



SURVEY RESULTS

Canadian National Sport Organizations' Governance Landscape Study

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EXECUTIVE SUMMARY

INTRODUCTION

National sport organizations (NSOs) face unprecedented governance, economic/marketing, and technological realities affecting their processes and performance, aspects sport system decision and policy makers understand poorly.

To strengthen their position in society, NSOs must attract new members, retain existing ones, and increase corporate and media support. This requires **balancing traditional sport activities and processes with more business-based activities**, such as managing their **brand** and customer experiences, as well as engaging in a **communications and social media** strategy, given today's networked society.

NSOs are also under increased scrutiny from **stakeholders** regarding their credibility to govern themselves effectively, to demonstrate appropriate ethical leadership standards, and to maintain the trust of their members and stakeholders. How NSOs respond to these **governance challenges** will impact their organizations, sports, individuals, and society.

This report offers the first landscape understanding of NSOs' governance, branding, and social media realities in over 30 years.

To glean this understanding, a survey was sent to all Sport Canada-funded NSOs (58), resulting in 32 NSOs (55%) completing the questionnaire. Data were analyzed for descriptive statistics, as well as stakeholder/social network analyses to draw out key trends in the NSO landscape.

KEY TRENDS & RESULTS

- ◆ NSOs have adopted similar phrases and words to articulate their missions, visions, and values.
- ◆ NSOs vary in capacity, ranging in size from no full-time employees to 58, and annual budgets between \$140,000 and \$24 million.
- ◆ NSO governance structures vary, with board sizes ranging from four to 15 members, and including between zero and 71% female board membership.
- ◆ NSOs operate with five or six committees, and 50% of

NSOs have stakeholders on their Board of Directors (BoDs).

- ◆ The majority of NSOs are still dependent on federal government funding that accounts for, on average, just under half of annual revenues for NSOs.
- ◆ The last five years have seen significant changes in NSO governance, with most moving to formally document key governance and business processes, re-drafting bylaws, and restructuring their boards.
- ◆ NSOs consider Sport Canada and their members to be their most relevant stakeholders.
- ◆ NSOs have become more transparent, publishing their Annual Reports, bylaws and important policy and other documents on their websites.
- ◆ Brand governance and the role of social media in brand governance were deemed very important by the NSOs responding to the survey. However, undertaking these tasks well stretched most NSOs' capacity.
- ◆ The use of social media was seen to be an effective, low-cost way to connect with stakeholders and to exercise some control over their brand. However, NSOs identified the bilingualism requirement to be a human and financial resource challenge.

CLOSING REMARKS

With the landscape survey portion of the study complete, the research team is currently conducting interviews with NSO boards and senior staff members to understand these results better (thank you to those who have participated already).

Following the analysis of the interview data, a workshop and webinar will be offered in spring 2020, where NSOs and other sport organizations will be invited to learn about and help develop best practices related to governance, brand governance, and social media. We hope to see you there!

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ACKNOWLEDGEMENTS

We would like to thank all NSO representatives who took time out of their busy lives to answer the survey. We would also like to thank the Social Sciences and Humanities Research Council of Canada (SSHRC) and Sport Canada for funding this project.



Social Sciences and Humanities
Research Council of Canada

Conseil de recherches en
sciences humaines du Canada

Canada



Canadian
Heritage

Patrimoine
canadien

Sport Canada

LIST OF ABBREVIATIONS

ABBREVIATION	FULL NAME
BoDs	Board of Directors
CAC	Coaching Association of Canada
CAS	Court of Arbitration for Sport
CCES	Canadian Centre for Ethics in Sport
CEO	Chief Executive Officer
COC	Canadian Olympic Committee
CPC	Canadian Paralympic Committee
DG	Director General
ED	Executive Director
HP Director	High Performance Director
IF	International Federation
IOC	International Olympic Committee
NFP	Not-for-profit
NSOs	National Sport Organizations
P/TSOs	Provincial/Territorial Sport Organizations
SSHRC	Social Sciences and Humanities Research Council
WADA	World Anti-Doping Agency

INTRODUCTION

National sport organizations (NSOs) are under increased scrutiny from stakeholders regarding their credibility to govern themselves effectively, to demonstrate appropriate ethical leadership standards, and to maintain the trust of their members and stakeholders. How NSOs respond to these **governance challenges** will impact their organizations, sports, individuals, and society.

GOVERNANCE CHALLENGES



NSOs wish to **grow their sport** at all levels while managing governance expectations from Sport Canada, a key funder, and other stakeholders (e.g., sponsors, athletes, and the media). However, human, financial and material **capacity** often present **limitations**.

Though federal funding for sport reached an all-time high in 2018-2019, investing over \$203.3 million CAD,¹ the current economic environment means **uncertain times**. As a significant portion of Canadian NSOs' funding stems from public sources, NSOs' **ability to stretch taxpayers' dollars** is **critical** to maximize benefits for all Canadians, from **grassroots to high performance sport**.

To strengthen their position in society, NSOs must attract new members, retain existing ones, and increase corporate and media support. This requires **balancing traditional sport activities and processes with more business-based activities**, such as managing their **brand** and customer experiences, as well as engaging in a communications and social media strategy, given today's networked society.

As such, **NSOs face unprecedented governance**, eco-

nomic/marketing, and technological **realities** affecting their processes and performance, aspects sport system decision and policy makers understand poorly.



This report offers the first landscape understanding of NSOs' governance, branding, and social media realities in over 30 years.

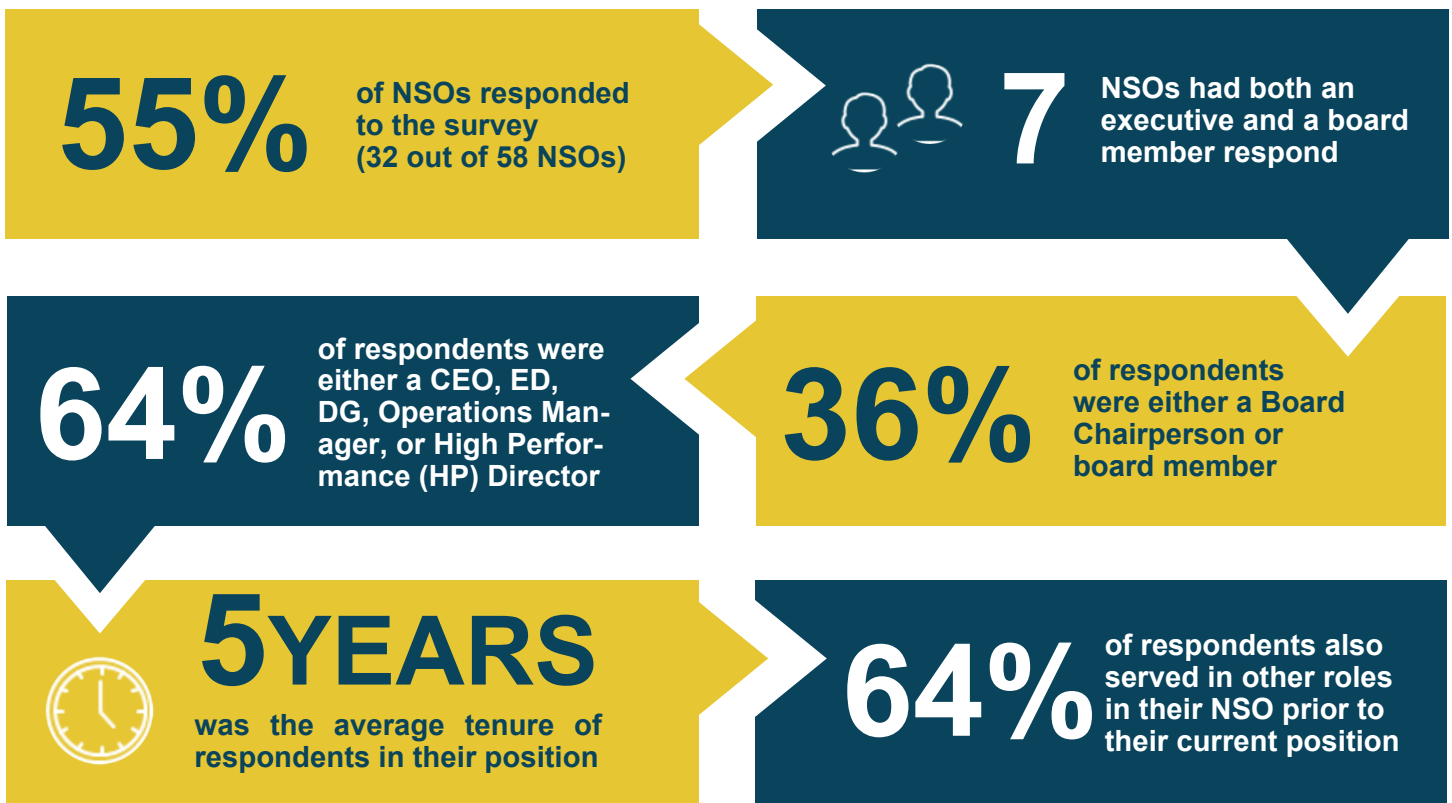
The report is structured as follows. We first briefly present the methodology used to gather and analyze the information on Canadian NSOs' current governance realities. Second, we describe the results in four sections: capacity realities/demographics, governance realities, branding realities, and communications and social media realities. We conclude the report with a summary of key trends, recommendations, and next steps.

¹Government of Canada (2018, August 30). Role of Sport Canada. Retrieved from <https://www.canada.ca/en/canadian-heritage/services/role-sport-canada.html>

METHODOLOGY

DATA COLLECTION

In fall 2017, we sent requests to the Chief Executive Officers (CEOs)/Executive Directors (EDs)/Directors General (DGs) and Board Chairpersons of all Sport Canada-funded NSOs to complete the landscape survey. With 32 responses, we returned to NSOs to ask clarification questions so we could understand certain answers. Twenty-one NSOs responded to the clarification questions.



DATA ANALYSIS

We used the SPSS quantitative data analysis software to analyse the survey data for descriptive statistics (frequencies, means/averages, ranges, etc.), which allowed us to draw out general trends in the data.

Respondents were also asked to describe their stakeholder interactions, which were analyzed using social network analysis.²



²Borgatti, S.P., Everett, M.G., & Johnson, J.C. (2018). Analyzing social networks. Thousand Oaks, CA: SAGE.

RESULTS SECTION ONE

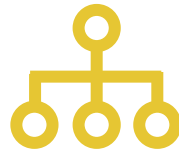
1. NSO CAPACITIES AND DEMOGRAPHICS

In this part of the survey, we sought to understand similarities, differences and changes related to:

NSO missions, visions,
and values



NSO structures



NSO budgets and revenue
sources



1.1. MISSIONS, VISIONS, AND VALUES

NSO MISSION STATEMENTS

Although all NSOs noted the word “sport” in their mission statements, their focus varied thereafter:

- 48%** | noted the word “excellence”
- 38%** | noted the word “national”
- 33%** | noted the words “world,” “athletes,” and “organization”

Less frequent keywords included:

“development,” “programs,” “achieve,” “members,” “participation,” “brand,” and “support.”



RESULTS SECTION ONE

NSO VISION STATEMENTS



In terms of vision statements, NSOs appeared more consistent. All (100%) noted the word “world” in their vision statements. In addition:

83% | noted the words “Canada,” “sport,” “strong,” and “participation”

58% | noted the words “Canadians,” “nation,” and “competitive”

50% | noted the words “international,” and “excellence”

42% | noted the words “podium,” “athletes,” and “competitions”

NSO CORE VALUES



In terms of values, NSOs noted **excellence (100%)** and **integrity (73%)** as core values. In addition:

53% | noted the word “respect”

40% | noted the words “commitment,” “environment,” “achieve(ment),” and “teamwork.”

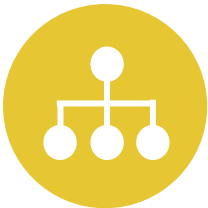
RESULTS

SECTION ONE

1.2. NSO STRUCTURE

Canadian NSO boards are elected by their provincial/territorial sport organizations (P/TSOs) 75% of cases, the rest being elected by athletes, local clubs, and national interest groups.

We found a range of basic capacity realities between the 32 NSOs who responded to the survey:



NSO FULL-TIME EMPLOYEE RANGE

NSOs ranged in size from no full-time employees to 58, with an average of 11 employees ($SD = 12$);



NSO BoD RANGE

BoDs ranged in size from four to 15 members, with an average of nine members ($SD = 2$);



PERCENTAGE FEMALE BoD

Boards had between zero and 71% women board members, with an average of 36% ($SD = 17\%$);



NUMBER OF COMMITTEES

Boards had, on average, between five and six committees; and



STAKEHOLDER INVOLVEMENT

Stakeholders (e.g., athletes, volunteers, parents, officials, staff, coaches, local sport organizations, and consultants) had a seat on 50% of NSO boards and committees.

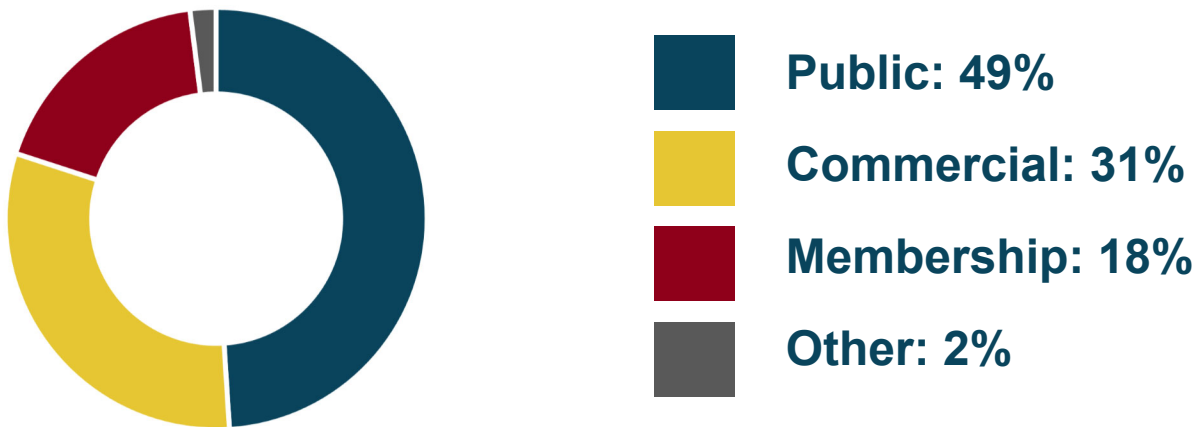
RESULTS

SECTION ONE

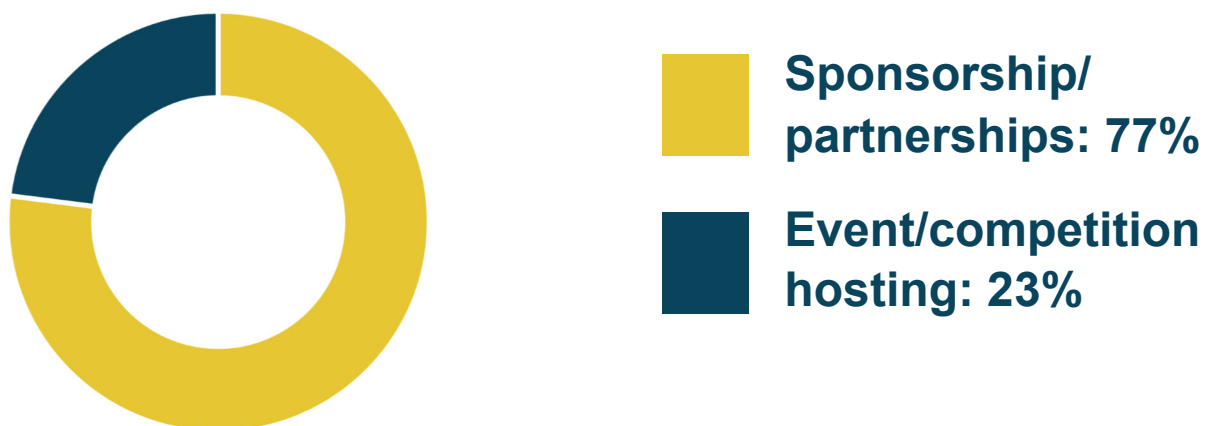
1.3. NSO BUDGETS AND REVENUE SOURCES

NSO budgets ranged from \$140,000 to \$24 million with an average of \$4.4M (*SD* = 6M) and with the following distribution of revenue sources:

Distribution of Revenue Sources (all)³



Distribution of Revenue Sources (commercial)^{3,4}



³Data based on 21 NSOs who completed the clarification questions; ⁴Broadcasting revenues accounted for less than 1% of the overall commercial revenue.

RESULTS

SECTION TWO

2. GOVERNANCE REALITIES

In this part of the survey, we sought to understand NSOs' current governance realities, as they pertained to:

- 2.1. NSO Decision-making;
- 2.2. General changes in NSO governance;
- 2.3. NSOs' stakeholder environment; and
- 2.4. Governance practices.

2.1. NSO DECISION-MAKING

Thanks to the new Canada Not-for-profit Corporations (NFP) Act, all NSOs surveyed shifted from having operational boards to **governance boards**.

Boards now focus on strategic, long-term decision-making. For 62% of NSOs, the CEO/DG assists in this regard. NSO boards and their CEOs/DGs also share financial decision-making responsibilities in 95% of NSOs.

However, CEOs/DGs are responsible for sport-related decision (86% of NSOs), marketing-related decision (81% of NSOs), and most human resource (HR)-related decisions (95% of NSOs). In the latter case, 48% of Boards also make HR decisions or assist in HR decision-making.

When it comes to communications and social media, decisions are made by CEOs 48% of the time, though most of these decisions appear to be made by lower-level staff (86% of the time).



DECISIONS BY BoDs

- ◆ Strategic, long-term
- ◆ Financial
- ◆ Human resource



DECISIONS BY CEOs/EDs

- ◆ Strategic, long-term
- ◆ Financial
- ◆ Human resource
- ◆ Sport
- ◆ Marketing
- ◆ Communications & social media



DECISIONS BY LOWER-LEVEL STAFF

- ◆ Communications & social media

RESULTS

SECTION TWO

2.2. GENERAL GOVERNANCE CHANGES

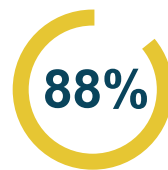
Over the past five years, NSOs have undergone significant changes in their governance structures, processes, and activities. These include new hires and bylaws, increased formalization, restructuring, board structure/composition, and new organizational procedures/systems (i.e., new ways of doing). For example, NSOs now have 66% of their key governance, HR, sport, marketing, and communications-related policy documents formalized (i.e., written down).



New Hires



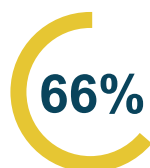
Board bylaws



Formalization



Restructuring



Board structure/
composition



New organizational
procedures/systems

2.2.1. MOST IMPORTANT

NSOs believed Sport Canada, their participants (e.g., athletes, officials, and coaches), and the NFP Act were the most important stakeholders and issues when thinking about governance (measured on a five-point Likert scale, 1=not important to 5= critically important).



Sport Canada

M = 4.56, SD = 0.67



Participants

M = 4.44, SD = 0.76



NFP Act

M = 4.19, SD = 0.76

2.2.2. STAKEHOLDER MANAGEMENT

NSOs believed managing stakeholders is more difficult today and stakeholders have increased their demands on NSOs (each question was measured on a five-point Likert scale, 1=not at all to 5= always; 1=not at all to 5=very high increase).



RESULTS

SECTION TWO

2.3. NSOs' STAKEHOLDER ENVIRONMENT

When examining NSOs' external relationships, similarities were found in NSOs' stakeholder environment.



100% of NSOs surveyed noted the federal government, athletes, coaches, officials, their international federation (IF), and the Coaching Association of Canada (CAC) as stakeholders;



91-97% of NSOs surveyed noted paid staff, volunteers, P/TSOs, Canadian Centre for Ethics in Sport (CCES), national sponsors, social media, and the Sport Law & Strategy Group as stakeholders;



81-87% of NSOs surveyed noted athletes' entourage, the written press, consultants, Canadian Olympic Committee (COC), and other NSOs/multi-sport organizations as stakeholders;



72-78% of NSOs surveyed noted Own the Podium, fans, provincial government, local sponsors, and their continental federation as stakeholders;



66-69% of NSOs surveyed noted TV/broadcasting, Court of Arbitration for Sport (CAS), and ParticipACTION, radio stations and local sport organizations; and

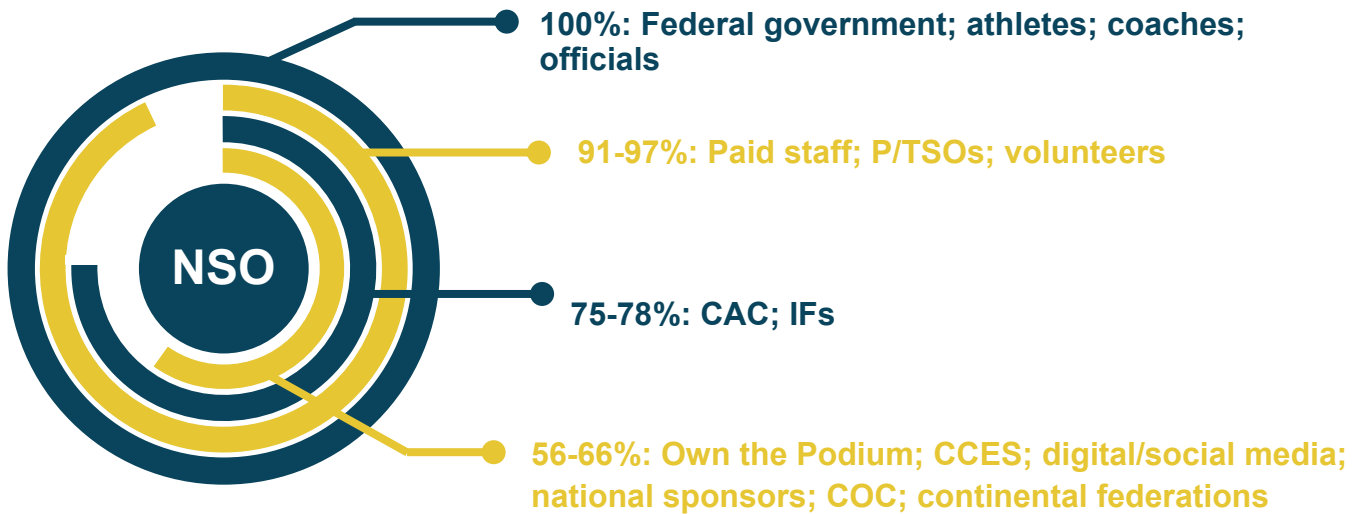


50-59% of NSOs surveyed noted Canadian Paralympic Committee (CPC), World Anti-Doping Agency (WADA), Active for Life, municipal governments, local businesses, distributors, International Olympic Committee (IOC), residents, community groups, and other IFs.

RESULTS

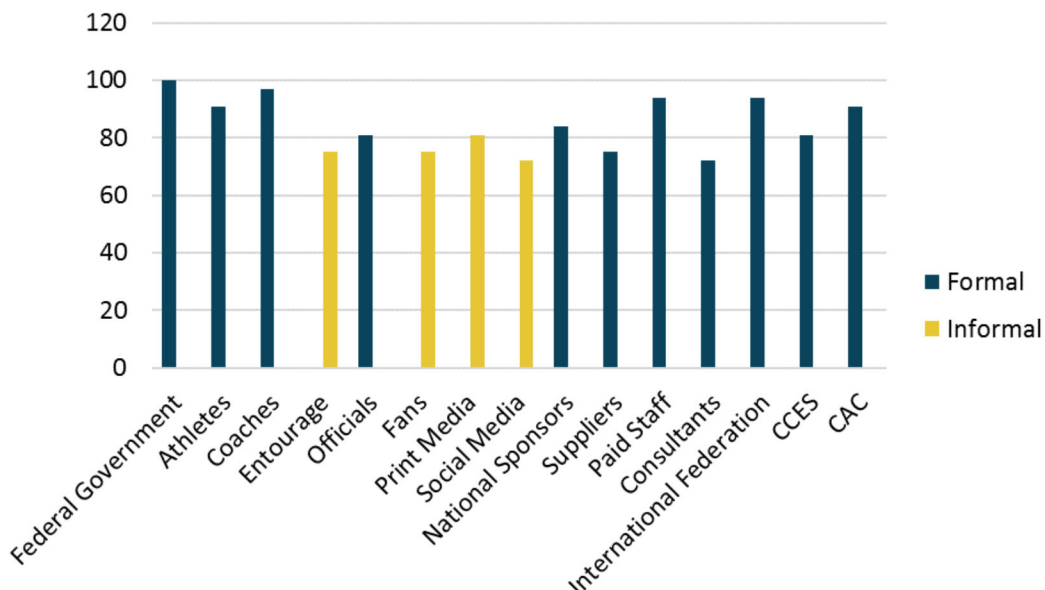
SECTION TWO

Only a select few stakeholders were identified as critical for survival (primary) stakeholders for NSOs:



Respondents also indicated whether their interactions with stakeholders were of a formal or informal nature. NSOs overwhelmingly noted their relationships with the federal government, athletes, and coaches. Informal interactions were the highest with media stakeholders, specifically print and social media.

Formal and Informal Interactions by Stakeholder (>70%)



RESULTS SECTION TWO

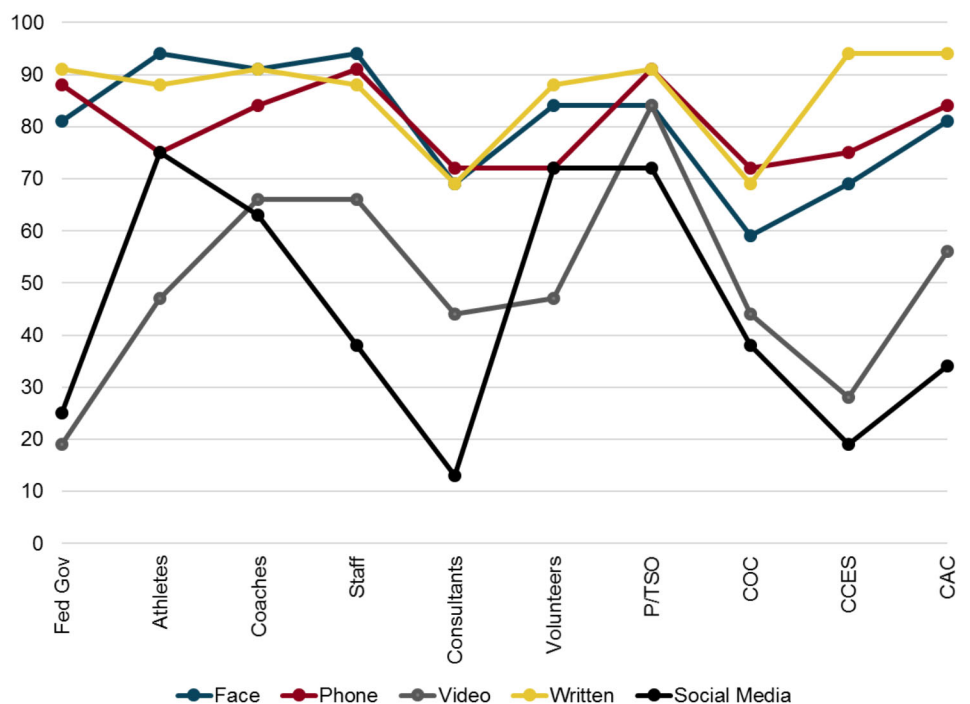
On average, NSOs use written communications to interact (e.g., e-mails, postal letters), with 55% of the sample (on average) indicating this preference across all stakeholders. Digital/social media was not the least utilized medium to interact with stakeholders; the medium used the least to interact across NSOs was tele/video-conferencing.

Types of Communications



Selected Average Types of Stakeholder Interactions

The use of face-to-face and written forms of communication seem to be very prevalent across primary stakeholders. Interestingly, the use of social media for interactions was highest with the athletes, volunteers, and P/TSO stakeholder groups.



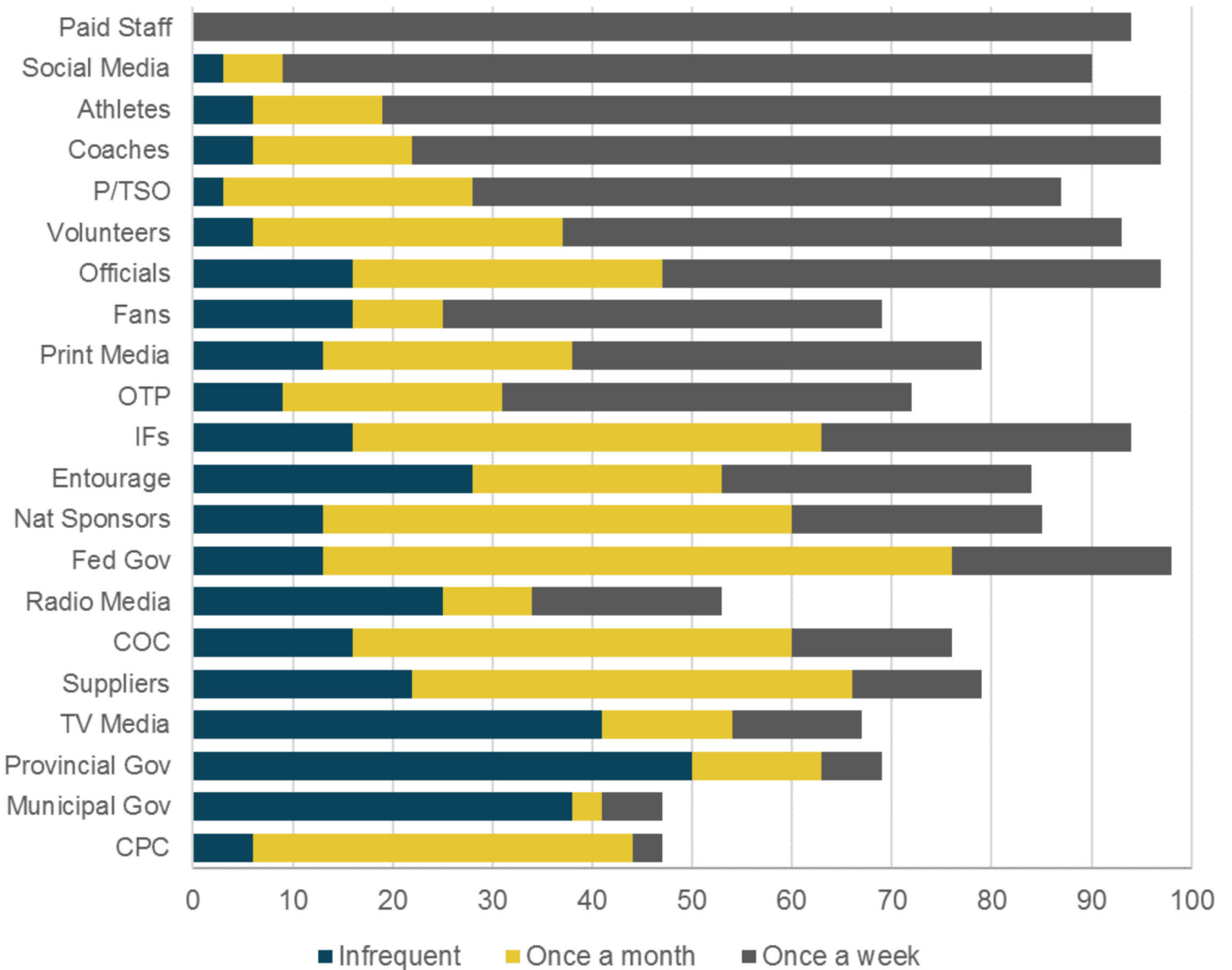
RESULTS

SECTION TWO

Finally, NSOs reported the average frequency of interaction with their stakeholders. Interactions were funneled into three major frequency periods: infrequent, at least once a month, and at least once a week.

The two stakeholders which NSOs reported, on average, to have the **most frequent interactions with were paid staff and social media users**. Coaches and athletes also emerged as stakeholders with whom interactions occurred at least once weekly. Concurrently, NSOs are speaking with other stakeholders like the COC and their organization's suppliers on a monthly basis for updates. Stakeholders with whom there was infrequent interaction were the Television and Government stakeholder groups, the latter specifically referring to Provincial and Municipal bodies.

Selected Average Frequency of Stakeholder Interactions (%)



RESULTS

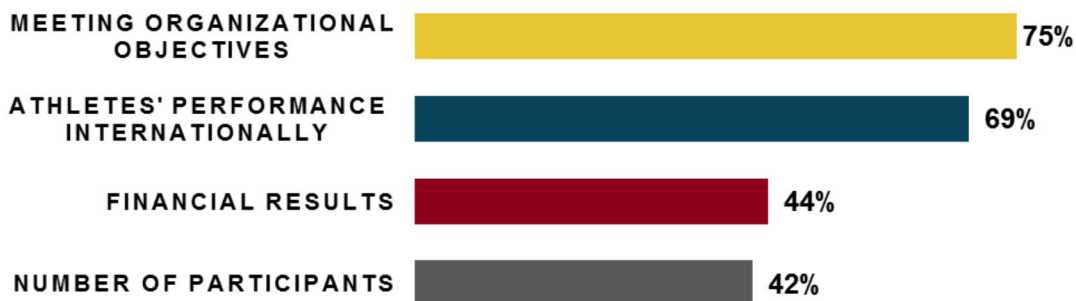
SECTION TWO

2.4. GOVERNANCE PRACTICES

We examined four key areas of governance: performance, accountability, transparency, and stakeholder participation in decision-making.

2.4.1. PERFORMANCE

Regarding how NSOs measure organizational performance, little consensus could be found, save for the idea of meeting organizational objectives (75% of NSOs):



2.4.2. ACCOUNTABILITY

When examining accountability, 78% of NSOs agreed there were differences between board accountability and staff accountability. Moreover, NSOs indicated different facets of accountability were important externally versus internally:

External accountability

- Legally: formal laws, and rules (97%)
- Performance: athlete performance (91%)
- Performance: reaching organizational goals (88%)
- Financially: reports to funders (88%)
- Financially: use of financial resources (84%)

Internal accountability

- Administrative: degree of org transparency (94%)
- Administrative: timely dissemination of information (91%)
- Performance: reaching organizational goals (91%)
- Financially: use of financial resources (91%)
- Legally: formal laws, and rules (84%)
- Personal/Professional: decision-making fairness (84%)

RESULTS

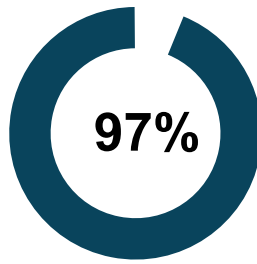
SECTION TWO

2.4.3. TRANSPARENCY

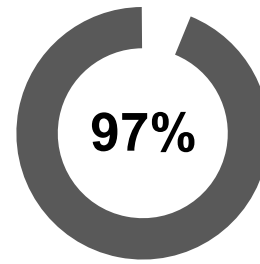
NSOs seemed to agree on how they should go about being transparent:



Reports at Annual General Meetings



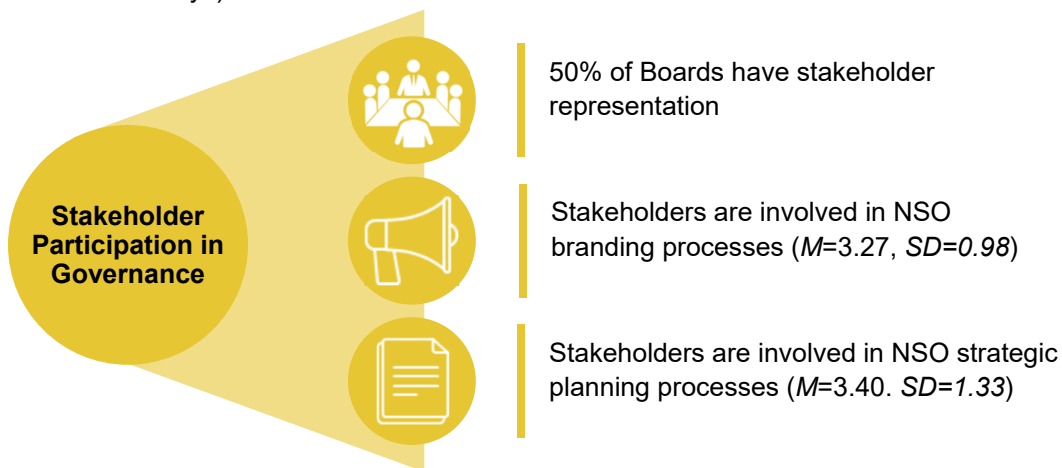
Having organizational bylaws



Publishing key documents on the website for all to see

2.4.4. STAKEHOLDER PARTICIPATION IN DECISION-MAKING

NSOs are including their stakeholders in their decision-making processes, as members of the board (50% of boards have stakeholders on them) or as part of their strategic planning or branding processes (measured on a five-point Likert scale, 1=not at all to 5= always):



86%

of NSOs agreed with the statement that **NSOs are increasingly similar in their governance.**

RESULTS

SECTION THREE

3. BRANDING REALITIES

In this part of the survey, we sought to understand:

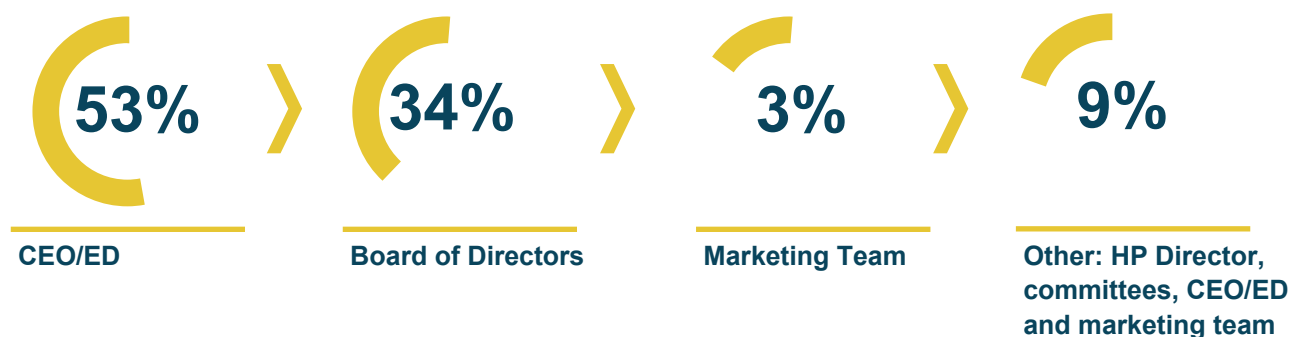
- 3.1. Brand governance within NSOs' overall governance;
- 3.2. The importance of brand governance in the relationship between NSOs and their stakeholders; and
- 3.3. The role of social media in NSOs' brand governance;
- 3.4. The benefits of social media use
- 3.5. Social media Content
- 3.6. Social media challenges

3.1. BRAND GOVERNANCE WITHIN NSOs' OVERALL GOVERNANCE

Respondents indicated branding/brand is often an important issue for NSOs (measured on a five-point Likert scale, 1=not at all to 5= always). Furthermore, 91% of NSOs agreed their brand was in line with their vision, mission, and values. However, only 56% of NSOs indicated they had previously conducted research on their brand, and 40% indicated they possessed an official brand document. Finally, 52% of NSOs surveyed have developed brand policies/regulations/guidelines.



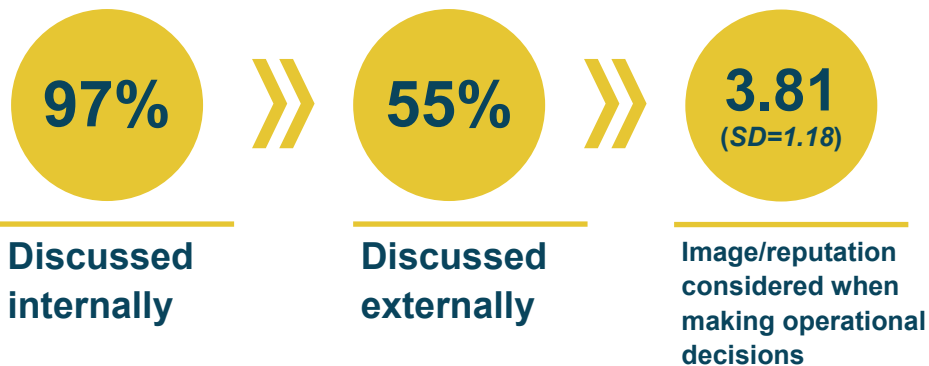
NSOs indicated brand management-related decisions were made primarily by the CEO/ED (53%), followed by the BoD (34%), and the marketing team (3%). NSOs also indicated brand management decisions were made by the HP Director, committees, as well as a combination between the CEO/ED and the marketing team.



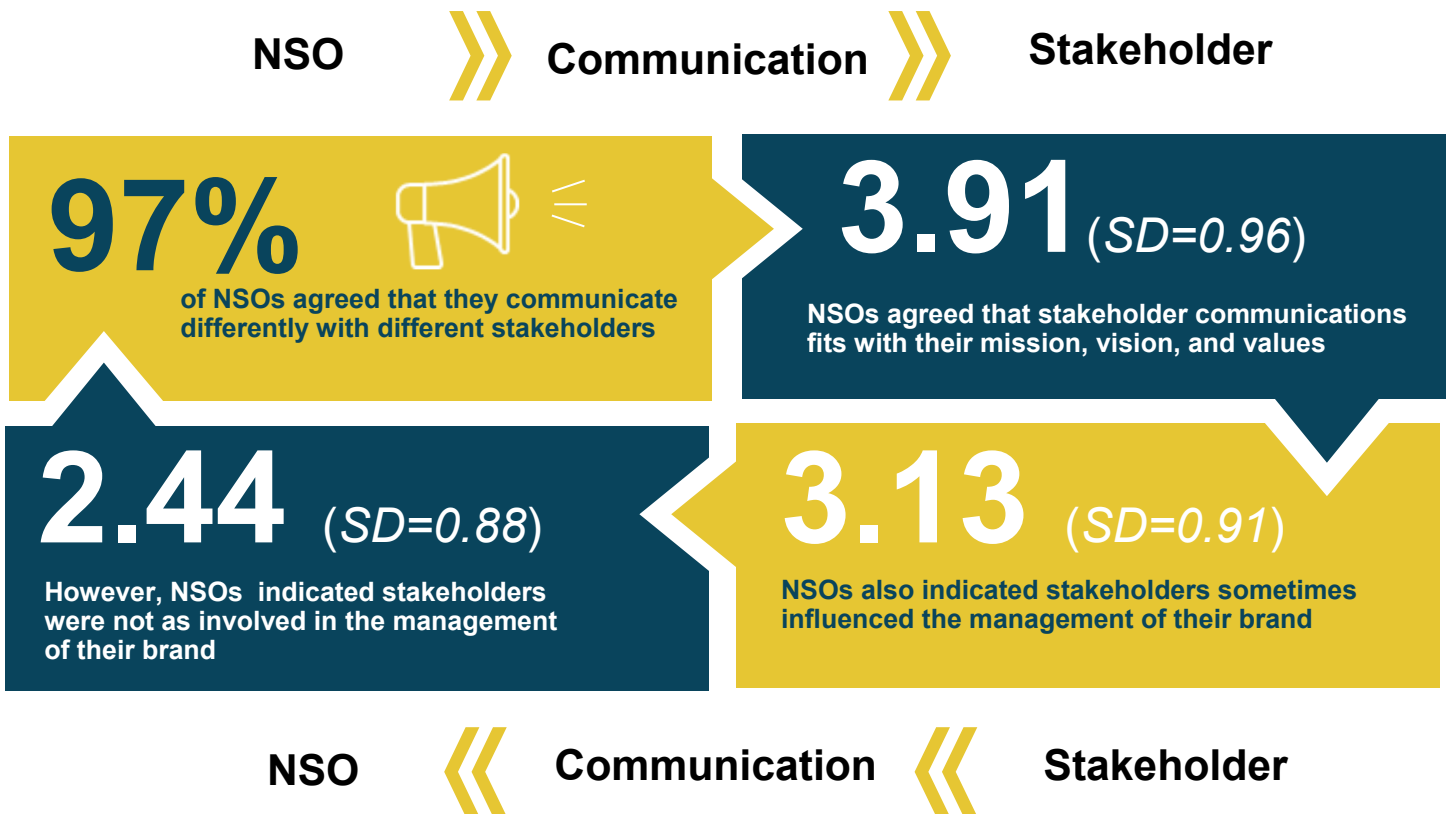
RESULTS

SECTION THREE

NSOs indicated brand strategy was discussed more internally (i.e., with the BoDs and committees) than externally, and their image and reputation is considered when making operational decisions.



3.2. RELATIONSHIP BETWEEN BRAND GOVERNANCE & STAKEHOLDERS



RESULTS

SECTION THREE

3.3. ROLE OF SOCIAL MEDIA IN NSOs' BRAND GOVERNANCE

The majority of respondents indicated social media was an important issue for NSOs and that social media was used to communicate their mission, vision, values, and goals. NSOs also agreed social media communication impacted their organization's brand (each question measured on a five-point Likert scale ranging from 1=not at all to 5= always).

Social media is an important issue

4.66
(SD=0.48)

Communicate mission, vision, values, and goals

NSO

3.53
(SD=1.02)

Social
media

Social media impact on brand

NSO

3.84
(SD=1.02)

Social
media

RESULTS

SECTION THREE

3.4. BENEFITS OF SOCIAL MEDIA USE

The three major themes emerging from the benefits of social media were connectivity, control, and effectiveness of the medium. Respondents noted social media enabled their brand to connect with multiple stakeholders simultaneously with different platforms, using existing guidelines for communication and brand management, in a highly engaging manner. Several organizations identified social media as a low-cost option relative to other communication mediums.



Connectivity

- Wide reach
- Flexible
- Always connected



Control

- Existing brand guidelines
- Issues management
- Preventing ambush marketing



Effective

- Access to new networks
- Quick, low cost
- Interactive, highly engaging

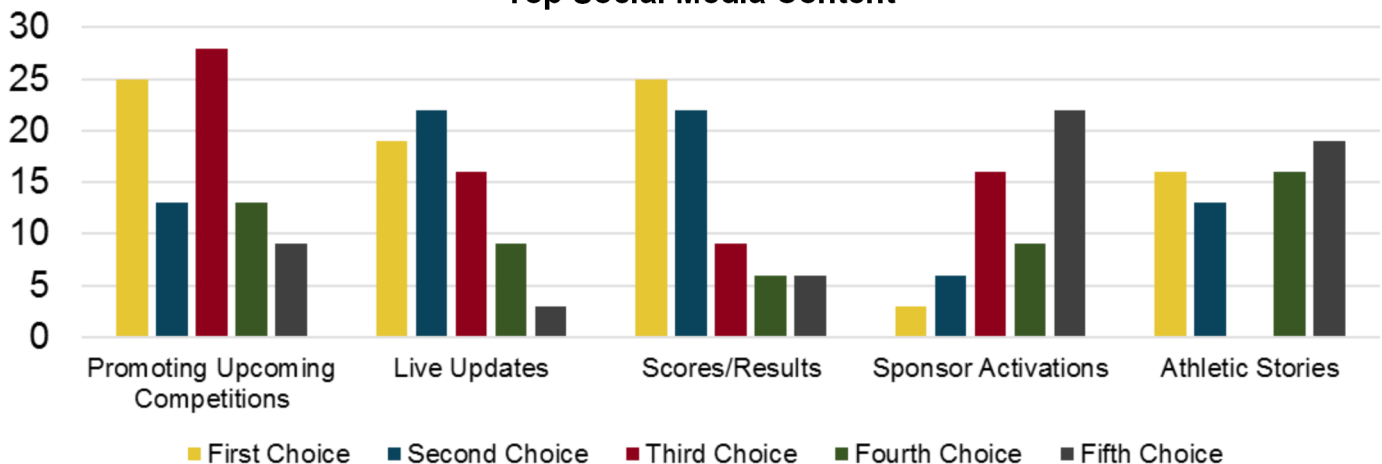
3.5. SOCIAL MEDIA CONTENT

Regarding the top content produced on their social media platforms, respondents indicated five major themes: the promotion of 1) upcoming competitions, 2) live updates, 3) scores, 4) sponsor activations; and 5) athlete training (i.e., action shots).

Promoting upcoming competitions was the most often selected type of content, with 87% of respondents selecting this theme in their Top 5. Live updates were in 69% of Top 5s, while scores were in 68%. Finally, athlete training and action shots were selected in 64% of respondent Top 5s, and sponsor activations just over half the time (56% of Top 5s).

Encouraging other NSOs (e.g., celebrating a successful result of another sport via social media) were not ranked in the Top 5 by 84% of respondents, and only appeared as the fourth and fifth choices for top social media content by a handful of brands (n = 9, n = 6).

Top Social Media Content



RESULTS

SECTION THREE

3.6. SOCIAL MEDIA CHALLENGES

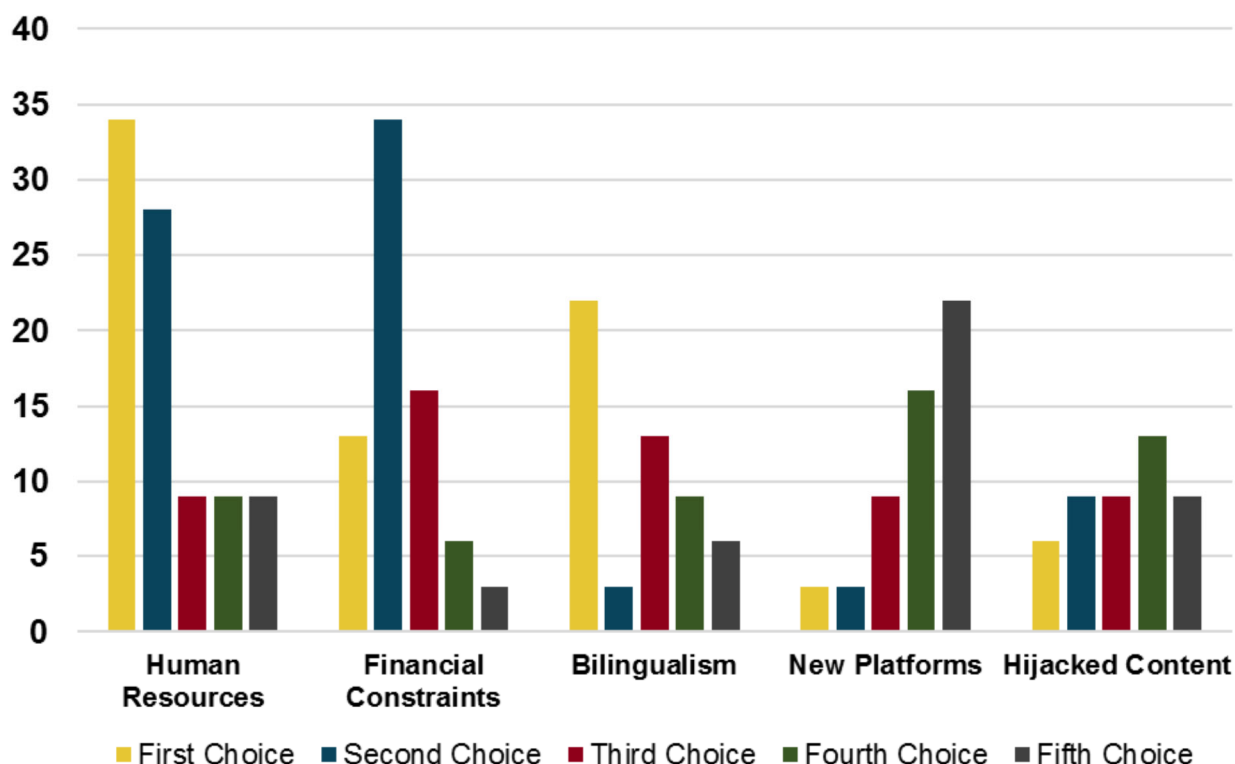
The most common challenge with operating and maintaining a social media presence cited was the lack of human resources, with this element being ranked as a Top 5 choice by 89% of respondents. Financial resources and spending constraints were the second most cited challenge with 72% of respondents ranking it in their Top 5.

Bilingualism, an often cited issue with communication in Canada,⁵ was ranked by 53% of respondents, as was the challenge of dealing with new, emerging social media platforms. The potential for social media users to hijack and distort content appeared as the fifth highest ranked choice with 46% of respondents putting it in their Top 5.

Further, “digital deficiencies” (e.g., poor content and multimedia skills) only appeared in 28% of the sample’s Top 5, but was the second highest third choice option for respondents (alongside bilingualism).

Roughly a quarter of respondents identified and ranked professionalism on social media as a Top 5 challenge. Lastly, the sample did not find independent athlete brands and accounts, or pressures from sponsors or Sport Canada, to have a significant bearing on their social media difficulties.

Top 5 Social Media Challenges



CONCLUSIONS

KEY TRENDS

- ◆ NSOs have adopted similar phrases and words to articulate their missions, visions and values.
- ◆ NSOs vary in capacity, ranging in size from zero full-time employees to 58, and annual budgets between \$140,000 to \$24 million.
- ◆ NSO governance structures vary, with board sizes ranging from four to 15 members, and including between zero and 71% female board membership.
- ◆ NSOs operate with five or six key committees, and 50% of NSOs have stakeholders on their boards.
- ◆ The majority of NSOs are still dependent on federal government funding that accounts for, on average, just under half of annual revenues for NSOs.
- ◆ The last five years have seen significant changes in NSO governance, with most moving to formally document key governance and business processes, redrafting bylaws and restructuring their boards.
- ◆ NSOs consider Sport Canada and their members to be their most relevant stakeholders.
- ◆ NSOs have become more transparent, publishing their Annual Reports, bylaws and important policy and other documents on their websites.
- ◆ Brand governance and the role of social media in brand governance were deemed very important by the NSOs responding to the survey. However, undertaking these tasks well stretched the capacity of most NSOs.
- ◆ The use of social media was seen to be an effective, low-cost way to connect with stakeholders and to exercise some control over their brand. However, NSOs identified the bilingualism requirement to be a human and financial resource challenge.

NEXT STEPS

With the landscape survey portion of the study complete, the research team is currently conducting interviews with NSO boards and senior staff members to understand these results better (thank you to those who have participated already).

Following the analysis of the interview data, a workshop and webinar will be offered in spring 2020, where NSOs and other sport organizations will be invited to learn about and help develop best practices related to governance, brand governance and social media. We hope to see you there!