

Masters Swimming Canada

Strategic Plan 2015-2018



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Introduction

Executive Summary



Through a six-month strategic exercise that included workshops, primary research, and interviews, Masters Swimming Canada (MSC) has developed new strategic objectives aligned with its refreshed mission and vision

MISSION

Provide leadership and enable 18+ Canadians in the participation in masters swimming; engaging them throughout a lifetime of growth, discovery, and personal achievement

VISION

To promote involvement and lifelong engagement in the masters swimming community through programs, competition, coaching, and strategic partnerships

STRATEGIC OBJECTIVES

GROW MSC'S CAPACITY AND RESOURCES

To increase the financial, human capital, and technological resources of the organization over the next three years by exploring opportunities to grow revenues and by leveraging partnerships and volunteers

ENHANCE COMMUNICATION WITH ALL STAKEHOLDERS

To ensure that the goals and aspirations of MSC are understood and acknowledged by all stakeholders, that messages conveyed by the organization are aligned with its mission and vision, and that all stakeholders always receive the right information at the right time

STRENGTHEN PARTNERSHIPS WITH STAKEHOLDERS

To increase MSC's partnership with other swimming organizations in Canada to ensure these stakeholders are aligned and engaged with MSC

IMPROVE MEMBERSHIP EXPERIENCE

To acknowledge the different needs of each swimmer segment and improve the swimmer's experience through tailored programs and services

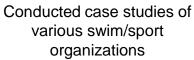
PARTICIPATE IN COACH DEVELOPMENT

To have a clear level of involvement in the development of masters coaches and the delivery of coaching programs

Summary of the Project Phases and Key Activities

Phase 1: Case Studies and Membership Consultations







Conducted survey of members (swimmers)

Phase 2: Internal Stakeholder Consultations



Conducted interviews with Board/staff members and various stakeholders



Redefined the vision and mission statements (Workshops 2a and 2b)

Phase 3: Finalize Strategic Plan and Next Steps



Defined future strategic objectives (Workshop 3)



Further developed and prioritized the strategic initiatives

MSC's Renewed Strategic Objectives

- Grow MSC's Capacity and Resources
- Enhance Communication with all Stakeholders
- Strengthen Partnerships with Stakeholders
- Improve Membership Experience
- 5 Participate in Coach Development

2015-2018 Future State Strategic Plan Going forward, MSC will communicate and act according to the following vision and mission statements

Vision Statement

Provide leadership and enable 18+ Canadians in the participation in masters swimming; engaging them throughout a lifetime of growth, discovery, and personal achievement

Mission Statement

To promote involvement and lifelong engagement in the masters swimming community through programs, competition, coaching, and strategic partnerships

Going forward, MSC will work to accomplish the following 5 key strategic objectives

1

Grow MSC's Capacity and Resources

To increase the financial, human capital, and technological resources of the organization over the next three years by exploring opportunities to grow revenues and by leveraging partnerships and volunteers

2

Enhance Communication with all Stakeholders

To ensure that the goals and aspirations of MSC are understood and acknowledged by all stakeholders, that messages conveyed by the organization are aligned with its mission and vision, and that all stakeholders always receive the right information at the right time

3

Strengthen Partnerships with Stakeholders

To increase MSC's partnership with other swimming organizations in Canada to ensure these stakeholders are aligned and engaged with MSC

4

Improve Membership Experience

To acknowledge the different needs of each swimmer segment and improve the swimmer's experience through tailored programs and services

5

Participate in Coach Development

To have a clear level of involvement in the development of masters coaches and the delivery of coaching programs

The following slides explain the key initiatives and performance indicators that support each of these strategic objectives

1

Grow MSC's Capacity and Resources

To increase the financial, human capital, and technological resources of the organization over the next three years by exploring opportunities to grow revenues and by leveraging partnerships and volunteers

Strategic Initiatives	Owner	Timeline
1.1 Review financial plan and goals and explore avenues to grow revenues (e.g., sponsorship)	Finance Committee	By the end of 2015
1.2 Develop a membership recruitment strategy with clearly defined value proposition, initiatives to be conducted and objectives	Executive Team	Starting early 2016
1.3 Develop a volunteer recruitment strategy with clearly defined value proposition, initiatives to be conducted and objectives	Executive Team	By the end of 2017

Please note that owners and timelines will be reviewed and discussed to ensure alignment with MSC's current pipeline of project as well as short- and mid-term capacity

Key Performance Indicators*:

- Annual revenues
- Annual revenues excluding membership fees
- Annual financial capacity budgeted
- Number of employees
- Number of volunteers
- Sponsorship Revenue



^{*} Key performance indicators demonstrate the data that needs to be collected, analyzed, and monitored to help evaluate the progress and fulfilment of the strategic initiatives

2

Enhance Communication with all Stakeholders

To ensure that the goals and aspirations of MSC are understood and acknowledged by all stakeholders, that messages conveyed by the organization are aligned with its mission and vision, and that all stakeholders always receive the right information at the right time

Strategic Initiatives	Owner	Timeline
2.1 Finalize the revamp of MSC's website	Communication Committee	By the end of 2015
2.2 Define clearly MSC's positioning in the Swimming landscape by drawing the value map of what other organizations do and how MSC complements them	Communication Committee	Starting early 2016
2.3 Develop and implement a communication plan directed to swimmers from MSC leveraging the membership recruitment strategy	Communication Committee	Starting early 2017

Please note that owners and timelines will be reviewed and discussed to ensure alignment with MSC's current pipeline of project as well as short- and mid-term capacity

Key Performance Indicators*:

- Number of monthly visits on MSC's website
- (Optional: follow-up survey with members and organizations)
- Number of emails opened by members / month
- Membership participation in forum discussions



^{*} Key performance indicators demonstrate the data that needs to be collected, analyzed, and monitored to help evaluate the progress and fulfilment of the strategic initiatives

3

Strengthen Partnerships with Stakeholders

To increase MSC's partnership with other swimming organizations in Canada to ensure these stakeholders are aligned and engaged with MSC

Strategic Initiatives	Owner	Timeline
3.1 Establish agreements with other swim organizations (including SNC and provincial organizations) to increase alignment between MSC and its stakeholders	President, Governance Committee	Starting Immediately
3.2 Implement agreements with other swim organizations	Governance Committee	Starting early 2016
3.3 Establish and implement agreements and partnerships with other organizations (for example Triathlon Canada)	President, Governance Committee	Starting early 2017
3.4 Reevaluate MSC's governance and ensure it is aligned with the requirements of new strategic agreements and partnerships	Governance and Rules Committee	Starting mid-2017

Please note that owners and timelines will be reviewed and discussed to ensure alignment with MSC's current pipeline of project as well as short- and mid-term capacity

Key Performance Indicators*:

- Number of partnership agreements
- Performance of specific agreements/partnerships (dependent on each initiative)
- Follow-up meetings, and interview/survey with organizations
- Sponsorship dollars



^{*} Key performance indicators demonstrate the data that needs to be collected, analyzed, and monitored to help evaluate the progress and fulfilment of the strategic initiatives

4

Improve Membership Experience

To acknowledge the different needs of each swimmer segment and improve the swimmer's experience through tailored programs and services

Strategic Initiatives	Owner	Timeline
4.1 Develop tailored offering by creating relevant swimming programs per swim segment , either inpool or online. Programs will be based on past survey results in an effort to customize programs to segment needs	Operations Committee	By mid- 2016
4.2 Create a network among swimmers through a forum/sharing platform; enable certain segments and swimmer "types" to share tips and ideas	Operations Committee/ Website Coordinator	By the end of 2016

Please note that owners and timelines will be reviewed and discussed to ensure alignment with MSC's current pipeline of project as well as short- and mid-term capacity

Key Performance Indicators*:

- Number of net new members
- Membership attrition and retention
- Membership tenure
- Membership renewals
- Social "engagement" (social media metrics)



^{*} Key performance indicators demonstrate the data that needs to be collected, analyzed, and monitored to help evaluate the progress and fulfilment of the strategic initiatives

5

Participate in Coach Development

To have a clear level of involvement in the development of masters coaches and the delivery of coaching programs

Strategic Initiatives	Owner	Timeline
5.1 Roll out Masters Swim coaching program / modules while ensuring MSC's offering complements existing programs	Coaching Committee	End of 2016
5.2 Build coach recruitment engagement plan by leveraging existing partnerships and relationships, and existing coaches as "champions"	Coaching Committee	Early 2017

Please note that owners and timelines will be reviewed and discussed to ensure alignment with MSC's current pipeline of project as well as short- and mid-term capacity

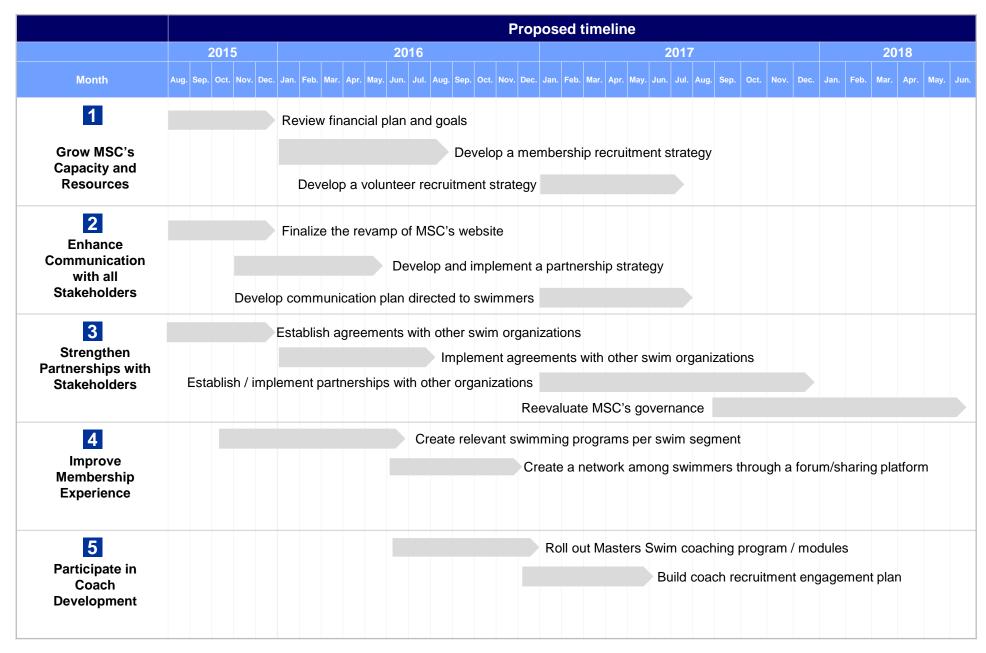
Key Performance Indicators*:

- Number of new coaches
- Coach rating completed by members who receive coaching
- Coach retention
- (Optional: follow-up survey with members and coaches)



^{*} Key performance indicators demonstrate the data that needs to be collected, analyzed, and monitored to help evaluate the progress and fulfilment of the strategic initiatives

Strategic Plan Timeline



Please note that the timeline will be discussed and updated as needed



In order for MSC to achieve its future strategic objectives, it must also take into account the following considerations

- Complete the strategic plan and use it as a guide for future decisions: the strategic plan should guide the executive team and the Board moving forward. Any key decisions should be assessed based on alignment with the vision and mission of the organization, and with respect to key initiatives in the pipeline.
- Have a clearly defined value proposition for master swimmers and make sure MSC is best positioned to
 deliver it: MSC has a key role to play in supporting master swimming in Canada but should not try to be
 "everything for everyone". MSC should leverage its knowledge of the swimming landscape and output of the
 survey analysis to focus its offering and ensure it complements or augments what other swimming organizations
 are doing.
- Create a momentum: while being important for any company, it is particularly crucial for MSC given its size and its ambitious objective that it begins its journey with small wins that will motivate the team and other stakeholders, and reinforce everyone's feeling that this strategic plan is achievable. The final timeline of decided initiatives should help build that moment.
- **Keep leveraging others to help you grow:** MSC's impact is currently limited by its resources (both financial and human). The organization should keep leveraging partners to support its growth. Building a communication plan, developing a member recruitment strategy, or mapping the offering of other swimming organizations could all be done with the support of an intern or volunteers (e.g., Deloitte, MBA students, Consulting Clubs, etc.). This would create some bandwidth for MSC's resources.

MSC must consider the following risks that could affect project success, and the following mitigation strategies

Risk Type	Risk	Mitigation Strategy
Operational	Capacity constraints on MSC staff who are able to contribute to strategic initiatives	 Allocate certain employees to a % allocation for each strategic initiative Allocate strategic initiative "leads" who are responsible for direct reports and allocating staff to initiative leads
	Key person dependencies (operations dependent upon certain stakeholders)	Ensure that each strategic initiative has an assistant lead, able to take over in case the initiative lead leaves the organization
Financial	Financial constraints limit execution of strategic initiatives	Clearly allocate financial needs in weekly status reports to enable adequate lead time
	Stakeholder buy-in	 Draft communication plan to disseminate to all MSC members, PSOs, and other various stakeholders Open a clear line of communication and enable transparency through initiative leads
	Execution does not align to timeline	Enable weekly status reports to track execution against timeline; initiative lead intervenes where necessary
Project	Scope misalignment	 Clearly communicate scope to MSC and initiative leads; track progress regularly against strategic pillars in status reports to ensure adherence to scope
	Execution is not completed	Weekly status reports enable MSC staff and initiative leads to track execution and allocate necessary staff to ensure completion
		 Inform board if timeline needs to be extended during monthly touchpoints

Next Steps and Final Recommendations

As next steps, there are a number of outstanding activities for MSC to complete

Phase 1: Case Studies and Membership Consultations



Conducted case studies of various swim/sport organizations



Conducted survey of members (swimmers)

Phase 2: Internal Stakeholder Consultations



Conducted interviews with Board/staff members and various stakeholders

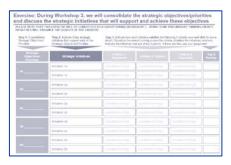


Redefined the vision and mission statements (Workshop 2a and 2b)

Phase 3: Finalize Strategic Plan and Next Steps



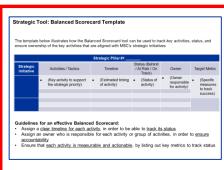
Defined future strategic objectives (Workshop 3)



Developed supporting initiatives (Workshop 3)



Further developed and prioritized the strategic initiatives



Next steps: determine the required activities, using the Balanced Scorecard Tool; write value statements



MSC will define the activities that support strategic objectives and initiatives and then use the Balanced Scorecard Tool to prioritize and assign these activities

Next Step 1: Define the Activities

For each of the 5 strategic objectives, and their corresponding strategic initiatives, MSC will define the key activities that must occur in order to fulfill these objectives and initiatives.

Next Step 2: Use the Balanced Scorecard Tool to Prioritize and Assign Activities

The template below illustrates how the Balanced Scorecard tool will be used to track and ensure ownership of each of the key activities. For each Strategic Objective/Priority, the various initiatives are listed in the first column, and the key activities (aligned to each initiative) are listed in the second column. *More information on the Balanced Scorecard Tool is on the next slide.*

	Strategic Objective #1							
Strategic Initiative		Activities / Tactics		Timeline	Status (Behind / At Risk / On Track)		Owner	Target Metric
	•	(Key activity to support the strategic priority)	•	(Estimated timing of activity)	 (Status of activity) 	•	(Owner responsible for activity)	
1b								
1b								

Guidelines for an effective Balanced Scorecard:

- Assign a <u>clear timeline for each activity</u>, in order to be able to <u>track its status</u>
- Assign an owner who is responsible for each activity or group of activities, in order to ensure accountability
- Ensure that <u>each activity is measurable and actionable</u>, by listing out key metrics to track status



MSC will use the Balanced Scorecard Tool to prioritize and assign these activities (cont'd)

Understanding the Balanced Scorecard Tool

What is a Balanced Scorecard?

- A way to track an organization's progress towards its goals and targets
- A summary of key activities that an organization can be held accountable to
- Evolutionary it should be reviewed periodically as the organization and the strategy change

What are the benefits of a Balanced Scorecard?

Increases the transparency of the strategy by clarifying the vision and focus the efforts toward shared goals

Provides information required to take managerial decisions:

- By translating the strategy into actions
- By helping prioritizing these actions
- By allowing for better tracking of the performance of departments

What are the Balanced Scorecard's objectives?

- Clarifies the vision in the terms and language of the business
- Links division performance to strategic goals
- · Helps focus thinking through trading-off activities
- Provides a framework to set quantitative and qualitative targets
- Enables managers to learn and revise goals, targets and the measures

What makes a good Balanced Scorecard?

- Simplicity a small number of important measures and actionable targets
- Forward-looking compared with the ability to track current performance
- Clear credible link to corporate objectives / strategy
- Consistency with short term and long term initiatives
- Provides feedback loop taking into account changing conditions, goals and capabilities

What are the components of a Balanced Scorecard?

Board Summary

An "executive summary" roll-up of the detailed balanced scorecard which provides a summarized view of all strategic priorities under each objective

Balanced Scorecard

A detailed section for each objective:

- Strategic Priority: A goal that supports a component of the organization's aspirations and mission
- Activities / Tactics: Specific activities or tactics that support each Strategic Priority
- *Timeline:* Specific timing for each activity
- Target Metric: A specific measure that the organization can use to track success
- Status: Shows whether the activity is on track, at risk, or behind
- Responsible: The particular individual who is responsible for delivery of the activity



MSC should develop value statements that support the new vision and mission statements created during the engagement workshops

Next Step 3: Create Value Statements

Future value statements must support the future vision and mission statements created in Workshop 2b (listed below). MSC's current value statements (also listed below) can be used as a starting point:

	engaging them throughout a lifetime of growth, discovery, and personal achievement
MISSION STATEMENT:	To promote involvement and lifelong engagement in the masters swimming community through programs, competition, coaching, and strategic partnerships
CURRENT VALUE STATEMENTS:	 To be the governing body of swimming in Canada To provide competition, coaching, programming for 18+ regardless of ability To improving health and fitness, To provide coaching and training aimed at adult swimmers To support club development To promote innovation, proaction, leadership, ethical, inclusion, respect, and trust within a swimming organization
FUTURE VALUE STATEMENTS:	



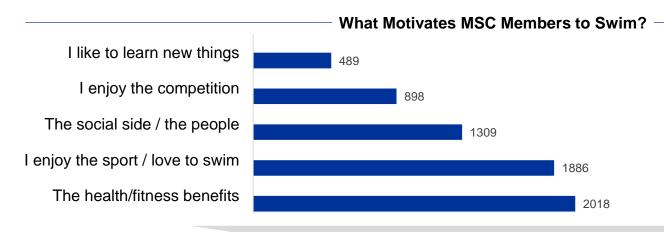
MSC should develop value statements that support the new vision and mission statements created during the engagement (cont'd)

Component	Definition / what is it?	
Vision Statement	The vision of an organization provides a concise picture of the organization, typically several years into the future, and sets a goal that the organization will strive to achieve. The vision engages, inspires, energizes and motivates the organization's various stakeholder groups to take action in the intended direction.	Focus of Workshops
Mission	The mission of an organization provides the 'how' of the vision statement by articulating what an organization will do to achieve its vision. It is focused on the present state and serves as a concise statement of the purpose of an organization.	2a and 2b
Value Statements	A declaration(s) that informs internal and external stakeholders about an organization's top priorities and core beliefs	Next step for MSC
Strategic Priorities	The strategic priorities of an organization further define what success looks like for that organization and outline the specific goals an organization must achieve in order to work toward realizing its vision and mission. The strategic priorities should be linked to the goals and objectives highlighted in the vision and mission statements as they will be fundamental to achieving them. A set of strategic priorities currently does not exist for Masters Swimming Canada. We are aiming to define an initial set of strategic priorities that Masters Swimming Canada will aim to achieve over the next 3-5 years.	Focus of Workshop 3

Research and Findings

Survey: What MSC can do to attract new members and retain existing ones

While swimming provides numerous of benefits, MSC members are primarily motivated by three factors: fitness & health, the love for the sport itself, and the social element



Other Motivating Factors:

- Having a good coach
- Working towards a goal
- Training for triathlon
- Desire to Improve mental health

Areas of Focus

Expand offering of fitness related classes

- Fitness was rated as a high priority and motivator for all swimmer segments
- Working with the clubs to expand the selection of health/fitness related services and programs will have tertiary benefits across various swimmers segments and ages – low investment, high return

Increased emphasis on helping members measure and track their performance

- Establish online / club-related portal that swimmers can use to track performance
- Easy way for MSC members to measure progress overtime
- Helps people to stay motivated and engaged as they progress through different stags in life

Better advertised / more frequent social events – in person and online

- More frequent communication of social events will keep members involved and engaged – more likely to invite a friend
- Implement online forum to facilitate knowledge sharing and consistent line of communication with members



Survey: Segmenting MSC membership

Deloitte.

Despite there being five distinct swimmer segments, access to good coaching and a lack of formalized performance tracking are pain points common to all groups

How can MSC cater to all Swimmer types?				
Type of Swimmer	Description	Pain Points	Potential Ways to Solve	
Fitness	Train to reach your fitness objective and to get stronger	 Lack of performance measurement Access to coaches / advice 	 Online personal tracking portal for MSC members Dry land training courses (i.e. stretching) Nutritional advice 	
Competitive	 Training is goal oriented and you t competition seriously have certain competitive goals compete mainly in swimming pool 	Lack of performance measurement	 Dry land training Better expectations set with coaches throughout hiring process Improved country-wide communication 	
Triathlon	Train with a swimming club for the purpose of becoming a stronger swimmer in triathlon	 Specific tri-training Lack of effective coaching Lack of performance measurement / structure 	 Online personal tracking portal for MSC members Better expectations set with coaches throughout hiring process 	
Open-water	 Oriented towards open water swin interested in performing in long distance events and/or open water competitions 	Need more specific technical	 Online personal tracking portal for MSC members Online forum for members to share information with each other 	
Recreational	 Enjoy swimming and learning abo sport, but rarely compete swim mainly for fun and the social aspect 	improvement	 Online personal tracking portal for MSC members "Office hours" from coaches More availability of training programs 	
Number of Responses 0000 0000 0000 0000 0000 0000 0000	46% 29%	12%	9% 4%	
F	Fitness Competitive	Triathlete	Recreational Open Water	

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Case Study: Various swimming and triathlon organizations were reviewed

Research Insights

Insight 1: resources are key drivers of growth

- The U.S. Masters Swimming and Masters Swimming Australia case studies both **highlight the need for resources to grow the organization and increase membership**
- USMS has six times more swimmers than MSC, as well as 14 full-time employees. MSA, while being slightly smaller than MSC, has one executive director and two assistants. It is also supported by local branches that can support MSA's work at the national level
- MSC may consider adding resources if it wants to dedicate more energy on enhancing its service offering and grow its membership

Insight 2: the internal and external structure

- The organizational structure is key to ensuring that the organization works as effectively as possible. All investigated organizations have executive directors and other administrative persons. Due to its size, USMS has more employees, specifically in finance and communication/marketing
- Interestingly, the external structure (i.e., how the organization is positioned relative to other swimming organizations and provincial branches) is at least as important as the internal structure; both having a significant impact on the effectiveness of communication. As an example, USMS works closely with USA Swimming and USA triathlon to develop partnerships in the industry
- MSA, on its side, has provincial branches that are independent, but nevertheless report to MSA. This ensures proper communication with swimmers in all provinces and supports the work of MSA at the national level

Insight 3: members have different needs to fulfill

- Members of master swimming organizations (MSOs) have different goals and needs, as shown by the results of the survey conducted by USMS. Interestingly, not all members have their needs fulfilled to the same extent
- Competitive swimmers appear to be the group that is best served by MSOs. For example. MSOs organize meets, track times and records, and develop competitive programs (e.g., million meters challenge)
- Surprisingly, MSOs provide less value to non-competitive swimmers, despite the fact that they represent a significant share of the
 membership. Gaining a better understanding of the needs of this swimmer segment will be key for MSOs to grow membership and provide a
 better experience
- Triathletes also have distinct needs. They do not always swim as fast or make as many strokes as other swimmers. Providing specific coaching advice and tailored training sessions (e.g., open water) may be options worth exploring for MSOs
- It will be key for MSC to leverage insights from the survey in order to provide the best possible swimming experience for all swimmers types

Case Study: Research was conducted on rowing organizations in Canada

Research Insights

Both primary and secondary research was conducted to understand ROWONTARIO and Rowing Canada. Two individuals were interviewed; these interviewees are both ex-ROWONTARIO Presidents, have recently been involved with Rowing Canada, and are now currently associated with local rowing clubs.

Insight 1: membership experience

- There is a clear distinction between recreational rowers and competitive rowers, even at the masters level; as such, different programs are offered at rowing clubs to satisfy the specific needs of each group
- Adult athletes, at the competitive level, are predominantly recruited and join rowing clubs due to their previous experience with the sport; adult athletes, at the recreational level, are recruited through learn-to-row programs and other local community outreach events.
- Some clubs are exploring the idea of developing Fitness Training programs, which can be offered to local communities. The intent of these programs would be to use the on-land rowing equipment (ergometers) at rowing clubs to create a high-energy fitness class. These classes could be offered to local communities, and not only compete with other gyms and fitness centres, but also offer opportunity to recruit athletes into rowing.
- The majority of the rower's interactions happen with a local club; provincial and national rowing organizations manage regattas, but the rowers register and are made of aware of regattas through their individual local rowing clubs. Therefore, the membership experience is heavily dependent on the structure and execution of rowing programs at the local club level.
- The level of coaching received by masters groups varies across different rowing clubs. This is dependent on the group of athletes, the cost of membership, and the club's infrastructure.
- Rowing Canada offers Canadian Masters Henley. With regards to regattas, ROWONTARIO offers the Ontario Masters Championships and the Bernaki Regatta. Some local clubs hold regattas that are sanctioned through ROWONTARIO (such as the Tony Fooks Regatta and the Hog Town Heats, recreational regattas for athletes of all ages). Realizing the strong social focus of masters rowing, ROWONTARIO is exploring the opportunity to make the Ontario Masters Champs more of a "camp" weekend, including both racing and social events.



Case Study: Research was conducted on rowing organizations in Canada (cont'd)

Research Insights

Rowing Canada, provincial organizations (such as ROWONTARIO), and local clubs operate as independent entities. The LTAD has been an initiative started by Sport Canada, and has been a push across all sports.

Insight 2: governance between rowing organizations

- Local clubs register their rowers to ROWONTARIO, which register into Rowing Canada; Rowing Canada's insurance policy covers all registered rowers across the country.
- Any information coming from Rowing Canada is shared with provincial organizations, which is then up to local clubs to share with their membership groups
- Some of Rowing Canada's focuses include developing coaches, as coaches are integral in the development of athletes and of clubs. Rowing
 Canada has a Coaching Education Committee, which helps strategize opportunities for talent recruitment and development. Similarly,
 ROWONTARIO provides coach development at the provincial level, which is tied to the NCCP, Sport Canada, and the Coaching Association
 of Ontario. There is coordination amongst the initiatives at the national and provincial levels.
- Ontario has a provincial advisory council that meets twice a year to discuss provincial issues that need to be addressed by Rowing Canada. This committee elects one representative to represent Ontario on the Rowing Canada Board of Directors
- Leaders in Ontario tried to launch an Ontario Masters Committee around 2003, but the initiative proved unsuccessful due to low interest; however, more recently, there has been a push to establish a masters rowing circuit in Ontario to bring more attention and competition to masters rowing

Insight 3: alignment to LTAD

- The LTAD initiative has been steady implementation at the club level. Although perception would seem that it's predominantly meant for junior athletes, the LTAD levels also are very applicable to masters rowers new and returning to the sport.
- There has been a culture shift within clubs to understand and implement the LTAD standards. This allows clubs to better understand the different segments of athletes, and as such, create programs and training schedules, and ensure the correct resources (boats, and coaches) to satisfy the development of athletes at each level.
- Recognizing the importance and reasoning of LTAD, ROWONTARIO has become more mindful of the different experiences it can offer to rowers in Ontario. For example, it has recently launched a regatta in Barrie that focuses on skill-development, for rowers of all ages.



Stakeholder Interviews: Key Stakeholder groups (MSC Board members, PSO's and MSO's, and volunteers) were interviewed

Board Member Interviews

Topic	Key Insights
Governance	 There has been turnover in the Board and therefore some knowledge transfer has been lost. There is an opportunity to clarify roles and responsibilities of Board members and governance practices, and establish the new Board as strong leaders within the swimming community There is a need to understand the bylaws of other swimming organizations, and revisit and readjust the MSC bylaws, as needed
Goals and Stakeholder Understanding	 There is a lack of common perspective between MSC's Board of Directors on MSC's mandate, which demonstrates confusion with regards to stakeholder needs and strategic priorities, how MSC interacts with each stakeholder group, and who exactly MSC's "customers" are. This lack of clarity makes it difficult to articulate goals/objectives and communicate to stakeholders. Therefore, there is a need to clarify MSC's raison d'être, clarify who MSC's "customers" are, and clarify how MSC should interact and collaborate with other swim organizations There is a need to develop stronger relationships with PSO's and MSO's in order to increase MSC's ability to influence
Programs	There is an opportunity for MSC to increase the quality of its program portfolio

PSO's and MSO's Interviews

Topic	Key Insights			
Governance	 Some provincial organizations believe MSC should be better connected with Swimming Canada; the concept of having MSC as a sub-group of Swimming Canada was proposed by various individuals. It is argued that this structure will maximize the alignment of goals and strategies and minimize the duplication of efforts and programs 			
Communication to Swimmers	 Provincial organizations feel they should be the ones to communicate directly to the swimmers in their provinces, and therefore MSC should coordinate more directly with PSO's to reach swimmers 			
Programs	There is a need for MSC to minimize the overlap and misalignment of its programs to those of other swimming organizations			

Volunteers (Coaches and Officials) Interviews

Topic	Key Insights			
Governance	There is a lack of clarity of roles and responsibilities between MSC and other swim organizations			
Awareness	Volunteers have a low awareness of the mandate, goals, and vision /mission of MSC			
Programs and Knowledge Sharing	• There is an opportunity for MSC to deliver coaching modules, which would be supplemental to official certification programs offered by Swimming Canada. Also, there is an opportunity for MSC to create a knowledge-sharing community or environment, where coaches, clubs, and swimmers can share information on things like nutrition, injury prevention, and swimming technique			



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Appendix A: Project Summary

Review of the Proposed Project Timeline

MSC has a new full-time Executive Director (ED), a number of new Board members, and part-time employees. As such, MSC is looking to fine tune its vision and mission and refresh its existing strategic plan to ensure it reflects the vision of the organization



Phase 1: Case Studies and Membership Consultations

- Conduct case studies on three comparable organizations
 - Leverage previous Deloitte deliverables and areas of expertise during analysis
- Develop and conduct MSC membership survey
 - Review and analyze survey findings

Phase 2: Internal Stakeholder Consultations

- Conduct Board member and staff interviews
- Conduct focus groups with MSC volunteers and coaches
- Review summary of key findings
- Present findings to MSC at validation workshop
- Discuss and adjust MSC's vision and mission statements

Phase 3: Finalize Strategic Plan

- Consolidate key findings and feedback from Phase 1-2
- Refine preliminary 2015-2017 Strategic Plan with MSC before confirming the final strategic recommendations



Summary of phase objectives and resulting deliverables and milestones

Phase 1: Case Studies and Membership Consultations

- Conduct case studies on three comparable organizations
 - Leverage previous Deloitte deliverables and areas of expertise during analysis
- Develop and conduct MSC membership survey
 - Review and analyze survey findings

Phase 2: Internal Stakeholder Consultations

- Conduct Board member and staff interviews
- Conduct focus groups with MSC volunteers and coaches
- Review summary of key findings
- Present findings to MSC at validation workshop
- Discuss and adjust MSC's vision and mission statements

Phase 3: Finalize Strategic Plan

- Consolidate key findings and feedback from Phase 1-2
- Refine preliminary 2015-2017
 Strategic Plan with MSC before confirming the final strategic recommendations

- Membership Survey
- · Summary of Case Study Findings
- Summary of Survey Findings
- Workshop 1a: Review Case Study findings
- Workshop 1b: Review Survey findings

- Stakeholder Interviews (Board members, PSO and MSO's, volunteers)
- Summary of Stakeholder Interview Findings
- Workshop 2a: Discussing Vision/Mission
- Workshop 2b: Finalizing Vision/Mission

- Workshop 3: Finalizing Strategic Objectives and Next Steps
- Strategic Plan and Presentation

Review of MSC's needs, as listed during project launch, and status upon project completion

Top-of-mind issues	To be provided by Deloitte	To be provided by MSC	Status upon project completion
Outdated strategic plan, given the change in management and renewed objectives	 Interviews with Board members and staff to evaluate current strategic priorities Updated Strategic Plan for 2015-2017, leveraging comparable frameworks from best-in-class organizations 	 Evaluate past strategic plan Commitment to implement project deliverables 	 Interviews with Board members and staff were completed The strategic plan was updated, according to Deloitte frameworks
Identifying opportunities to grow revenue	Identification and evaluation of additional revenue stream options (including membership growth, new services, sponsorship/partnership opportunities (e.g., Triathlon), and new investments), leveraging: — Case studies — Previous Deloitte deliverables	 Current MSC financials Assessment of potential revenue stream options 	 Case studies and membership survey identified potential new partnership models, new services (due to swimmers' needs) Limited financial analysis was completed, due to limited current state financial information provided
Understanding MSC's operational capacity and the impact of growing the organization	Deloitte thought leadership material on operational capacity, organizational design, change management	Organizational structure, job descriptions, and current operating model	Deloitte thought leadership provided and incorporated in research findings and workshop materials
Gaining a detailed understanding of the member experience	 Evaluation of current participant experience Member "journey" analysis 	Connect Deloitte to participants	Analysis of the membership survey studied the experience of various segments of swimmers
Understanding how to better promote MSC	Thought leadership on applicable non- profit marketing practices	 Current marketing budget and plan Website/Social Media analytics Branding 	Deloitte provided various point-of-view articles regarding nonprofits

Appendix B: Current State Information

Current Vision, Mission, and Values Statements

Vision Statement

Every adult swimmer in Canada will be aware of, and have access to, swimming programs and resources that enhance their swimming experience.

Mission

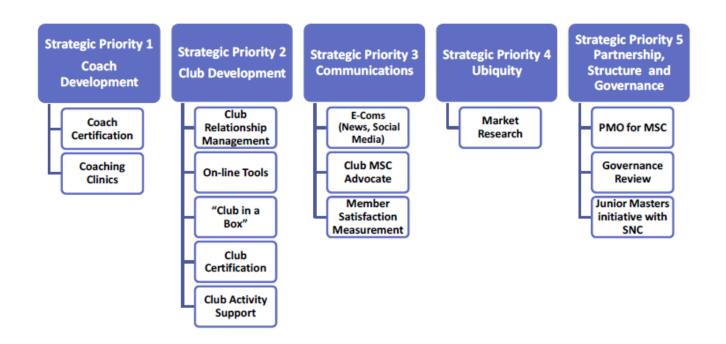
- To lead, develop, and support adult swimming in Canada.
- MSC will play an active leadership role in the development and support of adult swimming in Canada
- MSC will develop, promote, enhance, and grow adult swimming in Canada
- MSC will support adult swimmers and the organizations that serve them

Values Statement

- Participation and Achievement, Health and Wellness, Fun and Friendship
- Masters Swimming encourages participation regardless of level of ability
- Masters Swimming supports setting and achieving goals
- Masters Swimming promotes health and wellness through swimming
- Masters Swimming is fun
- Masters Swimming fosters friendships

Figure 1 - MSC Strategic Priorities

MSC Strategic Plan 2012 – 2017



Source: Masters Swimming Canada – 2012 Strategic Plan



Deloitte.

Appendix C: Research Findings

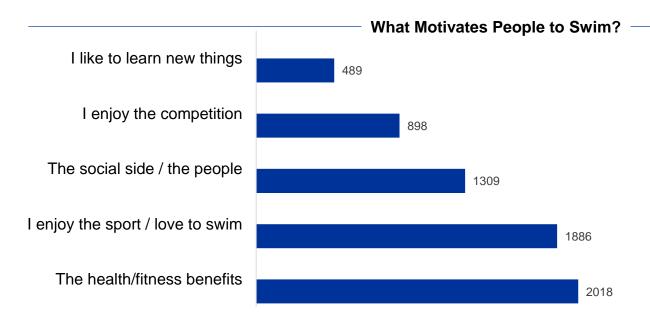
Survey Findings

Case Study Findings

Interview Findings

Swimmer motivations

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)



Other Motivating Factors:

- · Having a good coach
- Working towards a goal
- Training for triathlon
- Desire to Improve mental health

Quality / Frequency of Swim Meets

How Would You Rate Overall Quality of Swim Meets		
Rating	Number of Responses	
Very Good	907	
Good	570	
Poor	23	
Very Poor	1	

General Commentary on Swim Meets:

- "Excellent organization"
- "Encouraging and inclusive of all levels"
- "Most are well organized, with Provincial and National being the best overall"
- "Sometimes there aren't enough timers, or enough swimmers to make the competition fair"



Swimmer motivations (continued)

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)

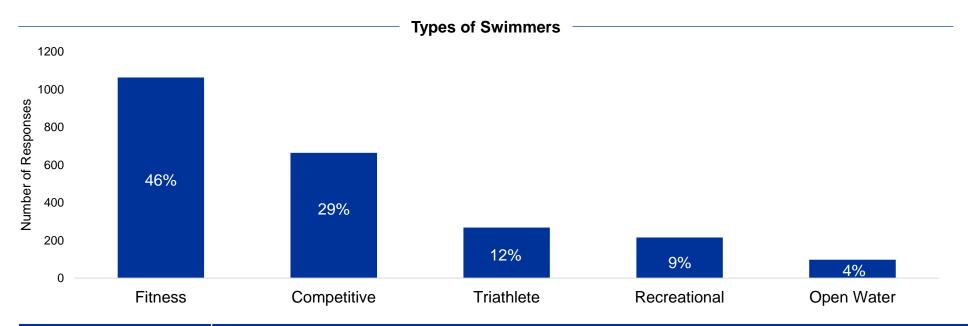
How Do Swimmers Describe Themselves?

Statement	Number of Responses			
	Very Well	Somewhat	Not Very Well	Not at All
I swim mainly to stay fit	1767	505	27	5
I have goals in mind when swimming	881	1035	267	101
I mainly enjoy learning about swimming	533	1032	400	167
I follow a structured training plan to perform at my best at swim meets	458	692	445	330
I swim mainly to get stronger for other sports I'm involved with (i.e. triathlon)	361	502	429	728
I am currently taking time off from setting swimming goals	240	429	362	758
I swim on a very casual basis	165	482	437	946
I thoroughly enjoy meeting new people in the swimming community	897	1058	243	59
I am new to masters swimming	252	327	263	1124
I have never competed in a Masters swim meet	531	74	92	1211
I take training and competition seriously	511	957	487	261
I compete on a casual basis, mainly for fun	456	756	331	457
I prefer swimming outdoor, rather than indoor	363	592	603	517



Swimmer segmentation

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)



Types	Description
Recreational Swimmer	you enjoy swimming and learning about the sport, but rarely compete. You swim mainly for fun and the social aspect.
Fitness Swimmer	you train to reach your fitness objectives and to get stronger.
Competitive Swimmer	your training is goal oriented and you take competition seriously. You have certain competitive goals you are trying to achieve. You compete mainly in swimming pools.
Open Water Swimmer	your training is oriented towards open water swimming, you may be interested in performing in long distance events and/or open water competitions.
Triathlete Swimmer	you train with a swimming club for the purpose of becoming a stronger swimmer in triathlon.



Fitness swimmers

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)

- 88% of Fitness Swimmers who responded to the survey indicated that the current system (clubs, coaches, MSC) does address their needs
- Of those who answered the survey,
 46% describe themselves as a Fitness
 Swimmer, largest group by far

Fitness Swimmers

Additional Commentary

- "Club is mediocre, MSC is of little relevance. I think MSC is losing its audience
- "don't get enough stroke improvement"
- "I find that there is no training available for intermediate swimmers. There should be training available to enhance your skills"
- "I generally find the coaching weak and I have no idea what MSC does for me."

What additional services could help address your specific needs?

"A masters swim club with a structured program and program goals

"Better communication between coaches and between swimmers and coaches."

"Dry land training"

"Masters Specific Coaching program, Much more communication from provincial and national bodies"

"More pool and specific lane swimming opportunity."

"More local meets."

"Nutritional Advice"

"Stretching related specifically to swimming"

"Specific technique coaching remains a difficult problem. Top coaches want to coach elite athletes, not masters."

Competitive swimmers

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)

83% of Fitness Swimmers who responded to the survey indicated that

the current system (clubs, coaches,

 Competitive Swimmers, who make up 29% participate in one open water competition per year, on average

MSC) does address their needs

Competitive Swimmers

Additional Commentary

- "Coaches-club is a system locally managed. It is hard to explain to others who MSC fits into that "system"
- "club coaching is inadequate, no competitive orientation"
- "Masters Coaches don't tend to be very technical with the swimmers"
- "I have chosen no for this answer because I feel MSC could be doing more to reach out to masters swimmers to provide a vision, progress, and completion of national swimming goals"

What additional services could help you reach your goals?

"Better communication from boards to swimmers"

"Better recognition and remuneration for the coaches"

"Better coaching"

"More access to pools in the community, especially long course pools."

"Need more communication provincially and on a National basis."

"Dry land training"

"Website that allows you to set goals and track against these targets"

"More pool time and better facilities ie. 50 metre pools!"

"Nutrition advice, strength training."

Triathlon swimmers

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)

- 76% of Triathletes who responded to the survey indicated that the current system (clubs, coaches, MSC) addresses their needs
- Triathletes, who make up 11% of total survey respondents, attend three to four triathlons per year, on average

Triathlon Swimmers

Additional Commentary

- "Coaching levels revolve around kids, not adults"
- "It certainly helps but I don't think the plan is orientated towards triathlon swimmers.."
- "The Masters swimming program is not very accessible, they only have early morning sessions"
- "Would like some longer-distance options in training and competitions"

What additional services could improve your performance?

"Better individual feedback at club level training days"

"Greater structure and seasonal planning with a focus towards distance"

"More focus on freestyle technique, less on other strokes"

"I would like to see Total Immersion swim training more widely available!"

"Tri specific training for all distances."

"More work on stroke improvement; tips tailored for individuals"

"Organized open water swim training"

"Proper consistent coaching with a periodized plan. Experienced professional coach used to working with competitive athletes

Recreational swimmers

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)

- 93% of Recreational Swimmers who responded to the survey indicated that the current system (clubs, coaches, MSC) does address their needs
- Of those who answered the survey, only 9% describe themselves as a Recreational Swimmer

Recreational Swimmers

Additional Commentary

- "Coaching is mainly focused on competitive swimming (and excompetitive swimmers)"
- "I'd like more coaching"
- "It seems to push for overall swimming improvements without addressing specific and individual abilities. It can be demotivating when in the presence of strong competitive swimmers"
- "Coaches are great, and I understand the need for a governing body, but it doesn't really affect my swimming daily."

What additional services could help address your specific needs?

"A bit more instruction on stroke improvement, other drills, etc."

"More awareness of other local clubs and masters training sessions"

"Focus on less competitive more recreational"

"I am not sure what role Masters Swimming Canada plays in my swim objectives or needs"

"More stroke improvement rather than training for competition"

"More outside training"

"Better swim meet entry process"

"recording swimming and analysis"

"Offer nutrition advice to limit specific types of foods that may not go well when swimming"

Open water swimmers

The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)

- 50% of Open Water Swimmers who responded to the survey indicated that the current system (clubs, coaches, MSC) addresses their needs
- Despite this, the majority rate open water events as very good
- Competitive Swimmers, who make up
 4% of total survey respondents, attend
 two open water events per year, on average

Open Water Swimmers

Additional Commentary

- "no outside swimming or open water technique training"
- "Not many swim coaches have true competitive open water swimming experience, and not many other swimmers are interested in competing in open water races, so it's hard to do any kind of specific training."
- "There are very few open water competitions and training programs"
- "There are no specifically trained coaches for Master Open Water. Also, there are few events"

What additional services could improve your performance?

"More open water clubs/groups"

"More events, longer distance events. I go to the states for most of my swims."

"More competitions and outdoor practices"

"Making more information on open water topics specifically easily available to members"

"more opportunities to swim with others in open water (I don't swim alone)."

"Regular swim training"

"coaching in the summer at the lakes, not in the pools"

"I would like a e-mail list serve or Facebook group geared towards open water swim opportunities and training

Swimmer perceptions of MSC and its programs

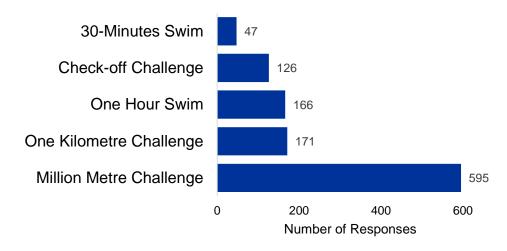
The membership survey closed May 30th, with a total of 3143 responses between French and English speaking participants; this represents 36.1% of MSC's total membership base (based on a total of 8716 members)

Perception of MSC

Key Insights / Comments

- 71% of those who responded DO consider themselves to be members of MSC; 11% do not; and 15% are not sure
- "Don't really feel like I'm part of a larger organization / am unaware."
- "I do not feel MSC's current structure connects me to it.
 There is a breakdown in the relationship between MSC and its provincial bodies. I believe making that connection MSC's primary one would solve many of these problems and give us, the members, control of our sport."

Which MSC programs do you participate in?



How do you view MSC?

- "I consider myself more as a member of my local club"
- "Only because I am paying for it each year"
- "A distant organization that receives money from the swimmers registration to a swim club"
- "A good organisation that does stimulate social events and good swimming techniques"
- "As an extra cheque I have to write in order to belong to my local Masters Club

Do you get value out of MSC?

- "Absolutely. Both as an athlete and socially"
- "Hard to say. I don't know that I can differentiate my particular club with masters swimming Canada. I feel that I get good value from what I club provides"
- "I have no idea what you do for our club"
- "Not really, I get value out of my local club and coaches"
- "Only in so far as I get value out of my club"



Founded in 1970, U.S. Masters Swimming is a fairly mature organization that has been growing quickly in recent years

Overview of the U.S. Masters Swimming Organization

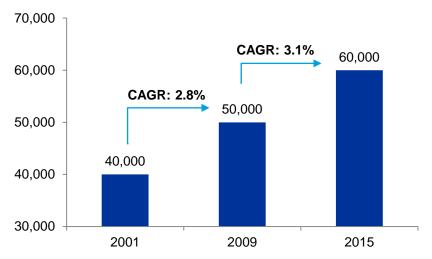


- U.S. Masters Swimming ("USMS") is a national membership-operated nonprofit organization that provides membership benefits to nearly 60,000 swimmers across the U.S.
- Benefits include the insurance, the SWIMMER magazine, sanctioned events, and others

Overview of Membership

- USMS's membership has been steadily growing over the past 15 years, showing the organization's ability to offer value added services to its members
- 86% of USMS's members renew their membership every year, which is in-line with MSC's fluctuation rate
- In 2011, the average membership tenure was 6.9 years

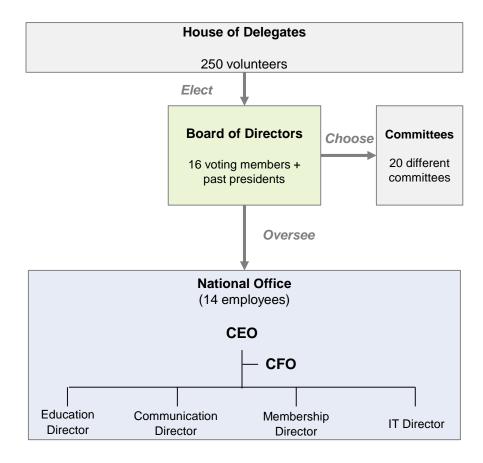
Historical Annual Membership



Source: USMS's website and members survey

Deloitte.

Organizational Structure



USMS recognizes the existence of four distinct swimmer segments with varying needs and preferences to cater to

Segmentation and Offering by Segment

• The 2011 members survey has highlighted the importance of considering different swimmer segments

34%

• Recognizing the need to act on this finding, USMS has decided to educate coaches on the different market segments, to make it easier for swimmers to find information relative to their specific segment (notably on the website), and to effectively target communications



Average age

49 years

26%

59%

Triathlon

- Triathletes do not want to feel disrespected because they are not the fastest swimmers or only swim freestyle
- A specific section of USMS's website is dedicated to triathletes' training; this section refers triathletes to articles and online workouts specifically dedicated to triathletes

2 Open Water

- The USMS also organizes open water sanctioned events
- As for the indoor competition, there are an annual calendar, open water championships, and various form of recognition for long distance swimmers

3 Fitness

- Fitness swimmers need to feel their club / coach is helping them reach their fitness goal
- Based on this finding, USMS has created achievement opportunities that are not competitive based for fitness swimmers (e.g., check-off challenge, go the distance)
- USMS also added online workouts for members living far from their club and training alone

4 Competition - Pool

- Competitive swimmers are most satisfied with USMS, which organizes a large number of sanctioned events and championships
- USMS has also developed numerous recognition program such as the "Top 10", "All Americans", and "All Stars" programs

1The market segments add up to more than 100% as some members have identified themselves as being in more than one category (e.g., both "Open Water" and "Triathlon" Source: USMS's website and members survey



Membership is stagnating for Masters Swimming Australia, whose primary challenge will be to attract young adults

Overview of Masters Swimming Australia

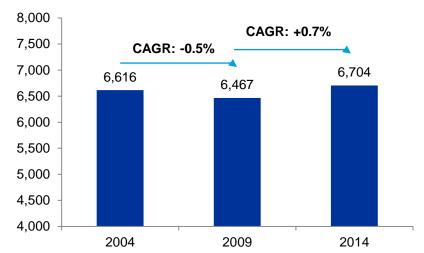


- Masters Swimming Australia ("MSA") was originally established in 1975 to provide pool competition for adult swimmers
- Mission statement: "To provide at club, state and national level an environment to encourage all adults, regardless of ability, to swim regularly and compete in order to promote fitness and improve their general well being"

Overview of Membership

- MSA counts 6,700 members from 190+ clubs located throughout Australia
- The number of members has been largely flat over the past decade
- The large number of members not renewing their membership annually is identified in the 2014 annual report as a key factor explaining this modest growth

Historical Annual Membership

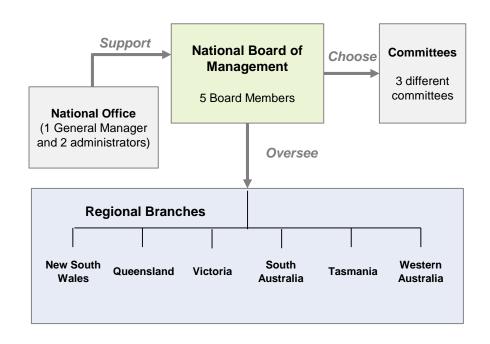


Source: Masters Swimming Australia website and 2014 annual report

Deloitte.

Organizational Structure

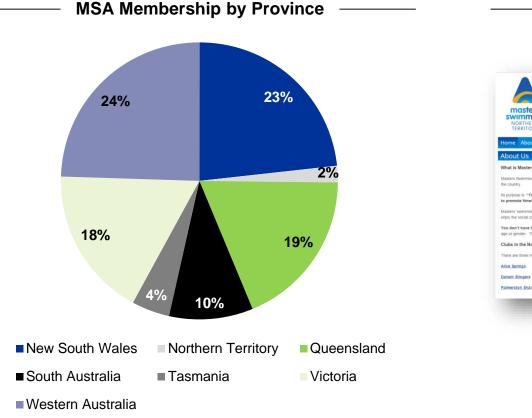
 A key characteristic of MSA is its organization by regional branches that have their own organizational structure, strategic plan, and service offering



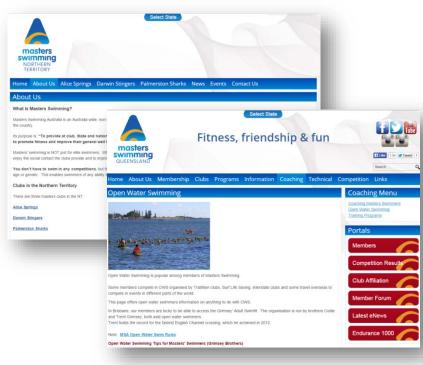
Given its regional structure, MSA must ensure that the member experience is harmonized across all regions

MSA's Structure by Branch

- · Branches are managed by delegates but each branch has its own organizational structure, depending mostly on its size
- Branches own the relationship with local clubs but also manage swimming programs at the provincial level
- Branches report to MSA, each has a dedicated section in MSA's annual report to review the past year and share updates on recent developments or events to come
- · Recently, the website of each branch has been harmonized to adopt the same look and feel as MSA



Overview of Provincial Organizations' Website



Source: Master Swimming Australia



Triathlon Canada is a relatively new sport organization that has experienced considerable growth over the past few years

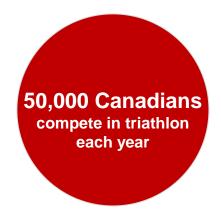
Overview of Triathlon Canada



- Triathlon Canada is a National Sport Organization (NSO) governing one of the fastest growing sports in Canada
- Triathlon Canada's mission is to provide excellence in leadership, structure and education for the growth and development of the sport

Overview of Membership

- Introduced in the early 1970's in California, triathlon now counts six million athletes around the world
- Triathlon Canada was created in 1985 and in 2000, triathlon made its first appearance at the Olympic Games
- It is estimated that race participation has increased by more than 300 per cent in the last five years



Organizational Structure

- As most Canadian National Sport Organization (NSO), Triathlon Canada is represented in provinces by Provincial Sport Organizations
- PSOs support Triathlon Canada by encouraging the participation in triathlons locally, providing clinics, training and coaching, and supporting local clubs
- Each PSO has its own staff and board members





















As underlined in its strategy, Triathlon Canada is looking for partnerships and alliances to grow participation

Triathlon Canada Strategy

Driving and framing the next quadrennial for Triathlon Canada are three strategic tri-pillars with corresponding strategic outcomes, strategies and key success indicators

PILLAR 1: PERFORMANCE

To optimize the platform for our elite athletes to excel in international and Olympic / Paralympic competition

PILLAR 2: PATHWAY

To advance national / provincial synergies in growing participation in Triathlon and paving the way to high performance

PILLAR 3: FINANCIAL FITNESS

To diversify and increase our financial resources and enhance organizational sustainability

Strategic Outcome

Participation growth in our sport and enhanced technical excellence

Strategic Outcome

- Implementation of LTAD model
- Coaching education programs and activities
- Officiating development and training
- Supporting international event hosting initiatives
- Developing strategic alliances internationally, nationally, and provincially

Success Indicators

- Quality, number and retention of coaches and officials
- Number of coaching and officiating training and education programs
- Number and type of international officiating opportunities and ability to quality maximum quotas for Major Games
- · Best in class Age Group Team organization
- Implement of Event Hosting Strategy

Source: Triathlon Canada's Strategic Plan 2013-2017



ROWONTARIO is a provincial rowing organization that supports and promotes the sport at all levels

Overview of ROWONTARIO



- ROWONTARIO (Ontario Rowing Association) is committed to support and promote the sport of rowing, which is highlighted in the variety and quality of programs and services it offers.
- ROWONTARIO is a provincial organization that works closely with local rowing clubs as well as Rowing Canada

Overview of ROWONTARIO

- ROWONTARIO's vision is that "Every Ontario community with a safe and accessible body of water has a rowing club functioning at optimal capacity"
- ROWONTARIO's mission is to "... enhance rowing participation and excellence through implementation of the FUNdamentals to Active for Life stages of the Canadian Sport for Life (Long-Term Athlete Development) (CS4L/LTAD) model"

Affiliation with Rowing Canada and Clubs

- ROWONTARIO provides assistance to Member Club and Member Associations/Organizations in the encouragement and development of competitive and recreational rowing
- Local rowing clubs in Ontario are registered with ROWONTARIO¹, and pay an annual membership fee. Registered clubs are able to vote at ROWONTARIO's Annual General Meeting
- All rowers at the clubs are registered with ROWONTARIO by category, and pay an annual fee. Registered members are able to participate in ROWONTARIO events
- ROWONTARIO represents Ontario rowing with the national rowing organization, Rowing Canada Aviron, by providing input on behalf of Members Clubs into national governance and policies

Source: ROWONTARIO website

1. Rowing clubs must also be registered with Rowing Canada Aviron

Organizational Structure

- ROWONTARIO is governed by a volunteer Board of Directors, with various committees providing additional support
- In 2014, ROWONTARIO transitioned to a Policy Board, in which the Board makes all governance decisions and operations decisions are delegated to staff

Elected

ROWONTARIO Board of Directors

President Secretary Treasurer 4 Directors

Committees of the Board

Governance Committee
Nominating Committee
Finance, Audit, & Risk
Committee
Human Resources
Committee

ROWONTARIO Staff

Executive Director
Manager, Member Services
Program Manager, Shells &
Sails
Coordinator, Sport Development
Technical Director



ROWONTARIO offers clubs, athletes, and coaches a variety of services, programs and events

Services Offered by ROWONTARIO

• ROWONTARIO provides various services, programs, and educational programs/courses to local rowing clubs, umpires, coaches, and athletes. ROWONTARIO also provides programs and awards, and also regattas and events to Ontario clubs and athletes.

Various Services Offered by ROWONTARIO

Club Funding and Coach Funding Club Funding

 Club Assistance Loan: clubs are eligible for a loan up to \$20,000 to support capital based purchases to support club development

Coach Funding

 Quest for Gold Enhanced Coaching Program: coaches that are developing their training and education or increasing their certification are eligible for this bursary program, which includes \$200 travel subsidy (applications are made to Coaches Association of Ontario)

Rowing

- Rowing Clubs: there are various rowing clubs across Ontario that offer different levels of programs.
- Para Rowing: rowing for people with physical disabilities / limitations, including a variety of types of disabilities. Five Ontario rowing clubs currently offer Para Rowing.
- Adventure Rowing: rowing for noncompetitive athletes. The Ontario Adventure Touring has touring boats that can be rented and transported. Tours across Ontario offer rowers the opportunity to explore new locations.
- Rowing in Schools (high school, university): rowing integrated into athletic departments at academic institutions. Various programs (from novice to competitive) are offered at both high schools and universities across Ontario.

Umpires and Coaches Development

- Umpiring: Umpires are dedicated members of the community that ensure regattas are safe and abide by rules.
- ROWONTARIO has a commitment to help coaches be the best they can be.
 ROWONTARIO offers various courses to help their development:
 - National Certified Coaching Program (NCCP) Courses: courses are run by the Coaching Association of Canada. Courses include RCA Coach and Learn to Row Instructor courses.
 - Non-NCCP Courses: courses include the development of coaches for Youth Coach and Fitness Rower programs.
- Professional Development Webinar Workshops: courses and seminars are offered to help coaches continue their development on an ongoing basis.
 Examples of programs are: Nutrition for Rowers, Injury Prevention and Monitoring, and Talent Identification.

Source: ROWONTARIO website



ROWONTARIO offers clubs, athletes, and coaches a variety of services, programs and events (continued)

Programs and Events Offered by ROWONTARIO

• ROWONTARIO provides various services, programs, and educational programs/courses to local rowing clubs, umpires, coaches, and athletes. ROWONTARIO also provides programs and awards, and also regattas and events to Ontario clubs and athletes.

Programs and Awards

- Row to Podium: national program is ROWONTARIO's flagship talent identification and development program. It originated from the Ontario High Performance Sport Initiative Program.
- Shells and Sails: program offers rowing and sailing clubs across
 Ontario the support to increase participation in the sports and
 improve the quality of programs. The program is funded through
 the Ontario Trillium Foundation.
- Canada Summer Games: regattas occur every 4 years, but ROWONTARIO provides athletes in Ontario with various annual training camps to help prepare for the national competition.
- Ontario Athlete Assistance Program: program provides athletes aiming to perform at the high national and international level with support needed to increase athlete performance and increase the overall number of athletes competing.
- Awards
 - Claude Saunders Award
 - Competitive Coach of the Year
 - Recreational Coach of the Year
 - Club of the Year

Regattas and Events

- ROWONTARIO Championships: held at the end of July, attracts around 1000 athletes from 35 clubs across Ontario and the US. This regatta is used as preparation for Royal Canadian Henley.
- ROWONTARIO Masters Championships: launched in 2002, this
 regatta is intended to increase the quality of racing opportunities
 for Masters athletes. The regatta attracts around 350 entries from
 37 clubs across Ontario and the US.
- AGM and Training Conference: includes a one-day training conference that provides coaches, athletes, volunteers, and club staff/Board members the opportunity to increase their education and expertise.

Source: ROWONTARIO website



Rowing Canada Aviron is a non-for-profit organization that acts as the national governing body for the sport of rowing

Overview of Rowing Canada

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- Rowing Canada Aviron (RCA) is a non-for-profit organization, the national governing body for the sport of rowing in Canada
- RCA represents 15,000 registered members at all levels (novices, juniors, seniors, university, masters, para rowers, recreational)

Overview of Rowing Canada

- RCA's mandate is to be "empowered by its member rowing clubs to govern
 the sport of rowing in Canada and to develop the sport by all means open
 to it. It is committed to delivering value to its members in the key areas of:
 governing the sport; enhancing individual's competencies; encouraging
 competition; leading the sport in international competition; promoting the
 sport; and providing services to individual members
- RCA's high performance program helps athletes achieve and compete as national team athletes
- RCA has a strategic plan that outlines its numerous strategic goals. Goals including¹:
 - Win gold medals at the Olympics, Paralympics and World Championships
 - Grow participation in the sport of rowing at all levels
 - Build a dynamic and sustainable organization

Affiliation with Provincial/Local Clubs

- RCA has a Provincial Advisory Council, which consists of Directors from each provincial rowing organization
- RCA is also member of the Canadian Olympic Committee, the Canadian Paralympic Committee and the Fédération internationale des sociétés d'aviron (FISA)

Organizational Structure

- RCA's Board of Directors governs RCA in pursuit of its vision and mission
- Board of Director's duties include ensuring RCA's longterm viability, and ensuring all its legal requirements
- RCA Board members are elected by membership, and therefore accountable to its membership

Rowing Canada Aviron Board of Directors

President

Treasurer, Provincial Director, 3 General Directors, Athlete Director

Rowing Canada Aviron Staff

CEO, Secretary, Director of Business Development, Communications and Media Relations Assistant

Rowing Canada Aviron High Performance Staff

High Performance Director, Talent ID Director, National Team Manager, Para-Rowing Manager, Development Coordinator, National Team Coordinator, National Team Coordinator LTC

Source: Rowing Canada Aviron website



1. More information can be found:

Rowing Canada Aviron provides various services and events to its member clubs and membership

Overview of Rowing Canada



 RCA provides a variety of services to its member clubs, which include the following areas: governing of the sport, representing Canada on the international stage through the National Team program, encourage domestic competition, insurance, coach education, promoting the sport, and supporting club development

Services offered to Member Clubs

Club development:

 RCA provides clubs with information to help with regatta sanctioning (the Regatta Handbook), and help with governance. RCA shares various policy documents, coach and athlete agreements, materials to help recruit new members to the sport, and various grants (including the iRow Youth Rowing Development Grant).

Coach development:

RCA aims to increase the number of coaches in Canada; RCA strives to
empower coaches through their development of technical knowledge, skills and
abilities. RCA developed the RCA CAN Row Coaches Handbook and shared it
with each provincial organization. The handbook supports the LTAD model,
provides each coach with knowledge to teach essential skills to new rowers.

Insurance:

 RCA provides its members with liability insurance coverage, covering a variety of rowing-related activities. RCA also provides free legal advice for members, and legal support in the event of Human Rights complaints.

Regatta sanctioning:

 For regattas designated as Canadian National Regattas, provincial organizations and RCA's Safety and Event s Committee provide approval. RCA provides information regarding sanction procedures, regatta hosting requirements and the mandatory application form (customized by province). Overall, RCA provides support, where possible, to planning regattas.

Source: Rowing Canada Aviron website

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Services offered to Rowers

Canadian Sport for Life (CS4L):

 This national initiative is to support the quality of sport and physical activity in Canada. CS4L supports education, recreation and health in community, provincial and national programming. The LTAD is a seven-stage training, competition and recovery pathway for athletes. RCA uses both initiatives to guide the development of programs.

Rowing events and regattas:

 RCA provides regattas across the country for various groups of rowers, including: CSSRA Championships, Junior Selection Trials, 2015 Canadian Masters Championships, Royal Canadian Henley Regatta

Detailed Summary of Board Member Interviews

A number of Board members were interviewed for this process. Interviewees included: Bob Groff, Alisa Boulanger, Dave Freeman, Dave Wilkin, Chrystian Gauvin (ex-board member), and Carol Fitzwilliam.

Board Members' Perceptions

	Current State Topics and Board Member Perceptions
Motivations for joining MSC's Board of Directors	There is a diversity and wealth of experience on the Board: Board members bring years of experience in other sport organizations, as members of other Boards, and years of involvement in swimming clubs and organizations in various capacities. Board members are motivated due to a long commitment and passion to the sport, to ensure the sport is successful in the future, and to improve their own fitness and those of others through competitions and social events
MSC's current role/mandate, and current strategy	 Some members are unclear of MSC's mandate; this lack of clarity has made communication to stakeholders difficult and has also created some friction between MSC and other organizations in the past. This may be due to MSC's lack of power/authority with other swimming organizations. Others feel that MSC's general role is to advocate, promote, and develop adult swimming to benefit health and fitness through interesting programs and competitions; MSC is meant to serve its membership in achieving a positive experience (this includes supporting PSOs to deliver the best services) Board Members feel that a strong strategy currently is incomplete or does not exist; MSC's current goals to rebuild and grow the organization are very aggressive and likely difficult to achieve on the current timelines
MSC's current value proposition to swimmers	 MSC offers programs that encourage swimmers to swim, improve their swimming ability, and compete. There is an opportunity to offer more programs targeted to non-competitive athletes (a large segment of athletes). MSC also offers liability coverage for swimming competitions. MSC has attempted to introduce a coaching certification that will be tailored to adult athletes; although this has never been achieved, some coaching support should be considered in the future There is currently little direct visibility and communication between swimmers and MSC (apart from the National Championships), the specific value offered to swimmers in not clearly articulated anywhere, and there is no clear MSC "membership" list
MSC's current value proposition to PSOs	Board Members feel there is little direct value that MSC offers PSO's; MSC has been criticized for lack of transparently in this matter. There is no formal statements of how MSC provides value to PSOs or clubs. Some members feel PSOs should be MSC's direct "customer" (PSOs, swimmers, clubs); MSC can continue to offer programs targeted towards swimmers, but should work with PSOs directly to help support masters swimmers
MSC's vision and mission	Many Board Members feel MSC's mission is not being effectively communicated to stakeholders, and is too broad. There is a need to follow-through with the vision and mission MSC sets, and communicate these to the different stakeholders
MSC's strengths	Board Members feel MSC's strengths include: strong Board and office staff with skills required, independence from Swimming Canada, the ability to grant registration to swimmers to compete, and the \$40,000 GIC
MSC's opportunities	Board Members feel there is a need for more funding, sponsorship, club development, and membership growth and recruitment; there is a need to improve communication (i.e. social media) and ensure that stakeholders see value in joining us (specifically provincial bodies). There is an opportunity to clarify MSC's role with regards to other organizations and the roles of other organizations.
	Future State Topics and Board Member Perceptions
Perception of MSC's goals / focus	Board Members feel that MSC should clearly define who MSC "customers" are, what MSC will offer, and how MSC will communicate its goals and strategies. MSC should only have a few top priorities. MSC's immediate focus should be to get aimed strategically and then implement priority projects effectively.
MSC's opportunities	Board Members feel there is an opportunity for MSC to offer programs specifically targeted to athletes who are young adults, and help adults transition to a lifelon participation in masters swimming. Also, there is an opportunity to demonstrate the health benefits of swimming for adult population
MSC's next priorities and needs	• From an organizational perspective, MSC must: rebuild relationships and accountabilities with membership, show value to provincial bodies, support clubs and provinces. To achieve this, a working Board is needed, stronger communication, and stronger relationships. There are different opinions on future strategic priorities based on previous priorities, but some specific opportunities include offering skill development clinics for both athletes and coaches, making relay racing more accessible to swimmers, and creating cup or challenge meets (in-person or virtual)



Detailed Summary of PSO's and MSO's Interviews

A number of PSO's and MSO's representatives were interviewed. There was representation from the following provinces: British Columbia, Alberta, Ontario, Quebec, and Nova Scotia.

PSO's and MSO's Perceptions

	Current State Topics and PSO's and MSO's Perceptions	
Involvement with swim organizations and interaction with MSC	Members of provincial organizations and volunteers have been active swimmers for many years	
MSC's current role/mandate, current strategy, and vision and mission statements	 Respondents feel that MSC's role is to provide support for swim clubs across the country, to represent the concerns of provincial bodies to SNC and FINA; some voiced a need for MSC and SNC to be better connected and coordinated; some respondents feel there is little awareness of MSC's role amongst swimmers Respondents feel that MSC is not a governing body, as it has no official sanctioning abilities and members; MSC supports rather than leads. As such, it is unsure if the current mission statement accurately captures the supportive nature of MSC The concept of having MSC as an operational committee of Swimming Canada was considered 	
MSC's current value proposition to swimmers	 Respondents feel that MSC offers things on the website that are of value to competitive swimmers. Respondents feel that MSC offers clubs and swimmers very little direct value; athletes are closer to their local clubs than to their provincial sport organizations. MSC does not have to communicate directly with swimmers, and instead should focus on provincial organizations, reach alignment, and let the provincial organizations (and their clubs) "own the swimmers" There is an opportunity for MSC to develop coaching programs, given MSC's specific knowledge of masters athletes and needs. MSC should develop additional materials that can be added to the existing coaching training programs when needed 	
MSC's current value proposition to PSOs	 Respondents feel that MSC promotes the sport of swimming and helps get masters athletes aware and involved Respondents feel that the coaching development program would be of value if it could get implemented 	
PSO's goals and support required from MSC	Provincial organizations are trying to grow the sport of swimming overall, provide support and resources to clubs to help their swimmers improve, increase swimmer membership, and provide to registered swimmers. These organizations need more support from MSC in order to promote the sport, provide coaching support, and provide a method of sharing information (workouts, best practices etc.) between the various clubs and provinces	
	Future State Topics and PSO's and MSO's Perceptions	
MSC's accomplishments and strengths	Respondents feel that MSC has not achieved many of the goals outlined in the 2012 Strategic Plan; MSC has made some effort on coaching certification but no product has been finalized; there are some useful tools and programs online, but content has not been recently updated; little has been finalized with regards to structure and governance	
MSC's opportunities	 Respondents feel there is an opportunity to cater to non-competitive athletes, improve the professionalism their online tools and processes, and offer coaching development modules (as "add-ons", rather than the official certification program). There is an opportunity for MSC to show fitness swimmers the benefits of competition and help convert athletes Respondents feel there is an opportunity for MSC to increase communication and ensure they have the right contacts at each PSO 	
MSC's future priorities and corresponding needs	 Respondents feel that MSC should focus on being a strong voice for masters swimmers with SNC, due to their strong understanding of what swimmers want. Also, MSC should focus on providing services to directly benefit individual swimmers of all types MSC should ensure that its programs and initiatives are not duplicates of the programs offered by other organizations, as this makes it hard for swimmers to identify what program they should participate in. For example, MSC should investigate which PSO have masters committees on their Boards. Also, MSC should ensure that its goals and priorities are achievable given its smaller organization. Quality of programs and services should be the focus over quantity Before addressing Triathlon as a possible partner, MSC should consult SNC and provincial organizations to ensure there is no conflict between provincial approaches and MSC's national approach 	



Detailed Summary of Volunteer Interviews

A number volunteers (coaches and officials) were interviewed. There was representation from the following provinces: British Columbia, Ontario, and Quebec.

Volunteers (Coaches and Officials) Perceptions

	Current State Topics and Volunteer Perceptions
Involvement with swim organizations and interaction with MSC	 Many coaches interviewed have been coaching for many years, have volunteered at both national and internal events, and are fully certified coaches. More broadly, volunteers are motivated to give back to the athlete, see athletes improve, enjoy the social aspects of volunteering, and share knowledge and skills with other volunteers
	Coaches find there is a high demand for coaches at their local clubs. Currently, coaches feel time constrained (the demand for coaches is high but they can only offer a certain amount of time to coaching)
	Coaches have limited interaction with MSC directly, apart from their involvement in the National Championship
MSC's current role/mandate, current	Due to low interaction with MSC, many volunteer respondents were unable to answer questions related to MSC's current role/mandate, strategy, and vision and mission statements; respondents are not well aware of MSC's focuses and activities
strategy, and vision and mission statements	 One volunteer interviewed sees a key difference between Swimming Canada and MSC; Swimming Canada is more focused on competition and high performance, whereas MSC is more flexible to serve a broader selection of masters athletes
Coaches and officials' goals, and corresponding support required from MSC	There is a sharing culture between coaches and within clubs. There is an opportunity for MSC to provide coach development support and provide a forum for coaches to share information and ideas
	Future State Topics and Volunteer Perceptions
	From a governance perspective, there is a lack of clarity of roles and responsibilities between MSC and other swim organizations
MSC's accomplishments, strengths, and future opportunities	Respondents feel that that one of MSC's short-falls is that it is not as well-known as it should be. MSC can help promote, through targeted campaigns, the sport of swimming to adult athletes
	There is an opportunity to boost the social aspect of masters swimming; there is an opportunity for MSC to help develop a social community, especially for the non-competitive swimmers. MSC has the opportunity to help make masters swimming and volunteering more fun and engaging
	Respondents feel that MSC's programs online are well received from the swimming community, however the calendar of events in incomplete and not always upto-date. There is further opportunity to develop a platform to share ideas, such as injury prevention, training techniques, and videos

List of individuals interviewed

MSC Board / Staff members

- Daniel Hetu
- Chrystian Gauvin
- Carol Fitzwilliam
- Dave Freeman
- Bob Groff
- Alisa Boulanger

Other Stakeholders

- Provincial organizations
 - Rod Carmichael (PSO, BC)
 - Cheryl Humphrey (PSO, AB)
 - Isabelle Ducharme (PSO, QC)
 - Bette El-Hawary (PSO, NS)
 - Mike Starr (PSO, ON)
 - Chris Smith (ON)
- Coach / Official
 - Danielle Brault (Coach, BC)
 - Laurent Schramm (Coach, QC)
 - Marc Daoust (Coach, QC)
 - Jeff Holmes (Official, ON)

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Appendix D: Deloitte Thought Leadership

Deloitte's Governance Framework is designed to set the roles and boundaries of an effective Board of Governance



The Board has heightened responsibility to these roles. It is not sufficient to simply understand and monitor these areas. **The board has to be an active party in the process** and should not delegate the decisions to management.

- Performance
- Strategy
- Governance
- Talent
- Integrity

For these roles, the Board should understand, for example, the operating models that are in place, determining such models are adequately developed and resourced, and monitoring the output. The Board should act as an active monitor.

- Compliance
- Reporting
- Operations
- Planning

"Good boards continuously strive to add value to the organization. An active role in strategy development and the continuous monitoring of its implementation is perhaps the most effective way to guide an organization to improved performance."



Measuring the performance of the board is critical to ensure the success of its overseeing role

The following <u>Representative Strategic Oversight Model</u> provides leading practices for boards to consider in executing their oversight responsibilities. The performance or maturity of MSC's board on each of the 4 key element may range from low to high, but MSC should take the time to evaluate how well it thinks it is performing.

Skills and knowledge



 Thoroughly understands the business and its drivers and has relevant, recent experience and knowledge in the industry, adjacent industries/markets, and competitors.

Process



- Executes a well-documented process to engage at all key points in the strategic planning process:
- Understands risks to and risk of the strategy;
- Establishes and approves KPIs to monitor strategic execution;
- Ensures senior management goals align with strategic priorities;
- Ensures management clearly communicates strategic plans internally to employees and externally to other stakeholders:
- Approves major strategic, capital or financing transactions and monitors execution;
- Clearly identifies the board leader responsible for execution.

Information



- Receives timely, detailed information on the strategic plan at every meeting;
- Receives adequate information related to execution and KPIs;
- Supplements information received from the architects of the strategic plans with information from internal (risk, HR, marketing, etc.) and external sources.

Behavior

- Board and management collaborate on the selection among strategic alternatives;
- Management seeks and the board provides appropriate input that leverages skills and knowledge;
- Designated board leader encourages open dialogue and ultimately builds consensus around the selected strategy;
- Board exhibits "healthy skepticism."



Strategy considerations for non-profit organizations (NPOs) and for-profit companies differ in four fundamental areas1

Strategic objectives

Customers/ Needs

Competition

Value exchange/ extraction transactions

For-profit company

A strategy is an integrated set of choices which positions the firm in its industry so as to create sustainable advantage relative to competitors and superior financial returns

Buyers of product or service

- · Use of product or service
- Emotional benefits of product or service

Competing for:

• Buyers

The aim of a value exchange is to maximize financial returns.

There are two ways to increase the value created in an individual customer transaction:

- Increase the customer's willingness to pay
- Decrease the internal cost to serve the customer

Non-profit organization

A strategy is an integrated set of choices which positions the organization in its sector so as to achieve its social mission and create sustainable advantage relative to competitors

Funders (primary)

- Satisfaction of helping/giving back
- New relationships
- Tax write-off
- Etc.

Service Beneficiaries (primary)

- Need fulfillment
 Volunteers (secondary)
- Satisfaction of helping/giving back
- Etc.

Competing for:

- Funding
- Service beneficiaries
- Thought leadership in the sector
- Volunteers

However, it can be in a NPO's best interest to cooperate with its "competition" in order to achieve a larger social goal

Value is defined as **societal improvement** made possible by the organization's activities. Ways to do this:

- Increase funders' willingness to donate
- Decrease the cost/effort to serve beneficiaries
- Decrease the cost/effort to raise funds and manage funders
- Decrease the cost/effort to recruit and manage volunteers

¹ Monitor Deloitte, "STRATEGY IN THE NON-PROFIT SECTOR: How does it differ from the for-profit sector?"

NPO Strategy Development and Implementation is a three step approach that evolves over time¹

2. Strategy 3. Implementation and 1. Foundation Development Management Setting **Determine Underlying** Make Fundamental Implement Action Plan & Establish **Develop Action** Purpose and Direction **Manage Organization to Achieve Goals Strategic Decisions** Goals and Plan to Implement Potential Methods: Potential Methods: Metrics Strategic Social Change Program Management Strategic Choice Based on **Decisions and** ModeP Program alignment with strategy Structurina® Strategic **Achieve** Vision / Mission Program management Cascade of Choices Goals/ Metrics **Decisions** development Program stakeholder alignment Activity Map Performance measurement/ program effectiveness Process Redesign Organizational Management **Iterative Process** Board of Directors -Development and usage Stakeholder alignment **Analyze Strategic** Organizational configuration **Options / Decisions** Performance management -Areas of Analysis & Potential Methods: Organizational and Employee Process Redesign Competitive Landscape Analysis **Asset Management** Customer Analysis • Human Customer Portrait[®] Market Mapping The Capabilities Profile™ Action Segmentation™
 Market Atlas™ Knowledge • Revenue and Cost Analysis Brand · Growth & Quality Drivers BrandMonitor®, BrandIntent™ System Analysis / System Dynamics Culture • Key Success Factors Analysis Network Risk Assessment Technology **Financial Management** · Organizational capabilities assessment Cost management • Social Value Creation Analysis Fundraising Investment management

> As a NPO measures its effectiveness and develops new approaches, it should revisit its strategy to ensure it best achieves its mission

As NPOs encounter major shifts in their environment, it can be necessary to recalibrate the organization's direction. Such shifts could include:

- Policy / sector changes
- New understandings about how the organization can best create desired social changes

² More detail on slide 3



¹ Monitor Deloitte, "TMI Perspective on NPO Strategy Development and Implementation"

The Social Change Model's three components work together to achieve the organization's social mission¹

The Social Change Model is:

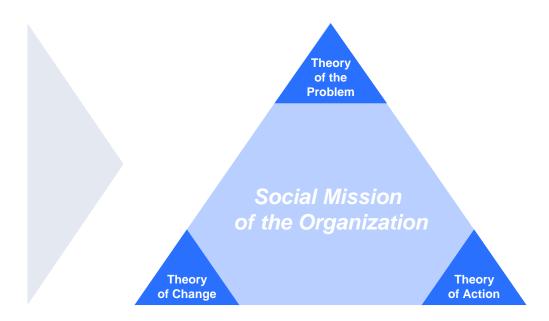
A tool for articulating an organization's understanding of and hypotheses about its:

Theory of the Problem: the social problem the organization is trying to solve and its symptoms and causes

Theory of Change: the "levers" necessary to implement change against this social problem

Theory of Action: the organization's role in using these change levers to help solve the social problem

The output of the Social Change Model is a diagram depicting the cause / effect relationships of the organization's change activities





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