

# U.S. Masters Swimming Business Plan 2012-2013

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## **Mission Statement**

To promote health, wellness, fitness and competition for adults through swimming.

## **Introduction**

Masters Swimming was organized in the late 1960s at the urging of Dr. Ransom Arthur. Dr. Arthur believed adults should swim for fitness. Based on his recommendation, the American Swim Coaches Association agreed to sponsor an adult swimming committee.

In the early 1970s, Masters Swimming became a committee of the Amateur Athletic Union. When the AAU disbanded in 1978, many national governing bodies, including United States Masters Swimming, were incorporated and formed.

In the 1980s, USMS registered its 20,000th member. It also gained full and equal recognition as a national governing body in United States Aquatic Sports. USAS is our voice to FINA, the global governing body for aquatics. This recognition provides USMS the same distinction as USA Swimming, USA Diving, USA Water Polo and USA Synchronized Swimming, our fellow NGB partners that comprise USAS.

During the 1990s, USMS became the leading authority on Masters swimming through projects like the development of usms.org. And in the millennium decade, USMS surpassed 40,000 members, hosted a FINA World Championship, and instituted governance changes that allowed the organization to evolve with a professional management structure.

In this decade, USMS established its headquarters and professional staff, rebranded its image, adopted a new strategic plan, created the Swimming Saves Lives Foundation, initiated Masters coach certification, will host a nationals in the Olympic Trials venue, and will host a Pan American Masters Championship for the first time.

Through the decades, USMS has survived and grown because of four primary ingredients: passionate volunteers, members who financially supported USMS, financial discipline, and resilient focus on the USMS mission.

It is worth noting that financial discipline has been an evergreen organizational principal. Our operating budget has nearly doubled the past five years to \$2.5 million and our investment reserve is nearly \$2 million. Our annual budget is published at usms.org and likewise our tax return is publicly available. We provide a Controller's letter and financials each month to the Board and Finance Committee. We forecast a two-year financial pro forma during the annual budget process. And our business is audited each year by an independent accounting firm. Hence, financial information that is readily available and vetted on a regular basis is not included in this plan.

This business plan follows the direction of our strategic plan that was adopted at the 2011 USMS annual convention. Its purpose is to fit hand and glove with the strategic plan. It is drafted with a two-year horizon allowing us to use it as a report card. Organizational opportunities within each strategy are highlighted by benefit and assigned to the appropriate committee and/or staff member.

Despite our momentum and successes, we are not without challenges. Submitted to the Board as Appendix A are challenges and potential risks to our business model, and what steps we have or should take to mitigate our exposure.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Rob Butcher". The signature is written in a cursive, flowing style.

Rob Butcher,  
| Executive Director

## **Our Values**

- We value HEALTH AND FITNESS, constantly challenging ourselves to achieve, in competition and in accomplishing our own goals.
- We value RESPECT for our teammates, competitors, coaches, employees, and volunteers.
- We value FUN, enjoying camaraderie with our fellow swimmers and embracing swimming as a joyful and satisfying avocation.
- We value LEARNING through coaching, programs, and communication.
- We value EXCELLENCE in safety, education, innovation, performance, leadership, and the provision of services and programs.

## **Our Strategies**

- Enhance the volunteer experience and improve volunteer performance through role clarity, training, recognition, and recruitment.
- Create and enhance membership value through expanded and improved USMS products, services and delivery infrastructure.
- Increase awareness of and strengthen the U.S. Masters Swimming brand and image in targeted markets.
- Engage and activate partnerships with organizations that align with the USMS mission, vision and values, for the purpose of increasing benefits to our members, enhancing and expanding the USMS brand, building USMS membership and improving access to swimming facilities.

## **USMS Core Business**

- Membership sales and consistent membership service in partnership with Local Masters Swimming Committees, clubs, chapters, and coaches
- Club and coach services support that includes being a resource to existing USMS programs, incubating new USMS programs, USMS Masters coach certification, and partnerships
- Sanction and promotion of pool, open water and virtual events
- Development and promotion of swimming-related content for adults
- Sponsorship, advertising and partnerships
- Swimming Saves Lives Foundation

## **USMS Responsibilities**

The USMS National Office consists of six divisions, each with its own staff leader and responsibilities.

### ***Executive Director***

#### **Assigned Leader: Rob Butcher**

- Board of Directors relations
- Executive Committee relations
- Compensation and Benefits Committee relations
- National Office, staff and contractor oversight
- Financial oversight
- Domestic relations
- International relations
- Strategic planning
- Crisis management and disaster recovery oversight
- Swimming Saves Lives Foundation

### ***Financial***

#### **Assigned Leader: Susan Kuhlman**

- Finance Committee, Audit Committee and Investment Committee relations
- Treasurer relations
- Budget management
- Cash management
- Financial Operating Guidelines controls
- Gift acceptance controls
- Internal and external financial reporting
- Human resources and payroll services
- Swimming Saves Lives Foundation

### ***Member Services***

#### **Assigned Leader: Anna Lea Matysek**

- Member customer service
- Membership retention programs
- LMSC relations
- Convention relations

### ***Club and Coach Services***

#### **Assigned Leader: Bill Brenner**

- Club and chapter relations
- Growth of new clubs and chapters
- Liaison for clinics and education
- Coaches Committee relations
- USMS Masters coach certification management

## ***Information Technology***

### **Assigned Leader: Jim Matysek**

- Management of usms.org
- Safeguarding IT systems and information
- Web development
- Web registration support
- Nationals event registration
- Web customer service
- IT support for LMSCs

## ***Publications***

### **Assigned Leader: Laura Hamel**

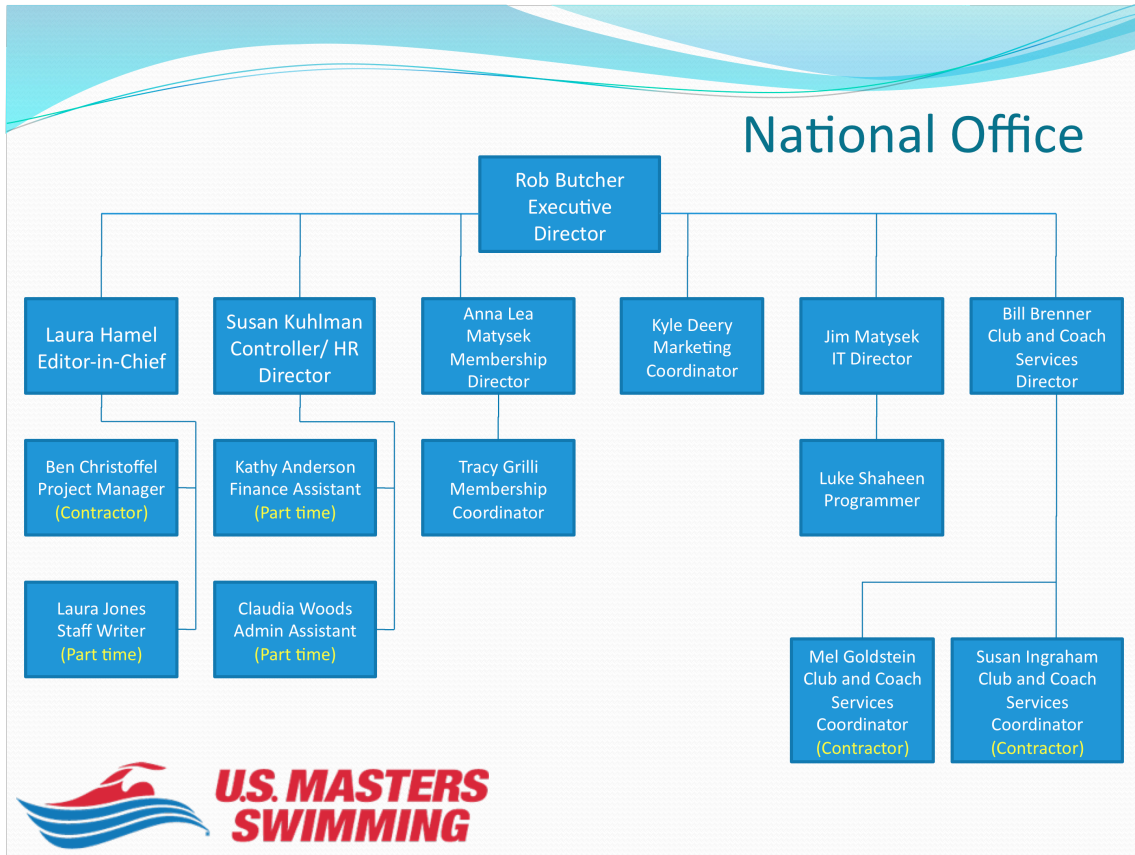
- *SWIMMER* magazine management and publication
- *STREAMLINES*, *STREAMLINES for Coaches* and *STREAMLINES for Volunteers* newsletter management and publication
- Editorial content management for usms.org
- Social media content management
- Creative services management (i.e. graphics design, video content, etc.)
- Press liaison and communications management

## ***Marketing***

### **Assigned Leader: Kyle Deery**

- Sponsor partner sales, service and activation
- Advertising sales and service
- Merchandising and licensing opportunities
- National championship, open water and postal event support
- Promotions and marketing campaigns
- Marketing resources management

# USMS Organizational Chart



## Our Priorities That Support The Strategic Plan

### *Strategic Priority #1*

Enhance the volunteer experience and improve volunteer performance through role clarity, training, recognition, and recruitment.

<b>Description</b>	<b>Benefit</b>	<b>Responsibility</b>	<b>Status</b>
Define volunteer responsibilities	Written job descriptions and expectations for all LMSC positions, committee chairs, executive committee, and board positions published. Engage mentors to assist volunteers	Volunteer Task Force, Board of Directors	In progress
Year-round training for volunteers	Committees and the National Office continue to write and make available tutorials, and offer webinars on such responsibilities as Top 10, Treasurer and Sanctions	LMSC Development Com., National Office (Anna Lea Matysek, Tracy Grilli, Susan Kuhlman)	In progress, ongoing
Volunteer training at Convention	Use satisfaction surveys to identify needs, measure the effectiveness and areas of improvement for volunteers	LMSC Development Committee, Executive Committee	In progress, ongoing
Registration and club retention program offered through the National Office	Puts the operational and time sensitive burden of renewals on staff, allowing Registrars to serve as experts to members in their LMSCs	National Office (Anna Lea Matysek, Bill Brenner)	2012 initiative
Recommend LMSCs establish a triathlon liaison volunteer position	18% of USMS members self identify as triathletes, providing a pool of potential volunteers. Utilize their talent and interest to further promote USMS at local triathlon events	Coaches Committee, Executive Committee	Recommendation
Recommend LMSCs establish a high school and college club swimming liaison volunteer position	This demographic is the future of Masters Swimming. Raise awareness by sponsoring and promoting to high school and college club swimming.	Coaches Committee, Executive Committee	Recommendation
Encourage LMSCs host regional SwimFest and clinics with USMS support	Increased hands-on education and training opportunities for USMS coaches	Executive Committee, Coaches Committee	Recommendation
Continue recording convention workshops	Allows access to education and information anytime via the web	LMSC Development Com., National Office	In progress

## ***Strategic Priority #2***

Create and enhance membership value through expanded and improved USMS products, services and delivery infrastructure.

<b>Description</b>	<b>Benefit</b>	<b>Responsibility</b>	<b>Status</b>
Adopt recommendations from the Membership Task Force	Create membership products that cater to our diverse membership interests, increasing the likelihood for growth and retention	Membership Task Force, Board of Directors, House of Delegates	2012 initiative
Redesign usms.org	Position usms.org as the premier online resource for adult aquatics	National Office (Rob Butcher)	2012-2013 initiative
Add more functionality to the Fitness Logs (FLOGs)	The FLOGS is our fastest growing member benefit and more functionality will lead to more use by members	National Office (Jim Matysek)	In progress
Incorporate open water and postal event results into the online database	Meets the needs of our open water demographic	National Office (Jim Matysek)	2012 initiative
Introduce the online sanction database	Gather important information about USMS events on the front end that can feed into the Calendar of Events and Results	End-to-End Event Management Task Force, National Office (Luke Shaheen)	2012 initiative
Grow USMS Masters coach certification program	Improve Level 1, Level 2 and add a Level 3 and Level 4 to provide education to our coaches	National Office (Bill Brenner)	In progress
Publish <i>SWIMMER</i> in a digital format	Extends the reach of our magazine to the digital audience	National Office (Laura Hamel)	2012 initiative
Create mobile apps	Allows members, and non-members, to connect to usms.org via tablets and other mobile devices	National Office (Jim Matysek)	Recommendation for 2012 and continue in 2013 and 2014
Create a 1-Mile Swim Challenge	Establishes a participation opportunity that every USMS member can achieve, and promotes SSL	Swimming Saves Lives Foundation, National Office (Rob Butcher)	Recommended opportunity for 2012 or 2013
Offer a website template to clubs and chapters	Many clubs and chapters do not have the resources to create their own website, a template could pull information from usms.org such as Places to Swim, Calendar of Events, event results, MY USMS, sanctions, etc.	National Office (Jim Matysek, Laura Hamel)	Survey clubs and chapters to gauge interest before dedicating resources and proceeding



### ***Strategic Priority #3***

Increase awareness of and strengthen the U.S. Masters Swimming brand and image in targeted markets.

<b>Description</b>	<b>Measurable Benefit</b>	<b>Responsibility</b>	<b>Status</b>
Increase number of coaches providing online workouts	Provides valuable benefit to markets such as triathletes, expectant mother and those who swim alone/unattached	Coaches Committee	2012 initiative
Create advertising messaging that promotes USMS	Raises the image of our brand with target specific markets (i.e. triathlon, college, high school, etc.)	National Office (Rob Butcher)	Ongoing
Increase activation and promotion through our sponsor partners	Expands our brand beyond our own communication capabilities	National Office (Kyle Deery)	Ongoing
Target chains such as 24 Hour Fitness, LA Fitness	Increased access to pools to expand Masters Swimming	National Office (Bill Brenner)	Ongoing
Sponsor high school swimming and state championships	The LMSC high school/college swimming liaison would take the lead and USMS would provide support	LMSCs, National Office (Kyle Deery)	Recommendation
Create more content that is of interest to the new/beginning adult swimmer	Improved member retention rate for first time joiners	Coaches Committee, Fitness Committee, National Office (Laura Hamel)	Recommendation
Create press release templates for events, clubs, and chapters	Help clubs market themselves while providing a consistent message about Masters Swimming to the public	National Office (Laura Hamel)	Recommendation
Host the 2012 USMS Summer Nationals in the Olympic Trials venue	Elevate USMS brand, enthuse sponsors, and promote SSL	National Office (Rob Butcher)	In progress
Host the 2013 Pan American Masters Championship	Showcase USMS to UANA internationally, creates a financial opportunity	National Office (Rob Butcher)	In progress

### ***Strategic Priority #4***

Engage and activate partnerships with organizations that align with the USMS mission, vision and values, for the purpose of increasing benefits to our members, enhancing and expanding the USMS brand, building USMS membership and improving access to swimming facilities.

<b>Description</b>	<b>Measurable Benefit</b>	<b>Responsibility</b>	<b>Status</b>
Network with other NGBs and membership-based organizations	Learn from mutual challenges and solutions that can be applied to our business	National Office	Ongoing
Partner with target-specific web sites	Expand messaging to sites, such as Growing Bolder and Athletic Foodie, that have crossover demographics	National Office (Kyle Deery)	Ongoing
Attend select college meets	Reaches out to a desired demographic	LMSCs, National Office (Kyle Deery)	Recommendation
Seek to partner with other associations that see the value in a relationship with Masters Swimming	Examples would be sanctioning Swim Across America events and dual sanction/recognition with USAT open water events providing more opportunity for members	National Office (Rob Butcher)	Recommendation