

**TO: USMS Board of Directors**  
**FROM: Rob Butcher**  
**RE: USMS 2014-2019 Organizational Priorities**

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If the evolution of the USMS business could be compared to the 400IM, we would be transitioning to the backstroke leg.

In 2008 the National Office was one single business unit. Tracy Grilli and Jim Matysek were our two employees, both working from home reporting to our volunteer Executive Committee. We also had several contractors, working remotely, providing operational functions.

In 2009 we established our headquarters, moving into 1,958 square feet of office space in Sarasota, Fla. We mapped out a professional business model that, over the past four years, has evolved into six business units: Administration/Financial/Swimming Saves Lives, Membership/LMSC Support, Communication and Publications, Marketing and Promotion, Education for Clubs and Coaches, and Information Technology.

Each year, because of added financial resources from membership dues increase and membership growth, sponsorship growth, education revenue, and expense efficiencies, we've been able to add one to two employees, creating the top layer of very talented professionals.

Since we began implementing a staff managed organization in 2008, we have experienced a nearly 50% growth in membership and a nearly 50% increase—to \$3MM for 2014—in our annual operating revenue. Membership and financial growth is a wonderful sign that there is demand for USMS. But with growth, and the expectation of continued growth, comes the responsibility of service.

We can add one more full-time professional to our current office environment and then we are at office seating capacity. To accommodate staffing needs, we'll need to move to a larger headquarters. The timing of the move (i.e. 2014 or 2015), will be determined once we know if we buy, rent, and what renovations would be required. It is our intent to remain in Sarasota.

The need to deepen our staff bench is fueled by two driving factors: a significant increased demand for existing and new National Office services and the increased workload—to critical capacity—across the board that makes us vulnerable to points of failure and further does not allow us to evaluate/implement new opportunities that will advance our purpose of encouraging adults to swim.

Highlighted in the next few pages are the key responsibilities within each business unit, our 2014 organizational chart, our organizational priorities, and our staff growth plan through 2019. In addition to financial growth from nonmembership areas (i.e. sponsorship, advertising, education), it is recommended and necessary that we maintain our \$2 per-year dues increase program through 2019.

Respectfully submitted,



Rob Butcher,  
Executive Director

## **Our Purpose**

- Encourage Adults to Swim

## **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 U.S. Masters Swimming 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.

## **USMS Core Areas Business**

- Membership sales and consistent membership service in partnership with Local Masters Swimming Committees, clubs, workout groups, and coaches
- Education and support to existing USMS programs
- Incubate new USMS programs
- 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 National Office Responsibilities**

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

### ***Executive Director***

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

- Board of Directors relations
- Executive Committee relations
- Compensation and Benefits Committee relations
- National Office, staff, and contractor oversight
- Strategic planning
- Financial oversight
- Domestic and other organizational relations
- International relations
- Crisis management and disaster oversight
- Local community leadership and visibility

### ***Administration, Financial and Swimming Saves Lives Foundation***

#### **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

#### **Administration, Financial and Swimming SSL Growing Responsibilities**

- i. Susan was hired to take over controller functions. She has grown the position into a fully functioning CFO position and performs the full breadth of responsibilities within this business unit with an administrative assistant whose time is allocated among all departments and an hourly, part-time financial assistant. When Susan was hired, an intriguing aspect she brought was previous foundation experience. We have made a significant financial investment into the feasibility and structure of our Swimming Saves Lives Foundation. The National Office is expected to operate the foundation. To date, all operations for the foundation have been managed by Susan and our executive director. In 2013, we received 39 grant applications (all for adult learn-to-swim programs). The purpose of SSL is becoming clear; support adult learn-to-swim programs. Giving to SSL is increasing. We are in need of staff resources so we can properly perform our financial responsibilities and focus on SSL.

- ii. We experienced in 2012/2013 the most uncomfortable position of reacting to a changing insurance landscape because we are stretched too thin with other responsibilities to plan. We have been investing significant time in 2013 conducting a risk assessment that will allow us to be better prepared and safeguarded for the future.
- iii. Current staff allocation: Susan Kuhlman, Claudia Woods and a part-time financial assistant.

## ***Member Services and LMSC Support***

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

- Registration system expert
- Member customer service
- Membership retention programs
- Club renewals
- LMSC relations
- Convention relations

### **Member Services and LMSC Support Growing Responsibilities**

- i. In surveys, when members are asked to identify the most important benefits of USMS membership, the three most cited examples are competition, insurance, and the magazine. Although all provide value, the next frontier of USMS membership exists with an expanded offering of a “USMS membership and save program.” We have successfully implemented, and our members have responded to, a membership rewards program with early membership renewal (i.e. eight current USMS sponsors offer discounts to members who renew by December 31). The strategy is to expand membership discounts by partnering with national companies that sell products our members spend money on, such as gym access fees, weight loss, massage, etc. If we can create a meaningful USMS member financial value proposition that demonstrates savings by being a USMS member, we create strategic advantage to both grow and renew USMS membership.
- ii. System-wide, we are experiencing a heavy turnover with LMSC volunteers. New volunteers require training, as do current volunteers. Because of the nearly 40 years of institutional knowledge with Anna Lea and Tracy, the de facto responsibility for volunteer training, volunteer tutorials and implementing LMSC responsibilities (i.e. Registrar, IRS filings, Top 10, etc.) when no one else will do it falls to Anna Lea and Tracy.
- iii. Convention operational responsibilities are shifting from volunteers to Tracy. Responsibilities related to convention such as convention management, volunteer committee requests, overseeing Rule Book updates, etc. has become a time consuming project to effectively manage.
- iv. Current staff allocation: Anna Lea Matysek and Tracy Grilli

## ***Education: Club and Coach Services***

### **Leader: Bill Brenner**

- Club and workout group education
- Growth of new clubs and workout groups
- Coaches Committee relations
- USMS Masters coach certification management
- LMSC club growth education
- Facilities resource for Masters programs

### **Education Growing Responsibilities**

- i. Our homegrown Masters coach certification has been a huge success. It requires, and will continue to require, a dedicated commitment to ensuring coaching content is relevant, we are tracking coaches, we are learning what new products coaches would like, we coordinate scheduling and registration of participants, and of course continue to teach. With nearly 1,000 coaches having taken the certification program, demand is high for more teaching and developing of Masters coach continuing education. Demand has also surfaced for new coach/instructor education programs, such as a USMS class that teaches instructors how to teach learn-to-swim programs for adults.
- ii. In addition to operating, managing, and teaching the Masters coach certification program, Bill has personally made more than 200 site visits. The majority of site visits have been initiated by Bill cold calling a facility/aquatic directors and developing a relationship so he may present revenue and programming potential to create a Masters swimming program.
- iii. Bill has become a sought after speaker having been asked to present to the Kroc Center Association, NIRSA, ASCA, CSCAA and other associations that represent aquatic directors on the benefits of adding a Masters swimming program.
- iv. In 2014, we are introducing a Masters coach membership for the first time. With 4,000 current members indicating they are a coach, we are bullish on conversion with an expectation of delivery of Masters coach membership benefits.
- v. Bill has made several club and coach presentations to zone's. With volunteer turnover heavy, continuing to educate our zone and LMSC leaders will be ever present.
- vi. Current staff allocation: Bill Brenner and contractor Mel Goldstein

## ***Communications and Publications***

### **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
- Creative services management (i.e. graphics design, video content, etc.)
- Communications management for our National Championship meets
- Social media content
- Press liaison and communications management

### **Communications and Publications Growing Responsibilities**

- In 2008, production of *SWIMMER* magazine was outsourced. We didn't offer e-newsletters for members or coaches. Volunteers occasionally updated web content. Under Laura's leadership the last few years, we enter 2014 with production and content for *SWIMMER* inhouse, we create and distribute 40 e-newsletters annually, and we write 10-20 new features each month for our website. In addition, our sponsors and advertisers have an expectation of integration into our publications, communications and social media programs.
- We are now producing videos for training and technique and product reviews that accompany *SWIMMER* magazine and usms.org articles. The videos are very popular, showcasing and reinforcing the USMS brand as the authority for adult swimming.
- When Laura has time with all other time-sensitive opportunities, we ask her to respond to PR efforts.
- Current staff allocation: Laura Hamel and a part-time associate editor

## ***Marketing and Promotion***

### **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
- Social media content
- Marketing resources management
- Liaison with college club events

### **Marketing and Promotion Growing Responsibilities**

- In 2008, our sponsorship revenue was around \$100,000 with 13 sponsors. We enter 2014 with 21 sponsors, 22 additional magazine advertisers, and sponsorship and advertising revenue of \$500,000. A robust USMS social media programs now exists and has become an expected part of promotion for our sponsors. We have also secured close to \$100,000 in value in-kind that is used to support our events. In addition, we have created a licensing and merchandise program that is promoting the USMS brand and delivering meaningful revenue.
- Tremendous organizational, time management, and communication skills are required to manage all the deliverables of our agreements as well renewals of agreements.
- We are now leveraging our membership database with targeted surveys that are providing predictability of buying success and justification for sponsors such as Nationwide and Marriott to sign deals with us. The traditional

- sponsorship/advertising sales model of impressions is still valid but the new frontier of opportunity is our ability to leverage our database to sign new sponsors.
- iv. Current staff allocation: Kyle Deery and Rob Butcher

## ***Information Technology***

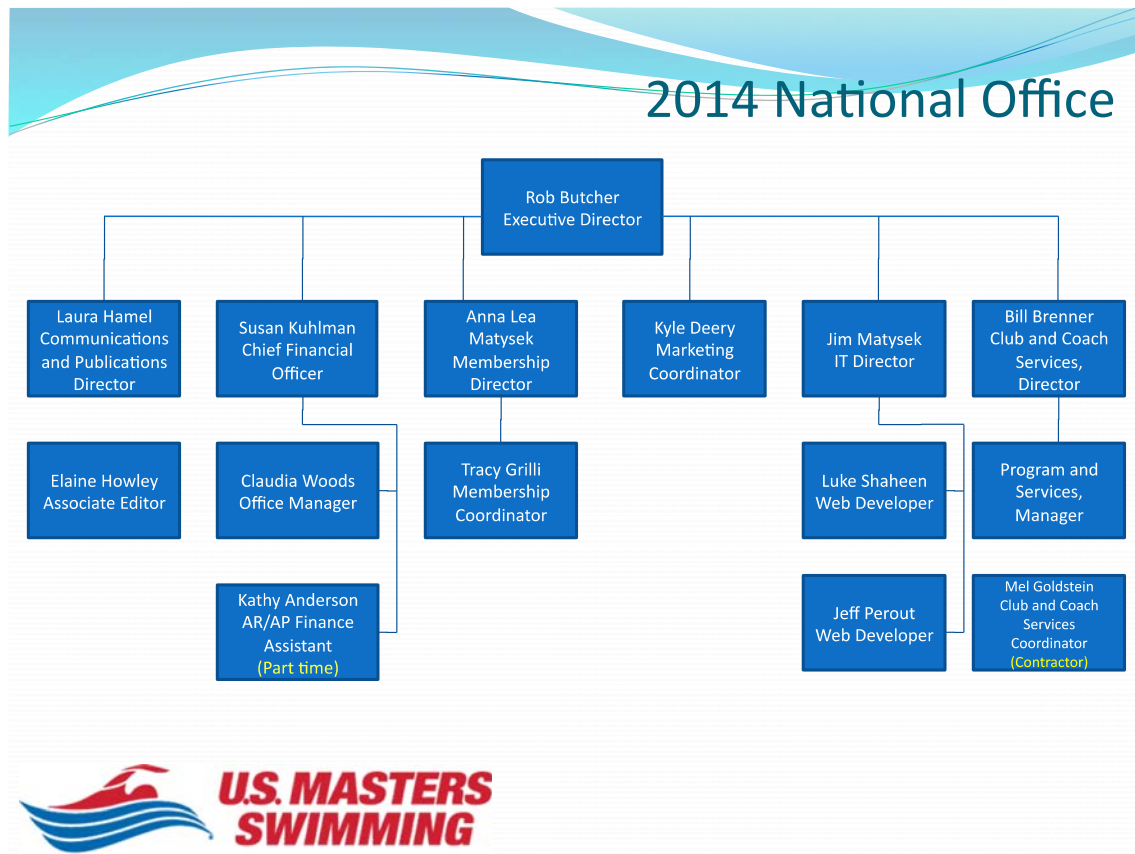
### **Leader: Jim Matysek**

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

### **Information Technology Growing Responsibilities**

- i. The 2006 IT task force recommended USMS add staff programmers to accommodate our growing IT needs as well as service existing programs. It is evident that as our programs continue to grow and provide benefit, there is high priority for integrated software programs that will allow us to take advantage of opportunities, be efficient, and safeguard our business. Our IT needs and services are not slowing down.
- ii. Home grown, proprietary and inhouse managed software includes membership and club registration system, nationals event registration, sanction application and database, events results database, calendar of events, places to swim and usms.org content management system.
- iii. Current staff allocation: Jim Matysek, Jeff Perout, Luke Shaheen

## 2014 USMS National Office





## *National Office Staffing Priorities*

	<b>Administration and Foundation</b>	<b>Communication and Publications</b>	<b>Membership and LMSC Support</b>	<b>Marketing and Promotion</b>	<b>IT</b>	<b>Education and Club and Coach Services</b>
2013	Susan Kuhlman	Laura Hamel	Anna Lea Matysek	Kyle Deery	Jim Matysek	Bill Brenner
2013	Claudia Woods	Elaine Howley (part time)	Tracy Grilli		Jeff Perout	
2013	Kathy Anderson (part time)				Luke Shaheen	
2014		<b>Elevate:</b> Elaine Howley to fulltime				<b>New Hire:</b> Program and Services Manager
2015	<b>Elevate:</b> Finance Assistant to fulltime			<b>New Hire:</b> An sponsorship/advertising account executive	<b>New Hire:</b> Programmer	
2016	<b>New Hire:</b> Foundation Director			<b>New Hire:</b> An event services position		
2017		<b>New Hire:</b> content and writer for digital		<b>Convert:</b> Ben Christoffel from contractor to fulltime social media and video services		<b>New Hire:</b> Education and services position
2018	<b>New Hire:</b> Foundation support		<b>New Hire:</b> Membership and LMSC support			
2019		<b>New Hire:</b> PR and content writer				<b>New Hire:</b> education and services
<b>Total</b>	6	4	3	4	4	4