



Kickoff

- In September of 2010 at the USMS Annual Meeting the Masters Foundation Committee at the time made up of Doug Church, Nancy Ridout, Rob Butcher and Christopher LaBianco made a presentation to the USMS Board re: advancing the philanthropic mission of USMS and presented a plan to invigorate the Masters Foundation.
- A three phased plan was outlined and suggested at the time.
- The presentation document will be made available to the USMS Board on the SSL forum

Phase I

October 2010 through January 2011

Goal:

1. Outreach by contacting our key constituencies, stakeholders, like minded groups, thought leaders, naysayers, etc.

Outcome:

1. Fundraising study process has been completed.
2. The USMS Swimming Saves Lives Fund mission statement was refined and tested.
3. The USMS Swimming Saves Lives fund was created.
4. USMS online membership renewal contribution options were restructured to include Swimming Saves Lives Fund language.



Financial

	2010 Approved Over Budget Request	Total Phase I Actual	Better/ (Worse)
Contributions			
Donor contribution for Phase I	11,250	9,862	(1,388)
Note: Commitment by donor was for 25% of Phase I expenses.			
Expenses			
Professional Services	33,500	32,149	1,351
Prospect research	5,000	5,220	(220)
Travel/Expenses	5,000	1,831	3,169
Materials/Misc.	1,500	250	1,250
Subtotal Expenses	45,000	39,450	5,550
Net Budget	(33,750)	(29,587)	4,163

Report was provided to and approved by the USMS Board on January 29, 2011 and will be made available on the SSL forum

PHASE II

February 2011 to September 2011 (Original) – extended to April 2012

Goals and Outcomes:

1. Identify and recruit fundraising leadership team
 - o The Task Force Became a Committee with several additional USMS members added including Brandon Franklin, Dia Rianda, Jeff Moxie
2. Recruit campaign chairman/co-chairmen
 - o Doug Church was named Campaign Chairman and Jeff Moxie Vice Chairman
3. Lead the fundraising committee to meet its goals during their introductory meeting in Sarasota
 - o A leadership committee meeting was held in Sarasota in May – the presentation document will be made available on the SSL forum. While not all the leaders ultimately could attend the meeting set the stage to move forward and launched the dialog on program initiatives and next steps to be taken.
4. Develop and recommend fundraising programmatic priorities
 - o An ongoing debate – programming priorities changed as folks weighed on the Foundation initiative. Still a work in progress.
5. Prepare donor recognition program
 - o A Donor Recognition Plan was devised and is in place for all received gifts.
6. Create Swimming Saves Lives Fund collateral materials such as information for the USMS website, pledge forms, and presentation pieces



7. Solicit major gift prospects
 - o Review of lead gift prospects
 - o Formulation of key solicitation strategies
 - o Solicitation training
 - o Assignment of key solicitations
 - o A number of major gifts were solicited and closed over \$100,000 worth. In addition to the gifts made as part of online registration. The Foundation brought in more financial support in 12 months than it had in 10 years.
8. Analyze fundraising potential, project overall working goal and financial targets
 - o A donor prospect list chart was created. Unfortunately it was one of the last initiatives completed so it has not been followed up on. File is attached USMS Tracking Report 2012
9. Attended the July 15-16, 2011 USMS board meeting to provide a progress update on the fundraising project
10. Provide a comprehensive fundraising report and presentation at the September 14-16, 2011 USMS annual meeting
 - o Doug Church presented to the Board and House of Delegates the Foundation financial numbers looked strong and the effort continued to receive strong support.

Financial:

2011 Phase II Over Budget Request	Total Phase II Actual	Better/ (Worse)
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Expenses

Professional Services	66,667	83,330	(16,663)
Travel/Expenses	10,000	7,933	2,067
Travel/Expenses	10,000	1,346	8,654
Logo development/misc.	5,000		5,000
Develop online giving site	2,500		2,500
Video tape	5,000		5,000
Donor Recognition	7,500	5,765	1,735
Subtotal Expenses	106,667	98,374	8,293



PHASE III

Current

Proposed goals to be discussed by SSL Committee

1. Finalization of the Foundation Strategic Plan, Leadership and Initial Leadership Gifts
2. Possible Foundation celebration event... perhaps a Fundraising Gala
3. Programmatic priorities should be determined and announced
4. Appropriate fundraising infrastructure needs to be put in place

Financial

2012 Phase III Budget	Thru 7/15/2012 Actual	Better/ (Worse)
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Expenses

Professional Services	75,000	24,302	50,698
Travel/Expenses	15,000	2,255	12,745
Printing		1,733	(1,733)
Total	90,000	28,290	61,710