



USMS Strategic Plan

I. Introduction

U.S. Masters Swimming initiated an update to its strategic plan during the Spring of 2016. The organization had been operating under a strategic plan developed in 2011. In conjunction with the hiring of a new Chief Executive Officer, the Board of Directors determined a review of the strategic plan was timely. The Board commissioned a Strategic Planning Task Force to develop a process to review the current plan, execute needed research, develop recommendations for updates and ultimately finalize a Strategic Plan to remain in place for up to 5 years.

USMS saw continued growth under the 2011 strategic plan, reaching a record of 63,648 members in 2015. The 2016 annual budget was approximately \$3,500,000 and the organization reserves were \$3,000,000, in addition to strong financial positions in most of USMS's 52 Local Masters Swimming Committees. The National Office moved into larger office space in Sarasota at the beginning of 2016 to accommodate the current staff of 18.

The Strategic Planning Task Force began the process by gathering detailed input through interviews and surveys of USMS's various stakeholders to include the Board of Directors, LMSC Chairs and Vice chairs, Committee Chairs and Vice Chairs, USMS members and the National Office staff. The Task Force reviewed the prior plan for areas of success and continued focus as well as relevance of the strategies in today's marketplace. After gathering all of the pertinent data, the Task Force met with the Board and the National Office staff to evaluate results, identify common themes, prioritize potential strategies and develop specifics of the updated Strategic Plan.

The strategic planning process revealed that the Mission, Vision and Values that have guided the organization since 2011 remain relevant today. While some of the key strategies set forth in this document are similar to the prior plan, adjustments and additions were developed to address shifting demographic and technology trends and the needs of our current and potential members. These strategies are designed to guide USMS decision making and business planning at a high level.



II. Mission

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

III. Vision Statement

USMS will be the premier resource for adult aquatic fitness in the United States and will make fitness through swimming available for as many adults as possible.

IV. 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.

V. Strategies

- **Membership Value:** Enhance and customize value and deliver it to consumer segments based on needs and interests.
- **Brand Clarity:** Simplify USMS branding and marketing to clearly communicate the essence of the USMS brand and to build affinity.
- **Innovation:** Transform USMS offerings to align with the changing environment.
- **Partnerships:**

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

Internal: Enhance the partnership between volunteers, coaches, and the National Office with the shared focus on providing the best membership experience possible.



VI. Explanation of Strategies

Membership Value

Strategy: Enhance and customize value and deliver it to consumer segments based on needs and interests.

An outcome of the 2011 strategic plan was an expansion of USMS products and programs. However, a more customized approach to the USMS membership experience based on the interests and needs of a variety of segments will be critical during the scope of this strategic plan. In today's digital environment, consumers are offered the ability to personalize their experiences with brands, both online and in person. USMS will strive to evolve from a one-size-fits all experience by sharpening our ability to provide value based on our members' preferences.

USMS currently provides value in a uniform way across our various market segments. Competitive pool swimmers, lap swimmers, open water participants and those simply swimming with a club to stay fit all have the same benefits, access to information and communication with USMS regardless of their goals. These market segments have unique reasons for joining our organization and USMS will work to tailor communication and the value proposition for members to maintain their connection with USMS.

USMS provides access to much of our value for free, including workouts, digital articles on usms.org and through social media, marketing materials, and in some cases our brand and logo. USMS will explore ways to protect our brand(s); simplify the cost structure for USMS membership so as to reduce barriers to entry; and enhance the value proposition of USMS membership, including better use of digital technologies to enhance our members' experience.

This strategy extends to USMS clubs, workout groups, and affiliated events. Clubs, workout groups and USMS affiliated events serve as the primary delivery method of USMS services and should be supported to provide the best possible experience for our members. Each club and event has its own unique challenges and USMS will be prepared to provide support through best practices, marketing, administration, negotiation of services, and customer service, with the ultimate goal of offering the best possible swimming experiences for our members.

Primary Measures of Success:

- *Increased membership/customer base and revenue*
 - *Improved member retention rates*

Ancillary Measures

- *More diversity in membership age demographics*
- *Increased event participation rates*
- *Increase in swimmers per club/workout group*
- *Increase in number of Clubs and Coaches*



Brand Clarity

Strategy: Simplify USMS branding and marketing to clearly communicate the essence of the USMS brand and to build affinity.

U.S. Masters Swimming members and volunteers provide the organization effective word-of-mouth and grassroots marketing, often speaking with passion about what USMS means to them. Given USMS's large geographical footprint it is imperative to have a clear and simple branding message integrated throughout the organization's branding and marketing efforts. This message clearly describes USMS and the benefits of membership in a manner that will pique the interest of both former and aspiring swimmers.

The aim of this strategy is to clarify and build the USMS brand to create an equity that makes swimmers proud to belong, non-members eager to join, and external stakeholders interested in affiliating. Optimally promoting health, wellness, and fitness for adults through swimming calls for a brand that beckons adults to want to belong.

Of note, as an organization that is inclusive of any adult 18 years of age or older, the desire to appeal to a wide range of demographics presents challenges to brand clarity and simplification. USMS will strive to ensure that our marketing and branding message(s) appeal to a broad range of demographics, while also promoting programs, services and benefits that engage specific segments.

With a fully developed and consistent brand strategy, USMS will utilize all of our communication assets, to include National Office, LMSC and Club digital communications, Coaching Certification and Clinics, and grass roots volunteer and member communication, to improve awareness among targeted segments and continue to build the USMS brand.

Primary Measure of Success:

- *Survey results showing improved brand awareness*

Ancillary Measures:

- *Increased membership acquisition and retention*



Innovation

Strategy: Transform USMS offerings to align with the changing environment.

To compete in a rapidly evolving market, USMS must embrace innovation. Our core product of competitive swim programs and events remains viable but the evolving demographics of our membership base require that new and creative ideas and opportunities be embraced and evaluated to ensure USMS is an attractive fitness option and remains the premier adult aquatic resource.

USMS will consider, research and develop new initiatives that broaden the appeal of aquatic fitness and event participation. Innovations that attract prospective members and better engage current members are critical to continuing to pursue our mission in a changing environment.

USMS will utilize marketing and membership research and data to help guide our evaluation of initiatives under consideration for testing or development. Technology will be leveraged when feasible to provide improved services, support and communication tools for our members and clubs. While building initiatives that are scalable, USMS will be adaptable in the creation of programs and benefits. Linkages to sponsor opportunities and activation will be explored.

While USMS history and tradition will always play an important role in our culture, innovative approaches are necessary to be able to promote fitness through swimming for the long term.

Primary Measures of Success:

- *Number of offerings tested and implemented*
- *Impact of those initiatives on overall membership*

Ancillary Measures

- *Increased participation in programs and events*
- *Added sponsorship inventory, opportunities and investment*



Partnerships

External

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

Retaining this strategy from 2011, the goal remains the same; to seek out and increase our partnerships with new and current organizations, enhancing membership and ultimately improving access to swimming facilities across the country. USMS currently has niche swimming market sponsorships and holds informal relationships with USA Triathlon, local health clubs, YMCA's and some municipal recreation departments. USMS will continue to capitalize on swimming partnerships while also placing focus on a level of consumer growth attractive to mainstream marketing sponsorships. USMS will formalize relationships with current and prospective industry and community partners, concentrating on specific demographics that are tangible and thus trackable, allowing us to measure our success and identify areas in need of improvement.

Primary Measures of Success:

- Increase in number of partners and sponsorship revenue
- Consumer growth or tangible benefits that are measurable specific to partner

Internal

Strategy: Enhance the partnership between volunteers, coaches, and the National Office with the shared focus on providing the best membership experience possible.

The continued development and growth of USMS and technological advances have created administrative efficiencies that offer opportunities to place added focus on providing world class service and the best possible membership experience. USMS has the benefit of a passionate base of regional and local volunteers and has traditionally set very high expectations on their time and the scope of work. Recognizing the value of these volunteers now and in the future, it is time to optimize their involvement so that their contributions can be directed to that which is best done by volunteers, who have a unique interaction with members and potential members.

USMS will build efficiencies and clarity in the strategic use of National Office staff, volunteers and coaches. USMS will cultivate strong partnerships between all stakeholders to provide consistently high levels of service for our members, regardless of the touchpoint. A continued focus on positive volunteer experiences will be integrated with the organizational goals related to the membership experience.

Primary Measures of Success:

- Increased interest in local and regional opportunities from first time volunteers

Ancillary Measures:

- Improved efficiency and clarity in delivery of membership benefits
- Improved retention and acquisition rates