

U.S. Masters Swimming

Strategic Plan Update

Four decades ago, Dr. Ransom Arthur penned a document boldly stating a then radical belief that adults should swim for fitness. Much talent, time, and treasure has been invested since then to advance our belief. It hasn't been without challenges. Today, USMS stands as the only self-governed Masters Swimming organization in the world. We accept, with honor, the responsibilities that come with our position as a global leader in encouraging adults to swim.

At the 2011 USMS annual meeting, we adopted a strategic plan that supports a goal of growing to 100,000 members. The summary within these pages reminds us of our values and strategies, and shares progress of the plan while providing a look ahead.

SWIMMING FOR LIFE,



Nadine Day
President



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

- I. Enhance** the volunteer experience and improve volunteer performance through role clarity, training, recognition, and recruitment.
- II. Create and enhance** membership value through expanded and improved USMS products, services and delivery infrastructure.
- III. Increase awareness** of and strengthen the USMS brand and image in targeted markets.
- IV. 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.

Our Core Business Areas

- ☑ Membership sales and consistent membership service
- ☑ Education and certification for Masters Swimming coaches
- ☑ Education and support for existing USMS programs
- ☑ Incubation of new USMS programs
- ☑ Sanction and promotion of pool, open water, and virtual events
- ☑ Development and promotion of swimming-related content
- ☑ Sponsorship, advertising, and partnerships
- ☑ Swimming Saves Lives Foundation

USMS Milestones

- **1968** Dr. Ransom Arthur publishes Swimming and Cardiovascular Fitness in the Older Age Group
- **1970** The first Masters Nationals were held in Amarillo, Texas, with 47 swimmers
- **1973** After much lobbying, the Amateur Athletic Union sponsors a Masters Swimming Committee
- **1978** The Amateur Sports Act broke up the AAU and USMS became the only self-governed Masters Swimming national governing body in the world
- **1980** United States Aquatic Sports was formed and in 1988 USMS gained full and equal recognition, along with USA Swimming, USA Water Polo, USA Diving, and USA Synchro
- **1986** USMS registered its 20,000th member
- **1992** USMS hosted the FINA World Championships in Indianapolis
- **1996** The USMS website, usms.org, was created and has become the leading web resource for Masters Swimming
- **2001** USMS registered its 40,000th member
- **2006** USMS hosted the FINA World Championship at Stanford University
- **2008** In 2008 and 2009, USMS hired a full-time executive director, rebranded itself, introduced online registration, registered its 50,000th member, and established its National Office in Sarasota, Fla.
- **2012** USMS hosted the Marriott Summer Nationals following the USA Swimming Olympic Trials in Omaha, Neb., in the same venue.
- **2012** The Swimming Saves Lives Foundation is established functioning under the nonprofit umbrella of USMS
- **2013** USMS hosted the Pan-American Masters Championship, the first time the event has ever been hosted in the U.S.
- **2020** USMS will celebrate its 50th anniversary

Programming Priorities

We have 52 Local Masters Swimming Committees and 18 national volunteer committees. Our National Office consists of an executive director and six divisions: membership services and LMSC support; club and coach services and education; communications and publications; marketing and promotion; information technology; and administration, financial, and Swimming Saves Lives Foundation. All are aligned to implement our strategic plan.

Engage Volunteers

OBJECTIVE: Recruit and train new volunteers, create and publish written volunteer job descriptions, and recognize volunteers.

OUR PROGRESS

Membership is growing and so is the number of clubs. Provision of services is becoming more extensive and delivery time-sensitive. Since 2012, LMSCs have experienced the following volunteer turnover rates:

- ✓ Registrar 15%
- ✓ Sanction chair 31%
- ✓ Top 10 21%
- ✓ Treasurer 23%

Volunteer job descriptions that define the necessary skills, responsibilities, and time commitment have been created and published at usms.org. The National Office has provided service when volunteers are unable to.

LOOKING AHEAD

Utilize convention and zone workshops to provide relevant education, training, and recruitment for volunteers. LMSC officers should have working knowledge of the USMS Guide To Operations, which includes information on keeping bylaws up to date, documenting, retaining, mentoring, and passing on institutional knowledge to new volunteers. Continue to share volunteer stories in *SWIMMER*, *STREAMLINES* and other communication channels.

OBJECTIVE: Improve volunteer communication.

OUR PROGRESS

STREAMLINES for Volunteers is a bimonthly publication with content created for volunteers. SLV is archived at usms.org. Committees and LMSCs have dedicated discussion areas at usms.org so information may be shared and archived.

LOOKING AHEAD

LMSCs should keep their websites up-to-date with accurate information from usms.org. Meeting minutes should be published in a timely fashion. Committees to assign publications liaisons in order to get vital information to their target audiences.

Enhance Membership

OBJECTIVE: Educate and certify Masters Swimming coaches, who can make or break member experience.

OUR PROGRESS

The coach certification program helps coaches become successful. Levels 1 and 2 teach on topics such as characteristics of a successful Masters Swimming coach, understanding the adult learner, coaching triathletes and open water swimmers, writing workouts, marketing, and stroke school. Level 3 prepares the Masters coach to become the CEO: leadership, budget, events, and developing a support team. All levels are taught in a live classroom environment. Since 2010, 1,100 coaches have attended certification. Surveys of attendees reveal:

- ✓ The majority of coaches attending have been coaching less than three years.
- ✓ 87% responded the program helped improve their Masters Swimming programs.
- ✓ While early in measuring, we see an improved membership retention rate for Masters Swimming programs with a certified coach vs. the overall USMS membership retention rate.
- ✓ The primary interest swimmers participate in their programs are:
 - 44% fitness
 - 31% competitive pool swimmers
 - 22% triathletes
 - 3% open water swimmers

LOOKING AHEAD

Add more coach improvement education products—71% of attendees said they would like to participate in future educational opportunities. Transition management of the certification to USMS. Survey coaches so we can offer products that fit their needs. Train LMSC/Zone ambassadors who can provide quick and accurate turnaround information to facilities seeking to start Masters Swimming programs. Study the cost-benefit of a national Masters Swimming coach conference.

OBJECTIVE: Improve and enhance membership.

OUR PROGRESS

A rewards incentive program is offered for members who renew by December 31. Masters Swimming coaches provide online workouts for members. Enhancements continue to the Fitness Logs with Nike providing prizes. Some content has shifted to a members-only area of usms.org.

LOOKING AHEAD

Develop partnerships with national fitness and weight-loss chains that will offer discounts to USMS members. Utilize membership surveys to uncover member spending habits so we can target those categories for chain discounts.

OBJECTIVE: Create an in-house registration system.

OUR PROGRESS

Controlling our registration system is a necessity for providing new membership products. It has required the upgrade of our IT infrastructure and the addition of new programming staff.

LOOKING AHEAD

Features of the 2014 registration cycle include a coach membership and the ability to register workout groups. Enhancements to be added in 2015 include the ability for club registration information to populate in Places to Swim and new membership types such as a multi-year or introductory memberships.



→ Increase Brand Awareness

💡 OBJECTIVE: Promote USMS at the grass roots.

OUR PROGRESS

Since 2012, we've made 147 site visits (74 to existing or newly registered clubs, 49 to workout groups, and 24 to facilities with no USMS affiliation). The 123 clubs and workout groups represent 12,824 registered USMS members. Event hosts and clubs have requested more than 30,000 USMS branded swim caps. They have also requested more than 400 USMS banners for their facilities.

LOOKING AHEAD

Continue to make site visits for the purpose of educating and promoting the benefits of USMS. Train volunteer ambassadors within LMSCs who have the skills and desire to support this cause. Implement an online ordering process of marketing resource for clubs, workout groups, and event hosts.

💡 OBJECTIVE: Promote USMS through our publications.

OUR PROGRESS

Five years ago, *SWIMMER* magazine and usms.org were our two communication voices. Both have undergone major facelifts and upgraded content management systems. Our website was completely redesigned. We now publish more than 30 e-newsletters annually, we have a robust social media program, we produce more than 30 original videos each year, and we have sponsor partners who want to promote USMS.

LOOKING AHEAD

Creation of a USMS app. Add more content writers. Develop a newsstand model for *SWIMMER* magazine and digitize and archive historic Masters Swimming images. Add resources to take advantage of public relations opportunities.

💡 OBJECTIVE: Promote USMS through the Swimming Saves Lives Foundation

OUR PROGRESS

We have a goal to create a \$10 million foundation. We completed a viability evaluation verifying this can be accomplished, we've identified two giving cases that have emotional appeal and tremendous societal benefit (adult learn-to-swim programs and medical research that advances the benefits of adult swimming), we created and recruited an SSLF Board of Trustees, and we received a record 38 SSLF grant requests for 2013.

LOOKING AHEAD

The CDC estimates that 37% of American adults can't swim the length of a 25-yard pool. Drowning is a societal issue and preventable. In 2012-2013, SSL funded five grants that benefited approximately 200 adults with learn to swim opportunities. In 2013-2014, we expect to provide grants to more than 30 programs that would benefit nearly 4,000 adults with a learn to swim opportunity. Our investment and commitment to eradicating adult drowning is a hand-in-glove complement to our purpose of encouraging adults to swim. Our goal within the next 10 years is to create a network of more than 1,000 SSLF partner providers who are positively impacting lives, with USMS serving as a leader on this issue.

← Activate Partnerships

💡 OBJECTIVE: Establish partnerships with pool providers and improve access to pool facilities

OUR PROGRESS

We are forging relationships with organizations such as NIRSA-Leaders in Collegiate Recreation, College Swimming Coaches Association of America, National Swimming Pool Foundation, National Drowning Prevention Alliance, and the Salvation Army Kroc Center Association. We have become a sought-after presenter at their conferences.

LOOKING AHEAD

Establish relationships with national pool operators such as 24 Hour Fitness, LA Fitness, Boys & Girls Club of America, and Jewish Community Centers of America and educate their aquatics directors on the benefits of offering a Masters Swimming program, certify their coaches, seek access discounts for members, and market their facilities to USMS members.

💡 OBJECTIVE: Sponsor promotion of the USMS brand.

OUR PROGRESS

The number of sponsor/advertising partners has increased from 13 to 35. Household brands such as Marriott, Nationwide, and Garmin add cachet to USMS. Sponsors use the USMS logo in their advertising, websites, and social media campaigns, thus expanding our brand beyond our own communication outlets.

LOOKING AHEAD

Stage unique events that can generate positive and significant publicity for USMS. Encourage technology partners to offer Masters Swimming web templates to clubs, workout groups, and LMSCs so online information is consistent.

Other Priority Initiatives

 Implement our short-term and long-term risk management program with our new risk management partner, Entertainment Sports and Insurance eXperts (ESIX).

 Expand our National Office to better serve our members, clubs, and constituents.

 Develop opportunities to boost our open water national championship events and other open water events.

 Develop a marketing and merchandising plan for our 50th anniversary in 2020.

 Continue to lead global discussions on Masters Swimming issues as we foster international relations, seek FINA committee appointments, and target international events we might want to host.

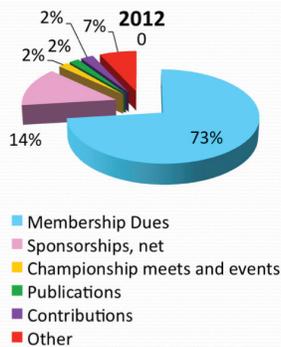


2009 - 2014 Financials

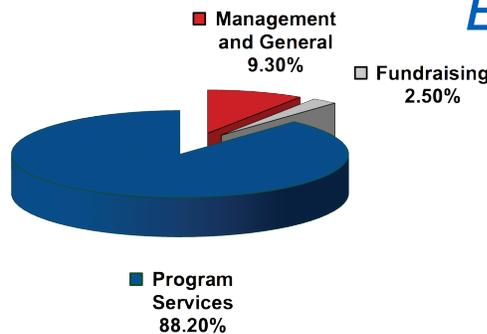
Ordinary Income/Expense	Net Pan Ams		Net Omaha			
Revenues	2014	2013	2012*	2011*	2010*	2009**
Membership	2,137,118	1,957,016	1,805,676	1,618,184	1,471,422	1,306,167
Education, Coach & Club Services	140,750	107,875	80,256	42,245	20,700	19,470
Events Revenue	96,340	132,083	78,958	129,748	82,942	51,893
Sponsorships	558,820	548,966	487,566	451,721	330,886	271,277
Other	76,500	10,000	107,833	66,716	49,554	34,369
Total Income	3,009,528	2,755,940	2,560,289	2,308,614	1,955,504	1,683,176
Expenses						
Membership	1,291,291	1,240,893	1,174,324	1,069,122	1,075,757	999,832
Education, Coach & Club Services	571,599	464,898	351,994	235,925	197,220	203,854
Events Expense	232,827	227,285	261,857	197,280	161,066	134,770
Marketing	214,550	165,100	144,209	193,264	90,738	47,369
Insurance	331,000	331,863	149,071	158,395	147,331	125,337
Convention	91,890	92,710	80,225	66,878	74,495	61,880
Administration	224,388	214,815	197,285	175,710	274,013	73,499
Swimming Saves Lives Fund Raising	51,896	42,006	56,037	126,357	29,051	2,875
Total Expense	3,009,440	2,779,570	2,415,002	2,222,931	2,049,671	1,649,416
Net Ordinary Income	88	(23,630)	145,287	85,683	(94,167)	33,760
Investment Activity	92,500	102,103	151,955	(31,435)	10,748	23,968
Other non-operating activity	(74,600)			(2,069)	22,953	33,318
Net Other Activity	17,900	102,103	151,955	(33,504)	33,701	57,286
Net Income	17,988	78,473	297,242	52,179	(60,466)	91,046

*2012-2010 Source audited financial statements
**2009 Source reviewed financial statements

Revenue



Expenses



USMS BOARD OF DIRECTORS

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USMS COMMITTEE CHAIR AND FINA APPOINTMENTS

Audit Committee, Elyce Dilworth
 Championship Committee, Jeff Roddin
 Coaches Committee, Scott Bay
 Compensation and Benefits, Sarah Welch
 Finance Committee, Jeanne Ensign
 Fitness Education Committee, Marcia Anziano
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 LMSC Development Committee, Paige Buehler
 Long Distance Committee, Donn Livoni
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Open Water Committee, Lynn Hazlewood
 Recognition and Awards Committee, Sally Dillon
 Records and Tabulation Committee, Chris Stevenson
 Registration Committee, Leo Letendre
 Rules Committee, Kathy Casey
 Sports Medicine and Science Committee, Jane Moore
 Swimming Saves Lives Foundation, Doug Church
 FINA Masters Committee Vice-Chair, Mel Goldstein
 FINA Sports Medicine Committee, Dr. Jim Miller

NATIONAL OFFICE STAFF

Executive Director, Rob Butcher
 Chief Financial Officer, Susan Kuhlman
 Membership Director, Anna Lea Matysek
 Membership Coordinator, Tracy Grilli
 Communications and Publications Director, Laura Hamel
 Club and Coach Services Director, Bill Brenner
 Marketing Coordinator, Kyle Deery
 IT Director, Jim Matysek
 Web Developer, Luke Shaheen
 Web Developer, Jeff Perout
 Office Manager, Claudia Woods