



End-to-End Event Management (E2EEM) Task Force Meeting Minutes

July 23, 2010

Attendees:

Lisa Baumann, Metro
Mark Gill, Florida
Richard Hess, Colorado
Emmett Hines, Gulf
Steve Peterson, Pacific Northwest
Jeanne Seidler, Wisconsin
Ed Tsuzuki (Chair), New Jersey
Mary Beth Windrath, Minnesota

The Task Force reviewed and critiqued a draft process flow for event sanctions. The draft is documented below.

Sanctions Process Strawman

1. Event host/director requests sanction
 - a. Either from LMSC or within USMS, or could be someone outside of USMS as well
 - i. "Click here" to apply for an event sanction
 - ii. Presented with form, similar to Calendar of Events request form
 1. <http://www.usms.org/comp/eventform.php>
 - iii. Complete form
 1. http://www.usms.org/admin/lmschb/gto_sanc_pool_application.pdf
 2. Additional fields (see survey results/additional LMSC forms)
 - iv. Allow attachments that can be viewed and/or downloaded by reviewer (sanctions chair), to allow for LMSC specific requirements
 - v. Integrated with certified pool length data base, allowing requester to select from filtered (by LMSC) list of all pools (certified or not), or can enter new pool information. Meet sanction information would capture the certification status.



- vi. Allow submission of credit card information for validation (fee to be processed upon approval of sanction request)
 - 1. If sanction is denied, would need a way to refund the fee
 - 2. Fees are established uniquely by LMSC
 - 3. Need a way to collect a performance bond as a deposit only, and have a way to refund the bond as appropriate
 - 4. Need a way to get the appropriate funds to the LMSC
 - 5. Some LMSCs collect money after the event (e.g. splash fee). Would be best to have one process for collecting fees (across USMS). Perhaps, if you do it the common way, can use the on-line (credit card) process, else will have to do it manually. LMSC Dev. Committee could assist here.
 - 6. Might look at automatic withdrawal from bank account as well.
 - vii. Submit form
 - viii. E-mail is generated to LMSC sanctions chair, cc-ing event director who submitted request
 - 1. Reminders sent every N days (N could be set as a parameter)
 - 2. Allow LMSC to add other people to cc (notification) list
 - ix. Provide ability to view and edit open requests
 - 1. Might need a way to control who has access to which requests
 - b. Concerns:
 - i. Some LMSCs apply for the sanction very late in the process. Will add a meet to the calendar well in advance of requesting a sanction.
 - ii. Should allow process to set calendar first as well as request sanction first.
 - iii. Perhaps calendar gets established and populated early with restricted access within LMSC. From there, sanctions could be requested from there.
2. LMSC sanctions chair logs in to USMS admin
- a. LMSC sanctions chair can:
 - i. View pending requests – with ability to approve/deny
 - 1. Display appropriate historical information on the requester or organization (club) who has requested



- sanction. Would need indicator flags in data base to be able to display this information. In order to gather this data, there would need to be a feedback capability where someone (e.g. Sanctions Chair, Top Ten Recorder, LMSC Chair, Officials Chair) could enter comments on any event throughout its life cycle. (e.g. not enough officials, late for submitting results, etc.). Capture individual who has entered comments.
- ii. Updates to the request status or application information (e.g. public comments) should be automatically generated and sent to requester (e.g. Submitted, Pending, Approved, Denied)
 1. Approve
 - a. Add sanction number (provide this capability, however offer option to accept automatically generated “USMS Sanction ID” (see c. below)
 - b. Disallow existing number within LMSC if it already exists in the data base
 - c. Create “USMS sanction ID” (per Guide to Operations) for event tracking
 - d. Attach LMSC specific documents to be forwarded to event director
 - i. LMSC can maintain set of documents on USMS server
 - ii. Browse local hard drive and attach documents
 2. Deny
 - a. Add comments (reason for denial)
 - i. Public comment
 - ii. Private comment
 - b. Returned to requester
 - c. Requester can edit and resubmit, or cancel
 - d. If requester cancels, Sanctions Chair should be able to decide whether this requests remains in history
 3. Requester gets notified of outcome (cc: Sanctions chair, Top Ten, Officials Chair – allow LMSC to maintain notification list)
 - iii. View past approved or denied requests, within LMSC
 - b. All requests can be viewed by National Office, VP Local Operations, Records and Tab Chair



- i. View all
 - ii. Select by LMSC

- 3. Approved events automatically added or (updated if on calendar as “pending” event) to USMS Calendar of Events and will be tracked (as part of E2EEM throughout its life cycle). (see concerns above regarding order of sanction request vs. calendar request)

- 4. Post-Event process event
 - a. feedback on event
 - b. event results
 - c. splash fees
 - d. etc.

- 5. Dashboard for VPLO, National Office, Records and Tab chair
 - a. Sanction requests and status
 - b. Events and status
 - c. Exceptions
 - i. Sanctions applied for not yet reviewed
 - ii. Post-Event steps not completed
 - iii. Event validated (e.g. pool length certified)
 - iv. Event results/swims not processed/validated (e.g. USMS membership, relays validated, etc.)
 - v. National/World records not applied for