



USMS Volunteer Summit - Business Proposal

This document was submitted to the Board of Director in advance of the 2021 Summer Board meeting and was the basis for the Board's decision to move forward with the Volunteer Relay for 2022. It was developed by a Task Force formed after the 2021 Winter Board meeting to evaluate the best use of volunteer resources and membership funds. Not every detail in this document will be implemented and commentary in red italic has been added to provide context on where planning currently stands. This was one of the most well thought-out and communicated task force proposals presented to the Board in recent years and the Board felt that the extensive background may provide delegates comfort in the development of next year's plans for in-person meetings.

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1. Executive Summary: Annual Volunteer Summit

United States Masters Swimming (“USMS”) volunteers are a diverse group of individuals and are vital to the organization. When it comes to equipping our volunteers, there is no “one size fits all” solution. There is no set of perfect presentations that will energize our volunteers; we energize our volunteers with engagement not information. We create engagement by:

1. Creating mentor/mentee relationships
2. Creating peer-to-peer and/or friend relationships
3. Sharing experiences and expertise
4. Contributing to solving a problem and providing needed input

Our recommended approach to the annual Volunteer Summit provides a framework to address each of these areas by:

1. Planning for mentoring, peer coaching, and relationship-building sessions as a core part of the agenda, not simply as evening or optional activities.
2. Providing a “choose your own adventure” format so volunteers with different expertise and experience levels can participate in appropriate sessions and can interact with other volunteers with similar interests.
3. Asking USMS to choose an overarching theme for each year’s Summit, which will guide which volunteers attend and focus the discussions on topic(s) that are current, relevant, and meaningful to the organization.

2. Volunteer Summit

2.1. Mission Statement

The mission of the annual USMS Volunteer Summit is to engage, energize, and equip USMS volunteers.

2.2. Background

With the possibility of the USMS Annual Business Meeting taking place virtually each year, there is still a need to gather the volunteers in-person to network, share ideas, collaborate, and motivate each other. The USMS Volunteer Summit is designed to strengthen communication and collaboration between USMS and its volunteers, empowering volunteers to serve the USMS membership effectively. This is all in service to the USMS mission of becoming the premier resource for adult aquatic fitness and making swimming available for as many adults as possible.

The annual USMS Volunteer Summit is an opportunity to **engage, equip** and **energize** volunteers through:

Engaging with subject matter and sharing experience/expertise

The Summit includes sessions where volunteers are given an opportunity to share their knowledge and experience to brainstorm and share with others interactively.

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Cultivating mentor/mentee relationships

The Summit provides structure for experienced volunteers to mentor less experienced volunteers, while simultaneously providing context and guidance to volunteers new to USMS (or to long-time volunteers now in a new role). For those who want to mentor but have no experience, we could introduce "peer coaching groups" of three individuals. Triads could work well for this situation, with the expectation that each individual plays the role of asking for and giving support.

Cultivating peer-to-peer and/or friend relationships

The Summit provides opportunities for volunteers to meet and share ideas with volunteers who perform a similar function in a different LMSC, and/or provide opportunities to create camaraderie with swimmers from different geographic areas who have similar interests.

Contributing to solving a problem and providing needed input

The Summit includes opportunities for volunteers to contribute their input and problem-solving expertise to issues that are a priority to the organization. Being part of conversations that relevant national committee(s) are having or influencing recommendations that the Board of Directors will review is inspiring.

2.3. Proposed Structure

Our recommended approach provides a framework to address each of these areas by:

- Planning for mentoring, peer-coaching, and relationship-building sessions as a core part of the agenda, not simply as evening or optional activities.
- Providing a "choose your track" format so volunteers with different expertise and experience levels can participate in appropriate sessions and can interact with other volunteers with similar interests.
- Asking USMS to choose an overarching theme for each year's Summit, which will guide which volunteers attend and focus the discussions on topic(s) that are current, relevant, and meaningful to the organization.
- Providing structured social activities to create traditions that repeat attendees will look forward to and that past attendees will tell new attendees about (for example, social events might include: icebreaker social event Friday night, structured group swim workout Saturday morning, awards luncheon Saturday, locally-themed scavenger hunt event Saturday night, dryland workout Sunday morning, etc.)

Each year, there would be four tracks to allow attendees to "choose your track" based on their experience and interest (New Volunteer, LMSC Volunteers, Coaches and Other Groups (based on that year's Theme)). Certain sessions would involve attendees from more than one track to build relationships and/or brainstorm together. Some tracks would repeat every year with small variations (e.g. newer volunteers), while some tracks would change significantly based on that year's theme. This structure allows for those who attend every year to get a different experience each time, while also allowing those who are attending for the first time or who only attend every few years to have an engaging experience based on that year's theme.

2.4. Event Name

The proposed event will be referred to as the Volunteer Summit in this document, but we also think that the title “Volunteer Workshop” could also work. We may want to move away from the word “summit” in order to avoid confusion with other, historical events (Leadership Summit).

Relay 2022 was selected.

2.5. Sample Themes

Club Development - repeat every 3 to 5 years

- What can 1) LMSC volunteers, 2) Club owners, 3) coaches, 4) facility operators and 5) national organizations each do to A) grow existing clubs, B) formalize informal masters lap swimming groups into clubs and c) start new clubs in facilities that don't currently have masters swimming?
- What are our strategies as an organization? What tasks and responsibilities does each role have in the process?
- How do we work together both from the bottom up and the top down (e.g. working with the pool coordinator at the local YMCA to book pool time versus negotiating a national contract with YMCA corporate)?

Club Development has been selected as the theme for 2022.

Membership & Community - repeat every 3 to 5 years

- Who are our members and how can we serve them better?
- How do we reach athletes who don't already know about us?
- How do we make membership attractive to triathletes or other non-traditional swim team athletes?
- Can/should we partner with other national organizations to target specific demographics such as veterans or disabled persons?
- How can our members serve their local communities while promoting swimming and enjoying the camaraderie of other swimmers?
- How do we grow ALTS programs and who can we partner with (Red Cross? USA Swimming?) to promote swimming safety and help teach swimming to all age groups?

Event Hosting - repeat every 3 to 5 years

- Event Hosting 101: How everyone can work together, sanctions, officials, meet director, event host, and results
- How to grow new events and build participation
- Streamlining the event hosting process
- Becoming a USMS event host
- Event Hosting Brainstorm and problem-solving session



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2.6. Three-Day Agenda with Six Session Blocks

Agenda currently contemplates beginning Friday afternoon and ending Saturday night. There may be light sessions on Sunday morning, but the goal was to allow attendees to get home on Sunday.

Times listed below are suggestions to provide reference for time frame and are not final.

F R I D A Y	Time	Event
	5:00 PM	Check-In
	6:00 PM	Opening Remarks
	7:00 PM	Networking Reception w/ Icebreaker Activity

S A T U R D A Y	Time	Event
	6:30 - 7:30 AM	Optional: Swim Practice
	8:00 - 9:00 AM	Breakfast
		USMS Update + Keynote Inspirational Speaker
		Session 1
		Session 2
	(1.5 Hours)	Awards & Recognition Luncheon
		Session 3
		Session 4
	6:30 - 8:30 PM	Fun Activity w/ local theme + Dinner

S U N D A Y	Time	Event
	7:00 - 8:00 AM	Breakfast
		Session 5
	Session 6 (Wrap-Up Sessions for All)	



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		Closing Lunch On-the-Go (Box lunches available for those who need to leave)
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2.7. Plan for Attendees

Each LMSC will have **at least** three allocated slots regardless of their membership numbers: one for experienced volunteers, one for “first time” volunteers (never attended USMS Convention or USMS Volunteer Summit) and one for “coach on deck” volunteers (actively coaching a group of swimmers at least once per week on an ongoing basis).

Current plans are for each LMSC to have the ability to bring the same number of attendees as they have assigned entitled delegates for the annual meeting. The Board, LMSC Development, Past Presidents and Coaches committee members would also be included. The message to LMSCs is to actively solicit involvement from at least 1 new volunteer that hasn't attended national meetings previously.

Each LMSC is encouraged to invite an even split of returning and new volunteers from their board to the Summit. The Summit community is best served by including a diverse group of people from each LMSC who are interested in fully participating, and who will bring this information back to their LMSCs. A best practice is to rotate returning volunteers each year to best match the Summit's annual theme. The Summit is an opportunity to practice effective succession planning while sharing the tools and resources to help LMSCs onboard volunteers to successfully fulfill their roles and should be used as such.

The cost of attendance for these three allocated slots will be subsidized. Not all LMSCs will fill all of their slots every year. Larger LMSCs may have additional slots of each type, based on overall membership numbers. The cost of attendance for these attendees will also be subsidized. The national office staff is in charge of letting each LMSC know how many Summit slots they have based on membership numbers.

For LMSC with less than three allotted attendees, we are discussion a plan to apply for additional spots based through the USMS President. The goal is to gain insight into their commitment to implement services locally in evaluating the request.

An LMSC may invite additional attendees above their allocation; however, the LMSC will be responsible for fully funding the attendees' expenses.

Additional attendees can attend at LMSC expense and approval.

Other attendees may include:

- USMS Board of Directors
- Past USMS Presidents
- ~~Chair and Vice Chair of each USMS National Committee~~
- ~~Zone Chairs~~

National Committee attendance will be based on theme of each meeting.



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A reasonable target for the Volunteer Summit attendance is 300 people.

2.8. Date and Schedule

The 2022 Spring USMS National Competition is scheduled for April 28 - May 1, 2022. The first annual Volunteer Summit should take place in the early Spring 2022 (late February/early March) timeframe. With this cadence, the annual business meeting will take place in early fall and the annual volunteer Summit will take place in late February/early March.

The Task Force initially recommends a Friday evening to Sunday afternoon schedule. This would allow for participants who work full-time to minimize using their vacation time.

We are aware that the National Office is open to extending the time to Friday morning if there is additional business to be accomplished. Additional business to take place on Friday morning could include:

- Adult Learn to Swim Training Sessions
- Coach Certification Training Sessions
- National Office Business
- Board of Directors Meeting
- And more

2.9. Location

Our recommendation is to host the first annual Summit in the United States Central Time Zone.

Subsequent Summits may be held in alternating locations; e.g. 2022: Central, 2023: West Coast, 2024: East Coast, and so forth.

2.10. Awards

Awards will be presented at this event, as part of the Summit's goal to celebrate and energize volunteers.

This is something the Board agrees with but has decided to let evolve as USMS see how the Relay, Annual Meeting and annual calendar develop.

Our recommendation is that the award presentation take place on Saturday at lunch when most are scheduled to be in attendance.



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2.11. Inaugural Theme for 2022: Club Development

The Task Force recommends Club Development as the inaugural theme for Spring 2022.

Session #	Track A USMS Organization and Structure (for newer Volunteers)	Track B Leadership Skills Development (for LMSC Leaders and more experienced Volunteers)	Track C Supporting Coaches and Clubs (for Coaches on Deck and LMSC Coach Chairs or other Volunteers that support coaches and clubs)	Track D Partnerships & Program Development (for Coaches or other Volunteers who are involved in Business Development, Club Management and/or Facility Coordination)
1	USMS Structure, Function & History	How LMSCs Can Support Coaches, Clubs & Facilities* (Build Relationships between Volunteers, Coaches & Management*)		
2	National Committees & The Annual Meeting	Leadership Foundations	How to Grow Participation	
3	Volunteer Central - Knowing Your Resources	Leadership Applications	Bringing the Best to the LMSC Coaches Chair Role	Find New Clients & Revenue Streams: ALTS & Other New Programs
4	Build Relationships Between LMSC Volunteers		All About the USMS Level Four Coaching Certification Review	Eliminate Roadblocks to Growth
5	Club Development Brainstorm*			
6	USMS Organization and Structure Wrap-Up	Leadership Skills Development Wrap-Up	Coaches Wrap-Up	Partnerships & Program Development Wrap-Up

*Part of the session is small group discussion that includes mentoring and/or peer coaching groups.

2.12. Club Development Theme Session Descriptions

Specific content is being developed by a planning group but these suggestions will be the starting point to finalize the agenda.

MULTI-TRACK SESSIONS

SESSION 1-B-C-D

Session Title: How LMSCs can Support Coaches, Clubs & Facilities (Build Relationships between Volunteers, Coaches & Management)

Session Track: B, C, D

Description: The LMSC Development Committee will facilitate a peer coaching session for the three tracks: LMSC Volunteers/Leadership, Coaches and Club & Facility Management. The Committee will pair people up on the front end to start the relationship and hopefully allow it to continue in a longitudinal coaching or mentoring relationship. The discussion will be focused on the needs of coaches, the needs of clubs, and the needs of facilities as well as on the resources available to LMSCs and how LMSCs can support coaches, clubs and facilities.

Objectives: By the end of this session, participants will:

- Make a connection with members of similar roles (swim coaches with swim coaches)
- Meet potential peer coaches or mentors with the option to continue in a longitudinal mentoring relationship after the Summit
- Have a better understanding of what coaches need and what LMSC volunteers can do to support coaches and clubs
- Discuss how they can welcome diverse groups of individuals into their facility or program

SESSION 2-C-D

Session Title: How to Grow Participation

Session Track: C, D

Description: This session will focus on how swim coaches, clubs, and facilities can work together to grow membership and increase participation in existing programs.

Objectives: By the end of this session, participants will:

- Discuss ways to grow membership and participation in existing programs
- Discuss how they can welcome diverse groups of individuals into their programs
- Make connections with other USMS volunteers who have successfully grown participation in programs

SESSION 4-A-B

Session Title: Build Relationships between Newer Volunteers and LMSC Leaders/Volunteers

Session Track: A, B

Description: The LMSC Development Committee will facilitate a peer coaching and/or mentoring session for two of the tracks: Newer Volunteers and LMSC Leaders. The Committee will pair people up on the front end to start the relationship and hopefully allow it to continue in a longitudinal mentoring

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relationship. The discussion will focus on the newer volunteer's onboarding experience, what they have learned at the Summit (and any questions they have) and on the experienced volunteer's history with USMS.

Objectives: By the end of this session, participants will:

- make a connection with members of similar roles (sanctions chairs with sanctions chairs)
- meet potential mentors with the option to continue in a longitudinal mentoring relationship after the Summit

SESSION 5-A-B-C-D

Session Title: Club Development Brainstorm

Session Track: ALL TRACKS (A, B, C, D)

Description: All participants will come together and for a targeted brainstorming session on the Summit's primary theme: Club Development. What can 1) LMSC volunteers, 2) Club owners, 3) coaches, 4) facility operators and 5) national organizations each do to A) grow existing clubs, B) formalize informal masters lap swimming groups into clubs and c) start new clubs in facilities that don't currently have masters swimming? Each breakout table should include a mixture of participants from each track.

Objective: By the end of this session, participants will:

- Conceptualize and deliver concrete solutions for the USMS organization, in conjunction with participants from other tracks and viewpoints.
- Discuss how USMS clubs can welcome diverse groups of individuals.
- Discuss USMS programs (like Adult Learn to Swim)

TRACK A: USMS Organization and Structure

For newer volunteers.

SESSION 1-A

Session Title: USMS Structure, Function & History

Session Track: [USMS Organization and Structure](#)

Description: High level overview of the structure and function of USMS: the USMS Staff, Board of Directors, National Committees, Zones, LMSCs, Clubs and Workout Groups including the historical foundations of the organization and how it has grown into what it is today.

Objectives: By the end of this session, participants will:

- Understand how USMS grew to be what it is today and how the USMS volunteer and staff roles effectively function together within the larger USMS structure
- Understand the function of the National Office.

SESSION 2-A

Session Title: National Committees & The Annual Meeting

Session Track: USMS Organization and Structure

Description: High level overview of national committees, their current work in progress and priorities, the time frame of their work, selection criteria, critical roles (i.e. how rules are changed), how to find committee information and how to contact committees with ideas, requests, rules changes. High level



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overview of the importance of the annual meeting and the USMS delegate process. This session will include a panel or round-robin with committee representatives to ask questions and learn more from them.

Objectives: By the end of this session, participants will:

- Understand how committees function and the roles they fulfill to support USMS to progress as an organization
- Know how to get involved with any of the national committees
- Understand the importance of the annual meeting
- Understand how the Board of Directors and National Committees function in tandem with the National Office, in more detail.

SESSION 3-A

Session Title: Volunteer Central - Knowing Your Resources

Session Track: USMS Organization and Structure

Description: High level overview of all of the resources available on the Volunteer Central website. Q&A Panel with national Office Staff and representatives of key national committees who support volunteers.

Objectives: By the end of this session, participants will:

- Know where to find resources that live on the USMS website
- Know who to contact for questions about various topics
- Hear from subject matter experts from the National Office on resources and areas of collaboration

SESSION 4-A: See Multi-Track SESSION 4-A-B

SESSION 5-A: See Multi-Track SESSION 5-A-B-C-D

SESSION 6-A

Session Title: Newer Volunteer Wrap-up

Session Track: USMS Organization and Structure

Description: Conclude the Summit with fellow new volunteers, debrief any information gained, and reflect on what actions to take back to your respective LMSCs. MoLoCo Feedback session (More Of/Less Of/ Continue doing).

Objectives: By the end of this session, participants will:

- reflect on what they learned or experienced during the weekend
- identify three main takeaways
- share what information they still need, provide feedback on the Summit

TRACK B: Leadership Skills Development

For LMSC leaders and more experienced volunteers.

SESSION 1-B: See Multi-Track SESSION 1-B-C-D

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SESSION 2-B

Session Title: Leadership Foundations

Session Track: Leadership Skills Development

Description: This session will focus on developing the individual as a leader. Examples of topics & skills developed include: Leadership Skills, Goal Setting & Prioritization, Planning & Scheduling, Communication Skills.

Objectives: By the end of this session, participants will:

- Have a new leadership skill to practice going forward in their leadership role.
- Gain insight into their own leadership skill toolbox.

SESSION 3-B

Session Title: Leadership Applications

Session Track: Leadership Skills Development

Description: This session will focus on leadership in action and working with other volunteers. Examples of topics & skills developed include: Communication Skills, How to Run an Effective Meeting, Conflict Management, Volunteer Recruiting & Onboarding, Mentoring, and Recognition.

Objectives: By the end of this session, participants will:

- Have a new leadership skill to practice going forward in their leadership role.
- Gain insight on how to be an effective leader in their LMSC.

SESSION 4-B: See Multi-Track SESSION 4-A-B

SESSION 5-B: See Multi-Track SESSION 5-A-B-C-D

SESSION 6-B

Session Title: LMSC Leadership & Experienced Volunteers Wrap Up

Session Track: Leadership Skills Development

Description: Conclude the Summit with fellow new volunteers, debrief any information gained, and reflect on what actions to take back to your respective LMSCs. MoLoCo Feedback session (More Of/Less Of/ Continue doing).

Objectives: By the end of this session, participants will:

- reflect on what they learned or experienced during the weekend
- identify three main takeaways
- share what information they still need, provide feedback on the Summit

TRACK C: Supporting Coaches and Clubs

For coaches on deck and LMSC Coaches Chairs or other volunteers that support coaches and clubs.

SESSION 1-C: See Multi-Track SESSION 1-B-C-D

SESSION 2-C: See Multi-Track SESSION 2-C-D



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SESSION 3-C

Session Title: Bringing the Best to the LMSC Coaches Chair Role

Session Track: Supporting Coaches and Clubs

Description: Share resources for coaches, how to fill the Coaches Chair role and be impactful in creating opportunities for swimmers and coaches in your LMSC. IE Coach Clinics, Swimmer Clinics, hosting coach cert courses, creating scholarship opportunities for coaches, engaging & communicating to your local coaches to create a local network of resources.

Objectives: By the end of this session, participants will:

- Know tips, tricks and ideas to create a lasting impact on the coaches in their LMSC

SESSION 4-C

Session Title: All About the USMS Level Four Coaching Certification Review

Session Track: Supporting Coaches and Clubs

Description: Learn the background and basis for the Level Four application and how to start setting up your local coaches to start meeting the criteria earlier and more often.

Objectives: By the end of this session, participants will:

- Understand the importance & the requirements of the Level 4 certification
- Understand paths to support in your LMSC to help potential future Level 4's get started
- Review guidelines of what USMS needs from an ideal USMS coach

SESSION 5-C: See Multi-Track SESSION 5-A-B-C-D

SESSION 6-C

Session Title: Coach Wrap Up

Session Track: Supporting Coaches and Clubs

Description: Conclude the Summit with fellow new volunteers, debrief any information gained, and reflect on what actions to take back to your respective LMSCs. MoLoCo Feedback session (More Of/Less Of/ Continue doing).

Objectives: By the end of this session, participants will:

- reflect on what they learned or experienced during the weekend
- identify three main takeaways
- share what information they still need, provide feedback on the Summit

TRACK D: Partnerships & Program Development

For Coaches or other Volunteers who are involved in business development, club management, and/or aquatic facility coordination.

This track is open to anyone who is interested in USMS-related partnerships and program development. It may include club owners, coaches who own their clubs, volunteers who help manage their club, volunteers who work at aquatic facilities, etc.

SESSION 1-D: See Multi-Track SESSION 1-B-C-D

SESSION 2-D: See Multi-Track SESSION 2-C-D

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SESSION 3-D

Session Title: Find New Clients and Revenue Streams: ALTS & Other New Programs

Session Track: Partnerships & Program Development

Description: Trying to build and run a new program (e.g. Adult Learn-To-Swim, pre-teams, clinics, etc.) without adequate financial or human resources is hard. Learn how to use USMS' Club Central to help with the business side and appeal to more than just team swimmers. Programs covered may vary from year to year, but Diversity and Inclusion and ALTS programs should be included in 2022.

Objectives: By the end of this session, participants will:

- Learn how to build an Adult-Learn-To-Swim program
- Know how to leverage the "Club Central" resources on USMS.org for start up activities
- Create a strawman proposal and timeline for launching a program from scratch
- Learn about community engagement (having a presence at other healthy events, etc)

SESSION 4-D

Session Title: Eliminate Roadblocks to [Club/LMSC] Growth

Session Track: Partnerships & Program Development

Description: In a world of finite pool space there's only so big a team can get - or is there? In this session participants will brainstorm all the reasons why a program cannot grow and then tackle them one by one. We will also explore the idea of diminishing returns on membership growth.

Objectives: By the end of this session, participants will:

- Have a list of strategies to use to address their particular roadblocks
- Know how to leverage the "Club Central" resources on USMS.org for growth
- How to negotiate with facilities about the value of a masters team

SESSION 5-D: See Multi-Track SESSION 5-A-B-C-D

SESSION 6-D

Session Title: Club & Facility Management Wrap Up

Session Track: Partnerships & Program Development

Description: Conclude the Summit with fellow new volunteers, debrief any information gained, and reflect on what actions to take back to your respective LMSCs. MoLoCo Feedback session (More Of/Less Of/ Continue doing).

Objectives: By the end of this session, participants will:

- reflect on what they learned or experienced during the weekend
- identify three main takeaways
- share what information they still need, provide feedback on the Summit

3. Financial Plan

According to our recommendation, we are recommending that at least three participants be subsidized per LMSC. See the [Plan for Attendees](#).



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An LMSC may invite additional attendees however the LMSC will be responsible for fully funding the attendees expenses. The National Office is responsible for providing the unsubsidized attendee cost information to the LMSCs in advance.

USMS is planning to cover most costs including hotel accommodations and hospitality. LMSCs will be responsible for travel and incidentals.

4. Appendix

4.1. Existing Resources

Previous Leadership Summit agendas, presentations, and other available information.

- 2015: <https://www.usms.org/volunteer-central/lmscs/lmsc-leadership-Summit/2015-leadership-Summit>
- 2017: <https://www.usms.org/volunteer-central/lmscs/lmsc-leadership-Summit/2017-leadership-Summit>
- 2019: <https://www.usms.org/volunteer-central/lmscs/lmsc-leadership-Summit/2019-leadership-Summit>