023	"ABA Annual Meeting & Expo - American Bar Association" - August 3-8, 2023

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Date	Description
11/15/2023	2022 CHAR500, 990 Form, Audited Financial Statement
1/5/2024	Tyler Schropp Deposition Exhibit 3 Minutes of the meeting of the NRA BOD NRA-NYAGCOMMDIV-01559645-01559881
1/11/2024	LaPierre-audio-full
1/11/2024	New Recording Shows NRA Treasurer Plotting to Conceal Extravagant Expenses Involving Wayne LaPierre (1)
1/11/2024	New Recording Shows NRA Treasurer Plotting to Conceal Extravagant Expenses Involving Wayne LaPierre (2)
1/11/2024	New Recording Shows NRA Treasurer Plotting to Conceal Extravagant Expenses Involving Wayne LaPierre (3)
1/11/2024	NYAG v NRA Trial Transcript
1/11/2024	The Trace-New Recording Shows NRA Treasurer Plotting to Conceal Extravagant Expenses Involving Wayne LaPierre
1/17/2024	NYAG v. NRA Trial Testimony
1/18/2024	NYAG v. NRA Trial Testimony
1/30/2024	NYAG v NRA Trial Transcript
2/6/2024	NYAG v NRA Trial Transcript
2/7/2024	NYAG v. NRA Trial Testimony
2/8/2024	NYAG v NRA Trial Transcript
2/24/2024	John Commerford Deposition Exhibit 3 2024-02-24 S. Daniels email to A. Arulanandam re Board Communication re NY Jury Verdict NRA-NYAGCOMMDIV-01567087-01567089
5/2/2024	"2024 NRA Board of Directors Election Results" - American Rifleman article
5/9/2024	John Commerford Deposition Exhibit 1 Amended Notice to Take Deposition or NRA Representative
5/9/2024	Tyler Schropp Deposition Exhibit 1 Amended Notice to Take Deposition or NRA Representative
5/13/2024	"Dallas could spend about \$138,000 to host NRA convention" - WFAA article
5/15/2024	John Commerford Deposition Transcript
5/16/2024	2024-05-15 Schropp, Tyler Deposition Rough Draft Transcript
5/16/2024	Tyler Schropp Deposition Transcript
5/20/2024	"Bob Barr Elected NRA President, Doug Hamlin Elected to Serve as NRA Executive Vice President & CEO" - NRA-ILA Article

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Documents with Bates Numbers

Bates Number
Aronson_NRA0046027
NRA-NYAG-00018664
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NRA-NYAGCOMMDIV-01575254 - NRA-NYAGCOMMDIV-01575256
NRA-NYAGCOMMDIV-01575257 - NRA-NYAGCOMMDIV-01575258
NRA-NYAGCOMMDIV-01575259 - NRA-NYAGCOMMDIV-01575260
NRA-NYAGCOMMDIV-01575261 - NRA-NYAGCOMMDIV-01575262
NRA-NYAGCOMMDIV-01575263
NRA-NYAGCOMMDIV-01575264 - NRA-NYAGCOMMDIV-01575265
NYAG-00014929
NYAG-00282434

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Exhibit 1**Resume****Professional Experience**

Independent fundraising consultant, 2019 - Present.

Senior Vice President for Development and Alumni Relations, Boston University, 2006 – 2019.

Associate Dean for Development and Alumni Relations, Harvard Law School, 1986 – 2006.

Associate Vice President, Director of Development, DePaul University, 1980-1986.

Director of Annual Giving, Northwestern University, 1978 – 1980.

Director of Alumni Relations (1976-1978), Director of Program Development (1973-1976),

Assistant Director of Development (1971-1973), Bucknell University (1971 – 1978).

Teacher in Morocco with the Peace Corps, 1970 – 1971.

Education

Bachelor of Arts, Bucknell University, 1970. Major – Economics, departmental honors.

Master of Science, University of Pennsylvania, 1975. Major – Educational Administration and Leadership.

Doctor of Education, University of Pennsylvania, 1977. Major – Educational Administration and Leadership. Awarded the William E. Arnold Award for Outstanding Promise of Leadership.

Professional Associations

Board member, Peace Corps Commemorative Foundation, 2015 – Present

Board member, The Shawnee Institute, 2017 – Present.

Trustee Bucknell University, 1993 – 2013. Served as Committee Chair of the Nominating and Governance, Academic Affairs, Advancement, Honorary Degrees.

Trustee, Council for the Advancement and Support of Education, 1999 – 2005. Chair of the National Conference, 2008.

Member, Commission on Philanthropy, Council for the Advancement and Support of Education, 1998 – 2001.

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Chairman, Section on Institutional Advancement, American Association of Law Schools, 1994 – 1996. Member, Executive Committee, 1986 -2006.

Executive Committee, Section on Legal Education and Admission to the Bar, American Bar Association, 1995 -2006.

Advisory Board member, Center for Wealth and Philanthropy, Boston College, 1999 – 2015.

Board Member, Association of Fundraising Professionals, Boston Chapter, 2008-2011.

Teaching

Seminar for New Presidents, Harvard University Graduate School of Education, 1995 – Present.

Harvard University, “Principles and Practices of Fundraising.” Extension School, 1997 – 2006.

Harvard University, Institute for Educational Management, Graduate School of Education, 1993-2001.

Harvard University, Management Development Program, Graduate School of Education, 1994-1998.

Kellogg Graduate School of Management, Northwestern University, Lecturer on Nonprofit Marketing, 1978-1980.

National University System, Morocco, teacher. 1970-1971.

Publications

Books, co-author

New Strategies for Educational Fund Raising, 2002, American Council on Education, Praeger Series on Higher Education.

The Unit Development Officer’s Handbook, 2002, Council for the Advancement and Support of Education.

The Handbook of Institutional Advancement, 2nd edition, 1986, “Annual Giving Programs: Responding to New Trends and Realities.” Jossey Bass.

The Successful Capital Campaign, 1986, Council for the Advancement and Support of Education.
New Directions for Institutional Advancement: Increasing Annual Giving, 1980, Jossey Bass.

Numerous published articles.

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Partial list of consulting clients

Alvernia University
American Association of Law Schools
American Baptist Association
American Ireland Fund
American Repertory Theater of Harvard University
Association of Theological Schools
Autism Speaks
Bowdoin College
Bryant College
CASE Western Reserve University
Chronic Fatigue Syndrome Association
Colby College
College of St. Benedict
Columbia Law School
Cornell Law School
Cornell University
Democratic National Committee
Harvard University
 Climate Observatory
 New Presidents Seminars
 Presidents Advanced Seminars
 Management Development Program
 Institute for Educational Management
 Program on International Financial Systems, Harvard Law School
Ireland Funds Worldwide
Johnson and Wales University
Joint Center for Political and Economic Studies
King's Academy, Amman Jordan
Kohn Cruikshank
Legal Aid Society
McGeorge School of Law
National Ballet of Canada
Natural Resources Defense Council
Oberlin College
Oklahoma City University
Operation Homefront
Peace Corps Commemorative Foundation
Rails to Trails Conservancy
Shawnee Institute
Stanford Law School
State University of New York at Buffalo
Syracuse Law School
The Nature Conservancy
Trinity University, Dublin
University of California San Francisco
University College Cork

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University College Galway
University of Baltimore
University of Chicago Law School
University of Maine Law
University of Maryland
University of Michigan Law School
University of Mississippi
University of Vermont
Victoria College

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Exhibit 2

Dues and Contributions – NRA Audited Financial Statements						
2018-2023						
	2018²⁹	2019³⁰	2020³¹	2021³²	2022³³	2023³⁴
Dues	\$170,391,374	\$112,969,564	\$119,746,915	\$97,478,535	\$83,274,950	\$61,825,078
Contributions	\$110,276,554	\$95,705,343	\$97,364,222	\$79,416,321	\$65,306,547	\$52,837,170
Total	\$280,667,928	\$208,674,907	\$217,111,137	\$176,894,856	\$148,581,497	\$114,662,248

²⁹See PX-2512 p. 85

³⁰ See PX-0159 p. 22

³¹ See PX-2374 p. 78

³² See DX1-0729 p. 210

³³ See PX-0226 p. 70

³⁴ See NRA-NYAGCOMMDIV-01572583 p. 7

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Exhibit 3

Member Report by State 2018-2023						
	2018³⁵	2019³⁶	2020³⁷	2021³⁸	2022³⁹	2023⁴⁰
Total NRA Members	5,261,613	4,898,791	4,845,664	4,606,029	4,312,388	3,905,694

³⁵ See NRA-NYAGCOMMDIV-01574173

³⁶ See NRA-NYAGCOMMDIV-01574176

³⁷ See NRA-NYAGCOMMDIV-01574182

³⁸ See NRA-NYAGCOMMDIV-01574179

³⁹ See NRA-NYAGCOMMDIV-01573959

⁴⁰ See NRA-NYAGCOMMDIV-01573962

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Exhibit 4

Planned Giving Results		
Year	Yearly Increase	Cumulative
2018⁴¹	\$14,333,400 ⁴²	\$298,868,300
2019⁴³	\$32,114,200	\$330,982,500
2020⁴⁴	\$6,306,100	\$337,288,600
2021⁴⁵	\$(3,988,100)	\$333,300,500
2022⁴⁶	\$5,726,100	\$339,026,600
2023⁴⁷	\$1,524,000	\$340,550,600
2024 YTD 02/29/24⁴⁸	\$787,900	\$341,338,500

⁴¹ See NRA-NYAGCOMMDIV-00117612

⁴² See NRA-NYAGCOMMDIV-01529620 Reports \$284,534,900 within the “Accumulated Planned Gifts” section. This figure was subtracted from the “Accumulated Planned Gifts” from the 2018 Financial Statement Package.

⁴³ See NRA-NYAGCOMMDIV-00999056

⁴⁴ See NRA-NYAGCOMMDIV-01530337

⁴⁵ See NRA-NYAGCOMMDIV-01530442

⁴⁶ See NRA-NYAGCOMMDIV-01574147

⁴⁷ See NRA-NYAGCOMMDIV-01571629

⁴⁸ See NRA-NYAGCOMMDIV-01571499